

# HPE Content Manager - Simple Scanning Demo

## 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 to select a record type and then fill in the respective HPE CM profile form. The document will then be converted into a text searchable PDF/A file and uploaded into HPE CM

This job requires the EzeScan PRO and EDRMS Modules.

## 2 Compatibility

- EzeScan 4.3 or higher

## 3 Installation Instructions

### Copy Sample Document(s)

- The job is set to use documents in the [C:\ProgramData\Outback Imaging\EzeScan\Samples](#) folder

**NOTE:** If you are planning on scanning the image then open the above folder locate a document 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 - Simple Scanning Demo.cfg](#) file.
- Select [Import All Items Below](#).
- Click the [Import button](#).
- When the import has finished click the [Close](#) button.

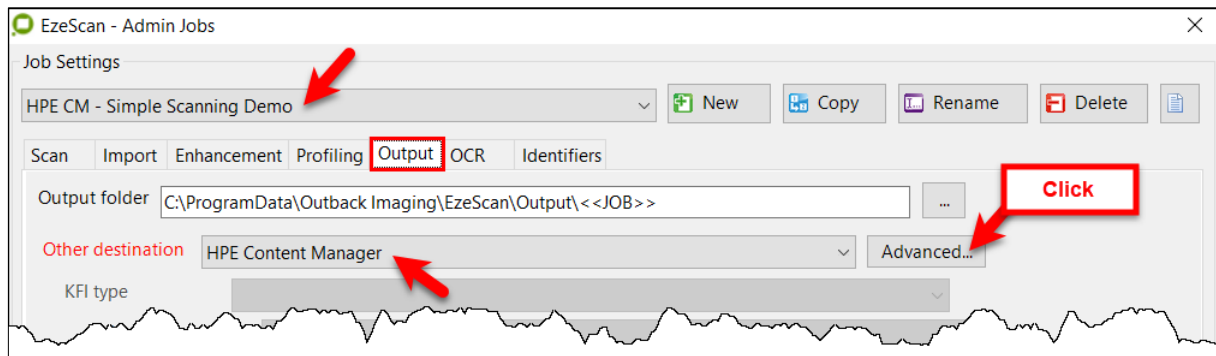
### Configure the Job settings

- Select the [Admin](#) menu > [Job](#) option.
- Select [HPE CM - Simple Scanning Demo](#) from the Job Type drop down list.

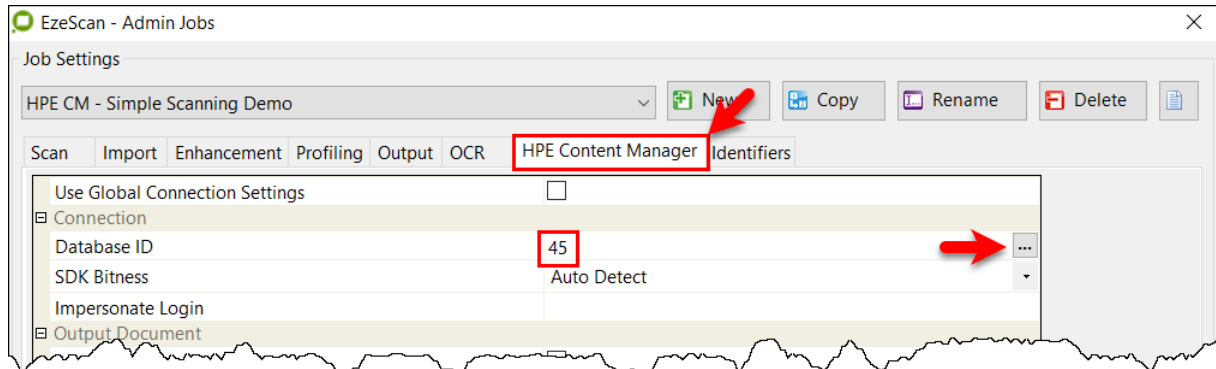
**NOTE:** To use a TWAIN or ISIS scanner with this Job, configure the Scan Tab settings for your scanner; **OR** to use a network scanner with this Job, on the Import tab change the input path to where your device saves the images to. You could also select Enable Import Folder Processing option so then there will be no need to browse for the image - Import folder will pick up images in the input folder automatically.

- On the [Output](#) tab the [Other Destination](#) is set to [HPE Content Manager](#) and you will need to check the dataset which you are connection to. Click the [Advanced](#) button as shown in Figure 1 below.

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**Figure 1 - Output tab - click the Advance button to go to the HPE Content Manager tab (below)**



**Figure 2 - ensure you configure the HPE Content Manager settings tab to “your” environment**

- Click in the box that has **45** and then click browse **...** button and choose your HPE CM dataset (you may need to confirm with your HPE CM administrator)
- Click the **Save** button.
- If prompted to create the output directory click **Yes**.
- Click the **Close** button.

**NOTE:** There are no KFI or Uploads associated with the **HPE CM - Simple Scanning Demo** Job


## 4 Operation Instructions

1. Select the **Admin** menu > **Job** option or press **F6**.
2. Select the **HPE CM - Simple Scanning Demo** job from the drop down list.
3. Click the **Import File Button** and select a sample file to process



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. The **HPE CM Record Type** screen will appear; **select a Record Type**

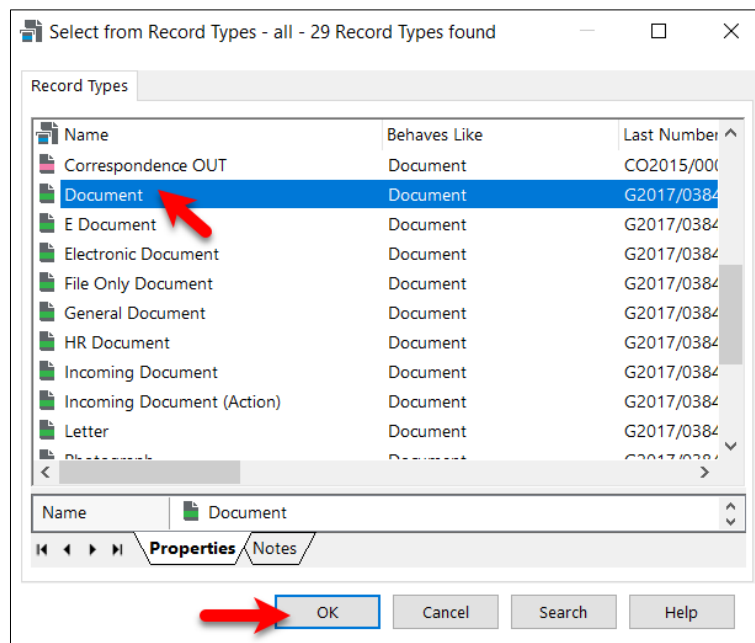


Figure 3 - select a Record Type

6. The HPE CM registration screen will appear (like below). Complete all required fields and click **OK**

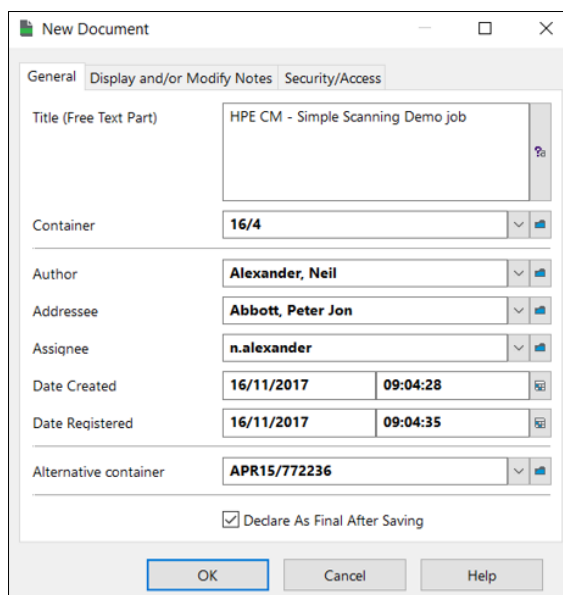
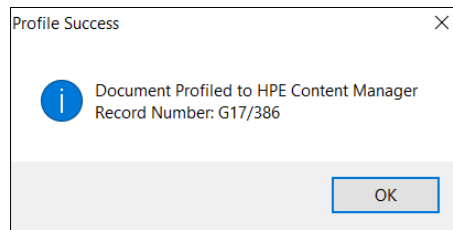


Figure 4 - complete the fields and click OK

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

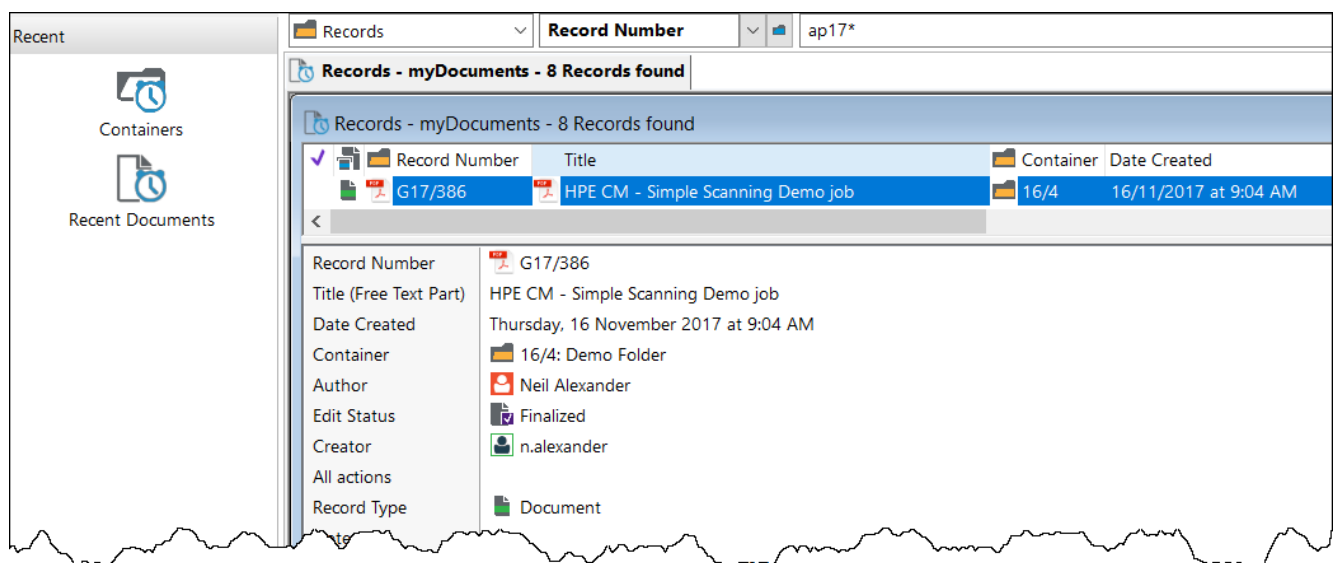


*Figure 5 - Success Message*

- Repeat [steps 4 to 7](#) for any 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 records should appear.



*Figure 6 - Screenshot of a processed document in HPE Content Manager (Properties tab selected)*