

Job Name: Docushare – Discovery Demo

Description:

This job contains five separate types of invoices. EzeScan Discovery will look for four fields on each Invoice, Supplier Name, Invoice Number, Invoice Date and Total Amount. The image will then be uploaded into Docushare with the Invoice Number as the title and the following fields in the Summary Field.

This job requires the EzeScan PRO, KFI, EDRMS, Discovery 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 "Docushare – Discovery 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 "Docushare – Discovery 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 Upload settings

- Select the Admin menu > Upload option.
- Select "Docushare – Discovery Demo" from the Upload Type drop down list.
- In the upload properties pane, Change the following to your server
 1. Server (you may need to confirm with your Docushare administrator)
 2. User
 3. Password
 4. In the Grid on the right there is a target field called Object Type. This is currently set to "Document", if required change this to the custom Document object type that you will be uploading.
 5. In the Grid on the right there is a target field called DocuShare Folder / File. This is currently set to "Zonal OCR -cf 11". Change the 11 to your Collection handle. If your collection is named differently then put in this syntax "your_collection_name -cf your_handle"
- When Complete, Click Apply then OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "Docushare – KFI + Upload 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 Supplier Name field. Confirm the value and press the right arrow button or press Enter.
- 6) You will be now directed to the Invoice Number field. Confirm the value and press the right arrow button or press Enter.
- 7) You will be now directed to the Date field. Confirm the value and press the right arrow button or press Enter. Press the Submit button or press Enter twice.
- 8) You will be now directed to the Total field. Confirm the value and press the right arrow button or press Enter. Press the Submit button or press Enter twice.
- 9) The document will then get converted to a searchable PDF file and uploaded into Docushare (with the respective data applied). Repeat steps 4 to 6 until no more documents remain in the batch.