

1 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) HPE Content Manager indexing fields.

In this demo job the operator is prompted to enter a Title, Container, Date Created, Author Location, Record Action, Workflow, Relate to another Record, Alternate Container, Security Caveat, Security Level, Classification and Retention Schedule as shown in Figure 3 on page 4. The document will then be converted into a text searchable PDF file and uploaded into [HPE Content Manager](#) (HPE CM).

This job requires the [EzeScan PRO](#), [KFI](#), [EDRMS](#) and [Upload](#) modules.

2 Compatibility

- [EzeScan 4.3](#) or higher

3 Installation Instructions

Import Sample Configuration

- Open EzeScan and select the [Admin](#) menu > [Settings Backup](#) > [Import](#) option.
- Click the browse button and browse to the [HPE CM - Detailed Scan Index Demo.cfg](#) file.
- Select [Import All Items Below](#)
- Untick 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 - Detailed 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 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](#).
- It will create a new folder called [C:\ProgramData\Outback Imaging\EzeScan\HPE CM - Detailed Scan Index Demo](#) on the PC client running the [HPE CM - Detailed Scan Index Demo](#) Job
- Click the [Close](#) button.

Configure the KFI settings

The **HPE CM - Detailed 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)

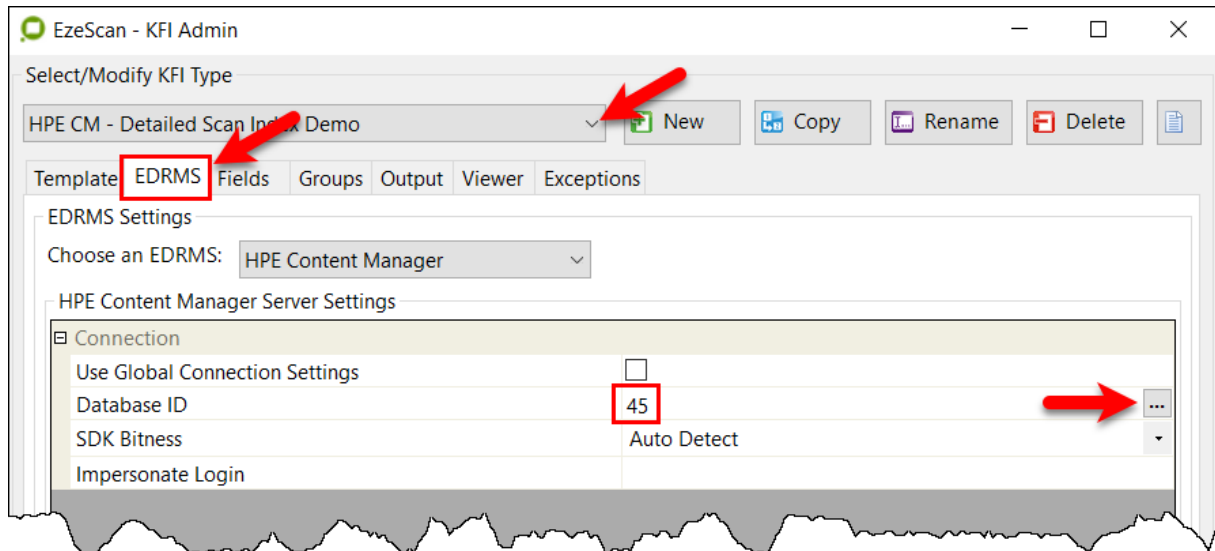


Figure 1 - ensure you configure the KFI to "your" environment

Configure the Upload settings

The **HPE CM - Detailed 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)
- Also ensure that you have a record type called **Document**. Change if required in the upload **Field Value**

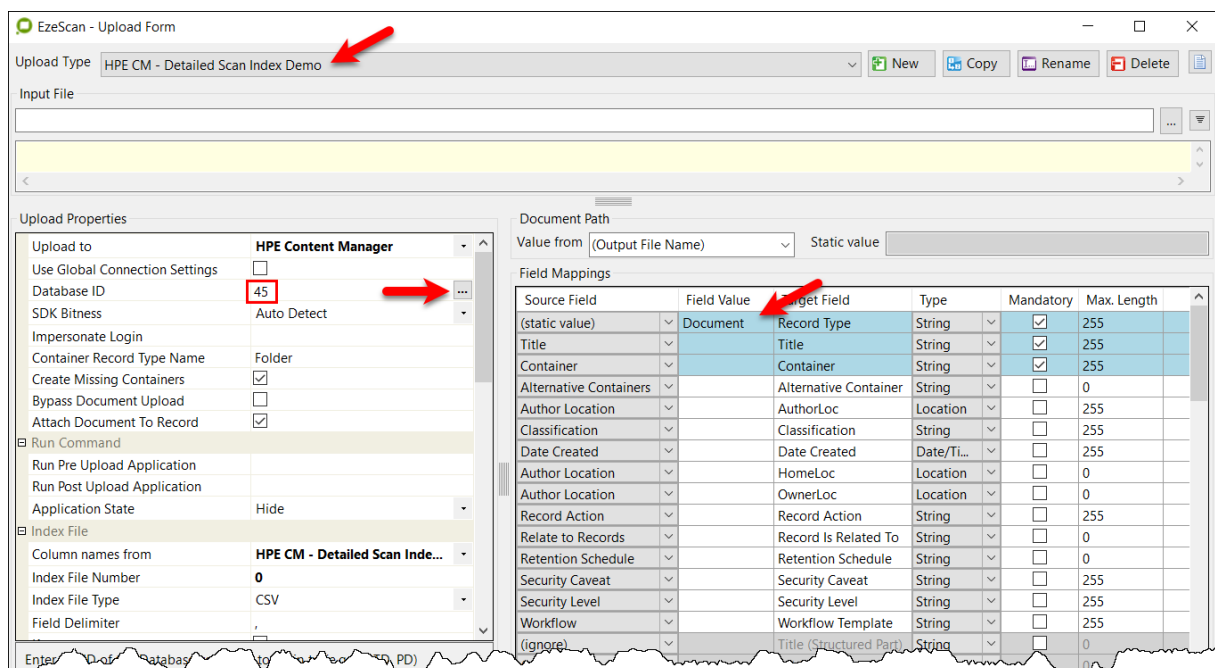


Figure 2 - ensure you configure the Upload to "your" environment












4 Operation Instructions

1. Select the **Admin** menu > **Job** option or press **F6**.
2. Select the **HPE CM - Detailed Scan Index Demo** job from the drop down list.
3. Click the **Import File Button** and select the **Separator_sample.tif** file.

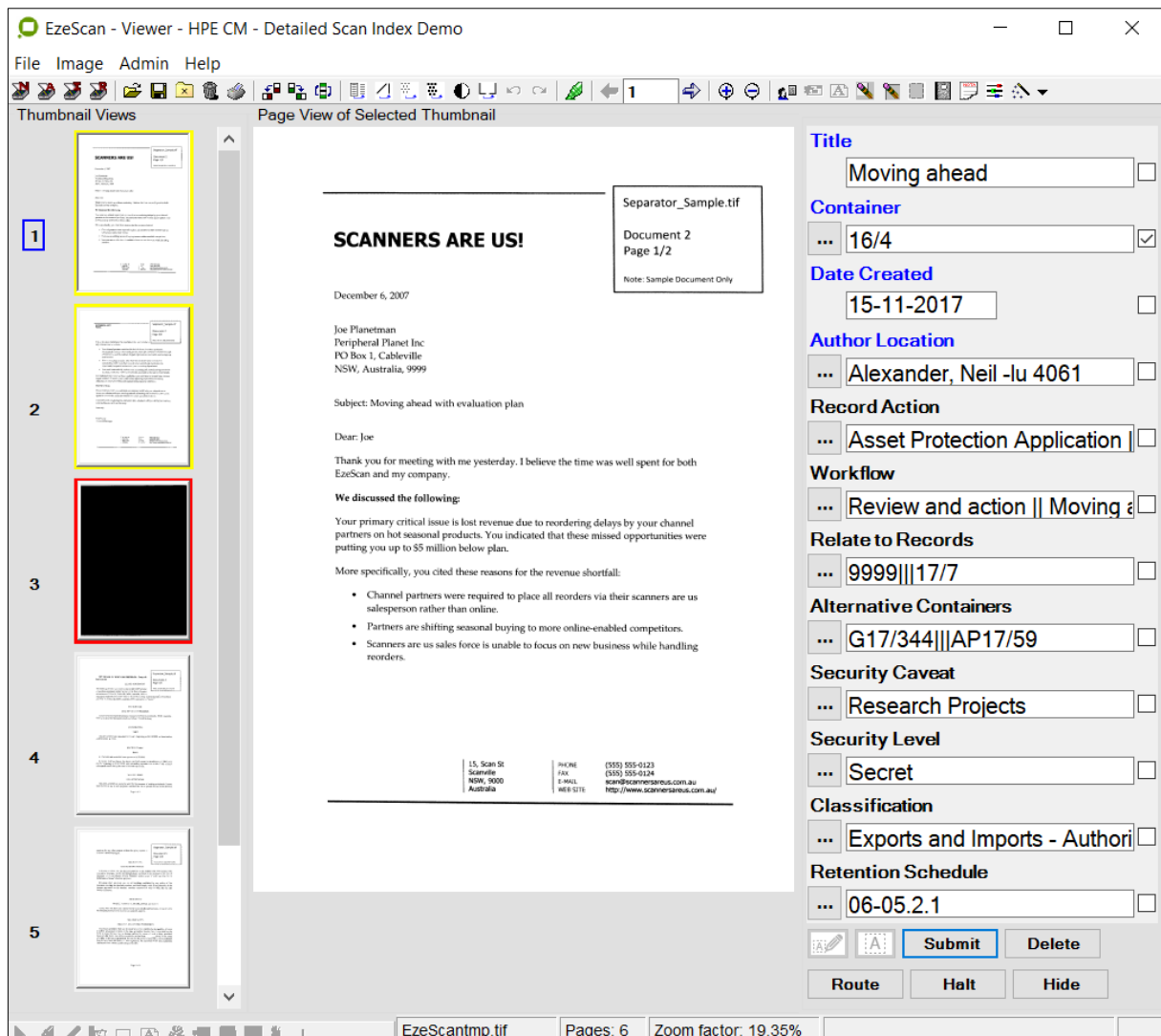


Separator_sample.tif

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.
5. Complete these fields; hitting the **Enter** key to proceed to the next field (where required)
 - a) **Title** TIP - use the zone pen to capture text off the sample document
 - Mandatory field - must be completed
 - b) **Container**.....click the browse  button to select a container
 - Mandatory field - must be completed
 - c) **Date Created**TIP - hit the spacebar
 - Mandatory field - must be completed
 - d) **Author Location**..... click the browse  button to select a Location
 - Mandatory field - must be completed
 - Multiples may be selected
 - e) **Record Action**click the browse  button to select an Action
 - Non-mandatory field - may be skipped if not required
 - Please ensure that there are suitable Actions available along with assignees too
 - Make sure the assignee being used is aware that they are being assigned dummies
 - f) **Workflow** click the browse  button to select a Workflow
 - Non-mandatory field - may be skipped if not required
 - The workflow title will be drawn from the above Title field (<<F1>>)
 - Please ensure that there are suitable workflows available along with assignees too
 - Make sure the assignee being used is aware that they are being assigned dummies
 - g) **Relate to Records** click the browse  button to select Related Records
 - Non-mandatory field - may be skipped if not required
 - Multiples may be selected
 - h) **Alternative Containers** click the browse  button to select Alternate Containers
 - Non-mandatory field - may be skipped if not required
 - Multiples may be selected
 - i) **Security Caveat**click the browse  button to select a Security Caveat
 - Non-mandatory field - may be skipped if not required
 - j) **Security Level** click the browse  button to select a Security Level
 - Non-mandatory field - may be skipped if not required
 - k) **Classification** click the browse  button to select a Classification
 - Non-mandatory field - may be skipped if not required
 - l) **Retention Schedule** click the browse  button to select a Retention Schedule
 - Non-mandatory field - may be skipped if not required

6. The **Submit** button should now be highlighted, *click it* or press the *Enter* key to Submit the document
7. The image will then get converted to a PDF file and uploaded into the *HPE Content Manager dataset* that was created during the process



EzeScan - Viewer - HPE CM - Detailed Scan Index Demo

File Image Admin Help

Thumbnail Views Page View of Selected Thumbnail

1

2

3

4

5

SCANNERS ARE US!

December 6, 2007

Joe Planetman
Peripheral Planet Inc
PO Box 1, Cableville
NSW, Australia, 9999

Subject: Moving ahead with evaluation plan

Dear Joe

Thank you for meeting with me yesterday. I believe the time was well spent for both EzeScan and my company.

We discussed the following:

Your primary critical issue is lost revenue due to reordering delays by your channel partners on hot seasonal products. You indicated that these missed opportunities were putting you up to \$5 million below plan.

More specifically, you cited these reasons for the revenue shortfall:

- Channel partners were required to place all reorders via their scanners are us salesperson rather than online.
- Partners are shifting seasonal buying to more online-enabled competitors.
- Scanners are us sales force is unable to focus on new business while handling reorders.

Separator_Sample.tif
Document 2
Page 1/2
Note: Sample Document Only

Title
Moving ahead

Container
16/4

Date Created
15-11-2017

Author Location
Alexander, Neil -lu 4061

Record Action
Asset Protection Application

Workflow
Review and action || Moving ahead

Relate to Records
9999|||17/7

Alternative Containers
G17/344|||AP17/59

Security Caveat
Research Projects

Security Level
Secret

Classification
Exports and Imports - Authori

Retention Schedule
06-05.2.1

Submit **Delete**

Route **Halt** **Hide**

EzeScantmp.tif Pages: 6 Zoom factor: 19.35%

Figure 3 - Screenshot of a processed document with all fields populated - only 1st 4 fields are mandatory

8. A message box should pop up with the number of the record which was just created. Click OK to proceed

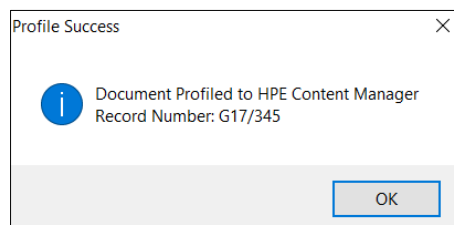


Figure 4 - Success Message

9. Repeat *steps 4 to 8* for the additional documents or until no more documents remain in the batch.

5 Viewing the processed files

Open HPE Content Manager and check **Recent Documents** and the saved record should appear

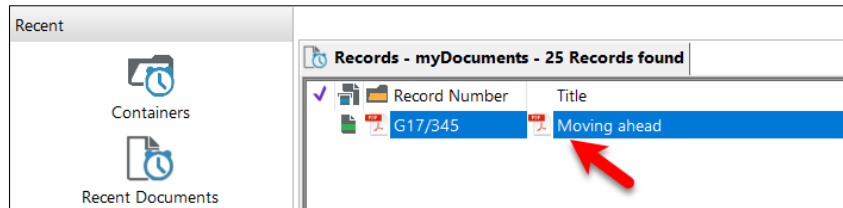


Figure 5 - Record is in HPE Content Manager