

Digitech ImageSilo Tutorial

Live Forms and workflow submissions can be saved directly into Digitech PaperVision® Enterprise and ImageSilo® document management systems.

This tutorial will walk you thru the steps for connecting a frevvo form to ImageSilo. By the end of this tutorial, you will have a frevvo form that creates a new PDF document in your ImageSilo project with index fields every time someone submits the form.

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Prerequisites

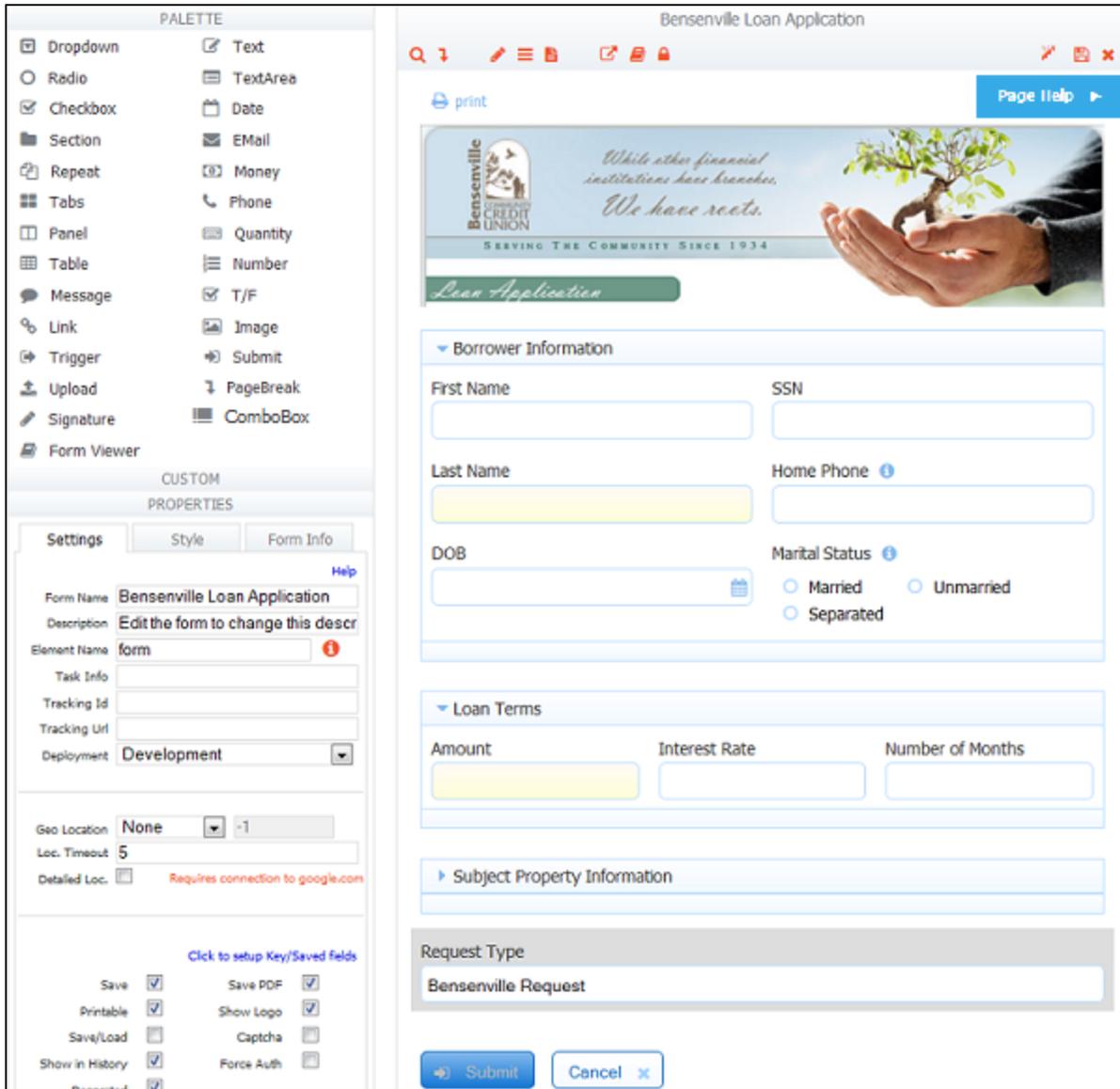
- An ImageSilo account. If you don't have one, please contact your nearest Digitech reseller or visit [the Digitech web site](#). We assume that you are familiar with using PVE/ImageSilo.
- A frevvo Live Forms account. If you don't have one [Signup Here](#) online.

Create an ImageSilo/PVE Project

We'll use a Loan Documents test project for this Tutorial. The project has three index fields in ImageSilo: Document Type, Surname and Request Amount of type Text, Text and Currency respectively. Create the project in ImageSilo.

Create a Form

Login to your Live Forms account on <http://www.frevvo.com>. Or if you are using an In-house installation login there. Create a new form. If you are not familiar with the Forms Designer, please consult the [User's Guide](#) to get started. Open the Form Designer where you can drag/drop new controls to create your form.



Loan Test Form

Drag/Drop controls from the Palette to the Form Designer canvas (the palette and drag/drop is explained in detail [here](#)). We have created controls in the form called:

1. Last Name which corresponds to the ImageSilo index field Surname
2. Amount which corresponds to the ImageSilo index field Request Amount
3. Request Type which corresponds to the ImageSilo index field Document Type

PVE/ImageSilo Wizard

The final step is to use the wizard to connect the form's submission to your ImageSilo project.

1. Click the  toolbar button.
 2. The wizard launches and you will see three tabs labeled "Doc Actions", "Additional Emails" and "Doc URIs".
 3. The Doc Actions Tab is selected by default.
 4. Click the "Save to ImageSilo or PaperVision Enterprise" button. This launches the wizard.
 5. Login with your credentials.
 6. A drop down will appear and the list of projects is displayed.
 7. Select the Loan Documents Test project.
 8. Select a snapshot format (PDF, TIFF ...).
 9. You can choose to store the XML document as well.

10. Click Next.

Please enter your credentials below:

Entity: 6384

User Name: adeshpande

Password: ●●●●●●●● Login

Select a project below

Project: [Dropdown]

Send Snapshot: Dev Testing
Diploma and Transcript Requests
Employees
Invoices test
Leave Approval
Loan Documents test
Patient Records test
Permit Request
Personnel Files test
Policy Documents
SOF Demo(Mixed)
Types test
Types2

Send XML:

PaperVision

The wizard needs to sign in to retrieve the list of projects. It will setup your form to save a document to the selected project.

You can independently configure what your user will see using Form Actions.

Next

ImageSilo Wizard

1. The next panel shows the three ImageSilo index fields.
2. For each index field, a drop down lists the form fields.
3. Select the appropriate field from the form that corresponds to each index field.
4. Click Finish on the wizard.

Document Type: RequestType

Surname: LastName

Request Amount: [Dropdown]

Address
Amount
City
DOB
Dropdown50
FirstName
HomePhone
InterestRate
LastName
MaritalStatus
NumberOfMonths
RequestType
SSN
State
TitleWillBeHeldNWhatName
YearBuilt
Zip
frevvo_submit_name

PaperVision

Setup index fields.

You can independently configure what your user will see using Form Actions.

Back Finish

ImageSilo Wizard

Test the form

Now you are ready to test your form. Click the "Finish" button on the form designer and click the "Test" button for the form on the forms home

page. This opens your frevvo form for use. Fill in the form fields. Note that frevvo ensures that when you enter values into certain fields such as Date or Amount, that the value you enter is in fact valid. It will warn you and prevent you from submitting the form unless all required fields contain valid values.

Complete the form and submit it. frevvo will generate a snapshot in your chosen format and create a new document in ImageSilo with the appropriate index fields. In ImageSilo you can view the generated PDF or TIFF as usual using the ImageSilo viewers.

| Search Criteria | | Page 1 of 1 |
|---------------------|--------------|----------------|
| Document Type | Surname | Request Amount |
| Bensenville Loan | Esposito | \$333.33 |
| Bensenville Request | Collinsworth | \$120,500.00 |
| Bensenville Request | Kollins | \$100,000.00 |

ImageSilo Index fields

Bensenville Community Credit Union
While other financial institutions have branches, We have roots.
 SERVING THE COMMUNITY SINCE 1934

Loan Application

Borrower Information

First Name: Robert
 Last Name: Collinsworth
 SSN: 123-55-6789
 Home Phone: 304-6767
 DOB: 3/31/1954
 Marital Status: Married Unmarried Separated

Loan Terms

Amount: 120000.00
 Interest Rate: 4
 Number of Months: 360

Subject Property Information

Document in ImageSilo