

Job Name: eDocs 5 – Discovery demo
Integration Type: eDocs5

Description:

This Job uses the Discovery module to search for the Supplier Name, Invoice Number, Invoice Date and Total fields on the 5 different Invoices included in the sample TIF file. When an image is submitted it is converted into a PDF file; the Discovery fields are merged into the Name field; and then the file is uploaded to Folder on the eDocs server.

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

Compatibility:

EzeScan 4.2.85 or higher

Installation Instructions:*Copy Sample Document(s)*

- Copy the file "Discovery.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 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 "eDocs 5 – Discovery demo.cfg" file.
- Select Import All Items Below.
- Tick the KFI Templates option.
- Click the Import button.
- When the import has finished click the Close button.

Configure the Job settings

- Select the Admin menu > Job option.
- Select "eDocs 5 – Discovery 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

- Select the Admin menu > Upload option.
- Select "eDocs 5 – Discovery demo" from the Upload Type drop down list.
- In the Upload Properties pane specify your eDocs Library, User, and Password.
- In the Upload Mappings pane locate the Target Field "PROFILE_FORM". Click in the Field Value cell and then click on the ... button that appears to select a Profile Form from a list.
- In the Upload Mappings pane locate the Target field "Parent Folder Number". Click in the Field Value cell and then click on the ... button that appears to browse for the eDocs Folder where the documents will be uploaded to, or leave this field blank for no Folder.
Note: Login to your eDocs Client to create a folder for the upload documents if you do not already have one.
- If you want to populate the Profile Form fields of the documents to be uploaded, press the Auto Populate button. EzeScan will automatically add the fields to the Upload Mappings pane. Select a Source Field option on each of the desired fields.
Note: Use the option Static Value to type in a fixed value for a field, or Ignore to bypass that field when uploading.
- Click the Apply button and OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "eDocs 5 – Discovery demo" Job from the drop down list.
- 3) Click the Import File Button and select the "Discovery.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 find the Supplier Name, 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 Supplier Name in the KFI input panel. When complete, press the right icon or the enter button.
- 5) 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.
- 6) 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.

- 7) 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 the Submit button.
- 8) The image will then get converted to PDF and uploaded into the eDocs Folder specified earlier. Repeat steps 4 to 7 until no more documents remain in the batch.