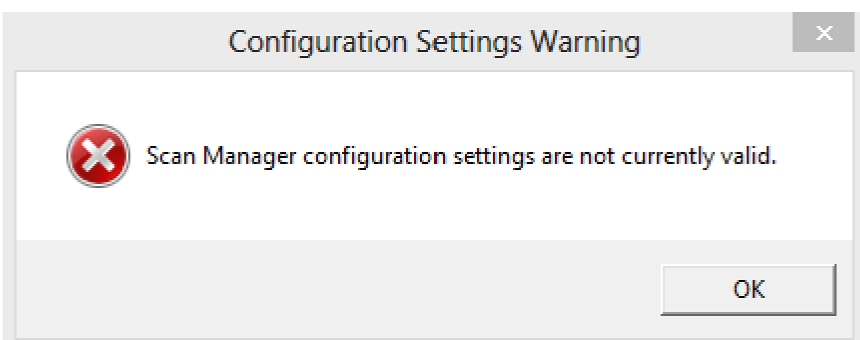
Using the Scanned Document Manager

Introduction

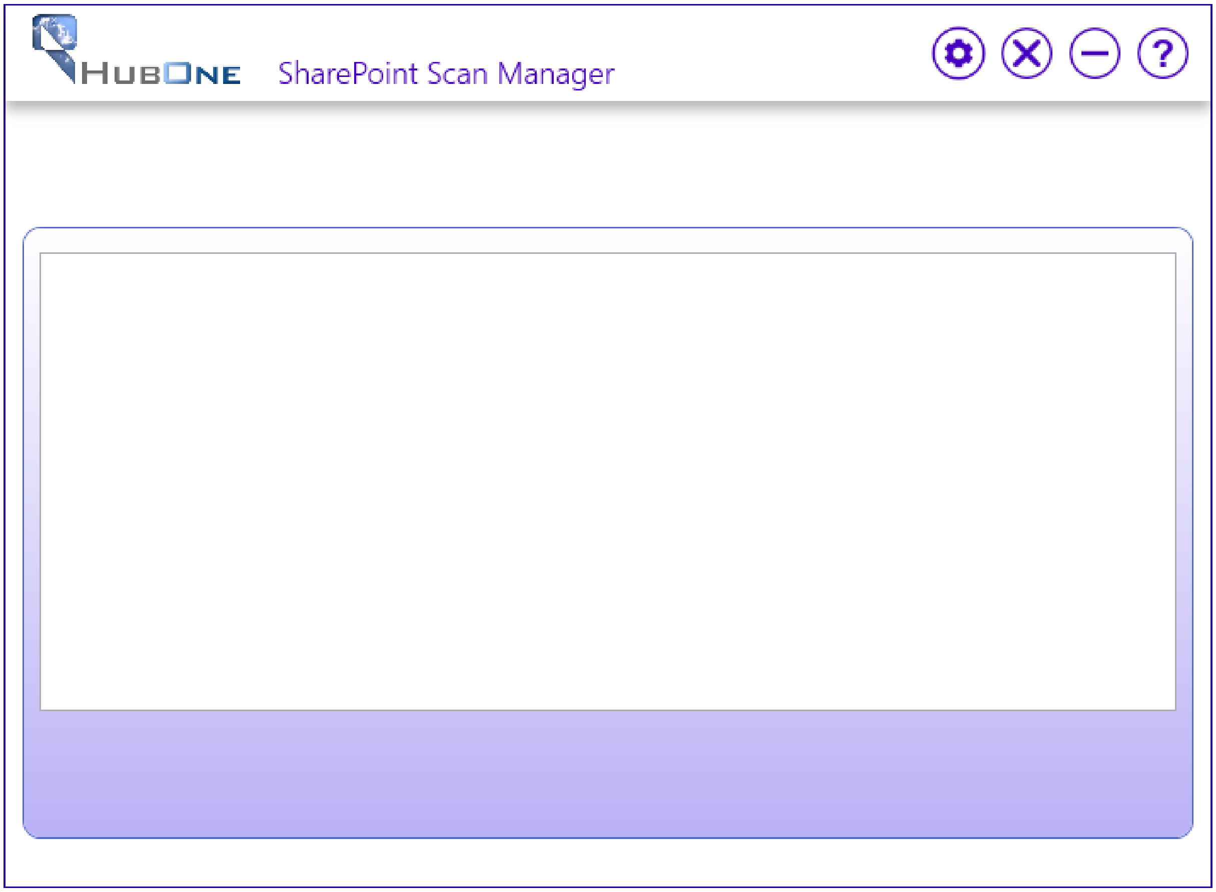
The HubOne SharePoint Scanned Document Manager Application is a useful tool providing the means to greatly reduce the time spent by your staff filing scans into SharePoint. The application uses state-of-the-art technologies to intelligently read, categorize and file scans from your scanner and organize them in SharePoint according to options you have configured.

Monitoring your Scanner

After installing the application and running it you will be required to enter a number of configuration settings fields before being able to let the application monitor your scanner directory. You will be warned that settings are not yet valid.



The application on initial run will appear blank as below. First we must configure settings.

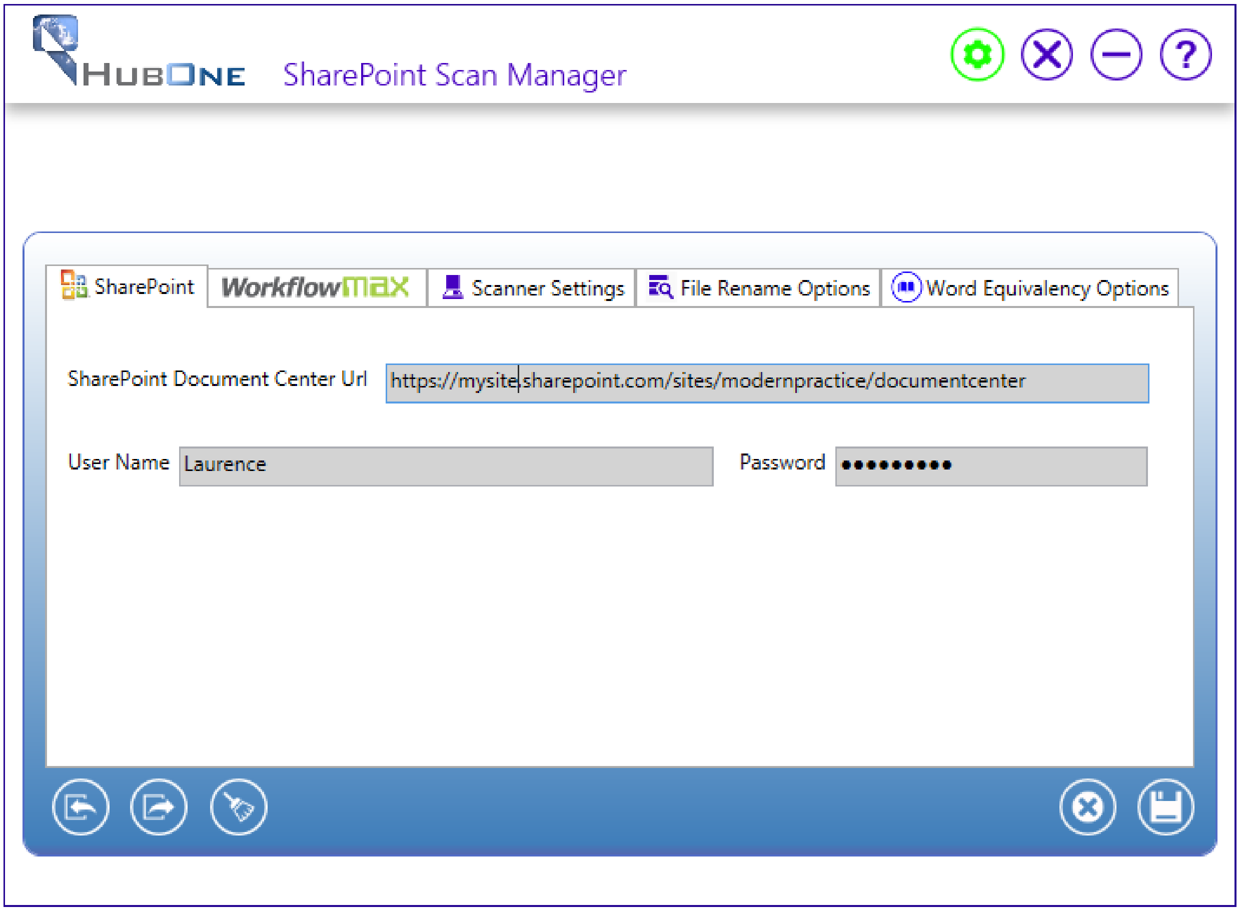


The buttons on the top right are (from left to right): **Settings**, **Close**, **Minimize**, and **Help**. Click the Settings button to get started.

Scanner Settings

Clicking the Settings button will open a tab control allowing you to input essential and custom data for monitoring your scanner. Once **ALL** settings are valid and the Save Button on the bottom right is clicked the Refresh Button will appear. Click this to reload the application with your new settings and to connect to WorkflowMax and SharePoint. On first connection the system will contact SharePoint and WorkflowMax and cache your clients list for you. If you have selected Custom Fields this process may take a few minutes. Grab a cup of coffee…

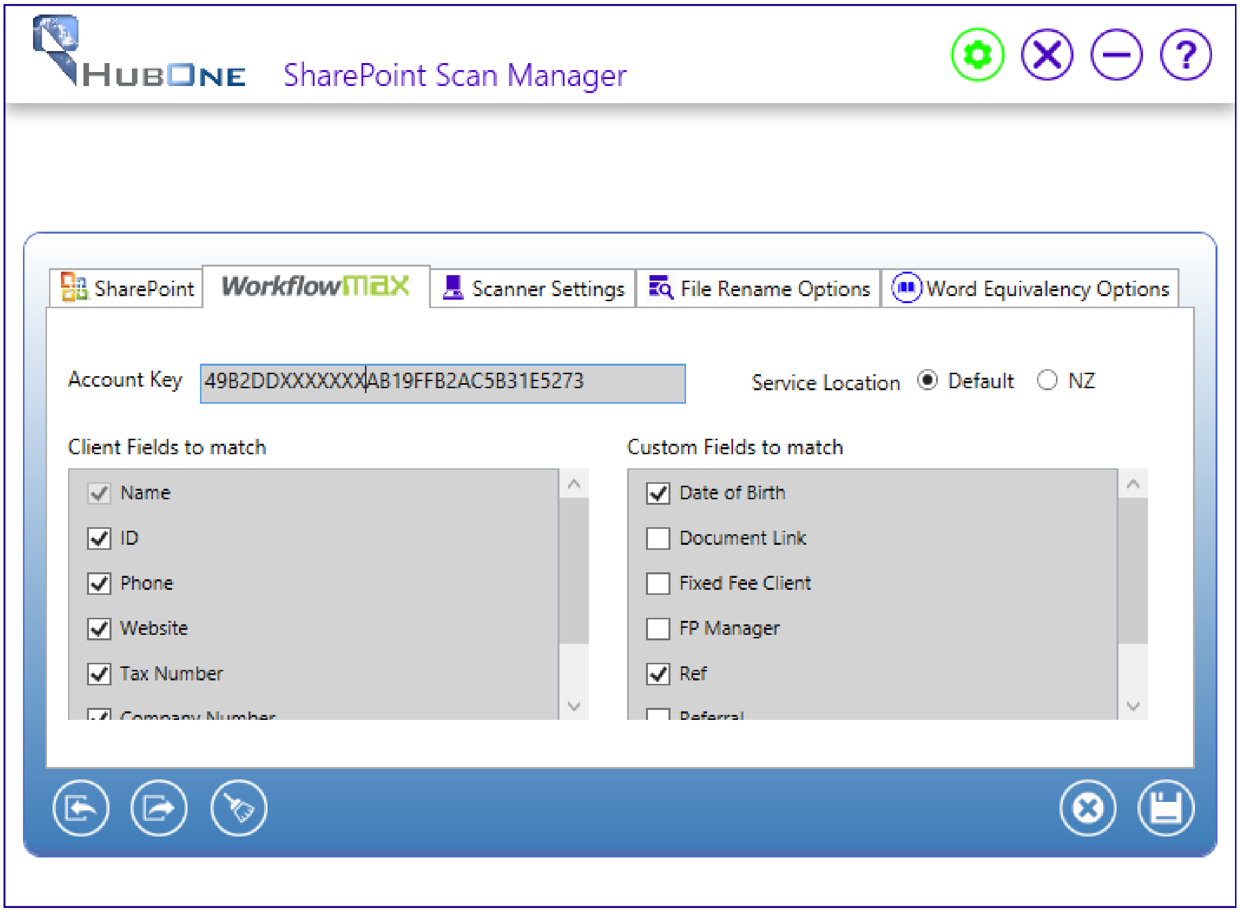
Setting up the Software



SharePoint Tab

On the SharePoint Tab you are prompted to enter the URL of your Modern Practice Portal Document Center, your SharePoint User Name and Password.

Click the Save Button on the bottom right to save your settings.



WorkflowMax Tab

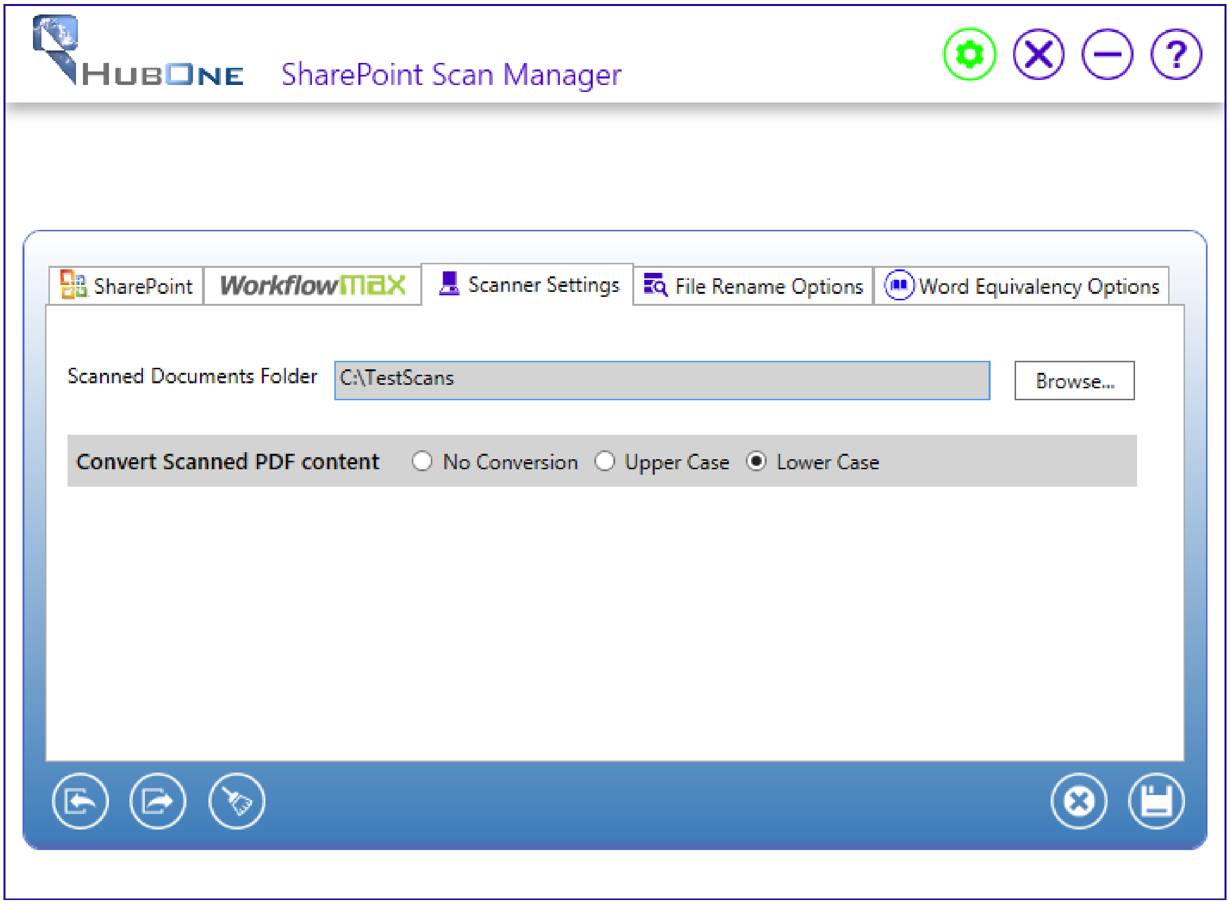
Here you are prompted to enter your WorkflowMax Account Key which HubOne will supply. Email us at support@hubone.com to request this key.

You must also select your location Service Location – the default is Australia but if you are located in New Zealand you must change the Service Location setting.

Client fields to match: These are the fields the application will look to match within your scanned document. Name is selected as mandatory. E.g. If your scanned document contains the name of one of your WorkflowMax clients, the application will file the scan under the correct Client folder in your Document Center's Clients folder. If Name is not matched the software will attempt to match on any of the other fields you have selected.

The same goes for any Custom Fields you may have set up in WorkflowMax.

Click the Save Button on the bottom right to save your settings.

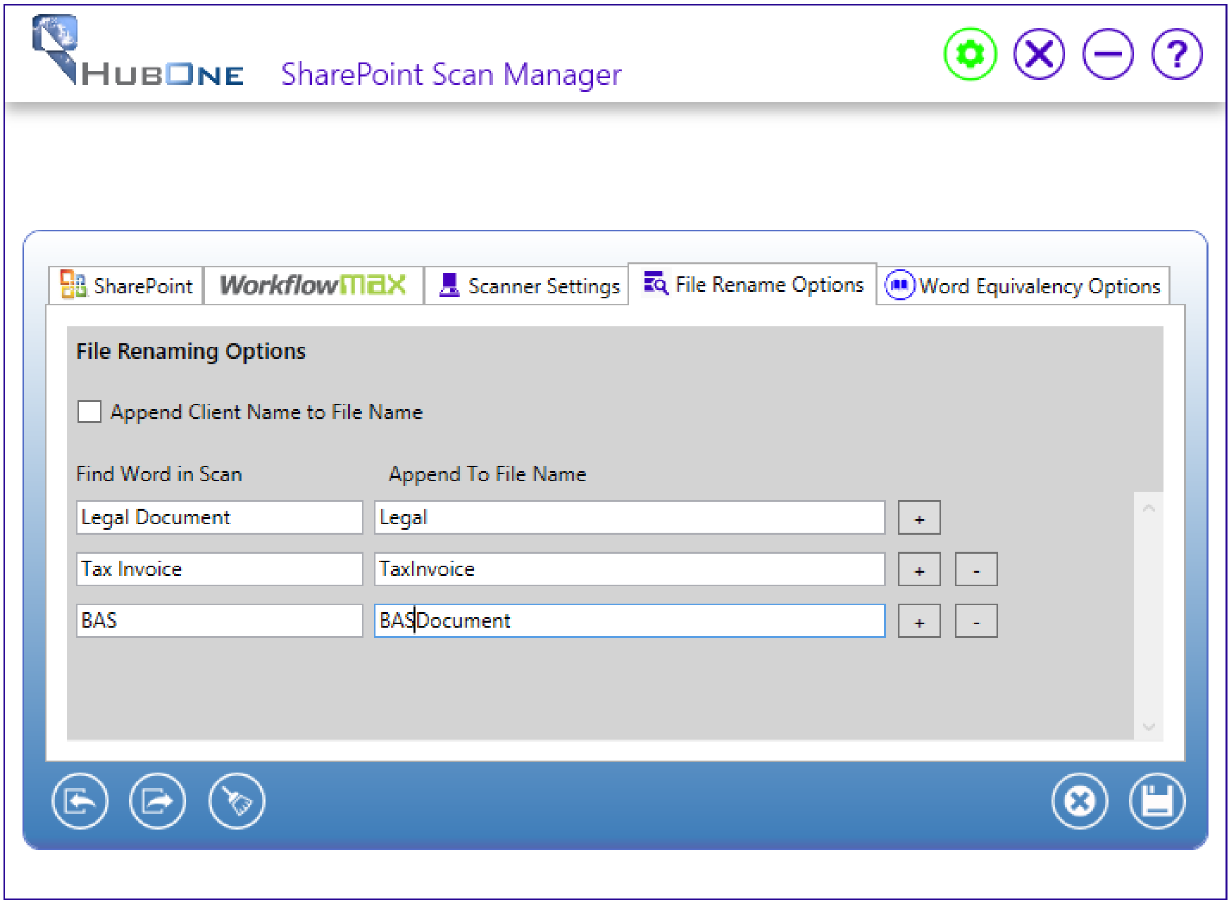


Scanner Settings Tab

Here you are prompted to enter the folder where your scanner saves its output pdf files. This is the folder the software will monitor and to which your scanner must send its pdf output files.

You can also select to convert the entire pdf content to a different case to aid in locating keywords. E.g. If your scanned document contains the Client Name “Dobson **and** Sons” and your WorkflowMax clients name is “Dobson **And** Sons” it may be a good idea to convert to lowercase to match.

Click the Save Button on the bottom right to save your settings.



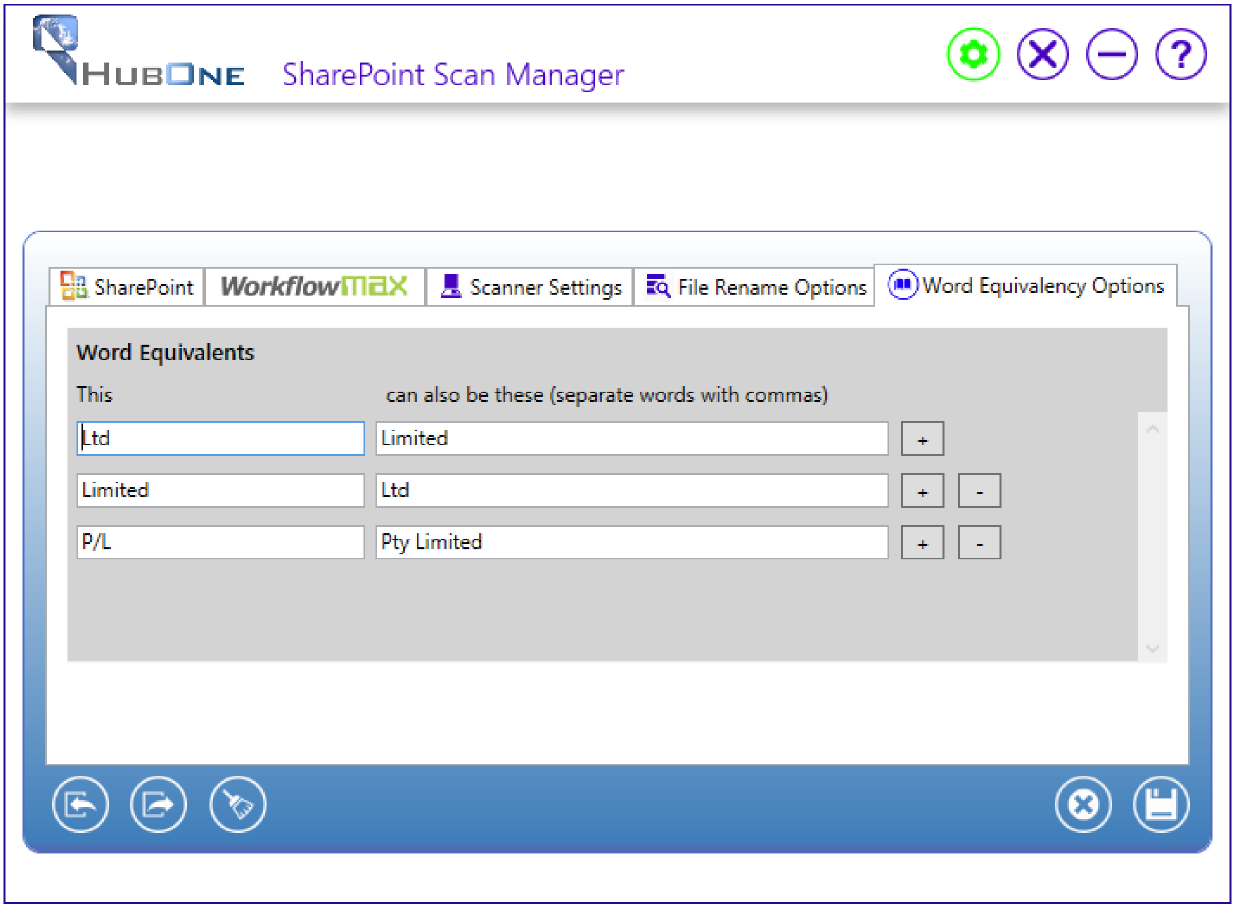
File Rename Options Tab

This window gives you the option to add file renaming rules.

Selecting the Append Client Name to File Name check box will rename your scanned documents with the Client Name appended.

You can add as many “Find Word in Scan” rules as you please. If the software locates any of these words in the document it will append your chosen word to the file name.

Click the Save Button on the bottom right to save your settings.



Word Equivalency Options Tab

Here you are able to enter as many Word Equivalents as you please. The software checks the client's name for any of the words on the left and if found it will scan the document contents for any variation you enter on the right.

E.g. If your client's name in WorkflowMax is "HubOne Pty **Ltd**" but your document content contains the name "HubOne Pty **Limited**" – the first rule in the image above would locate this name in the document and file this document in the HubOne Pty Ltd folder in SharePoint.

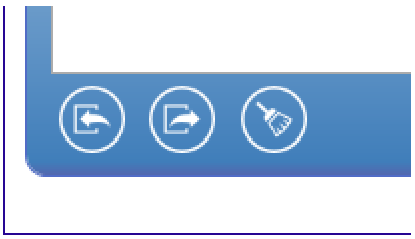
Click the Save Button on the bottom right to save your settings.

Importing and Exporting Settings

Once your settings are complete and valid you can Export them to allow others to use the same settings on their machines. Click the middle Export Settings button on the bottom left and select a location to save your settings file.

To Import saved settings click the Import Settings button on the far left and select the relevant .xml file to import. NB: username and password for SharePoint are not saved.

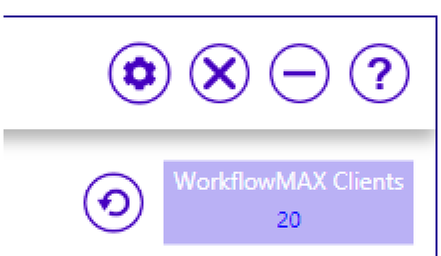
Click the broom button to clear all your settings.



Using the Software

Once your settings are complete and valid and you have clicked the Refresh Button on the bottom right of the application window the system will connect to SharePoint and WorkflowMax and synchronize your clients list. Click the green Settings Button at the top right to close the Settings feature. The software is now ready to use and will start monitoring the folder you have selected in settings. A notification box will appear in the top right hand corner indicating your WorkflowMax client tally.

NB: If a new client is added to WorkFlowMax it is a good idea to resynchronize the software with WorkflowMax so it will have the updated list cached. You can do this by clicking the Reload Button next to the WorkflowMax Clients notification box.



Drag and Drop Feature

You can drag and drop pdf files directly onto the application screen to manually process too.

File Logs

The directory you have selected to scan will contain 2 folders. These are “UploadCompleted” which will contain all files that have been successfully uploaded to SharePoint and “UploadErrors” which will contain files that have not been uploaded due to some issue. The FileUploadLog.csv file will contain a history of all files processed including the original file name and its subsequent renamed file and location in SharePoint.