

Job Name: Laserfiche – Simple Indexing Demo

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) Laserfiche indexing fields. In this demo job the operator is prompted to enter a Document Name, Folder, Tag and a Date of Document.

The document will then be converted into a text searchable PDF file and uploaded into Laserfiche.

This job requires the EzeScan PRO, KFI, EDRMS and Upload modules (DM Bundle).

Compatibility:

EzeScan 4.2.105 or higher

Installation Instructions:

Import Sample Configuration

- Open EzeScan and select the Admin menu > Settings Backup > Import option.
- Click the ... button and browse to the "Laserfiche - Simple Indexing Demo.cfg" file.
- Select "Import All Items Below" option and then click the Import button.
- When the import has finished click the Close button.

Configure the Job settings

- Select the Admin menu > Job option.
- Select "Simple Indexing 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 documents to. You could also select Enable Import Folder Processing option so then there will be no need to browse for the document - Import folder will pick up the documents in the input folder automatically.

- Click the Save button. (If prompted to create the output directory click Yes)
- Click the Close button.

Configure the KFI settings

- Select the Admin menu > KFI option.
- Select " Simple Indexing Demo" from the KFI Type drop down list.
Select the EDRMS tab

The operator will have two options to configure the KFI Type to Laserfiche.

1) Use Global Connection Settings, this is helpful if all jobs are saving to the same Laserfiche repository. To do this, select the Admin Menu, Select the EDRMS tab, select Laserfiche from the drop down list and configure the Server, Repository, Username and Password information. Click Save when complete.

2) Configure Connection Settings on a job basis. This is usually if jobs are saving to different repositories or using different credentials to authenticate. To do this configure the Server, Repository, Username and Password information.

Click Apply then OK.

Configure the Upload settings

- Select the Admin menu > Upload option.
- Select "Simple Indexing Demo" from the Upload Type drop down list.
- In the upload properties pane, Change the following to your server:

The operator will have two options to configure the UPLOAD Type to Laserfiche.

1) Use Global Connection Settings, this is helpful if all jobs are saving to the same Laserfiche repository. To do this, select the Admin Menu, Select the EDRMS tab, select Laserfiche from the drop down list and configure the Server, Repository, Username and Password information. Click Save when complete.

2) Configure Connection Settings on a job basis. This is usually if jobs are saving to different repositories or using different credentials to authenticate. To do this configure the Server, Repository, Username and Password information.

- When Complete, Click Apply then OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "Simple Indexing Demo" Job from the drop down list.
- 3) Click the Import File Button and select the "Separator_sample.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.
- 4) The document will load into the viewer, press the F4 button. EzeScan will prompt the operator to enter a Document Name. Enter a document name and press the right arrow button or Press Enter.
- 5) You will be now directed to the Folder field. The Browse For Folder screen will appear, select a folder to store the document into and then Click Select.
Press the right arrow button or press Enter.
- 6) You will be now directed to the Tag field. The Select a Tag screen will appear, select a Tag and then Click OK.
- 7) You will be now directed to the Date of Document field. Enter a date (hint: Press the space bar to enter the current date).
Press the Submit button or press Enter twice.
- 8) The document will then get converted to a searchable PDF file and uploaded into Laserfiche (with the respective data applied). Repeat steps 4 to 7 until no more documents remain in the batch.