

Job Name: SharePoint - Simple Scan Index 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) indexing fields and a SharePoint Folder to save the document into. This job utilises the EzeScan Key From Image (KFI) module to allow the operator to reuse data in the scanned batch (e.g. save all documents into the same folder)

The document will then be converted into a text searchable PDF file and uploaded into the respective SharePoint Folder.

This job requires the EzeScan DM Bundle Module.

Compatibility:

EzeScan 4.2.66 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 "SharePoint - Simple Scan Index 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 "SharePoint - Simple Scan Index 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.

- When complete, click Save then Close.
- If prompted to create the output directory click Yes.
- Click the Close button.

Configure the KFI Settings

- Select the Admin menu > KFI option.
- Select "SharePoint - Simple Scan Index Demo" from the drop down list .
- *Select the EDRMS Tab.*
- *Change the SharePoint Site URL, Username and Password and Domain (if required) to your SharePoint Server.*
- *Click Apply then ok.*

Configure the UPLOAD Settings

- Select the Admin menu > UPLOAD option.
- Select "SharePoint - Simple Scan Index Demo" from the drop down list.
- In the upload properties pane, Change the following to your server:
 - SharePoint Site URL
 - Username
 - Password
 - Domain (if required)
- Click Apply then OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the " SharePoint - Simple Scan Index 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 image will load into the viewer, press the F4 button. EzeScan will prompt the operator to enter a Title. Enter a Title and press the right arrow button or press Enter.
- 5) You will be now directed to the Summary Field, Enter a summary and press the right arrow button or press Enter.
- 6) You will be now directed to the Folder Field, EzeScan will prompt the operator with a SharePoint Folder browse screen. Browse to the folder of where the document is to be saved in. Click the Choose Folder button and then click Submit.

The image will get removed from the EzeScan viewer and uploaded to SharePoint.

- 7) Follow Steps 4 to 6 until there are no more documents in the batch.

Hint: If the operator wishes to save a batch of documents into the same folder or have the same summary, click the ReUse button that appears on the right side of the index panel. This will remember the entered data for the rest of the documents in the scanned batch.