

Job Name: M-Files – Staff Registration demo
Integration Type: M-Files

Description:

This Job uses a database browse to search on an Employee/HR database and retrieve the employee number, first name, surname and national insurance number fields while splitting the document based on the barcode value from the sample document. 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 BCR modules.

Compatibility:

EzeScan 4.3.0 or higher

Installation Instructions:

Copy Sample Document(s)

- Copy the file "Staff_Registration 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 – Staff Registration 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 – Staff Registration 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 a HR class object with the metadata as per the description.
- Select the Admin menu > Upload option.
- Select " M-Files – Staff Registration 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 First Name, Last Name and Employee Number 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 – Staff Registration demo" Job from the drop down list.
- 3) Click the Import File Button and select the "Staff_Registration Demo.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 read the value of the barcode and extract this into the first field.
- 5) EzeScan will now pop-up a database browser with the employee number, firstname and lastname columns to be searched on. Enter a value in any of these fields and click on search, or leave the values empty to return all the values.
- 6) The image will then get converted to TIF and uploaded into the M-Files File vault that was selected during the configuration. EzeScan will automatically separate the remaining documents, populate the fields and upload the documents.