



PSIGEN software **inc.**
the **science** of document capture

QUICKstart

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Modified: 12.5.19
Screenshots: 7.5.0.11



PSI**capture**

PSIcapture Installation using a License Server

Quick Start Guide

Getting Started

Welcome to PSICapture!

This Quick Start Guide is designed to help you through the process of downloading and installing PSICapture within a typical business network environment where it has never before been installed. Every network environment has many variables such as security policies and folder permissions can be configured in a limitless variety of ways, this guide will only provide the installation steps for a typical environment that we are likely to encounter. You will also learn to configure some basic Storage Locations. For additional information on features not covered in this guide please refer to the PSIGEN wiki at help.psigen.com. PSIGEN offers detailed hands on training with the PSICapture software as well.

This guide covers Installation of PSICapture 7.6.x. This guide assumes you have basic knowledge of Microsoft Windows.



Requirements:

- Ensure your computer meets the [min. requirements](#)
- You have **DOWNLOADED** version 7.6.x of PSICapture
- You have a current PSICapture License Keys
 - LSxxx-xxxxxxx – License Server Activation Key
 - PLxxx-xxxxxxx – License Server Key
 - PSxxx-xxxxxxx – Product Key

Download the Installation Package

As of the creation of this Guide, the latest version of the PSICapture software is available at this location:

<http://downloads.psigen.com/PSICapture.Setup.7.6.zip>

The version number near the end of the above URL will change as newer versions are released.



The PSICapture Setup file is roughly 500 MB. When using a broadband connection, you should be able to download it in around 10-15 minutes.

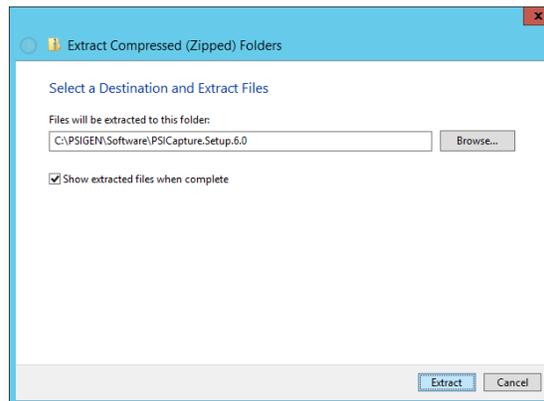
Extract the Setup File

When your download has completed, open the folder where you downloaded the file.

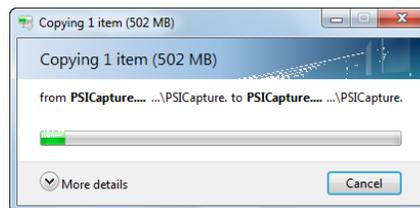
The PSICapture Setup is a compressed (zipped) folder that you will need to unzip before you can install the software. Right-click on the file and select **Extract All...**

Enter the Destination path as:

C:\PSIGEN\Software\PSICapture.Setup.7.0



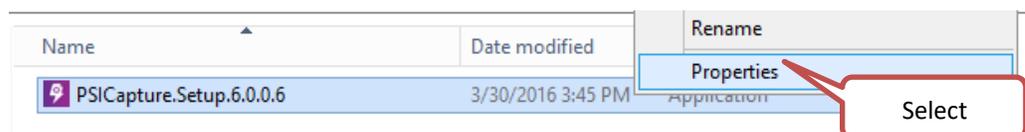
The files will be copied out of the compressed folder to the Destination location.



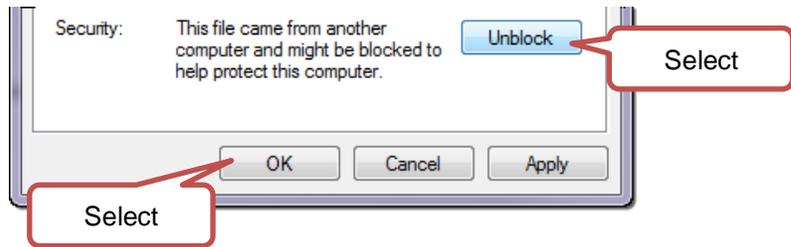
Select the PSICapture Setup executable from the new location.

Name	Date modified	Type	Size
 PSICapture.Setup.6.0.0.6	3/30/2016 3:45 PM	Application	486,452 KB

Right-click on the install file and click **Properties**.

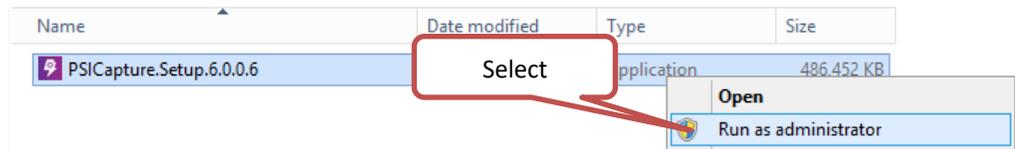


At the bottom of the Properties windows, if there is either a button or a checkbox to **Unblock** the file, please click it. If you do not see any option to Unblock or if it is grayed out, the file is already unblocked, and no action is necessary. Click **OK**.



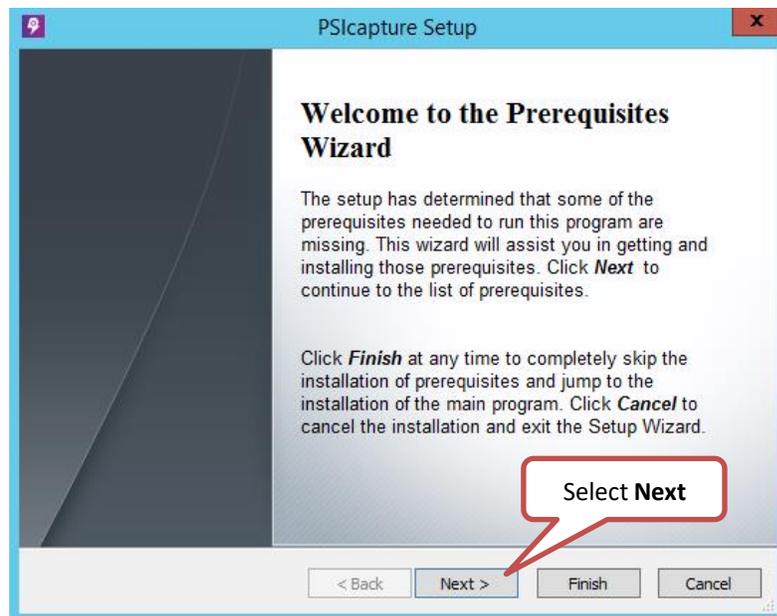
Running the Installation Package

Right-click on the installation package you just extracted from the compressed (zipped) file and choose **Run as administrator**.

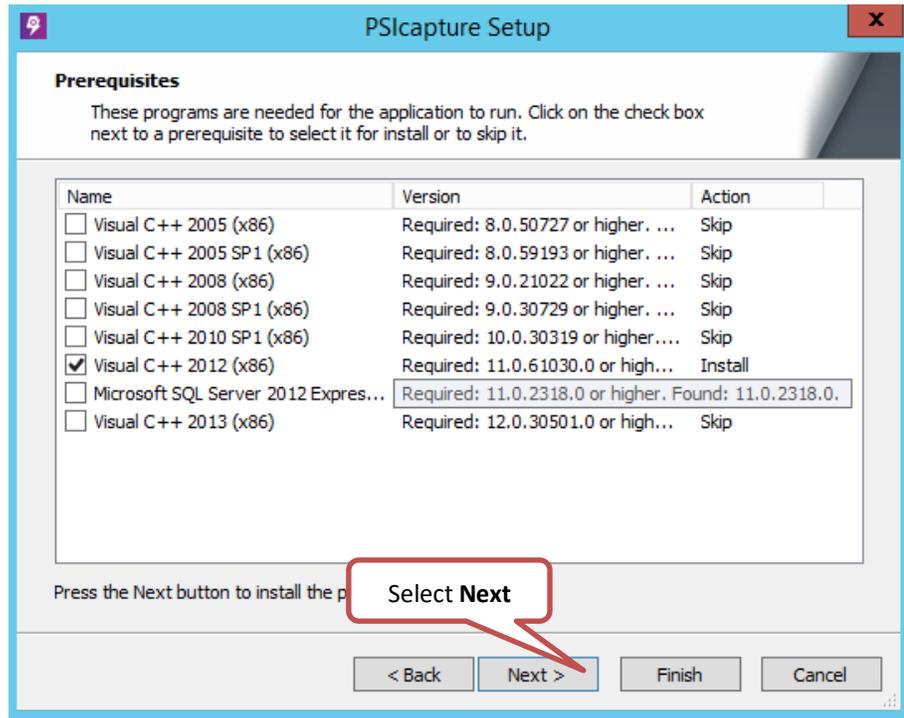


Prerequisites Wizard

The setup wizard will automatically determine whether any of the prerequisites needed to run PSICapture are missing.

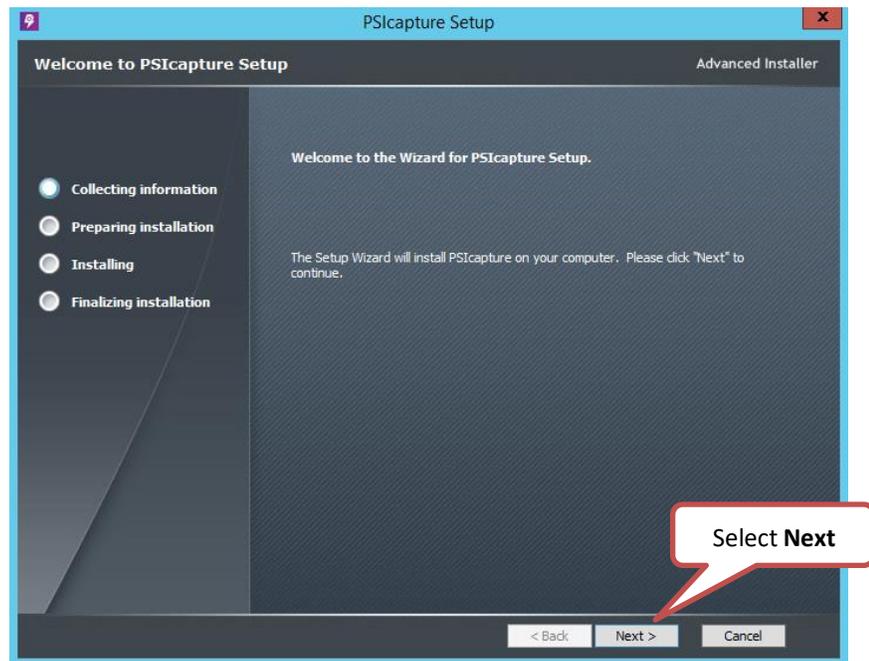


☆ Note:
All missing prerequisites will automatically be selected for you. If they are unselected, then requirements are already met.

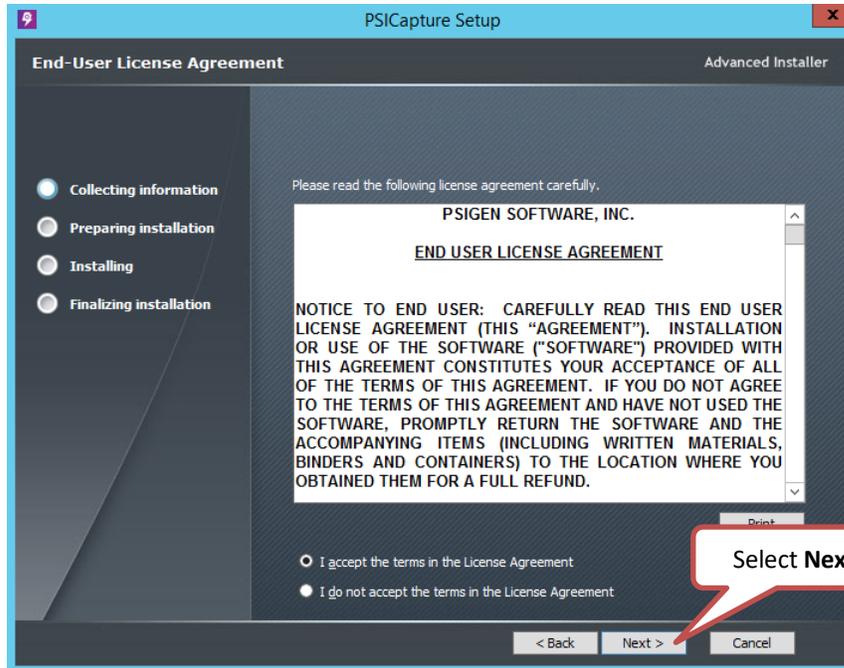


PSICapture Setup

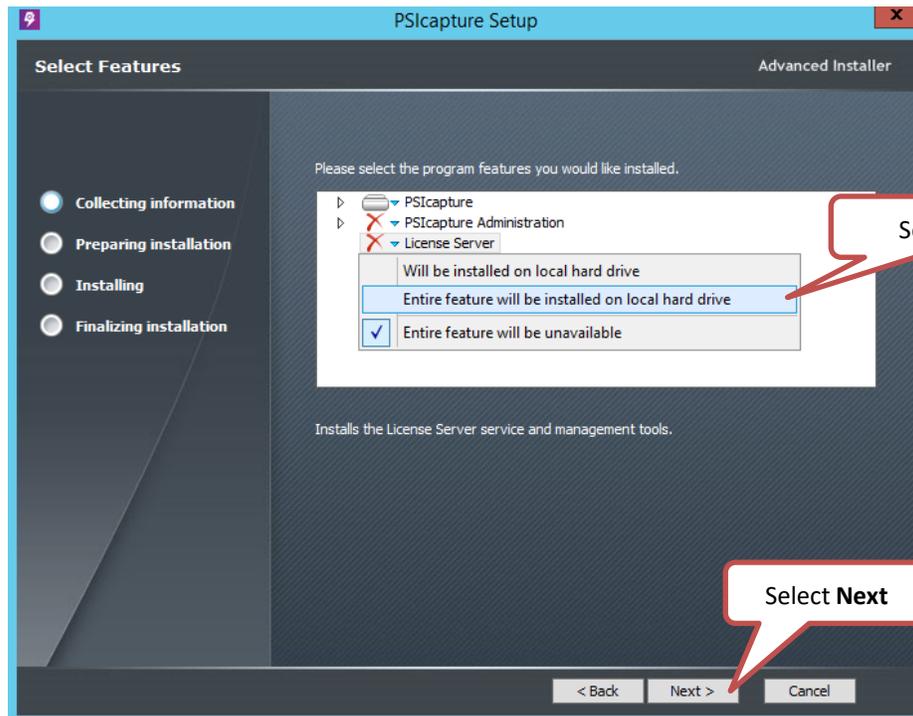
The Setup Wizard will install PSICapture on your computer.



Review, then **Accept** the terms in the License Agreement.



Select the License Server option and select it to be installed, and click **Next**.



PSIcapture

This is the core installation for the PSIcapture product. This is the only feature that you need to install to create capture profiles and process batches.

PSIcapture Administration

This will **only** install the Administration module. When running the Admin Tool, you will be able to create, modify, and review capture profile configurations and run reports, but you **will not** be able to capture images or process batches through any workflow. Running the PSIcapture Admin Tool does not consume a license.

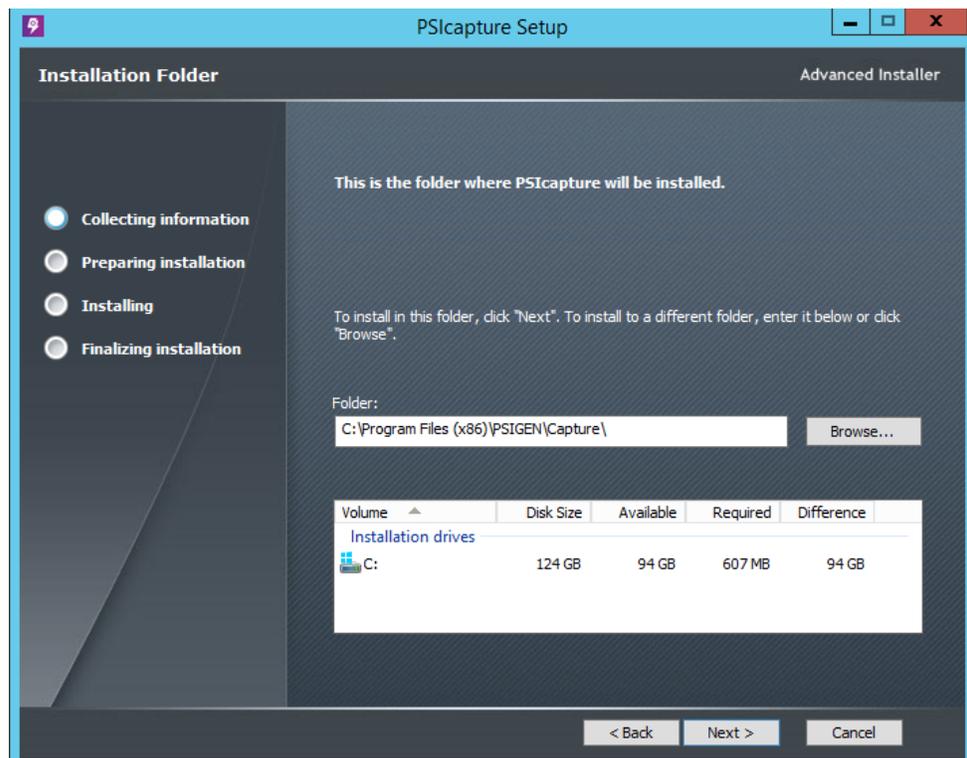
License Server

This will install the License Server service and management tools. This is used to manage the concurrent licenses, and track usage of the pooled annual page counts. If you are running the software in standalone mode, as opposed to in a multi-machine production environment, then the License Server feature is unnecessary.

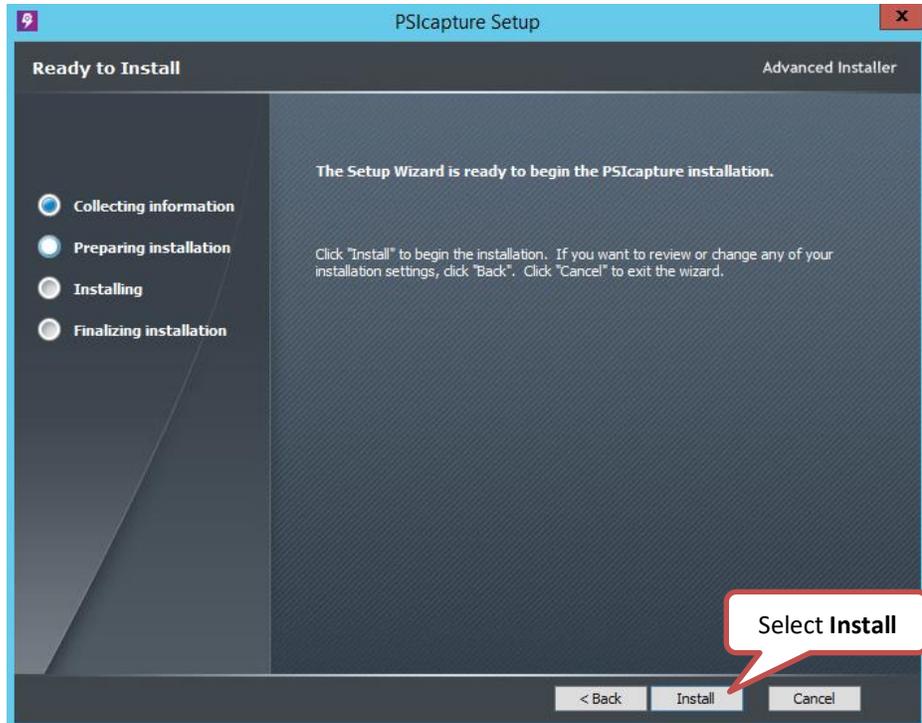
☆ Note:

If you will be installing the License Server separate from the main Capture Server and/or have Network Workstations, you will want to make sure you are running the same build on all installations.

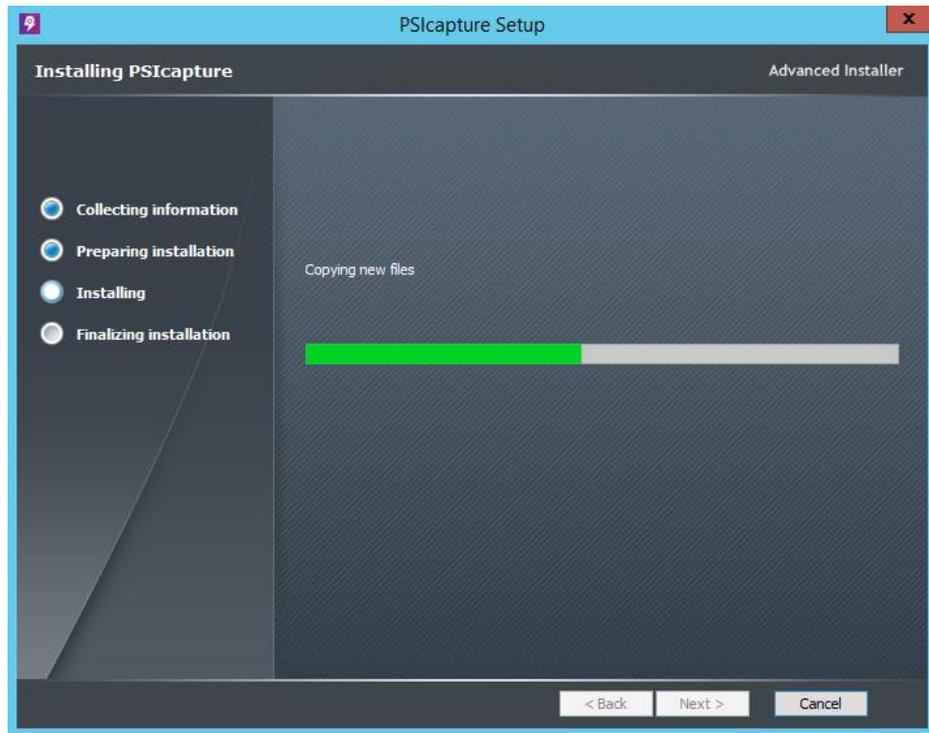
To install to the default folder, click **Next** again.



The Setup Wizard is now ready to begin the PSICapture installation.



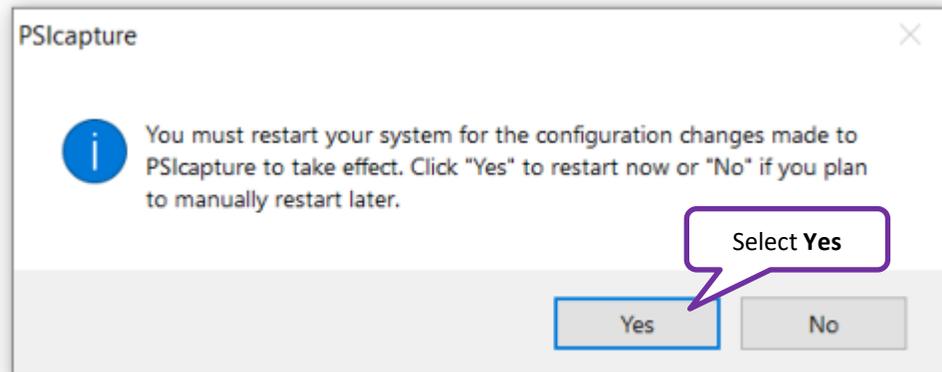
Wait for the files to be extracted from the installer. The extracted files will then be copied to the install location.



When installation is complete, click **Finish**.

When installation is complete, you may be prompted to reboot, select **Yes**.

☆ Note:
If you will be installing PSICapture for the first time on this machine it will require a reboot after the installation is complete.



Configure the Service Manager

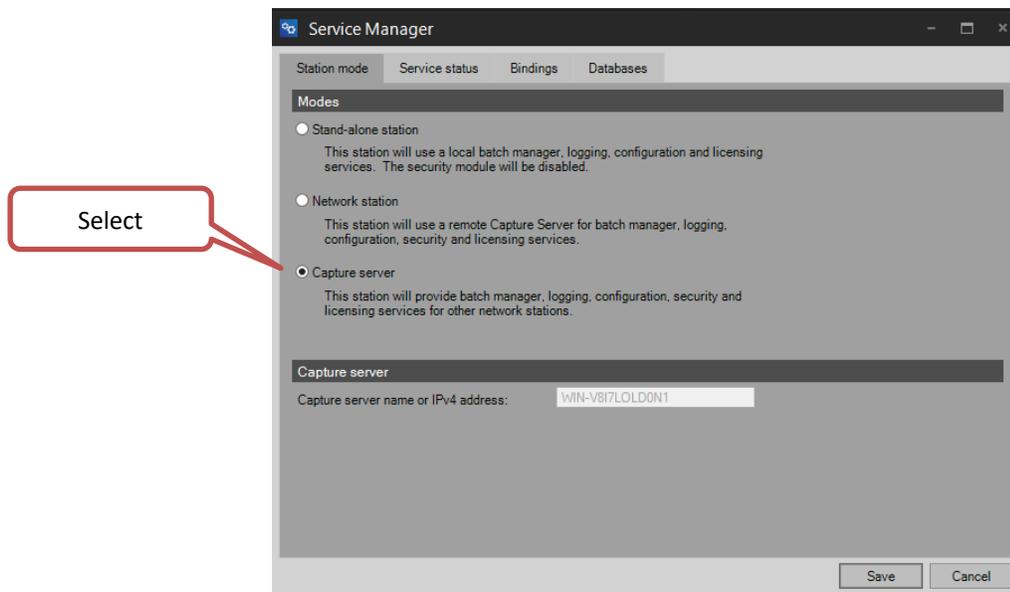
We will now setup the Service Manager to run PSICapture as a Capture Server.

For Windows 7 - Click on the Start Menu >> PSIGEN >> Service Manager

For Windows 8/8.1/10 and Server 2012 R2/2016/2019 – Click on the Windows icon.



Select **Capture Server**, then click Save



Configure the License Server

We will now configure the PSICapture License Server. We will start by activating the License Server itself using the PSICapture License Server Activation Key. Once this has been accomplished, we can either choose to load PSICapture Product Keys individually, or load a PSICapture Server Key, which contains multiple Product Keys.

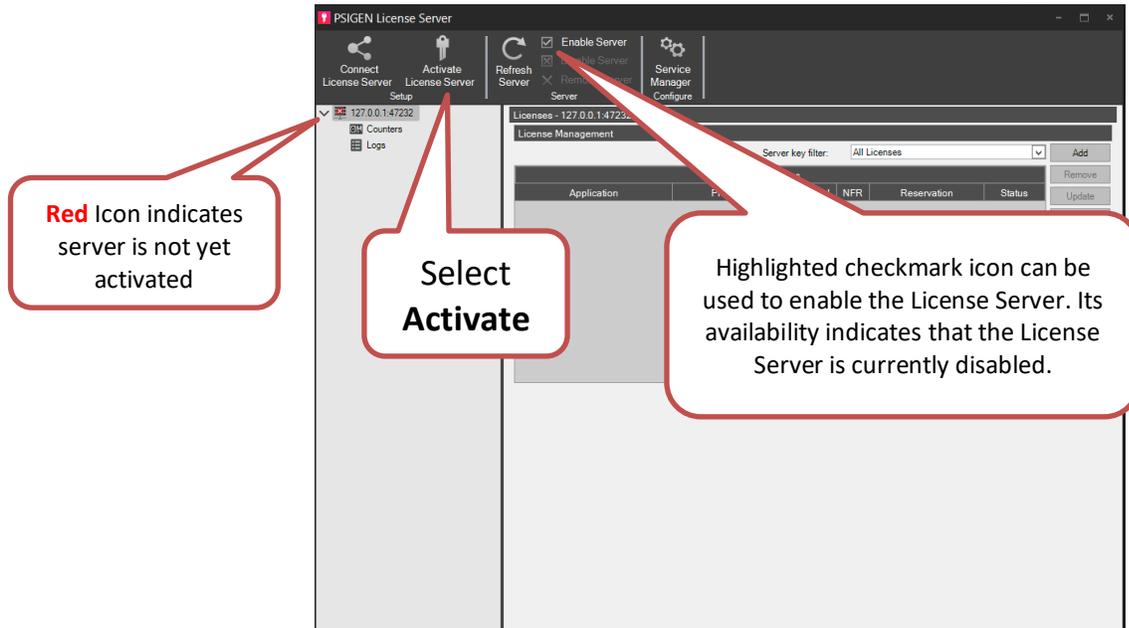
- PSICapture Keys
 - LSxxx-xxxxxxx – License Server Activation Key
 - PSxxx-xxxxxxx – Product Key
 - PLxxx-xxxxxxx – License Server Key
- For Windows 7 - Click on the Start Menu >> PSIGEN >> License Server
- For Windows 8/8.1/10 and Server 2012 R2/2016/2019 – Click on the Windows icon.



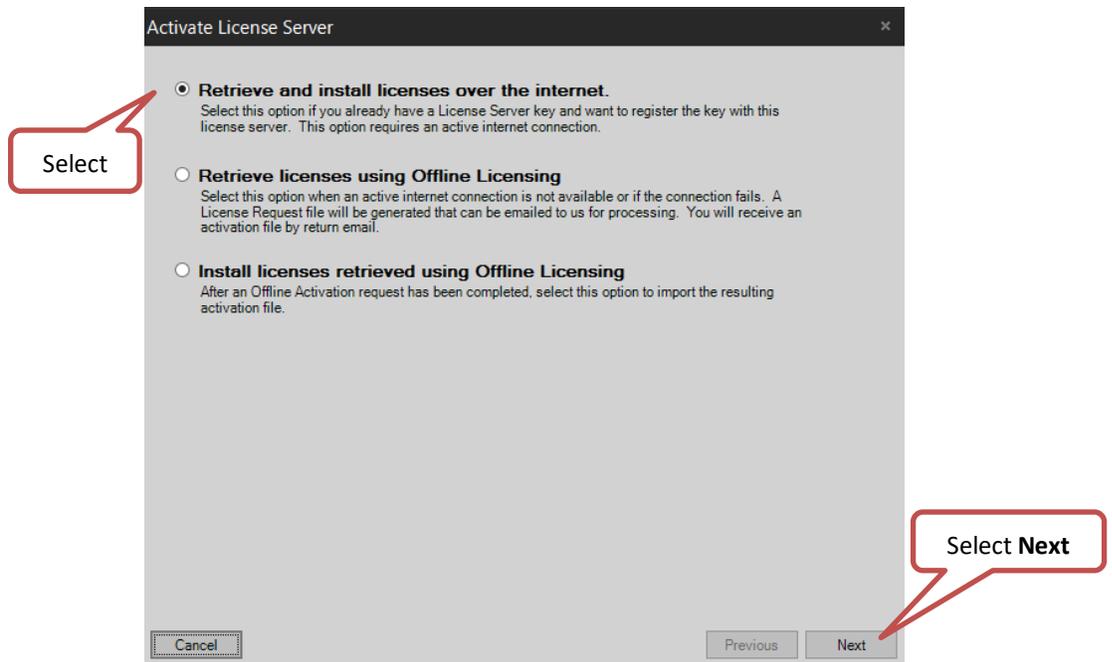
Then type License Server, in the results select,



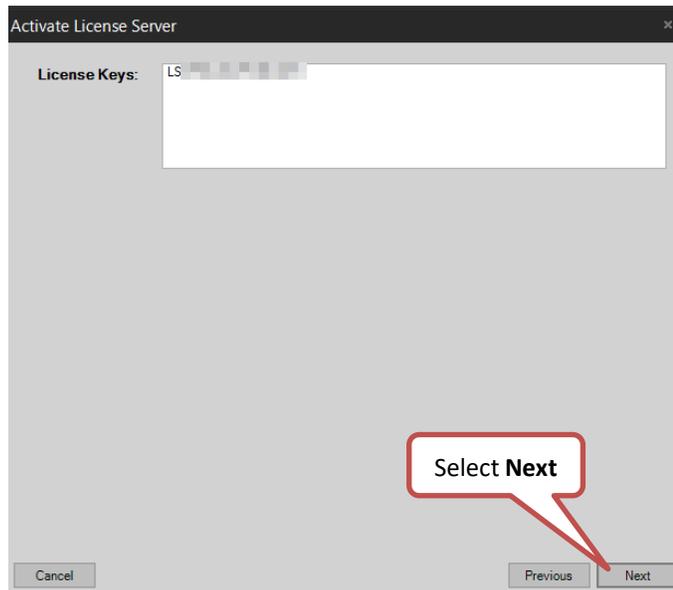
We will now activate the PSIGEN License Server.



If you have an internet connection, we will retrieve and install the licenses over that connection.



Type in the PSIScapture License Server Activation Key. This will be the key that begins with "LS"



Complete the following registration form (**bold** fields are required).

Complete the following registration form. This information will be used internally to improve license management and support services, and will not be shared with any third party. [View our privacy policy](#)

General information

Name (required): Matt Cason

Company (required): PSIGEN

Reseller:

Phone:

Email (required): matt.cason@psigen.com

Website:

Address

Address line 1:

Address line 2:

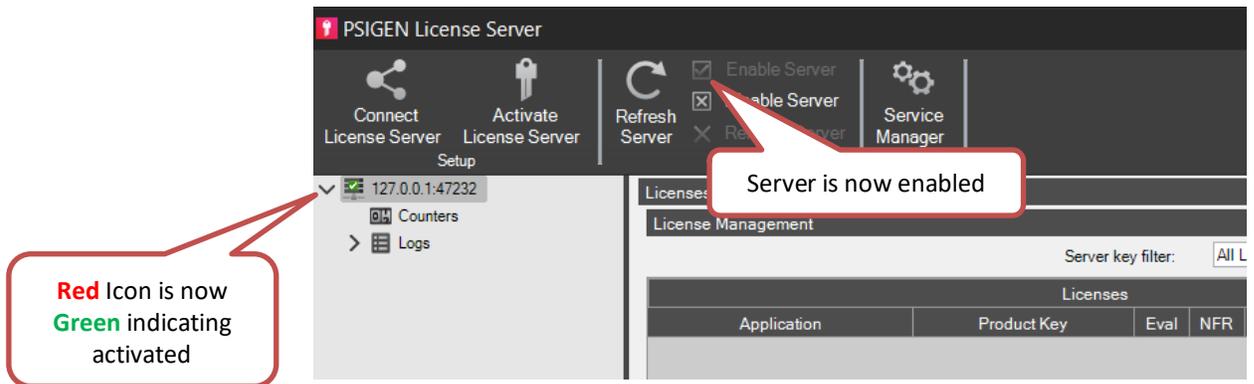
City:

State or province:

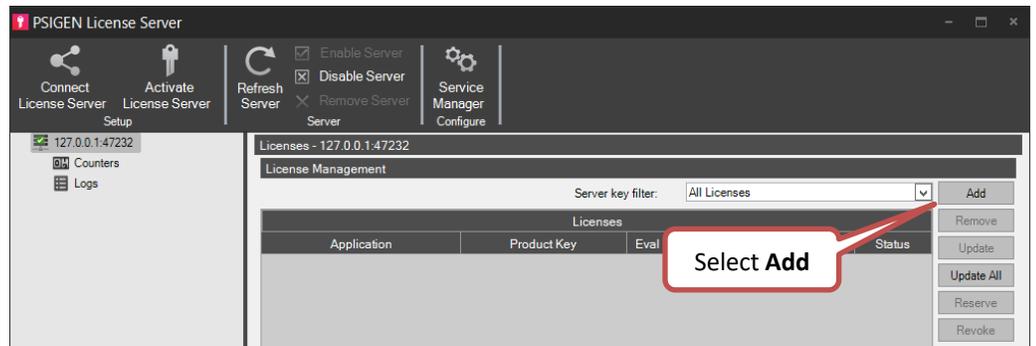
Zip or postal code:

Country:

When the server activation is complete you will see the indications below.



With the License Server activated and enabled we are now ready to load the Product Key(s) or Server Key.



Using the Internet, we will retrieve and install the licenses, Click **Next**.



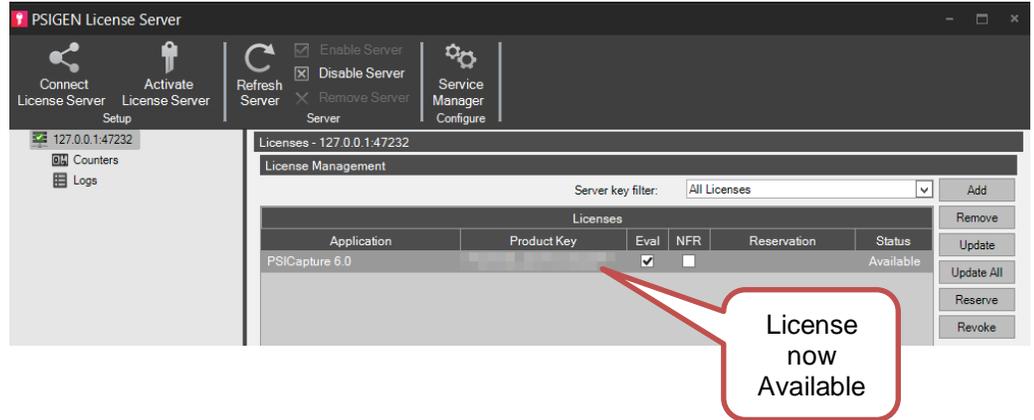
Type in the Product or Server Key, Click **Next**. If you have purchased only one license, you will not have a Server Key. If you have multiple licenses, you will likely have been provided with a Server Key. Entering the Server Key will effectively load all your purchased Product Keys at once.

☆ **Note:**

If you have issues with the license server not being reachable from the Network Stations, it is most likely due to a firewall or antivirus installation. We use port 47232 to connection stations to the capture server and port 47233 to distribute batches. If running into this issue create new rules that allow both Capture Services.exe and TCP 47232-47233 to be allowed on Public, Domain, and Private Connections.

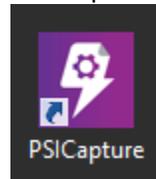
Please complete the registration form that you see next (bold fields are required). Click **Next**.

Once the activation is complete, you will see the list of available keys listed:

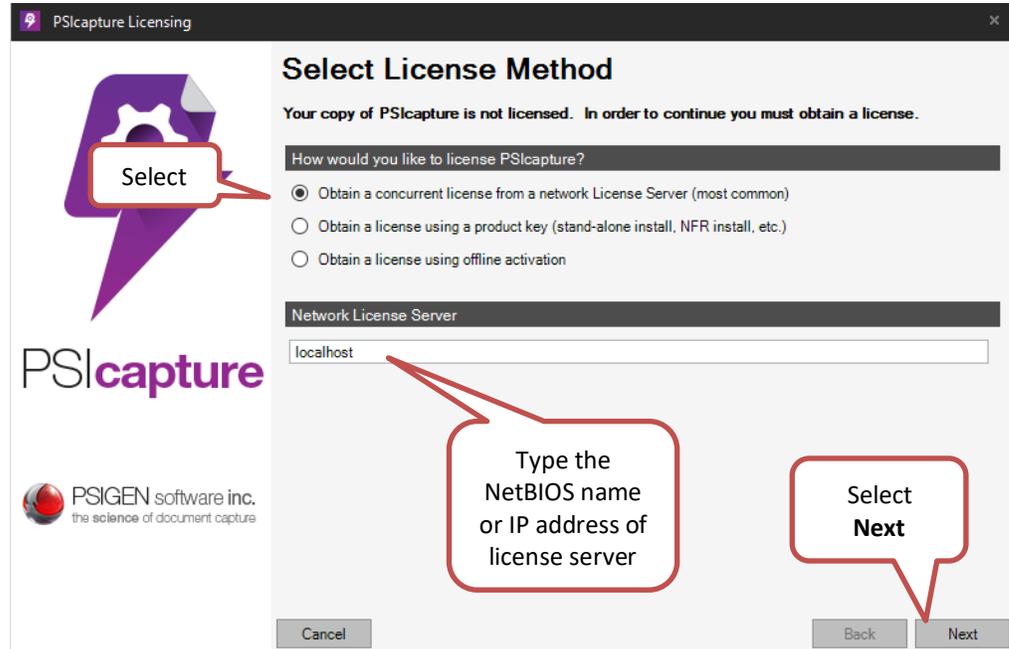


Configuring PSICapture to use the License Server

The License Server is now installed, configured and activated. We will now point PSICapture to the License Server to review the available license. Open PSICapture from the icon on the desktop or from the Start Menu.



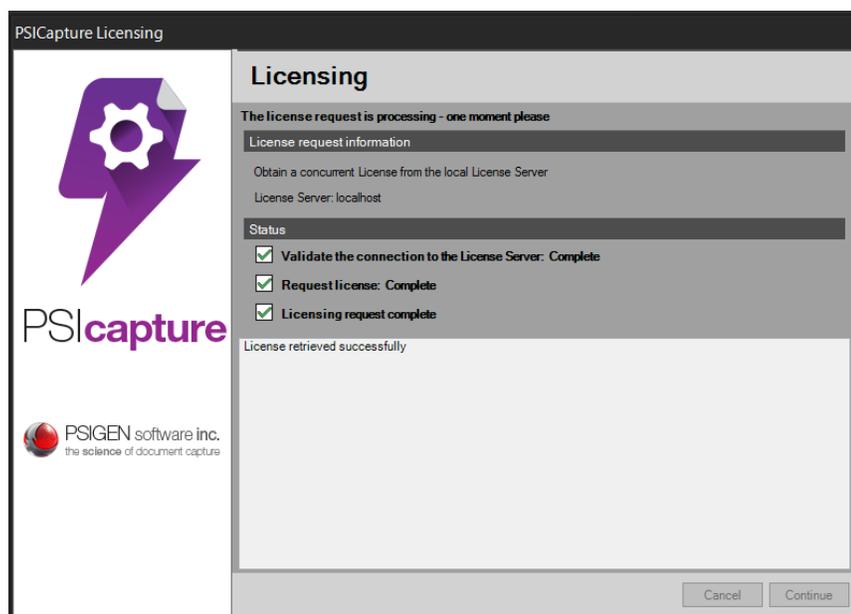
Since we are configuring PSICapture on the same machine where we just installed the License Server, we will point PSICapture to *localhost* for retrieving the license.

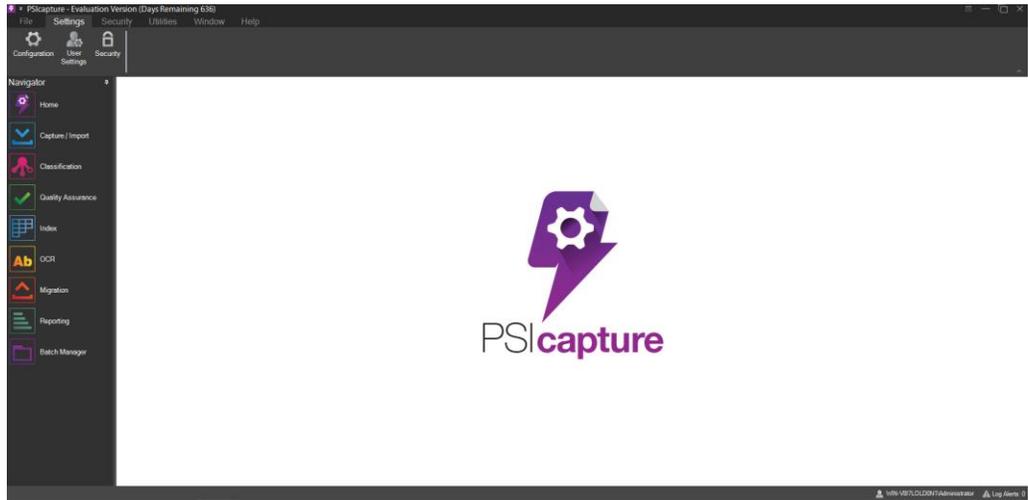


☆ Note:

When installing PSICapture on any other machines on the network, you will point PSICapture to the License Server machine by entering the name of the license server or its IP address.

This will reach out to the license to see if there is an available valid license. You should see three green-checks and the PSICapture product will open.





Now you will create two Storage Locations.

One of them will be called **Batch Storage**. This folder will store the image files for temporary internal use within the program. The other will be the **Migrations** folder, which will be the Windows Network Folder destination for files exported by PSIScapture.

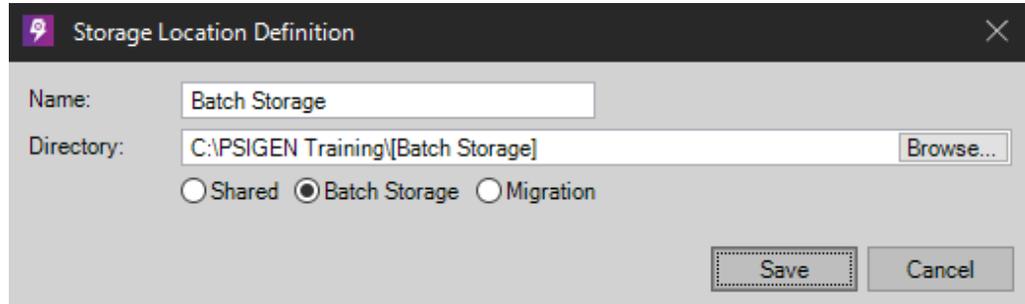
1. Select
Configuration

Click the **Configuration** icon and then click the **Storage** tab. Then click the **Add** button.

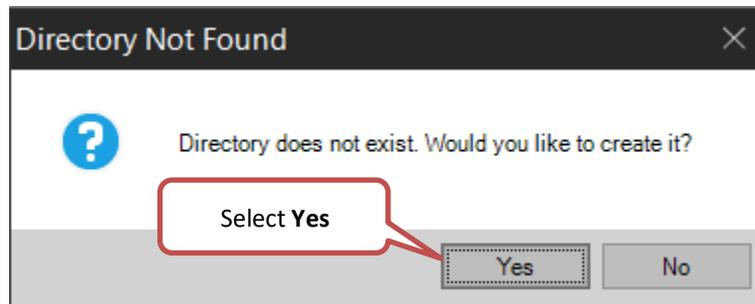


Name the location **Batch Storage**. For **Storage Directory**, type “C:\PSIGEN\[Batch Storage]”, set storage type to **Batch Storage**. Then click **Save**.

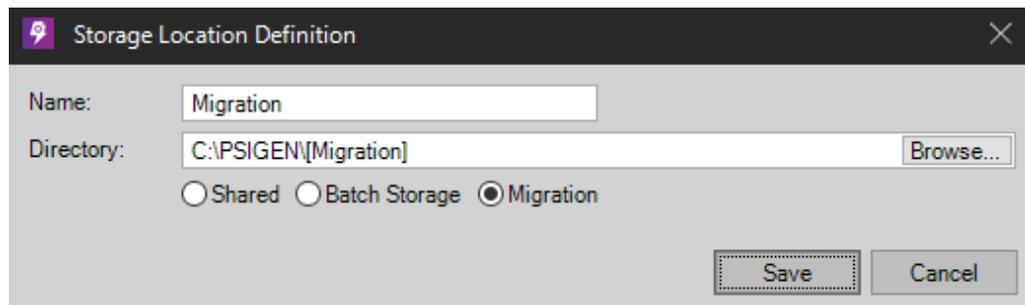
☆ **Note:**
If you have a main Capture and License Server and have Network Workstations, you will want to make sure your storage locations on the server have the proper share permissions and you use the full UNC path for the directory.



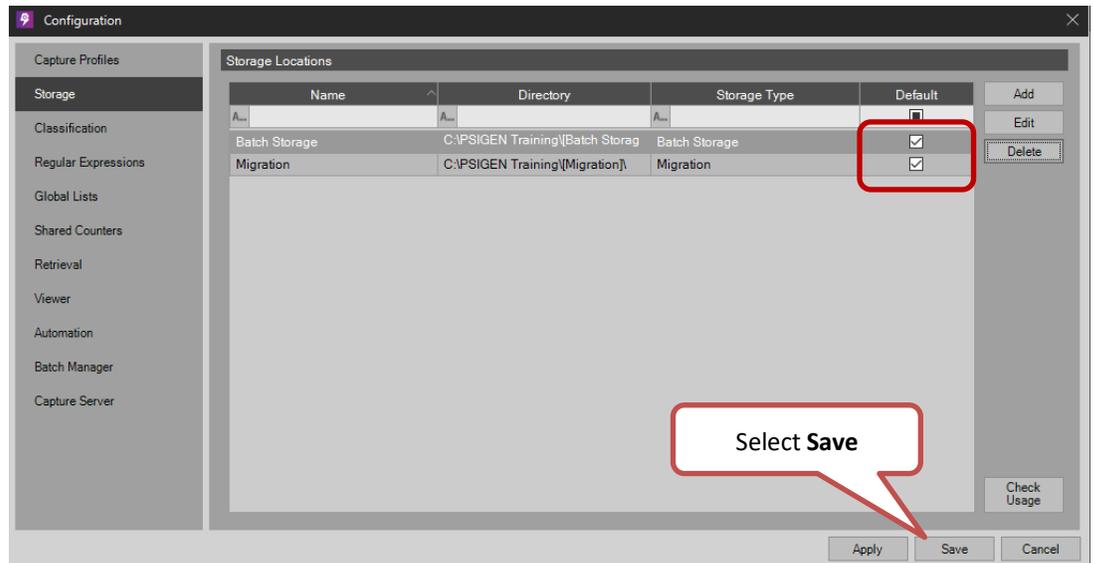
Because this folder does not yet exist on your hard drive, you will be prompted to create it.



Now **Add** a second Storage Location to be used for your Migrations.



Now that your two Storage Locations are defined, we want to set them as the defaults and click **Save**.



CONGRATULATIONS!!
You've just installed PSICapture and a License Server
and defined two Storage Locations.