

1 Description

This Job uses the EzeScan Discovery module to search for the ABN, Invoice Number, Invoice Date and Invoice Total fields on the 5 different Invoices included in the sample TIF file. A database lookup is used to retrieve the Supplier Name. When an image is submitted it is uploaded to HPE Content Manager.

This job requires the [EzeScan Pro](#), [EzeScan DM Bundle](#) and [Discovery Modules](#).

2 Compatibility

- [EzeScan 4.3](#) or higher

3 Installation Instructions

Copy Sample Document(s)

- Copy the file [Discovery with ABN.tif](#) from the Scan Original folder into the folder...

[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 - Supplier Invoice Discovery Demo.cfg](#) file.
- Select [Import All Items Below](#).
- Tick the [KFI Templates](#) and [Lookups](#) options.
- 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 - Supplier Invoice Discovery Demo](#) from the Job Type drop down list.

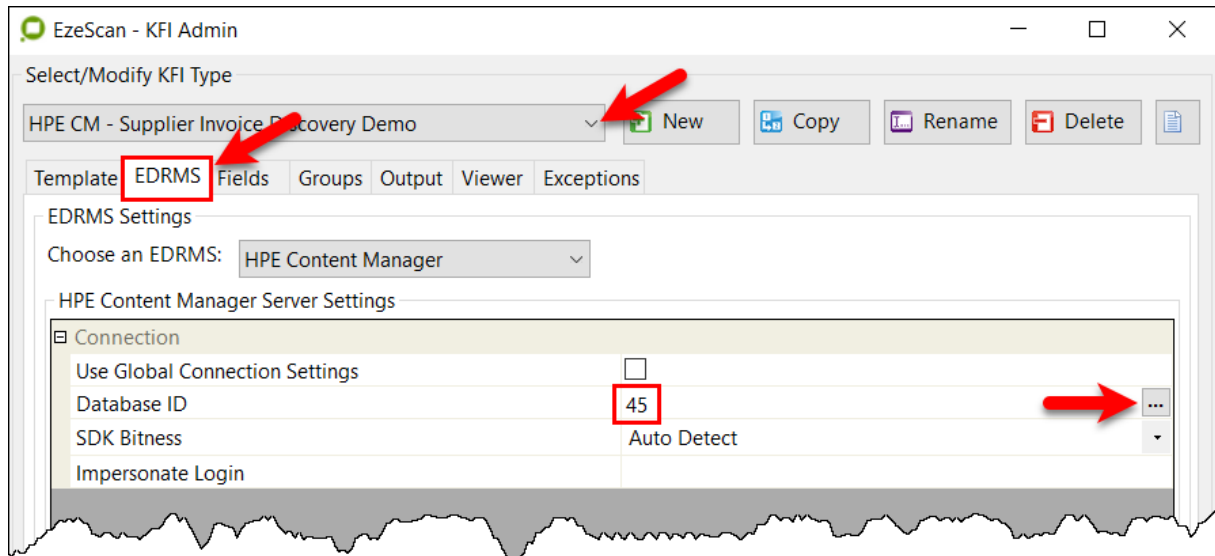
NOTE: To use a TWAIN or ISIS scanner with this Job, configure the Scan Tab settings for your scanner; **OR** to use a network scanner with this Job, on the Import tab change the input path to where your device saves the images to. You could also select Enable Import Folder Processing option so then there 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 - Supplier Invoice Discovery Demo

The **HPE CM - Supplier Invoice Discovery 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)



EzeScan - KFI Admin

Select/Modify KFI Type

HPE CM - Supplier Invoice Discovery Demo

Template **EDRMS** Fields Groups Output Viewer Exceptions


EDRMS Settings

Choose an EDRMS: HPE Content Manager

HPE Content Manager Server Settings

Connection

Use Global Connection Settings ☐

Database ID **45** [...] 

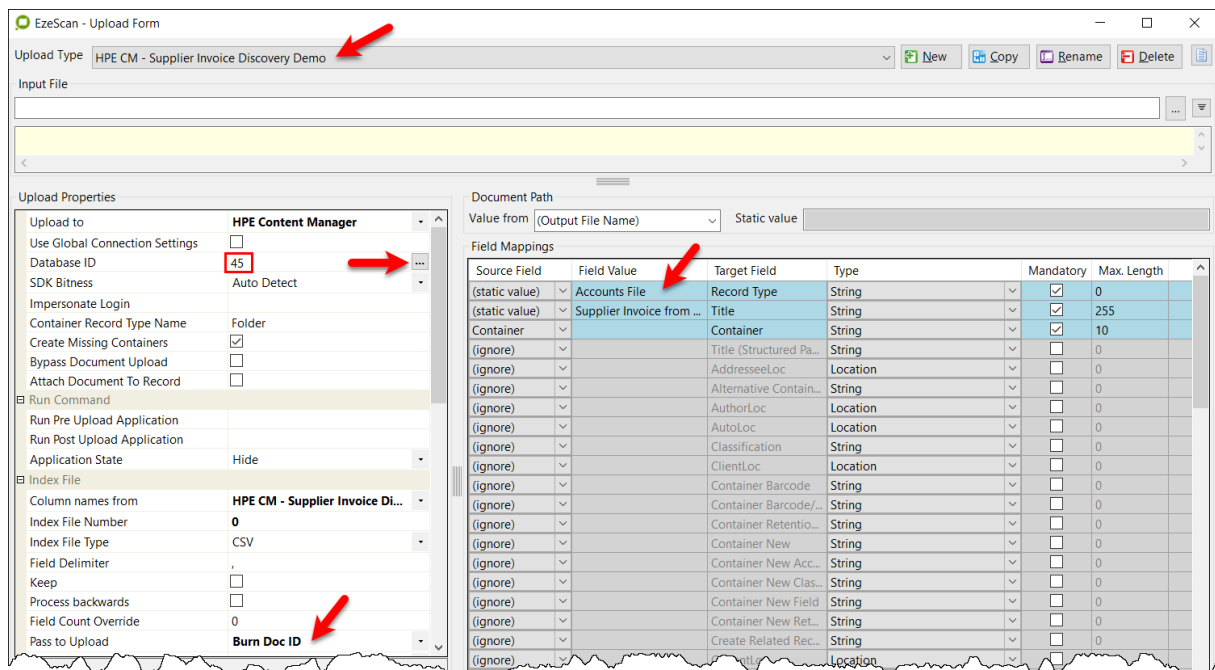
SDK Bitness Auto Detect

Impersonate Login

Figure 1 - ensure you configure the KFI to “your” environment

The **HPE CM - Supplier Invoice Discovery 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 **Accounts File**.
 - Change if required in the upload **Field Value**



EzeScan - Upload Form


Upload Type HPE CM - Supplier Invoice Discovery Demo

Input File

Upload Properties

Upload to HPE Content Manager

Use Global Connection Settings ☐

Database ID **45** [...] 

SDK Bitness Auto Detect

Impersonate Login

Container Record Type Name Folder

Create Missing Containers ☒

Bypass Document Upload ☐

Attach Document To Record ☐

Run Command

Run Pre Upload Application

Run Post Upload Application

Application State Hide

Index File

Column names from HPE CM - Supplier Invoice Di...

Index File Number 0


Index File Type CSV

Field Delimiter

Keep ☐

Process backwards ☐

Field Count Override 0

Pass to Upload **Burn Doc ID** 

Document Path

Value from (Output File Name) Static value

Field Mappings

Source Field	Field Value	Target Field	Type	Mandatory	Max. Length
(static value)	Accounts File	Record Type	String	<input checked="" type="checkbox"/>	0
(static value)	Supplier Invoice from ...	Title	String	<input checked="" type="checkbox"/>	255
Container		Container	String	<input checked="" type="checkbox"/>	10
(ignore)		Title (Structured Pa...	String	<input type="checkbox"/>	0
(ignore)		AddresseeLoc	Location	<input type="checkbox"/>	0
(ignore)		Alternative Contain...	String	<input type="checkbox"/>	0
(ignore)		AuthorLoc	Location	<input type="checkbox"/>	0
(ignore)		AutoLoc	Location	<input type="checkbox"/>	0
(ignore)		Classification	String	<input type="checkbox"/>	0
(ignore)		ClientLoc	Location	<input type="checkbox"/>	0
(ignore)		Container Barcode	String	<input type="checkbox"/>	0
(ignore)		Container Barcode/...	String	<input type="checkbox"/>	0
(ignore)		Container Retentio...	String	<input type="checkbox"/>	0
(ignore)		Container New	String	<input type="checkbox"/>	0
(ignore)		Container New Acc...	String	<input type="checkbox"/>	0
(ignore)		Container New Clas...	String	<input type="checkbox"/>	0
(ignore)		Container New Field	String	<input type="checkbox"/>	0
(ignore)		Container New Ret...	String	<input type="checkbox"/>	0
(ignore)		Create Related Rec...	String	<input type="checkbox"/>	0
(ignore)		Print Loc	Location	<input type="checkbox"/>	0

Figure 2 - ensure you configure the Upload to “your” environment

NOTE: The upload is set to “Pass” to the **Burn DocID Upload**; to burn the record number onto the document



4 Operation Instructions

1. Select the **Admin** menu > **Job** option or press **F6**.
2. Select the **HPE CM - Supplier Invoice Discovery Demo** job from the drop down list.
3. Click the **Import File Button** and select the **Discovery with ABN.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.



Discovery with
ABN.tif

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) **Tax Invoice** EzeScan Discovery will search for the word **Tax Invoice** on the document
 - Designed to ensure that you are actually processing a Tax Invoice
 - Will return the word **Invoice** if successful
 - b) **ABN** EzeScan Discovery will search for an **11 digit number** on the document
 - Designed to check for a number which meets rules set in the Discovery settings
 - Will return the word **ABN Number** if successful
 - c) **Supplier Name** Uses the ABN Number to search for a matching Supplier name
 - Mandatory field - must be completed
 - Uses a SQL query to search the abnlookup (Lookup set)
 - SQL statement = `select Supplier_Name from abnlookup where ABN='<<ABN>>'`
 - Designed to ensure that you are actually processing a Tax Invoice
 - Will return the **Supplier Name** if successful
 - d) **Order No** EzeScan Discovery will search for an **order number** on the document
 - e) **Invoice Date** EzeScan Discovery will search for an **invoice date** on the document
 - f) **Invoice Number** EzeScan Discovery will search for **invoice number** on the document
 - g) **Gross Total** EzeScan Discovery will search for **gross total** on the document
 - h) **Tax Total** EzeScan Discovery will search for **tax total** on the document
 - i) **Net Total** EzeScan Discovery will search for **net total** on the document
 - j) **Container** click the browse  button to select a container
 - Mandatory field - must be completed

TIP: The reuse box has been set on the value tab so it will use the same container for the remaining documents to be processed in the batch

6. The **Submit** button should now be highlighted (as shown in Figure 3 below), **click it** or press the **Enter** key to Submit the document

EzeScan - Viewer - HPE CM - Supplier Invoice Discovery Demo

File Image Admin Help

Thumbnail Views Page View of Selected Thumbnail

1

2

3

4

Runners R US Pty Ltd
 895 Epsom Road, Sydney, NSW
 Phone 02 1934 5777
 Fax 02 1934 3467
 ABN 32 456 876 900

TAX INVOICE

DATE: 12/04/2008
 INVOICE NO: 1234587

TO: Mater Shoes
 Loading Dock
 88 Long Road
 Sydney, NSW

FOR: KEN BROWN
 PO : 958323372

Quantity	Code	DESCRIPTION	AMOUNT
1	XX1001	Nike Sneakers	\$556.05
1	XA1004	Joggers	\$350.00
4	XC4005	Boots	\$720.00
			GST \$162.60
TOTAL			\$1,788.65

Make all checks payable to: **Runners R US Pty Ltd**
 Payment is due within 7 days.
 If you have any questions concerning this invoice, contact: **Runners R US Pty Ltd**
 Thank you for your business!

Tax Invoice
 Invoice
 ABN
 Supplier Name
 Order No
 Invoice Date
 Invoice Number
 Gross Total
 Tax Total
 Net Total
 Container ☒
 Submit Delete
 Route Halt Show

EzeScantmp.tif Pages: 4 Zoom factor: 19.35%

Figure 3 - Screenshot of a processed document with all fields populated - only 2 fields are mandatory

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

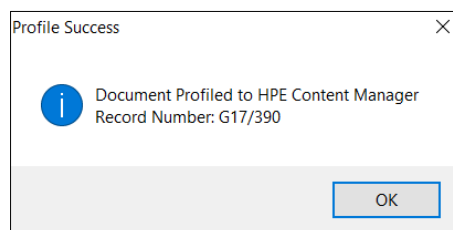


Figure 4 - Success Message

NOTE: There is a 2nd Upload called **Burn DocID** which "Burns" the HPE CM Record Number on the top LH corner of the uploaded document

- Repeat **steps 4 to 7** for the additional documents until no more documents remain in the batch.

TIP: The uploaded record's Title is created in the upload process using this string...
 Supplier Invoice from - <<IF8>> - Dated <<IF10>> - Invoice # <<IF11>> - Amount - <<IF12>>

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 documents

Recent

Containers

Recent Documents

Record Number Title Container Date Created

G17/390 Supplier Invoice from - Runners R US Pt... 16/4 16/11/2017 at 10:59 AM

This document claims compliance with the PDF/A standard (PDF/A-1A)

G17/390

DocID is "burnt" onto the top of the document

Runners R US Pty Ltd
895 Epsom Road, Sydney, NSW
Phone 02 1934 6777
Fax 02 1934 3467
ABN 32 456 876 900

TAX INVOICE

DATE: 12/04/2008
INVOICE NO: 1234587

TO:
Mater Shoes
Loading Dock
88 Long Road
Sydney, NSW

FOR: KEN BROWN
PO : 958323372

Quantity	Code	DESCRIPTION	AMOUNT
1	XX1001	Nike Sneakers	\$556.05
1	XA1004	Joggers	\$350.00
4	XC4005	Boots	\$720.00

Favorites

Figure 5 - Screenshot of a processed document in HPE Content Manager (Preview tab selected)