

1. PURPOSE OF DEMONSTRATION

There are six EzeScan jobs configured with this workflow

1. The 1st job takes a group of invoices and sorts them into separate folders using the EzeScan Forms module. It will check each page and attempt to match to the respective EzeScan job configured for the form.
2. The other 5 jobs are configured with zone OCR to extract the following data from the sorted forms:
 - Invoice Number
 - Invoice Date
 - Total Amount

When the five jobs have been completed the index data and images will be stored in their respective output folder.

2. COMPATIBILITY

- EzeScan 4.3.60 (and above)
- EzeScan licenced with these modules...
 - Pro
 - Index (KFI)

3. INSTALLATION INSTRUCTIONS

3.1. Load EzeScan

3. Select Admin → Settings Backup → Select Import
4. Click the button and browse to the **Forms Demo.cfg** file
5. Select **Import All Items Below**.
6. Ensure the **KFI Templates** option is **ticked** ☒
7. Click the **Import** button.
8. Press **F6** and select "**#1 - Forms Recognition - Sort Forms**" from the Job Type drop down list
9. Click the **Save** button
10. When prompted click **Yes** for the **Output Directory** message
11. Repeat steps 8 & 9 for the remaining jobs...
 - a) #2 - Forms Recognition - Form 1
 - b) #3 - Forms Recognition - Form 2
 - c) #4 - Forms Recognition - Form 3
 - d) #5 - Forms Recognition - Form 4
 - e) #6 - Forms Recognition - Form 5
12. Click **Close**

TIP: There should be an input/output directory created for each of these jobs; for example:
C:\ProgramData\Outback Imaging\EzeScan\Input\#2 - Forms Recognition - Form 1
C:\ProgramData\Outback Imaging\EzeScan\Output\#2 - Forms Recognition - Form 1

3.2. Copy Sample Document(s)


Sample File

Copy the file “**Sample File - Forms Recognition.tif**” from the **Sample Documents** folder into the folder...
<C:\ProgramData\Outback Imaging\EzeScan\Input\Sample File - Forms Recognition.tif>


NOTE: If you are planning on scanning the image then open the above file and print it. When scanning it is recommended to scan the documents at a resolution of 300 DPI.

4. OPERATION INSTRUCTIONS


4.1. Step 1 - separate the invoices

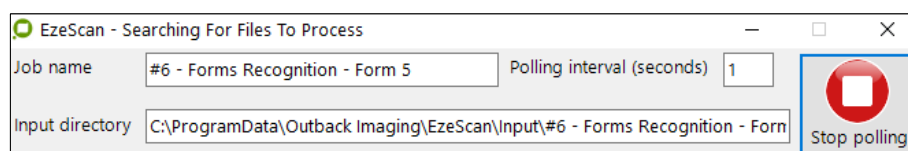
1. Select the **Admin menu > Job** option or press **F6**.
2. Select “**#1 - Forms Recognition - Sort Forms**” Job from the drop down list.
3. Click the **Import File** button 
4. Select the “**Sample File - Forms Recognition.tif**” file.

NOTE: If using a TWAIN or ISIS scanner press the Scan button instead, or the Import Folder button if using a network scanner.

5. The image will load into the viewer
6. Press the **F4** key or click on the Profile icon - 
7. EzeScan will process each of the 5 invoices in the TIF file and separate them into respective output folders based on the Forms rules

4.2. Step 2 - process the separated invoices

1. Select the **Admin menu > Job** option or press **F6**.
2. Select “**#2 - Forms Recognition - Form 1**” Job from the drop down list.
3. Click on the **Import Folder** button 
4. The sorted TIF file will be imported into the EzeScan document viewer window
5. The 1st KFI will automatically run and use OCR to capture the Invoice Number, Invoice Date & Total Amount of the 1st invoice
6. Once the page has completed being profiled ezescan will begin polling for the next job



7. The polling process should import the 2nd invoice into the EzeScan document viewer window
8. The 2nd KFI will automatically run and use OCR to capture the Invoice Number, Invoice Date & Total Amount of the 2nd invoice
9. The process will continue until all 5 invoices have been processed

10. The images will be converted to a PDF file and saved (with the CSV data) into the output folder -
- C:\ProgramData\Outback Imaging\EzeScan\Output\#2 - Forms Recognition - Form 1
 - C:\ProgramData\Outback Imaging\EzeScan\Output\#3 - Forms Recognition - Form 2
 - C:\ProgramData\Outback Imaging\EzeScan\Output\#4 - Forms Recognition - Form 3
 - C:\ProgramData\Outback Imaging\EzeScan\Output\#5 - Forms Recognition - Form 4
 - C:\ProgramData\Outback Imaging\EzeScan\Output\#6 - Forms Recognition - Form 5

C:\ProgramData\Outback Imaging\EzeScan\Output		
Name	Date modified	Type
#1 - Forms Recognition - Sort Forms	17/10/2016 4:32 PM	File folder
#2 - Forms Recognition - Form 1	17/10/2016 5:29 PM	File folder
#3 - Forms Recognition - Form 2	17/10/2016 5:29 PM	File folder
#4 - Forms Recognition - Form 3	17/10/2016 5:29 PM	File folder
#5 - Forms Recognition - Form 4	17/10/2016 5:30 PM	File folder
#6 - Forms Recognition - Form 5	17/10/2016 5:30 PM	File folder

C:\ProgramData\Outback Imaging\EzeScan\Output\#2 - Forms Recognition - Form 1			
Name	Date modified	Type	Size
EzeScan - Forms Recognition.csv	17/10/2016 5:29 PM	Microsoft Excel Co...	1 KB
XYZ_20161017_14.pdf	17/10/2016 5:29 PM	Adobe Acrobat D...	14 KB

11. Check each of the output folders for the image/s and index data.