

Job Name: TechnologyOne ECM – Simple Scanning 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 to fill in the respective TechnologyOne ECM profile form. The document will then be converted into a text searchable PDF file and uploaded to TechnologyOne ECM.

This job requires the EzeScan PRO and EDRMS 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 - Simple Scanning 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 - Simple Scanning 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.

- Select the output tab and click the Advanced button. The TechnologyOne ECM Settings screen will appear.
 - Enter your TechnologyOne ECM server details.
 - When complete, click Save then Close.
- If prompted to create the output directory click Yes.
- Click the Close button.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "TechnologyOne ECM - Simple Scanning 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 perform OCR and then display the TechnologyOne ECM profile screen.
- 5) Fill in the required metadata and then click OK.
- 6) The next image will display into the viewer, commence OCR and display the TechnologyOne ECM profile screen.

Follow Step 5 until there are no more documents in the batch.