

Job Name: SharePoint – Supplier Invoice Demo

Description:

This Job uses the Discovery module to search for the ABN Number, Invoice Number, Invoice Date and Total fields on the 5 different Invoices included in the sample TIF file. A database lookup is used to retrieve the Supplier Name. When a document is submitted it is uploaded to a SharePoint Folder named using the Invoice Number.

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

Compatibility:

EzeScan 4.2.66 or higher

Installation Instructions:

Copy Sample Document(s)

- Copy the file "Discovery with ABN.tif" from the Scan Original folder into the folder –
C:\Program Files\Outback Imaging\EzeScan 4.2\Samples

Note: If you are planning on scanning the document 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 "SharePoint - Supplier Invoice 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 "SharePoint - Supplier Invoice 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 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 Upload settings


- Select the Admin menu > Upload option.
- Select " SharePoint - Supplier Invoice Demo - Website" from the Upload Type drop down list.
- In the upload properties pane, Change the following to your server:
 - SharePoint Site URL
 - Username
 - Password
 - Domain (if required)

- In the Grid on the right there is a target field called Folder. This is currently set to "http://sharepoint2010/EzeScan%20Accounts/Supplier%20Invoices/<<IF7>>".
Clear this value and click on the  button that will appear on the right.
The SharePoint Folder browse screen will appear.

Browse to the folder of where you want the documents to upload to and then click "Choose Folder".

The path will appear in the Field Value Column.

- Append <<IF7>> at the end of the path.
e.g.

Source Field	Field Value	Target Field
(static value)	0Accounts/Supplier%20Invoices/<<IF7>> 	Folder

(this value will create a subfolder of the Supplier Name under the nominated folder)

Click Apply then ok.

- Click the Apply button and then OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the " SharePoint - Supplier Invoice Demo" Job from the drop down list.
- 3) Click the Import File Button and select the "Discovery with ABN.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 now find the ABN 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 ABN Number in the KFI input panel. When complete, press the right icon or the enter button.
- 5) You will now be at the Supplier Name Field. EzeScan will now perform a database lookup based on the ABN Number retrieved from the previous field. If nothing is retrieved, type in the Supplier Name in the KFI input panel. When complete, press the right icon or the enter button.
- 6) 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.
- 7) 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.
- 8) 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 enter twice or click the Submit button.
- 9) The document will then get converted to a PDF and uploaded into the nominated SharePoint folder.

Repeat steps 4 to 8 until no more documents remain in the batch.

Please Note: If you would like EzeScan to populate its extracted data into separate SharePoint column fields, please [contact us](#) and we can assist with the setup.