

Job Name: TechnologyOne ECM – 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) TechnologyOne ECM indexing fields. In this demo job the operator is prompted to enter a Precis, Document Date, Author and then prompted to search views for entry.

The document will then be converted into a text searchable PDF file and uploaded to TechnologyOne ECM.

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

Compatibility:

EzeScan 4.2.190 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 "TechnologyOne ECM - 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 "TechnologyOne ECM - 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 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 "TechnologyOne ECM - Simple Scan Index Demo" from the KFI Type drop down list.
- Select the EDRMS tab and enter your TechnologyOne ECM server settings.
- Click Apply then OK.

Configure the Upload settings

- Select the Admin menu > Upload option.
- Select "TechnologyOne ECM – Simple Scan Index Demo" from the Upload Type drop down list.
- In the upload properties pane under 'Upload to' enter your TechnologyOne ECM server details.
- When Complete, Click Apply then OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "TechnologyOne ECM - 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 document will load into the viewer, press the F4 button. EzeScan will prompt the operator to enter a *Precis*. Enter a *Precis* and press the right arrow button or Press Enter.
- 5) You will now be prompted for the *Document Class* field. Browse for the appropriate *Class Name* and press the right arrow button or press Enter.
- 6) You will be now prompted for the *Document Date* field. Enter the *Document Date* and press the right arrow button or Press Enter.
- 7) You will then be prompted for the *Author* field. Choose the appropriate folder and press enter.
- 8) You will then be prompted for the *Responsible Officer* field. Browse for the appropriate *Responsible Office* and press the right arrow button or press enter.
- 9) You will then be prompted for the *Attachments to Document* field. Press the browse button to the left of the KFI field, the *Document Indexes* dialog will appear. Once all associated indexes have been selected, press *Enter*.
- 10) The document will then get converted into a searchable PDF file and uploaded to TechnologyOne ECM (with the respective data applied). Repeat steps 4 to 6 until no more documents remain in the batch.