

Job Name: EzeScan Archiver – 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) indexing fields. The document will then be converted into a text searchable PDF file and uploaded into the EzeScan Archiver.

This job requires the EzeScan PRO, KFI, 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 "EzeScan Archiver - 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 "EzeScan Archiver - 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 Upload settings (optional)

- Select the Admin menu > Upload option.
- Select "EzeScan Archiver - Simple Scan Index Demo" from the Upload Type drop down list.
- In the Upload Properties pane specify the disc path.

This is where the Web Page and documents will be saved.

Currently it is set to "C:\Archive\General" *(if the folder does not exist, EzeScan will create it when the first document is uploaded)*

Create this folder structure, or click in this box then click the ... button to change the path.

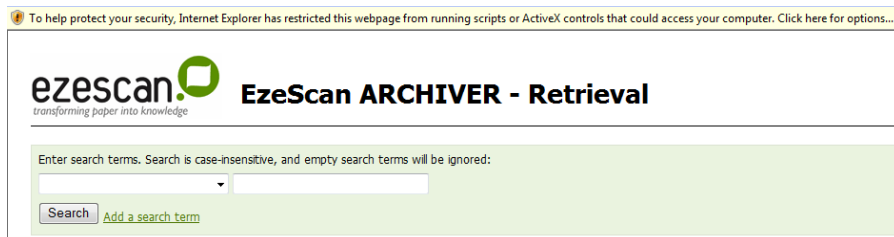
- Click the Apply button and then OK.

Operation Instructions:

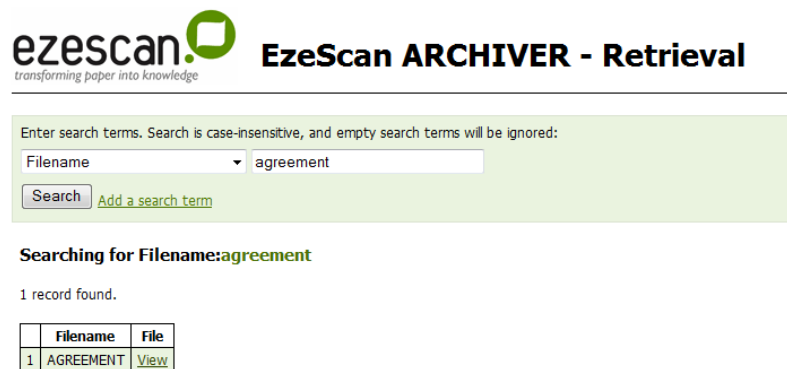
- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "EzeScan Archiver - Simple Scan Index Demo" Job from the drop down list.
- 3) Click the Import File Button and select the "Separator_sample.tif" file.
Note: If using a TWAIN or ISIS scanner press the Scan button instead, or the Import 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 Date field. Enter a date (hint: hit the space bar for today's date. Press the right arrow button or Press Enter.
- 6) You will be now directed to the Client Name field. A drop down list will appear of client names. (Note: This list can be customised or derived from a database, see Appendix) Select a client and then press the right arrow button or Press the Submit button or press Enter twice.
- 7) The document will then get converted to a searchable PDF file and uploaded into the EzeScan Archiver Disc path that was selected during the configuration. Repeat steps 4 to 6 until no more documents remain in the batch.

Viewing Files:

- 1) Open the "Index.html" file. This will launch the internet browser.



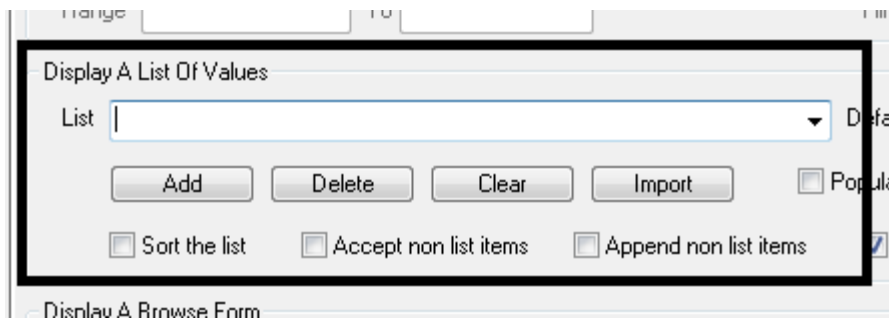
- 2) Click on the security warning on the top of the page and select "Allow Blocked content". Select "Yes" when prompted in the following dialog.
- 3) You will now be able to select an index field to search on using the drop-down list. Enter a value in the text box on the right and click 'Search'.
- 4) Click the "View" link to open up the PDF document.



Appendix

Changing the list values for the KFI Client Name

- 1) Select Admin -> KFI or Press F7
 - 2) Select "EzeScan Archiver - Simple Scan Index Demo" from the drop down list
 - 3) Select the Fields Tab
 - 4) On the third field "Client Name" click the edit link
 - 5) Select the Format Tab
- The option "Display A List Of Values" will appear.



- 6) Use the dropdown list to see the current list values.
- 7) To add an item, type the value in the box and click the Add button
- 8) To delete an item, select a value in the list and click the Delete button
- 9) To clear the whole list, click the Clear button and click Yes for the confirmation.
- 10) When complete click the OK, Apply and then OK button to save the changes.

Please Note: To populate the list from an ODBC compliant database please refer to the EzeScan KFI User Guide available from the help menu.