

HPE Content Manager - Container Barcode Demo

1 Description

This job will prompt the user for a Title and then it will read the barcode (from the Barcoded Cover Sheet) and upload it to the respective HPE Content Manager container, using the barcode value on the cover sheet for the container number.

This job uses EzeScan PRO, BCR, KFI and Upload modules

2 Compatibility

- **EzeScan 4.3** or higher

3 Installation Instructions

Copy Sample Document(s)

- Copy the file **HPE CM - Container Barcode Demo.pdf** from the **Scan Original Folder** into...
C:\ProgramData\Outback Imaging\EzeScan\Samples

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.

Import Sample Configuration

- Open EzeScan and select the Admin menu > Settings Backup > Import option.
- Click the browse button and browse to the **HPE CM - Container Barcode Demo.cfg** file.
- Select **Import All Items Below**.
- Tick the **KFI Templates** option.
- Click the **Import button**.
- When the import has finished click the **Close** button.

Configure the Job settings

- Select the **Admin** menu > **Job** option.
- Select **HPE CM - Container Barcode 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.

- Set the KFI and Upload settings on the Output tab to associated KFI & Upload
- Click the **Save** button.
- If prompted to create the output directory click **Yes**.
- Click the **Close** button.

HPE Content Manager - Container Barcode Demo

Configure the KFI settings

The **HPE CM - Simple Scan Index Demo KFI** will require the following to be checked/changed...

- On the **EDRMS** tab - Click in the box that has **45** and then click the browse [...] button and choose your HPE CM dataset (you may need to confirm with your HPE CM administrator)

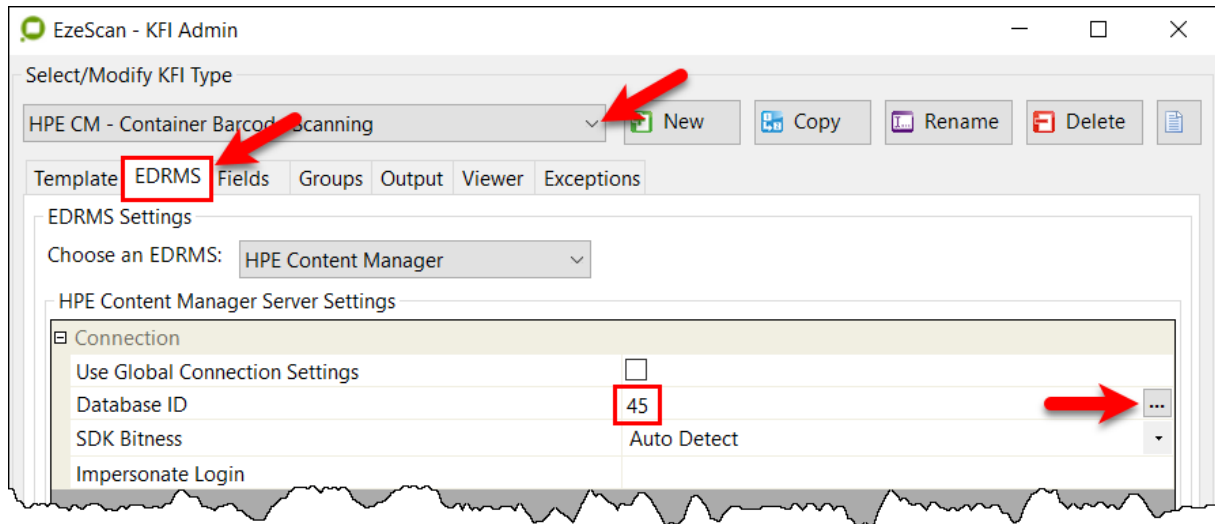


Figure 1 - ensure you configure the KFI to "your" environment

Configure the Upload settings

The **HPE CM - Simple Scan Index Demo Upload** will require the following to be checked/changed...

- On the **EDRMS** tab - Click in the box that has **45** and then click the browse [...] button and choose your HPE CM dataset (you may need to confirm with your HPE CM administrator)
- The Record type is set to **Document**. You may need to change it to one of your own
- The upload will load the processed document into a container with a number of **16/4**; which is the barcode value on the cover sheet.
 - You **will** need to create a container in your system with a record number of **16/4**

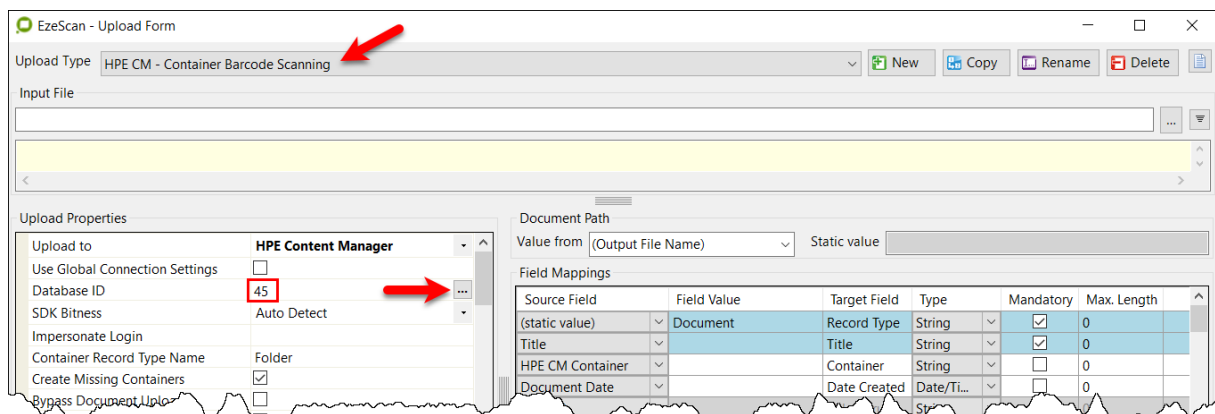


Figure 2 - ensure you configure the Upload to "your" environment


4 Operation Instructions

1. Select the **Admin** menu > **Job** option or press **F6**.
2. Select the **HPE CM - Container Barcode Demo** job from the drop down list.
3. Click the **Import File Button** and select the **HPE CM - Container Barcode Demo.pdf** file.



HPE CM - Container
Barcode Job.pdf

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 or the profile  icon.

TIP: This job is set to auto process so the 3 fields should auto process after starting the profile.

- a) The Title is set to auto populate
 - The KFI value tab has a “custom extract” set to Demo upload <<(Batch Doc ID)>> to Barcoded Container Number
 - The Title field should look like this...
Demo upload 0001 to Barcoded Container Number
 - The next document will increase the <<(Batch Doc ID)>> by 1...
Demo upload 0002 to Barcoded Container Number
 - b) Today's date will auto populate the Document Date field
 - c) The HPE CM Container field will auto populate from the barcode value on the coversheet
 - d) The KFI is set to auto submit the document so you should not have to click the **Submit** button
5. The image will then get converted to a PDF file and uploaded into **HPE Content Manager**
 6. The 2 additional documents in the batch will automatically process once the first document is uploaded.

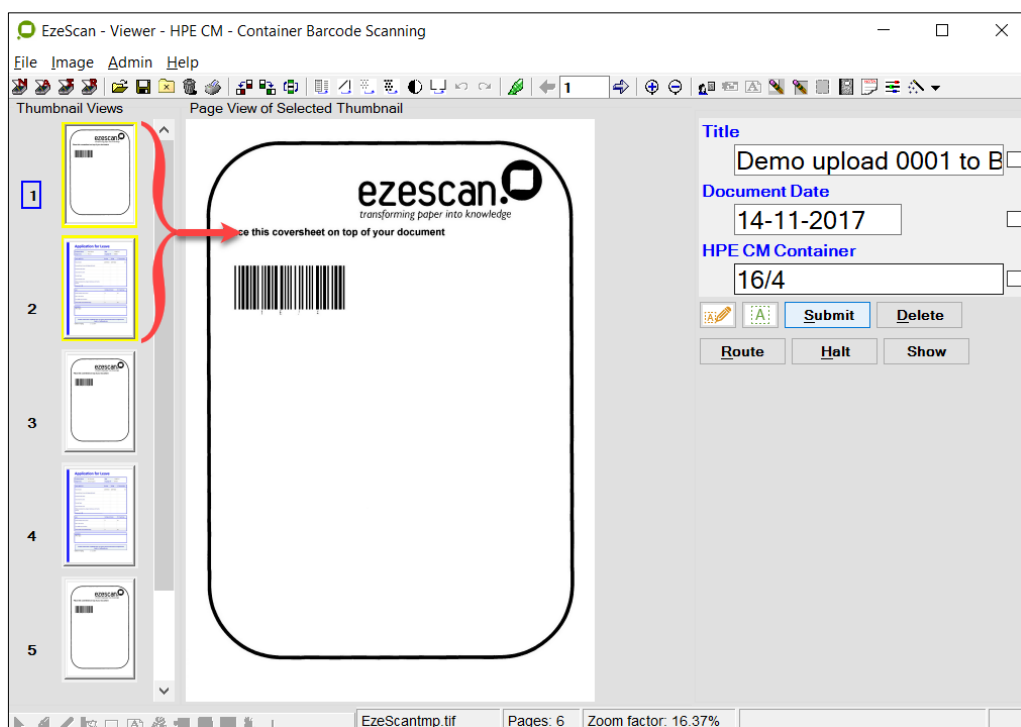


Figure 3 - Screenshot of a processed document with all fields populated - cover sheet will be deleted on upload

5 Viewing the processed files

Open HPE Content Manager and check [Recent Documents](#) and the saved records should appear.

Click the Preview tab to view the captured document

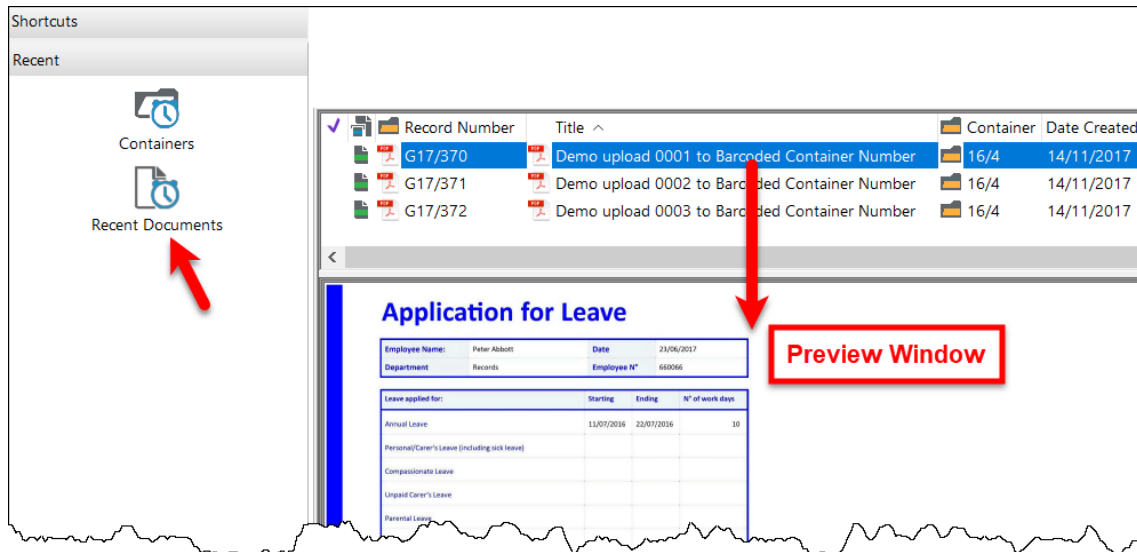


Figure 4 - Screenshot of a processed document in HPE Content Manager (Preview tab selected)