

Job Name: DocuWare – KFI & Upload demo
Integration Type: DocuWare

Description:

This EzeScan Job will prompt the operator for a Company, Subject, and Date. When complete, the image will be uploaded into DocuWare with the respective metadata populated. This job requires the EzeScan PRO, KFI, and Upload modules.

Compatibility:

EzeScan 4.2.85 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 "DocuWare – KFI & Upload demo.cfg" file.
- Select Import All Items Below.
- Click the Import button.
- When the import has finished click the Close button.

Configure the Job settings

- Select the Admin menu > Job option.
- Select "DocuWare – 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 images to. You could also select Enable Import Folder Processing option so then there will be no need to browse for the image - Import folder will pick up images 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 "DocuWare – KFI & Upload demo" from the KFI Type drop down list.
- Open the EDRMS tab and then fill in the DocuWare connection settings.
- Open the Fields tab and then click Edit on the "Company" field.

- On the Field Edit Form select the DocuWare tab.
- Click in the "File Cabinet" parameter and select the ... button and then choose the "Document Pool" option or another if not using the DocuWare sample VM.
- Click in the "File Cabinet Dialog" parameter and select the ... button and then choose the "Store Dialog - Enhanced" option.
- Click in the "File Cabinet Field" parameter and select the ... button and then choose the "COMPANY" field.
- Click OK to save the Field changes.
- Click the Apply button and then OK.

Configure the Upload settings

- Select the Admin menu > Upload option.
- Select "DocuWare – KFI & Upload demo" from the Upload Type drop down list.
- In the Upload Properties pane specify your DocuWare connection settings.
- In the Upload Mappings pane locate the Target Field "FileCabinet". Click in the Field Value cell and then click on the ... button that appears to select the "Document Pool" File Cabinet option in the list or another if not using the DocuWare sample VM.
- Press the Auto Populate button. EzeScan will automatically add the selected File Cabinets fields to the Upload Mappings pane.
- Now locate the Upload Target field "COMPANY" and then map in the Source Field "Company" option. Then map in the "Subject" option into the "SUBJECT" field, and "Date" option into the "DATE" field.
- Click the Apply button and then OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "DocuWare – 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 image will load into the viewer. Press the F4 button.
- 5) You will be now directed to the Company Field. Type in a Company, or press the browse button to choose a company from DocuWare. Press the right arrow button or Press Enter.
- 6) You will be now directed to the Subject Field. Type in a Subject / Description for the document, or use the Pencil tool to select the wanted text on the page. Press the right arrow button or Press Enter

- 7) You will be now directed to the Date Field. EzeScan will automatically fill in the current date. Type in another date if desired. Press the Submit button
- 8) EzeScan will now convert the current document to TIF file and upload it to the DocuWare File Cabinet that was selected during configuration. Repeat steps 5 - 7 until the remaining documents in the batch have been uploaded.