

Job Name: M-Files – Discovery demo
Integration Type: M-Files

Description:

This Job uses the Discovery module to search for the Company Number (ABN), Supplier Name, Invoice Number, Invoice Date and Total fields on the 5 different Invoices included in the sample TIF file. When an image is submitted, it is uploaded to a Vault on the M-Files server along with the extracted metadata.

This job requires the EzeScan PRO, KFI, Upload, and Discovery modules.

Compatibility:

EzeScan 4.3.0 or higher

Installation Instructions:

Copy Sample Document(s)

- Copy the file "Discovery Demo.tif" from the Scan Original folder into the folder –
C:\Program Files (x86)\Outback Imaging\EzeScan

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 ... button and browse to the "M-Files – 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 "M-Files – 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.

- Click the Save button.

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

Configure the Upload settings

- Within your M-Files vault, create an invoice class object with the metadata as per the description.
- Select the Admin menu > Upload option.
- Select "M-Files – Discovery demo" from the Upload Type drop down list.
- In the Upload Properties pane specify your M-Files connection settings.
- In the Upload Mappings pane locate the Target Field "Class". Click in the Field Value cell and then click on the ... button that appears to select the invoice class (created from step 1).
- Press the Auto Populate button. EzeScan will automatically add the selected class fields to the Upload Mappings pane.
- Now map the Source Fields Supplier Name, Invoice Number, Invoice Date, and Amount into the Upload Target Fields which was created respectively.
- Click the Apply button and OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "M-Files – Discovery demo" Job from the drop down list.
- 3) Click the Import File Button and select the "Discovery.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 image will load into the viewer, press the F4 button. EzeScan will now find the Supplier Name, verify if it is correct. If not either move the blue box to the correct area and click the A icon or type in the Supplier Name in the KFI input panel. When complete, press the right icon or the enter button.
- 5) You will now be at the Invoice Number Field. EzeScan will now find the Invoice Number, verify if it is correct. If not either move the blue box to the correct area and click the A icon or type in the Invoice Number in the KFI input panel. When complete, press the right icon or the enter button.
- 6) You will now be at the Invoice Date Field. EzeScan will now Find the Invoice Date, verify if it is correct. If not either move the blue box to the correct area and click the A icon or type in the Date in the KFI input panel. When complete, press the right icon or the enter button.
- 7) You will now be at the Total Field. EzeScan will now Find the Total, verify if it is correct. If not either move the blue box to the correct area and click the A icon or type in the Total in the KFI input panel. When complete, press the Submit button.

- 8) The image will then get converted to TIF and uploaded into the M-Files File vault that was selected during the configuration. Repeat steps 4 to 7 until no more documents remain in the batch.