

Job Name: eDocs 5 – KFI & Upload demo
Integration Type: eDocs5

Description:

This EzeScan Job will prompt the operator for a Name, Folder and Author.
When complete, the image will be uploaded into eDocs with the respective metadata populated.
This job requires the EzeScan PRO, KFI, and Upload modules.

Compatibility:

EzeScan 4.2.85 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 "eDocs 5 – KFI & Upload demo.cfg" file.
- Select Import All Items Below.
- 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 – KFI & Upload 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 KFI settings

- Select the Admin menu > KFI option.
- Select "eDocs 5 – KFI & Upload demo" from the KFI Type drop down list.
- Open the EDRMS tab and then fill in the eDocs Library, User, and Password settings.
- Open the Fields tab and then click Edit on the "Author" field.

- On the Field Edit Form select the eDocs5 tab.
- Click in the "Profile Form Name" parameter and select the ... button and then choose the Profile Form that the document will be uploaded to.
- Click OK to save the Field changes.
- Click the Apply button and then OK.

Configure the Upload settings

- Select the Admin menu > Upload option.
- Select "eDocs 5 – KFI & Upload 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.
- Click the Apply button and then OK.

Operation Instructions:

- 1) Select the Admin menu > Job option or press F6.
- 2) Select the "eDocs 5 – KFI & Upload 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.
- 5) You will be now directed to the Name Field. Type in a Name. Press the right arrow button or Press Enter.
- 6) You will be now directed to the Folder Field. EzeScan will prompt you with the Quick Retrieve browse screen. Browse to your Folder and then click the OK button. The Folder number will be returned into the KFI Panel. Press the right arrow button or Press Enter
- 7) You will be now directed to the Author Field. EzeScan will prompt you with the Author lookup screen. Select an Author and then click the OK button. The Author ID will be returned into the KFI Panel. Press the Submit button
- 8) EzeScan will now convert the current document to PDF file and upload it to the eDocs server. Repeat steps 5 - 7 until the remaining documents in the batch have been uploaded.