

Job Name: Docushare – KFI + Upload 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) Docushare indexing fields. In this demo job the operator is prompted to enter a Title, Summary and Collection. The document will then be converted into a text searchable PDF file and uploaded into Docushare.

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 "Docushare – KFI + Upload 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 – KFI + Upload 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 "Docushare – KFI + Upload Demo" from the KFI Type drop down list. Select the EDRMS tab, enter the Server Location, Username and Passowrd.
- Click Apply then OK.

Configure the Upload settings

- Select the Admin menu > Upload option.
- Select "Docushare – KFI + Upload 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.
- 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 Title field. Type in the title value and press the right arrow button or press Enter.
- 6) You will be now directed to the Summary field. Type in the summary value and press the right arrow button or press Enter.
- 7) You will be now directed to the Collection field. The Collection selection dialog will appear, select the Collection where the documents are to be stored.

Press the Submit button or press Enter twice.
- 8) 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.