

**Job Name:** TRIM – Simple Scan Index Demo

## Description:

This job is designed for simple unstructured scanning where an operator can split documents by using a black separator page and then be prompted with (customisable) TRIM indexing fields. In this demo job the operator is prompted to enter a Title, Container and a Location.

The document will then be converted into a text searchable PDF file and uploaded into TRIM.

This job requires the EzeScan PRO, KFI, EDRMS and Upload modules.

## Compatibility:

EzeScan 4.2.66 or higher

## Installation Instructions:

### *Import Sample Configuration*

- Open EzeScan and select the Admin menu > Settings Backup > Import option.
- Click the ... button and browse to the "TRIM - Simple Scan Index Demo.cfg" file.
- Select "Import All Items Below" option and then click the Import button.
- When the import has finished click the Close button.


### *Configure the Job settings*

- Select the Admin menu > Job option.
- Select "TRIM - Simple Scan Index Demo" from the Job Type drop down list.



**Note:** To use a TWAIN or ISIS scanner with this Job, configure the Scan Tab settings for your scanner. Or to use a network scanner with this Job, on the Import tab change the input path to where your device saves the documents to. You could also select Enable Import Folder Processing option so then there will be no need to browse for the document - Import folder will pick up the documents in the input folder automatically.

- Click the Save button. (If prompted to create the output directory click Yes)
- Click the Close button.

### *Configure the KFI settings*

- Select the Admin menu > KFI option.
- Select "TRIM - Simple Scan Index Demo" from the KFI Type drop down list.  
Select the EDRMS tab, click in the box that has "45" and then click the  button. Choose your TRIM dataset.
- Click Apply then OK.

### *Configure the Upload settings*

- Select the Admin menu > Upload option.
- Select "TRIM – Simple Scan Index Demo" from the Upload Type drop down list.
- In the upload properties pane, Change the following to your server:
  - 1) Database Name (you may need to confirm with your TRIM administrator)  
Click in the box that has "45" and then click the  button. Choose your TRIM dataset.
  - 2) In the Grid on the right there is a target field called Record Type. This is currently set to "Document" if using a different record type click the  button and choose your record type and then click OK.
- When Complete, Click Apply then OK.

### **Operation Instructions:**

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "TRIM - Simple Scan Index Demo" Job from the drop down list.
- 3) Click the Import File Button and select the "Separator\_sample.tif" file.  
**Note:** If using a TWAIN or ISIS scanner press the Scan button instead, or the Import Folder button if using a network scanner.
- 4) The document will load into the viewer, press the F4 button. EzeScan will prompt the operator to enter a title. Enter a title and press the right arrow button or Press Enter.
- 5) You will be now directed to the Container field. The My Containers screen will appear, select or search for a container to store the document into and then Click OK.  
Press the right arrow button or press Enter.
- 6) You will be now directed to the Author Location field. The Locations screen will appear, select or search for a location and then Click OK.  
Press the Submit button or press Enter twice.
- 7) The document will then get converted to a searchable PDF file and uploaded into TRIM (with the respective data applied). Repeat steps 4 to 6 until no more documents remain in the batch.