

## 1 Description

This Job uses zonal OCR to extract the Supplier Name, Work Order Number, and Date, information from the sample images provided. When an image is submitted it is converted into a PDF file and is uploaded into HPE Content Manager.

This job requires the [EzeScan Pro](#) and [EzeScan DM Bundle](#)

## 2 Compatibility

- [EzeScan 4.3](#) or higher

## 3 Installation Instructions

### *Copy Sample Document(s)*

- Copy the file [Zone OCR - Work Order.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 - Zone OCR - Work Order 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 - Zone OCR - Work Order 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 - Zone OCR - Work Order Demo

The **HPE CM - Zone OCR - Work Order 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)

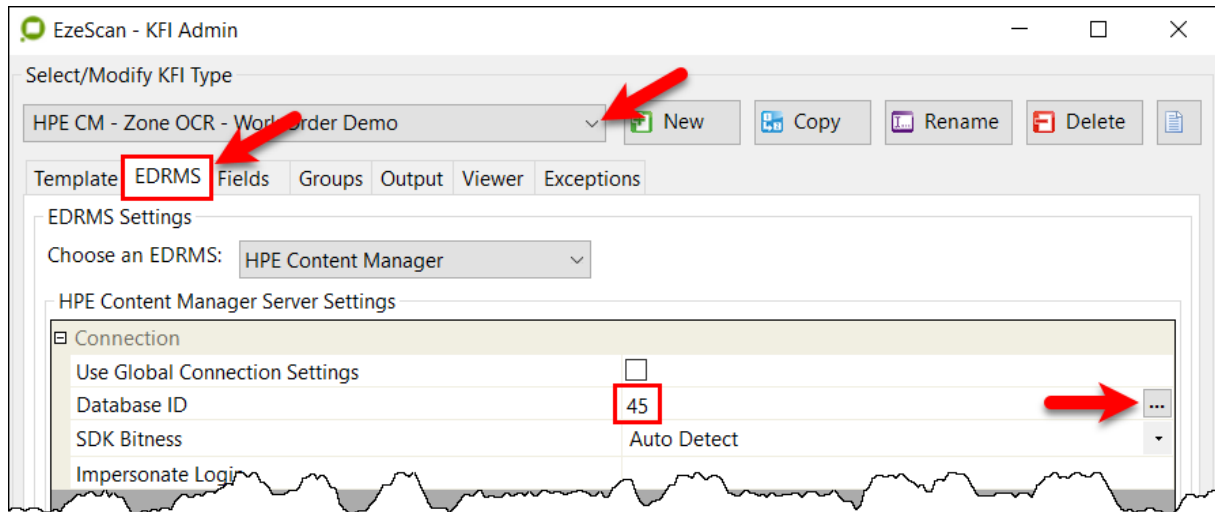


Figure 1 - ensure you configure the KFI to "your" environment

The **HPE CM - Zone OCR - Work Order 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** column

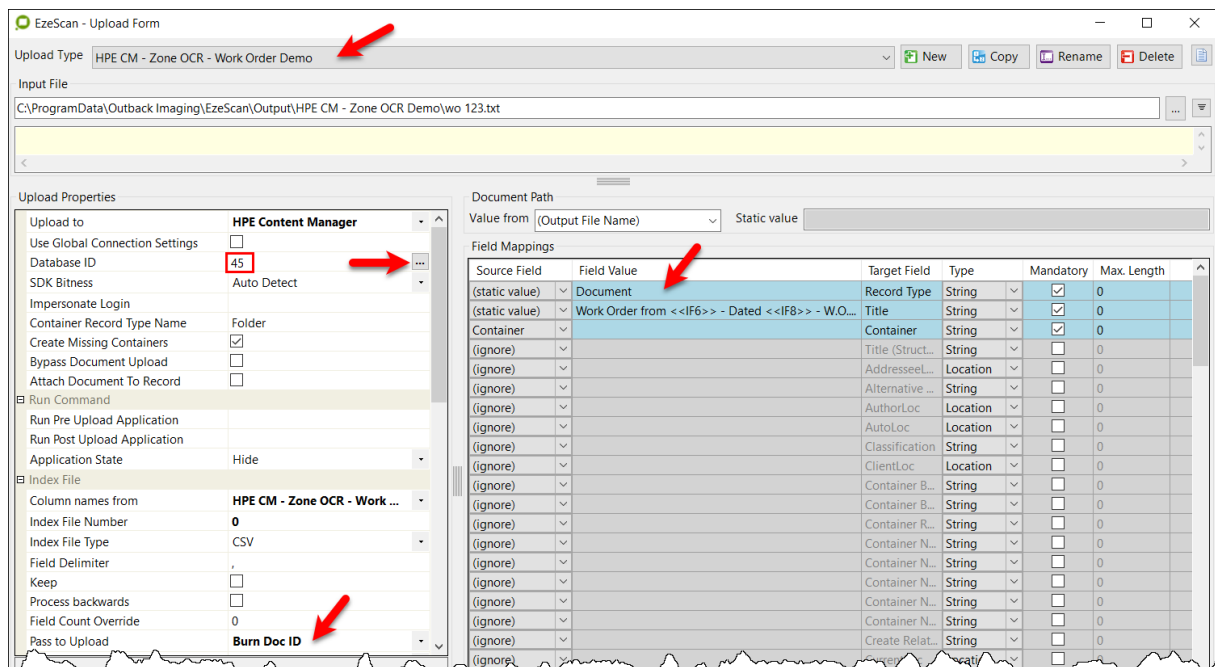




Figure 2 - ensure you configure the Upload to "your" environment

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

- [illegible]

**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).  
All fields are **Mandatory**
  - a) **Supplier Name** .....EzeScan OCR will capture the value from the template zone
  - b) **Work Order Number**.....EzeScan OCR will capture the value from the template zone
  - c) **Date**.....EzeScan OCR will capture the value from the template zone
  - d) **Container**.....click the browse  button to select a container
    - Mandatory field - must be completed

**TIP:** The reuse box has been set on the Container field's 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

[illegible]

**Figure 3 - Screenshot of a processed document with all fields populated - ALL fields are mandatory**

# HPE Content Manager - Zone OCR - Work Order Demo

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

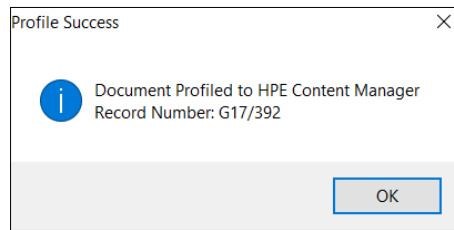


Figure 4 - Success Message

**NOTE:** There is a 2<sup>nd</sup> 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...  
Work Order from <<IF6>> - Dated <<IF8>> - W.O. Number <<IF7>>

## 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

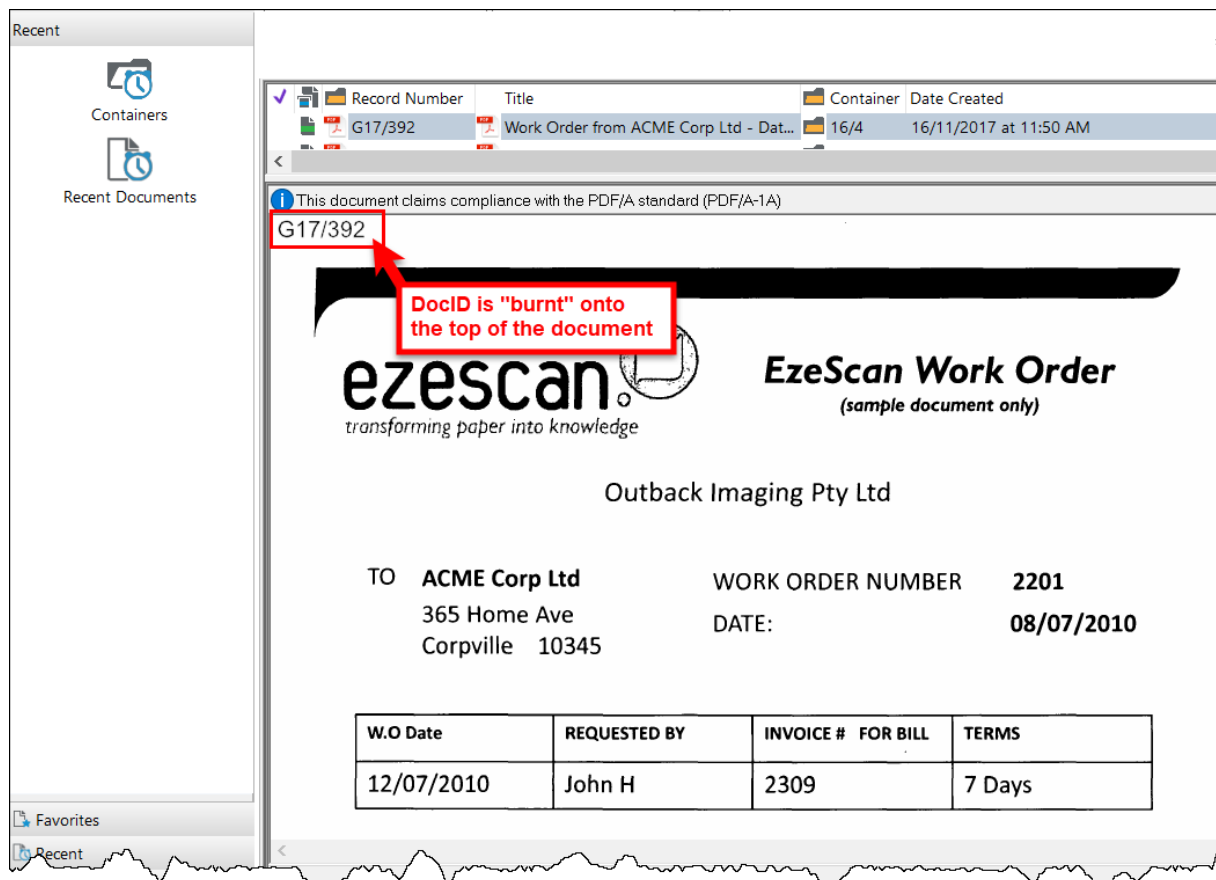


Figure 5 - Screenshot of a processed document in HPE Content Manager (Preview tab selected)