



EzeScan Upload

User Guide Addendum

Developed for EzeScan Release 4.3

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1 The Upload Module

EzeScan has an optional Upload module built into the EzeScan product. The EzeScan Upload option can be licensed as an option at purchase time, or at a later stage as a module upgrade.

The purpose of the Upload module is to take the output created by the KFI module (images and indexes) and Upload it to one of its supported systems.

1.1 Available Upload Connectors

The Upload module currently supports the following connector locations:

- Aconex
- Alfresco
- Civica Authority Purchases
- CSV Creator
- DocuShare
- DocuWare
- eDOCS 5 (Open Text)
- eDOCS 6 (Open Text)
- EzeScan Archiver
- Financial Edge NXT
- FTP
- HPE Content Manager (TRIM)
- iManage Work
- Infor Pathway
- InfoRouter (Active Innovations)
- InfoXpert (Infovision)
- Laserfiche
- MYOB AccountRight 2013.5 and above
 - Purchases
 - Receive Money
 - Sales
 - Spend Money
- Objective ECM
- ODBC (Databases)
- Open Text Content Server
- Raiser's Edge
 - Constituent
 - Gift Batch
- Sage 200
 - Accounts Payable
 - Accounts Receivable
 - Purchase Order
 - 2016
- Sage 300
 - Accounts Payable
 - Accounts Receivable
- SFTP
- SharePoint (Microsoft)
 - 2013
 - 2016
- SMTP
- TechnologyOne ECM
- TechnologyOne Financials
- Therefore
- WebDAV (Compliant Systems)
- Xero

The following sections take you through building a simple Upload definition using the Admin Tool and then running that Upload definition as a production job.

NOTE: You must be licensed to use the EzeScan Upload module.

1.2 Are you licensed to run EzeScan Upload?

First you'll need to check whether you are licensed to run the Upload option.

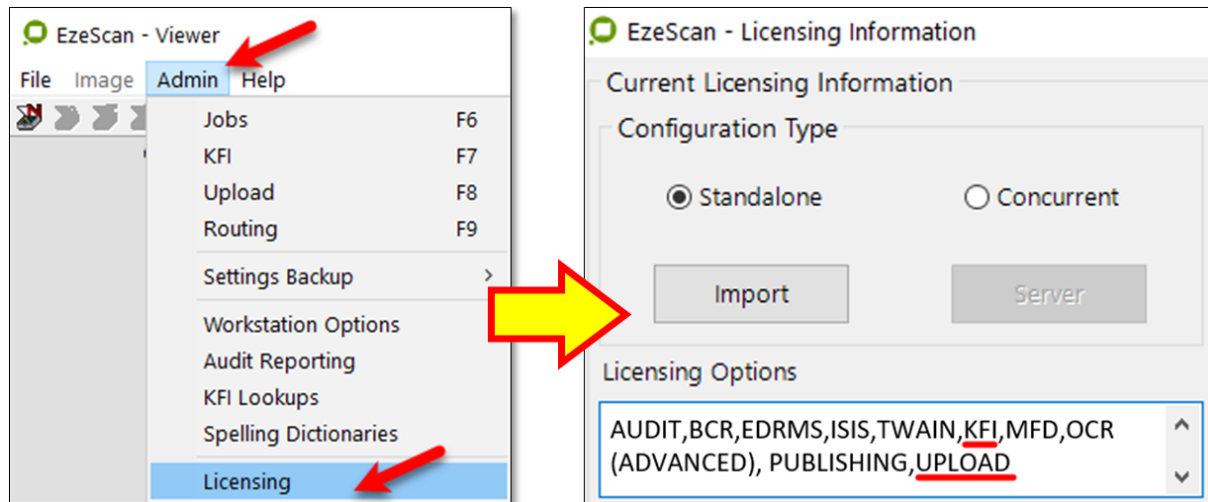


Figure 1 - Select Admin > Licensing then check that Upload & KFI appear in the Licensing Options window

- If the Licensing Options say either “EzeScan PRO All (Eval Only)” or contains the words “KFI” and “Upload” then you may run the Upload option.
- If your current production license is not licensed for Upload but you would like to evaluate the functionality please send an email to support@ezescan.com requesting a 15-day evaluation license with Upload enabled.

1.3 Prerequisites for running Upload

Before attempting to configure and run Upload you must have created:

- A job type or Route type that is going to be used with the Upload type you are going to create.
- A KFI type that is linked to that Job or Route type. The output indexes created by the KFI type will be used as the input indexes to the Upload module. It is possible to use Upload without KFI, but this is not how it was intended to be run.

TIP: Refer to the separate EzeScan KFI User Guide document for details on configuring a KFI type (available on the Help Menu)

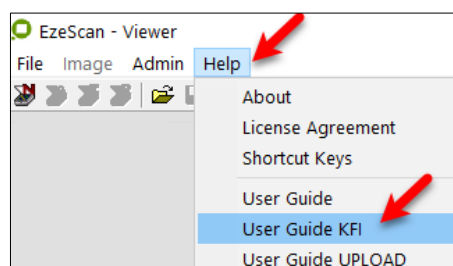


Figure 2 - find out more in the KFI User Guide

2. Upload Interface

The Operator can select the Upload module from the EzeScan Admin menu by selecting **Admin > Upload** or by pressing the **F8** Key.

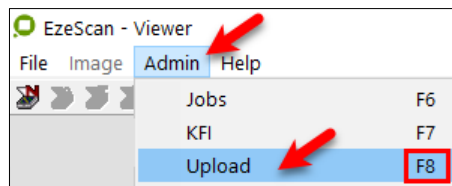


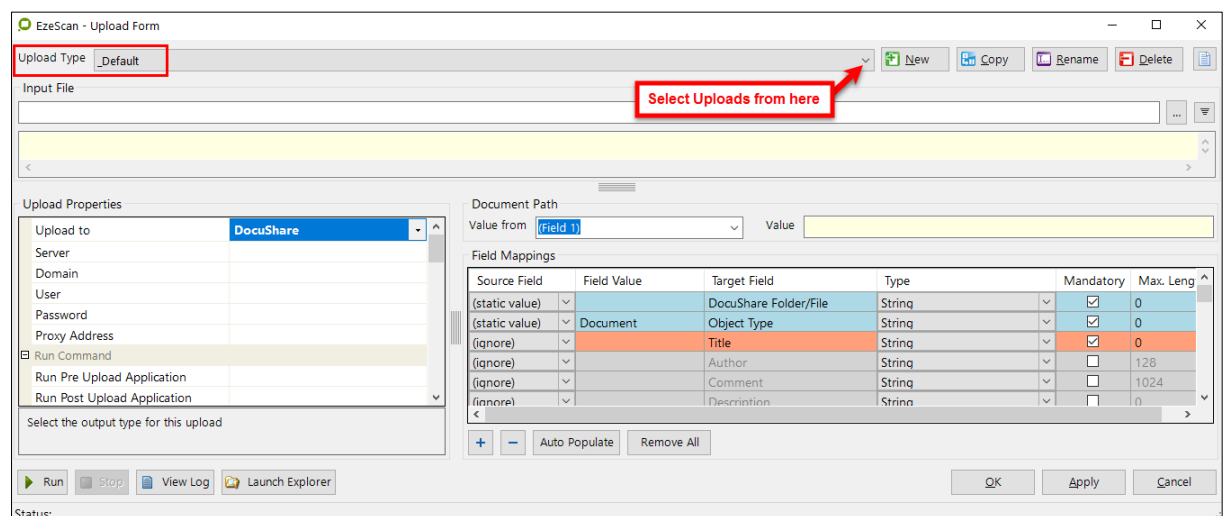
Figure 3 - select from menu or press the F8 key

2.1 Managing Upload Types

The Upload module may be accessed in either of the following means...

1. When the EzeScan image viewer is not displaying images, the Upload Admin form allows the operator to manage (create, edit, delete, rename) any of the available Upload types.
- OR
2. When the image viewer is displaying images, the Upload Admin allows the operator to edit the settings of the current Upload only.

The following form is displayed...



Source Field	Field Value	Target Field	Type	Mandatory	Max. Leng
(static value)		DocuShare Folder/File	String	<input checked="" type="checkbox"/>	0
(static value)	Document	Object Type	String	<input checked="" type="checkbox"/>	0
(ignore)		Title	String	<input checked="" type="checkbox"/>	0
(ignore)		Author	String	<input type="checkbox"/>	128
(ignore)		Comment	String	<input type="checkbox"/>	1024
(ignore)		Description	String	<input type="checkbox"/>	0

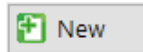
Figure 4 - the Upload screen - _Default Upload is shown

Selecting an existing Upload type

Simply choose an Upload Type from the list of available types using the pull down shown in Figure 4

Adding, renaming & removing Upload types

Upload types are managed by using the following lists and buttons:

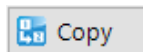


Adding a new Upload type

Use this button to create and save a new Upload type.

It will default with a new name. Overtyping this to make it your own and clicking **OK**

Figure 5 - creating a new Upload type



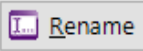
Copying a Upload Type

Use this button to copy an existing Upload type to a new Upload type.

This will automatically put a 2 on the end of the type. For example...

Figure 6 - copying an existing Upload type

Overtyping this to make it your own and clicking **OK**



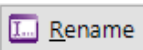
Renaming a Upload Type

Use this button to rename an existing Upload type.

1. Select the required Upload and click Rename and the first screen appears with the existing name + a number (e.g. New Upload Name 3)
2. Overtyping the old name to make it your own and clicking **OK**

For example...

Figure 7 - renaming an existing Upload Type



Removing a Upload type

Use this button to remove an existing Upload type.

Figure 8 - renaming

NOTE: _Default Upload type may not be removed from the list.



Notes

The Notes button provides the ability to add some notes about the Upload so that anyone opening it may be able to understand certain aspects of it.

2.2 Upload Properties

After a new Upload type is created the properties must be set.

This will allow the operator to define the Repository, Document, Index File and logging options etc.

The first thing to do is to select the system/application which you wish to Upload to refer to the [Available Upload Connectors section](#) on page 5 for a list of supported connectors.

Figure 9 - examples of the Upload Properties fields with 3 different systems/applications shown

UPLOAD TO SECTION

Upload to

Select the drop down box to choose the repository to be Uploaded to.
When selected, rows below will appear for the operator to populate with the respective information for the selected repository as shown in Figure 9.
For example...

- DocuShare - will ask for Server, Username & Password etc
- SharePoint 2016 - will ask for site URL, Login details and Domain etc
- HPE Content Manager - will ask for Database ID, container type etc

After the Upload option is selected, the Field Mappings Grid (to the right) will populate with its default respective fields.

Connector Settings

This part of the Upload settings will change depending on the selected connector.
Please refer to respective connector user guide for assistance.
Available in the Help menu...

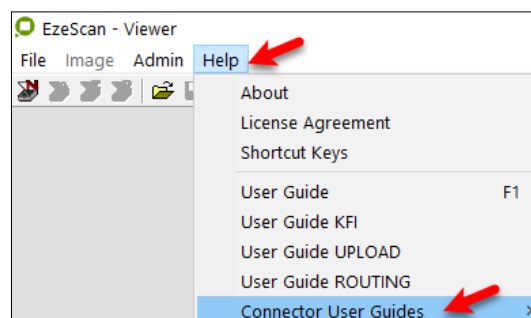




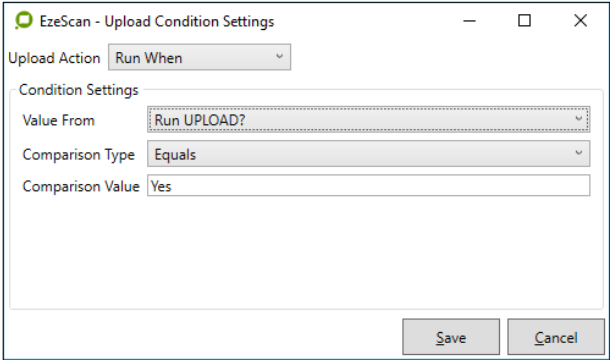
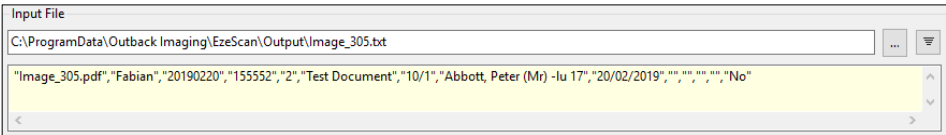
Figure 10 - refer to respective connector user guide


RUN COMMAND SECTION

Run Pre Upload Application	<p>Default is blank (N/A)</p> <p>The fully qualified path to the application to run <u>before</u> the Upload runs.</p> <ul style="list-style-type: none"> Click in the field and then click on the browse button  to set e.g. C:\bin\Backup.bat <<(Field 1)>>
Run Post Upload Application	<p>Default is blank (N/A)</p> <p>The fully qualified path to the application to run <u>after</u> the Upload runs.</p> <ul style="list-style-type: none"> e.g. Click in the field and then click on the browse button  to set e.g. C:\bin\Backup.bat <<(Field 1)>>
Application State	<p>Default is Hide</p> <p>The initial window state for the application run/pre/post Upload</p> <ul style="list-style-type: none"> Will only function if either of the above is set Select from Hide or Show

INDEX FILE SECTION

Column Names From	<p>Default is (none)</p> <p>This is used to specify which KFI is used with the Upload.</p> <p>If a KFI is selected then associating the field mappings are a lot easier.</p> <p>For Example, if a field in KFI is called “Title” it will most likely need to be mapped to the Title field in Upload.</p> <p>Firstly the operator will need to select the KFI that will be used.</p> <div><div><input type="checkbox"/> Index File</div><div>Column names from SharePoint - KFI Upload Demo</div></div> <p><i>Figure 11 - select the appropriate KFI from the list</i></p> <p>Then in the Source field a drop down list will appear showing the KFI fields. The operator can select the respective KFI field to map to the Upload field. In this case it is “Title”</p> <table><tr><th colspan="3">Field Mappings</th></tr><tr><th>Source Field</th><th>Field Value</th><th>Target Field</th></tr><tr><td>(static value)</td><td>http://sharepoint/Docs/Documents</td><td>Folder</td></tr><tr><td>(static value)</td><td>Client Support Document</td><td>ContentType</td></tr><tr><td>Title</td><td></td><td>Title</td></tr></table> <p><i>Figure 12 - matching the KFI (source) field to the connector’s (target) field</i></p>	Field Mappings			Source Field	Field Value	Target Field	(static value)	http://sharepoint/Docs/Documents	Folder	(static value)	Client Support Document	ContentType	Title		Title
Field Mappings																
Source Field	Field Value	Target Field														
(static value)	http://sharepoint/Docs/Documents	Folder														
(static value)	Client Support Document	ContentType														
Title		Title														
Index File	<p>Default is 1</p> <p>This option is whether to use the 1st KFI index file or the 2nd KFI index file etc.</p>															
Field Delimiter	<p>Default is , (comma)</p> <p>The character used to separate fields in the index file.</p> <div>TIP: If using the Column Names From option, this does not need to be set.</div>															
Keep	<p>Default is unticked <input type="checkbox"/></p> <p>This is to keep the image file after the image has been Uploaded.</p> <ul style="list-style-type: none">The image is kept in the output folder specified in the Admin form.															
Process Backwards	<p>Default is unticked <input type="checkbox"/></p> <p>This will start from the last line of the KFI output file and work its way up to the first line (i.e. in reverse order).</p>															

Field Count Override	<p>Default is 0</p> <p>This option would be used if the KFI output file is modified by a third party before being Uploaded.</p> <p>i.e. a KFI may have 10 fields, the third party app may add an additional 2, so the Field Count Override would need to be set to 2 and then the 2 field mappings could be applied.</p>
Upload Condition	<p>Default is Always Run</p> <p>This option can be used to set an UPLOAD to run or not run based from a field value condition.</p> <p>For example a KFI field could be set to Yes or No and that could be passed into Value From setting – In this example if the “Run UPLOAD” KFI field is set to Yes the upload will run.</p>  <p>Please note this setting is primarily designed for chained uploads (Pass to UPLOAD setting). The operator may want UPLOAD 1 not to run but UPLOAD 2 to run, based off the value applied.</p>
Pass to Upload	<p>Default is (none)</p> <p>This option will pass the image and index file onto another Upload.</p> <p>i.e. you may require to Upload to an EDRM system and also Upload to an ODBC database.</p> <p>You can also pass the 2nd Upload to a 3rd and so on</p>
Source Type	<p>Default is File</p> <p>This option used for when an Upload job is run on its own or as a scheduled task. It can be set to File or Folder.</p> <ul style="list-style-type: none"> • If set to File, EzeScan will use the index file specified in the Input file setting. For example - this is the Input File setting.  <p style="text-align: center;">Figure 13</p> <ul style="list-style-type: none"> ○ EzeScan will process through each line of the output document and Upload to its respective destination • If set to Folder, EzeScan will look for an index file and image per document. <ul style="list-style-type: none"> ○ When this is selected, the Input File setting is greyed out.

Source Folder	<p>Default is blank but <u>must</u> be set if the Folder option is selected</p> <p>If the Source Type is set to Folder, the operator will need to set the Source Folder. This will be where the EzeScan job has saved the output images and index files. For example...</p> <ul style="list-style-type: none">• Image_1.pdf• Image_1.txt• Image_2.pdf• Image_2.txt <p>Click in the field and then click on the browse button  to set</p>
Source Filter	<p>Default is *.txt</p> <p>This is where the operator can set a filter on what type of index files to run. For example if the job is outputting to text the filter would need to be set to "*.txt". The operator could also specify index filename options, e.g. if the Upload is only to process documents starting with the letter "A" the filter could be set to "A*.txt".</p>

DOCUMENT SECTION

Delay	<p>Default is 0 (no delay)</p> <p>The operator can specify a delay before the file is Uploaded (in seconds)</p>
Keep	<p>Default is unticked <input type="checkbox"/></p> <p>This is to keep the image file after the image has been Uploaded.</p> <ul style="list-style-type: none"> The image is kept in the output folder specified in the associated Job Output tab
Convert File Format To	<p>Default is Ignore - Use Existing</p> <p>Usually the output format is set at the job level.</p> <p>TIP: If the Uploads are being run as a separate task (e.g. using EzeScan server) then it would be advisable to do the PDF conversions in Upload. This will save more time for the operator as they do not need to wait for each file to be converted at the job level</p> <p>There are three options available...</p> <ol style="list-style-type: none"> TIF PDF Image Only PDF Text Searchable
OCR Engine	<p>Allows the operator to choose which OCR engine for PDF conversion</p> <p>There are four options available...</p> <ol style="list-style-type: none"> EzeScan OCR EzeScan OCR Advanced - Default setting OmniPage Pro 16 Office Edition OmniPage Pro 17 Office Edition <p>NOTE: OmniPage is not supplied with EzeScan and must be purchased separately</p>
OCR Language	<p>Default is English</p> <p>This sets the (Internal Engines) OCR engine to a specific language detection mode. There are multiple languages to select from in the list.</p>
Use existing PDF Text	<p>This option will skip performing OCR on the page for if the source page is from a PDF with a text layer. For example a PDF that has been digitally created, e.g. from Word > PDF.</p>
PDF Import Resolution Min	<p>Default is 300 (DPI)</p> <p>If the output from the job level is saving as a PDF then this option allows EzeScan what minimum DPI to import the file at.</p> <p>If the job level is saving as a tiff this option is ignored.</p>
PDF Import Resolution Max	<p>Default is 300 (DPI)</p> <p>If the output from the job level is saving as a PDF then this option allows EzeScan what maximum DPI to import the file at.</p> <p>If the job level is saving as a tiff this option is ignored.</p>
PDF Specification Version	<p>Default is 1.4</p> <p>Select the PDF specification version to use when outputting a PDF.</p> <ul style="list-style-type: none"> There are two versions to select from - 1.3 or 1.4
Use PDF/A	<p>Default is unticked <input type="checkbox"/></p> <p>This option will create the PDF file as a PDF/A compliance document</p> <p>TIP: Leave unticked if output file has been set to PDF on the Job's Output tab</p>

Fast Open PDF	Default is unticked <input type="checkbox"/> Allows the output PDF to start displaying pages before the entire document has been downloaded.
----------------------	--

LOG SECTION

Logging will create a file which will write an entry when a document is Uploaded to its destination. It can assist with troubleshooting and list when an Upload has completed successfully.

This is a sample Upload log file...


2010/06/11 13:06:34,C:\Program Files\Outback Imaging\EzeScan 4.2\Output\Image_1.pdf - Upload completed

2010/06/11 13:06:59,C:\Program Files\Outback Imaging\EzeScan 4.2\Output\Image_2.pdf - Upload completed

Halt on Error	Default is ticked <input checked="" type="checkbox"/> (Yes) Upload will stop when an error occurs
Log to a single log file	Default is ticked <input checked="" type="checkbox"/> (Yes) Upload will log all information to one log file instead of logging a single log file per file
Log Folder	Default is blank - EzeScan will save the log file in the same folder as the KFI index file. This option will allow the operator to have the Upload log file to be saved into a specific folder. <ul style="list-style-type: none"> If required, click in the field and then click on the browse button <input type="button" value="..."/> to set
Email Error Report	Default is unticked <input type="checkbox"/> This will send an email notifying the operator that an Upload failure/s has occurred. This feature works when the Upload module is being run on its own. i.e. File -> Run Upload or Admin -> Upload or running Upload as a scheduled task. Below is a sample email of an error report. <div data-bbox="531 1247 1390 1424" data-label="Image"> </div>
Email Address	Default is blank This is the email address that the Upload error log will be sent to. <div data-bbox="502 1529 1431 1579" data-label="Text"> <p>NOTE: Ensure SMTP settings are configured via Workstation Options</p> </div>

MARKUP SECTION

The mark-up options allow the output document to have mark-up text applied to them. System and Upload placeholders can be used. E.g. <<S15>>, <<IF6>> etc.

Use Markup	<p>Default is unticked <input type="checkbox"/></p> <p>Tick <input checked="" type="checkbox"/> this option to enable the mark-up. The following options will then become selectable</p>
Markup Text	This is the text that will appear on the image
Font Name	<p>Default is Arial</p> <p>Click in the field and then on the browse button <input type="button" value="..."/> to choose the font</p>
Font Size	<p>Default is 11pt</p> <p>Click in the field and then on the browse button <input type="button" value="..."/> to choose the font size</p>
Font Style	<p>Default is Regular</p> <p>Click in the field and then on the browse button <input type="button" value="..."/> to choose the font style</p>
Back Colour	<p>Default is Transparent</p> <p>This can be set to Transparent or White.</p> <ul style="list-style-type: none"> Setting to White will show a <u>white outline</u> of the text. For example... <div style="text-align: center;">  </div> <ul style="list-style-type: none"> This is helpful for images that may have black in the area of the mark-up so they can still be visible.
Page	<p>Default is 0</p> <p>Will set which pages the mark-up will appear on.</p> <ul style="list-style-type: none"> Set to 0 will mark-up every page, Set to a number greater than 0 for the specific page number to mark-up
Horizontal Justification	<p>Default Left (corner of page)</p> <p>This allows for the mark-up text to appear on the left, centre or right.</p>
Vertical Justification	<p>Default Top (section of the page)</p> <p>This allows for the mark-up text to appear on the top, middle or bottom</p>

2.3 Field Mappings

This is the field Mappings Grid. This is where the source data (from KFI) is mapped to the Target Field for the respective Upload repository. More information on the Target Fields can be found in section 2.5.

Field Mappings						
Source Field	Field Value	Target Field	Type	Mandatory	Max. Length	
(static value)	Document	Record Type	String	<input checked="" type="checkbox"/>	0	
(ignore)		Title	String	<input checked="" type="checkbox"/>	0	
Author		AuthorLoc	Locat...	<input type="checkbox"/>	0	
Folder		Container	String	<input type="checkbox"/>	0	
Date Received		Date Created	Date/...	<input type="checkbox"/>	0	
(static value)	Y	Finalise Record	String	<input type="checkbox"/>	0	
Document Type		Document Type	String	<input type="checkbox"/>	50	
(ignore)		Title (Structured Part)	String	<input type="checkbox"/>	0	
(ignore)		AddresseeLoc	Locat...	<input type="checkbox"/>	0	


Figure 14 - example of a field mapping set-up for an EDRMS

What do the colours mean?

Yellow	The field value is related to the KFI Index File
Light Red	The field value is mandatory and not populated.
Light Blue	The field value is mandatory and populated
White	The field value is not mandatory
Grey	The field value is inactive (not used)
Blue	The field value is currently selected (user has clicked I the field)

What are the columns and what do they do?

Source Field	This is the value which will be "Uploaded" to the target system. There are 4 types of Source fields:	(ignore)
	1. (ignore) the field will not be used.	(static value)
	NOTE: Source field cannot be left set to (ignore) when Mandatory the box is ticked <input checked="" type="checkbox"/>	(File Path)
	2. (static value) where a value <u>must</u> be added to the Field Value column	(Operator Name)
	3. System related source - e.g. File Path; Operator Name etc	(Date Processed)
	4. A KFI field name , which appears in the list when the "Column names from" has been set against a particular KFI	(Time Processed)
		(Pages Processed)
		Document Type
		Folder
		Date Received
		Author
		Address
		Title

	A value must be added into this column when the respective field has it's source field set to (static value). Example are...
Field value	<ul style="list-style-type: none"> An EDRMS record type. Found by clicking in the field and then on the browse button  to choose the value from the respective connector/system Setting an EDRMS Container to save a record into using KFI values plus text... Claim Folder <<IF7>> SBRN(<<IF6>>) Setting a tick box to yes by adding a Y against the respective field
Target Field	The field in the targeted system which the processed document and associated metadata is being Uploaded to; based on the mapping from the Source field
Type	The default type of metadata the target system will use for the Uploaded metadata. Generally left "as is" but may be changed if an option is available
Mandatory	<p>The EzeScan connector plugin will tick these boxes by default depending on the "Upload to" option selected as these values are generally mandatory in the targeted system.</p> <p>NOTE: The Source field cannot be left set to (ignore) when Mandatory the box is ticked <input checked="" type="checkbox"/></p>
Max. Length	<p>Dictates the maximum length the Uploaded metadata will allow to be Uploaded to the target system. For example...</p> <ul style="list-style-type: none"> If the target system metadata field has a size of 50 then the Max. Length value <u>must</u> be set to 50

What are the buttons at bottom of the grid?



The **plus button** is to add another field



The **minus button** is to remove a field. (Custom fields only)

The **Auto Populate button** will connect to the respective system and obtain all the custom fields for it.

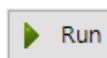
Auto Populate

NOTE: Please refer to the target mappings section for each system on how to use this option.

Remove All

The **Remove All button** will remove all custom field mappings in the grid

2.4 Command Buttons

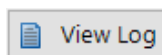


Use the **Run** button to start a manually initiated Upload of the currently selected Upload Type, using the currently selected Input File

Use the **Stop** button to stop the Upload of the currently selected Upload Type.

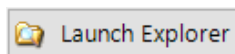


This is only used when input files with more than 1 input row are processed. When the program detects that the button has been pressed it will stop at the end of the processing the current row from the input file.

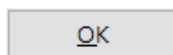


Use the **View Log** button to view the results of the last Upload.

The log shows whether the Upload worked or failed, and in case of failures may contain some useful error messages relating to the failure.



The **Launch Explorer** button will launch the explorer screen. e.g. My Computer.



The **OK** button will save the Upload type and then close the Upload form.

Apply

Use the **Apply** button to save any changes made to the currently selected Upload type.

Cancel

Use the **Cancel** button to close the Upload Admin form, ignoring any changes made since the last time the **Apply** button was pressed.

2.5 EzeScan Connector Target Field Mappings

The following connectors are available in the Upload module.

Please refer to the relevant user guide available from the Help menu to access all of the connector's Upload documentation.


- Aconex
- Alfresco
- Civica Authority Purchases
- CSV Creator
- DocuShare
- DocuWare
- eDOCS 5 (Open Text)
- eDOCS 6 (Open Text)
- EzeScan Archiver
- Financial Edge NXT
- FTP
- HPE Content Manager (TRIM)
- iManage Work
- Infor Pathway
- InfoRouter (Active Innovations)
- InfoXpert (Infovision)
- Laserfiche
- MYOB AccountRight 2013.5 and above
 - Purchases
 - Receive Money
 - Sales
 - Spend Money
- Objective ECM
- ODBC (Databases)
- Open Text Content Server
- Raiser's Edge
 - Constituent
 - Gift Batch
- Sage 200
 - Accounts Payable
 - Accounts Receivable
 - Purchase Order
 - 2016
- Sage 300
 - Accounts Payable
 - Accounts Receivable
- SFTP
- SharePoint (Microsoft)
 - 2013
 - 2016
- SMTP
- TechnologyOne ECM
- TechnologyOne Financials
- Therefore
- WebDAV (Compliant Systems)
- Xero

2.6 EzeScan Target Mappings


CSV Creator

The CSV Creator allows for a TXT/CSV file to be created. This can be useful if needed to create a CSV after an EDRMS Upload. For example a system may require the document EDRMS number to be supplied after an Upload.

UPLOAD PROPERTIES

Upload to	Select CSV Creator
Folder Path	Default is blank The path to where the file will be saved Click in the field and then on the browse button  to select
Base Filename	Default is blank Type the filename of the file here
File Extension	Default is csv File can be saved as a .csv or .txt file type
Create Header Row	Default is unticked <input type="checkbox"/> Tick this <input checked="" type="checkbox"/> if the output file needs a header row. The header row/s can be created in the following syntax
Append to Existing CSV	Default is unticked <input type="checkbox"/> Tick this <input checked="" type="checkbox"/> if the data to the file needs to be appended (default is to overwrite)
Copy Document	Default is unticked <input type="checkbox"/> Tick this <input checked="" type="checkbox"/> if the output document also needs to be saved with the file.

To create the columns for the CSV file...

1. Select the **CSV Creator** option in the "Upload to" field in Upload Properties section
2. Click the **Remove All** button and all of the current Field mappings will all be removed
3. Click the  button and the first field mapping will appear.
4. If creating header rows the following syntax is used...
`Header[LineNo]:Column[ColumnNo]:{Header Name}`
5. To create line rows the following syntax is used...
`Line[LineNo]:Column[ColumnNo]:{Column Name}`

Below is an example of a CSV file with a header row and line row

Field Mappings		
Source Field	Field Value	Target Field
(static value)	File Name	Header[1]:Column[001]:{File Name}
(static value)	Invoice Number	Header[1]:Column[002]:{Invoice Number}
(File Path)		Line[1]:Column[001]:{File Name}
Invoice Number		Line[1]:Column[002]:{Invoice Number}

Figure 15 - a 2 column CSV file to capture File Name & Invoice Number

OTHER UPLOAD PROPERTIES

Please refer to these previous sections...

[Run Command](#) - page 10; [Index File](#) - page 10; [Document](#) - page 13; [Log](#) - page 14; [Markup](#) - page 15.

FTP (File Transfer Protocol)

The File Transfer Protocol (FTP) is a standard network protocol used to transfer computer files between a client and server on a computer network. FTP is built on a client-server model architecture and uses separate control and data connections between the client and the server.

UPLOAD PROPERTIES

Upload to	Select FTP
Server	Enter the FTP server hostname <i>OR</i> IP address
Port	Default is 21 This is the FTP server port.
User	Enter the FTP username
Password	Enter the FTP password
Security Type	Default is None The security type to be used when connecting to the FTP server. Select from... 1. None 2. Explicit SSL/TLS 3. Implicit SSL/TLS
Connection Type	Default is Passive The connection type the FTP server supports. Select from... 1. Active 2. Passive
Connection Timeout	Default is 30 (seconds) Specify the maximum time that will be allowed to establish the connection.
Upload	Default is Document and Index File Upload defines which item(s) are to be Uploaded to the FTP server. Select from... 1. Document and Index File 2. Document Only 3. Index File Only
Use TMP Extension During Transfer	Default is unticked <input type="checkbox"/> Tick this <input checked="" type="checkbox"/> to use .tmp extension when transferring the file to the FTP server.

OTHER UPLOAD PROPERTIES

Please refer to these previous sections...

[Run Command](#) - page 10; [Index File](#) - page 10; [Document](#) - page 13; [Log](#) - page 14; [Markup](#) - page 15.

SFTP (Secure File Transfer Protocol)

Secure File Transfer Protocol (SFTP) is a secure version of File Transfer Protocol (FTP), which facilitates data access and data transfer over a Secure Shell (SSH) data stream. It is part of the SSH Protocol. This term is also known as SSH File Transfer Protocol.

UPLOAD PROPERTIES

Upload to	Select SFTP
Server	This is the SFTP server hostname <i>OR</i> IP address
Port	Default is 22 This is the SFTP server port.
User	Enter the SFTP username
Password	Enter the SFTP password
Key File	Enter the SFTP server key file path
Passphrase	Enter the SFTP server passphrase
Upload	Default is Document and Index File Upload defines which item(s) are to be Uploaded to the SFTP server. Select from... <ol style="list-style-type: none"> 1. Document and Index File 2. Document Only 3. Index File Only

OTHER UPLOAD PROPERTIES

Please refer to these previous sections...

[Run Command](#) - page 10; [Index File](#) - page 10; [Document](#) - page 13; [Log](#) - page 14; [Markup](#) - page 15.

ODBC (Open Database Connectivity)

Open Database Connectivity (ODBC) is an open standard application programming interface (API) for accessing a database.

By using ODBC statements in a program, you can access files in a number of different databases, including Access, dBase, DB2, Excel, and Text.

The ODBC function provided by EzeScan Upload process allows the insertion of captured data into a SQL based database using ODBC.

UPLOAD PROPERTIES

Upload to	Select ODBC
DSN	<p>This is the User or System DSN to be used to connect to the database. Click in the field and then on the browse button <input type="button" value="..."/> to select the required ODBC DSN This is configured in the "Data Sources (ODBC)" option in the Control Panel</p> <p>TIP: Further details about setting up ODBC settings are available in the KFI User Guide</p>
User	This is the database username
Password	This is the database password
Connection String Suffix	<p>Enter additional ODBC connection string settings. For example: "SUPPRESS_WARNINGS=1"</p>
Use Lookup	<p>Default is unticked <input type="checkbox"/></p> <p>Tick this <input checked="" type="checkbox"/> option to select a Lookup Set instead of an ODBC query</p> <p>TIP: Further details about using Lookup Sets is available in the KFI User Guide</p> <p>NOTE: Ticking this <input checked="" type="checkbox"/> option will grey out the DSN section (above)</p>
Connection Timeout	<p>Default is 100 (seconds)</p> <p>This is the time to allow EzeScan to connect to the ODBC connection.</p>
Command Timeout	<p>Default is 100 (seconds)</p> <p>This is the time to allow EzeScan to run the SQL Statement.</p>
Use Transaction	<p>Default is unticked <input type="checkbox"/></p> <p>Tick this <input checked="" type="checkbox"/> option to use an ODBC transaction for statements; which may be required some ODBC drivers to raise validation errors on commit</p>
Copy To Folder	<p>Default is blank (will not copy the file)</p> <p>This is the folder where the document will be copied to. Placeholders can be used to derive the document path, e.g. M:\Storage\<<F1>>\<<F2>>\</p> <p>Click in the field and then on the browse button <input type="button" value="..."/> to browse for the folder to copy the file too.</p>

SQL Statement

The SQL statement is entered in here.

Click in the field and then on the browse button [...] and the following screen will display:

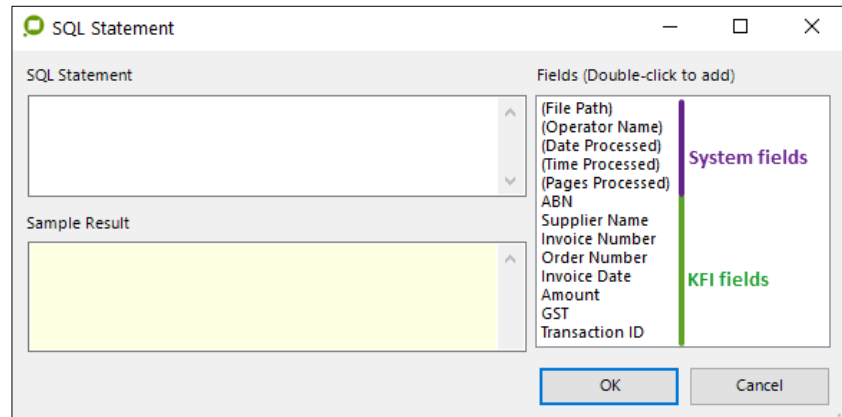


Figure 16

NOTE: If you have used the "Column Names From" option in the index file section the available Field Placeholder names from the KFI type will appear in the list. The column names from option is described in the [Index File Section Of Upload Properties](#) on page 10.

When the operator fills in the statement, the sample result will display below.
e.g. Load a test KFI output Index file to show the data.

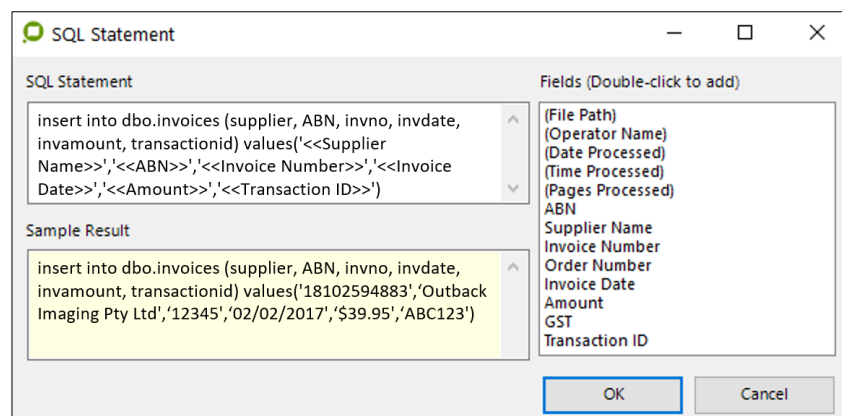


Figure 17

If the document is required to be Uploaded into the database as an image attachment/BLOB, two options can be used.

1. The command "UPDATE_WITH_IMAGE" can be used

- In the example the operator runs an insert statement to firstly Upload the data, and then a select statement to select the row which UPDATE_WITH_IMAGE is used to pass the document in. For example...

insert into dbo.invoices (supplier, ABN, invno, invdate, invamount, transactionid) values(' <<Supplier Name>>', '<<ABN>>', '<<Invoice Number>>', '<<Invoice Date>>', '<<Amount>>', '<<Transaction ID>>'); UPDATE_WITH_IMAGE select invfile, transactionid from dbo.invoices where transactionid = ' <<Transaction ID>>';

Please Note:

- In this example the column **transactionid** is the primary key, it is recommended to include the primary key column in the update_with_image statement.
- If the operator wishes to Upload a zone image, e.g. a separate image created by the KFI field option "Output As Separate Image" the placeholder "UPDATE_WITH_ZONE_IMAGE" can be used instead.

	<p>2. The placeholder <<DOCBLOBDATA>> can be used</p> <ul style="list-style-type: none"> This option is designed if the operator wishes to call a stored procedure (so therefore everything is done in one statement in EzeScan) or instead of using UPDATE_WITH_IMAGE (option 1) the insert statement can call the <<DOCBLOBDATA>> placeholder directly. For example... call poc_Upload.Upload_claim_doc('<<(Field 1)>>','<<DOCBLOBDATA>>') <p>Please note:</p> <ul style="list-style-type: none"> If using Oracle with option 2 the operator must use single quotes around the <<DOCBLOBDATA>> placeholder. If using SQL with option 2 the operator must prefix a 0x in front of the <<DOCBLOBDATA>> placeholder. It is not possible to populate a BLOB parameter when calling an Oracle Stored Procedure using the Oracle ODBC Driver. Use NVARCHAR2 instead. <p>The Oracle ODBC Driver is only capable of passing parameters values of up to 32k in size. As soon as you exceed this limit the driver crashes EzeScan. Due to this limitation it is not recommend to use a stored procedure with DOCBLOBDATA with EzeScan. Use the UPDATE_WITH_IMAGE option instead.</p>
Run Pre Upload Application \ Run Post Upload Application	<p>This will run an application and can be configured to run prior to the Upload of the document or after or can run both.</p> <p>Placeholder values can be used:</p> <ul style="list-style-type: none"> To pass the output file path use <<FILE>> To pass index file values use <<IF1>> <<IF2>> <p>e.g.</p> <ul style="list-style-type: none"> IF1 = First field in output file IF2 = Second field in output file <p>TIP: Please remember to use double quotes if the application or output values are to contain spaces. e.g. "C:\my app\run.exe" "<<FILE>>" "<<IF1>>"</p> <p>NOTE: The application must be completed (closed) before the ODBC command runs.</p>
Application State	<p>This can be set to Show or Hide.</p> <ul style="list-style-type: none"> Show will display the application to the operator. Hide will run the application as a hidden process.

OTHER UPLOAD PROPERTIES

Please refer to these previous sections...

[Run Command](#) - page 10; [Index File](#) - page 10; [Document](#) - page 13; [Log](#) - page 14; [Markup](#) - page 15.

SMTP (Simple Mail Transfer Protocol)

SMTP (pronounced as separate letters) is short for Simple Mail Transfer Protocol, a protocol for sending e-mail messages between servers.

Most e-mail systems that send mail over the Internet use SMTP to send messages from one server to another; the messages can then be retrieved with an e-mail client using either POP or IMAP

- The SMTP function provided by EzeScan Upload process allows for sending an email to an SMTP recipient.
- Generally used as a 2nd Upload process.
- Once the 1st Upload is processed the 2nd Upload (set in the “pass to Upload” setting) runs and sends an email.
- It could be an email advising that the document has been processed.

NOTE: The SMTP Mail Settings must be configured when generating emails from an Upload in either the EzeScan workstation options (SMTP tab)

UPLOAD PROPERTIES

Upload to	Select SMTP
Server	Enter the SMTP server hostname <i>OR</i> IP address
Port	Default is 25 This is the SMTP server port.
User	Enter the login name to access your SMTP mail server account
Password	Enter the password to access your SMTP mail server account
Authentication Method	Default is Auto Select the Authentication method to use when connecting to the SMTP server. Select from: <ul style="list-style-type: none"> • None • Auto • Login • Plain • CRAM-MD5 • NTLM
Security Type	Default is None The security type to be used when connecting to the FTP server. Select from... <ol style="list-style-type: none"> 1. None 2. Explicit SSL/TLS 3. Implicit SSL/TLS
Attach Document	Default is Ticked <input checked="" type="checkbox"/> (Yes) Specifies whether the document is to be attached to the email

OTHER UPLOAD PROPERTIES

Please refer to these previous sections...

[Run Command](#) - page 10; [Index File](#) - page 10; [Document](#) - page 13; [Log](#) - page 14; [Markup](#) - page 15.

TARGET FIELDS

The SMTP Upload configuration is detailed further in the [“Setting up an SMTP Email Notification Upload”](#) section on page 44.

Subject:	<p>This field will become the Email Subject</p> <ul style="list-style-type: none"> Maybe a (static value) option OR could also use a KFI field (e.g. Title)
To	<p>This field will become the To Address</p> <ul style="list-style-type: none"> Maybe a (static value) option OR could also use a KFI field
CC	<p>This field will become the CC Address</p> <ul style="list-style-type: none"> Maybe a (static value) option OR could also use a KFI field
BCC	<p>This field will become the BCC Address</p> <ul style="list-style-type: none"> Maybe a (static value) option OR could also use a KFI field
Message Body HTML	<p>This field will become the Message Body in HTML format.</p> <ul style="list-style-type: none"> If a carriage return is required then a <p> must be placed for start of each new line and </p> <ul style="list-style-type: none"> This can be defined in the custom KFI output. For example... <p><<F1>></p><p><<F2>></p> This can also be defined as a (static value) in Upload. For example... <p><<IF6>></p><p><<IF7>></p> The HTML must always have valid open and close tags. <H1>Heading</H1> <p>TIP: Refer to the “Email Body Created using HTML” section on page 48 for an example of creating a message body using HTML</p>
Message Body Text	<p>This field will become the Message Body in Plain Text format</p> <ul style="list-style-type: none"> If a carriage return is required then a <
> must be placed for each new line. <p>NOTE: This can only be defined as a (static value) in Upload. For example - <<IF6>><
><<IF7>></p> <p>TIP: Refer to the “Email Body Created using Plain Text” section on page 46 for an example of creating a message body using Plain Text</p>
From	<p>This field will become the From Address</p> <ul style="list-style-type: none"> Maybe a (static value) option OR could also use a KFI field
Reply To	<p>This field will become the Reply To address</p> <p>Warning: Using this option will require the operator to have the ability to run this command on the mail server. It may be easier to just use the “From” field instead.</p>
Read Receipt	<p>This field will become the Read Receipt Value.</p> <ul style="list-style-type: none"> Use the (static value) option and set it to <ul style="list-style-type: none"> Y (for Yes) T (for True) 1 (for True) Any other value will be read as No or False.
Attachments	<p>This field will allow you to specify other file attachments to be added to the email to be sent. Use the (static value) option</p> <ul style="list-style-type: none"> The operator can specify multiple attachments using a pipe () as the delimiter. <ul style="list-style-type: none"> e.g. C:\EzeScan\Scanning\Scan.pdf C:\EzeScan\Scanning\Scan.xml Placing the <<S1>> value in the field will add the processed file as the attachment <ul style="list-style-type: none"> The recipients will need access to this file location too - so take care where the file has been output to.

3. Creating an Upload

3.1 EDRMS Upload

Below we will show an example of creating an Upload into the **HPE Content Manager** EDRMS.

TIP: The same order of instructions can be applied when using any of the other EDRMS connectors. Specific details may be found in the relevant Connector user guides found under the EzeScan Help Menus

Pre requisites

CREATE A JOB AND KFI

1. Create a Job, KFI and Upload
 - a) Open the jobs screen (press F6) and click on the new button
 - b) Give the job a name e.g. **HPE Content Manager Upload Test**
2. When prompted; select **Yes** to create a **KFI**
3. When prompted; select **No** to create the **Upload** (we will do this later)
4. Leave the job with the standard defaults and take note of the output folder's path

EDIT THE KFI - ADD FIELDS

1. Create three fields - **Title**, **Date Received** and **Folder** using the standard processes as set out in the **EzeScan KFI** and **HPE Content Manager User Guides** (available via the Help menu)

TIP: The folder should be a valid container in your HPE Content Manager. e.g. 08/6

RUN THE JOB AND PROCESS THE KFI

1. Either scan a document or import one using the (above) job
2. Complete the 3 fields; for example...
 - a) Title **Parking Fine INF00001**
 - b) Date..... **06/02/2017**
 - c) Folder **PROP/12345**
3. Click submit
4. Make sure that you have an output image and index file created from your Job / KFI.
For example - **Image_1.tif** and **Image_1.txt**

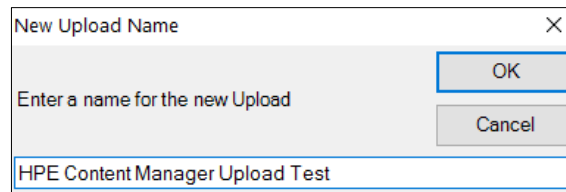
Create the Upload

NAME

1. Start the Upload Admin form by pressing **F8** whilst in the EzeScan viewer window.
2. Following the steps outlined in the [Create New Upload section](#) on page 8
3. Press the **Add** button to create a new Upload Type

TIP: if you use the same name for the Upload Type, the KFI Type and the Job Type, it will make it much easier for you to manage the linkage between the these 3 types.

- a) We have called our new Upload - **HPE Content Manager Upload Test**.

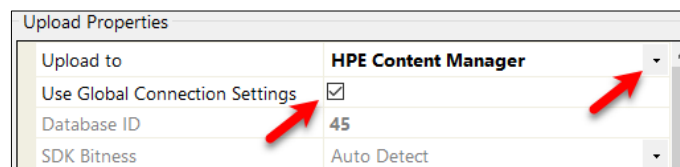


A dialog box titled "New Upload Name" with a close button (X) in the top right. It contains a text input field with the text "HPE Content Manager Upload Test". Below the input field are two buttons: "OK" and "Cancel". Above the input field is the instruction "Enter a name for the new Upload".

Figure 18 - Tip - keep the Upload name the same as your Job & KFI

SELECT THE EDRMS TO UPLOAD TO

1. Then from the Upload Admin form choose **HPE Content Manager** from the list of destination types.



A dialog box titled "Upload Properties". It contains a table with the following rows:

Upload to	HPE Content Manager
Use Global Connection Settings	<input checked="" type="checkbox"/>
Database ID	45
SDK Bitness	Auto Detect

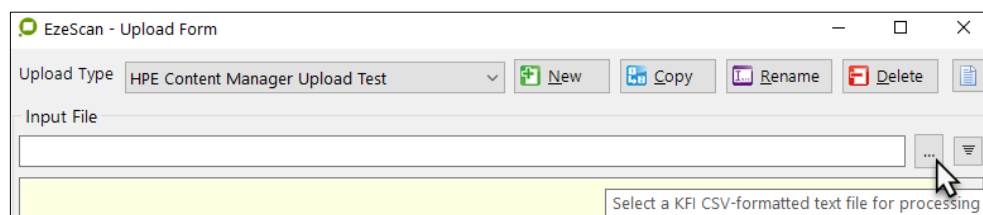
 Red arrows point to the "HPE Content Manager" dropdown, the "Use Global Connection Settings" checkbox, and the "Database ID" field.

Figure 19 - select HPE Content Manager & tick the default box

2. The next step is to select your HPE Content Manager Database.
 - a) Ticking the "Use Global Settings" box will use the default EDRMS as set in the Workstation Options. Generally the "Production" environment
 - b) If you wish to use another environment (e.g. Test) then leave the box unticked and click in the Database ID field then click the browse button [...] and when prompted select your HPE Content Manager dataset.

SELECT KFI OUTPUT FILE TO TEST AGAINST

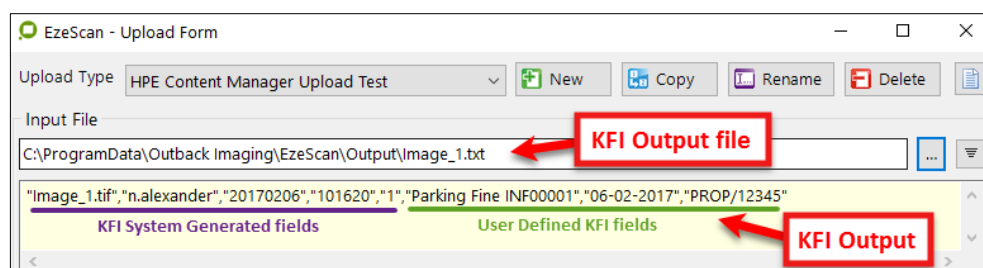
1. We need a KFI output index file test file (e.g. **Image_1.txt**) to use when testing the Upload
 - a) **Browse** and find the KFI output index file that you want to use with this Upload type.
 - The file is required because it is going to contain the KFI index field data that is going to be mapped across to HPE Content Manager properties as the file is Uploaded to HPE Content Manager.
 - b) Click on the browse button [...] and browse to the file...



A screenshot of the "EzeScan - Upload Form" window. The "Upload Type" is set to "HPE Content Manager Upload Test". Below it, there is an "Input File" field with a browse button [...]. A tooltip is visible over the browse button, stating "Select a KFI CSV-formatted text file for processing".

Figure 20 - browse for the output file

- c) The KFI output should show in the pane below.



A screenshot of the "EzeScan - Upload Form" window showing the KFI output. The "Input File" field now contains the path "C:\ProgramData\Outback Imaging\EzeScan\Output\Image_1.txt". Below the input field, there is a list of fields divided into two sections: "KFI System Generated fields" and "User Defined KFI fields". The "User Defined KFI fields" section contains a list of fields: "Image_1.tif", "n.alexander", "20170206", "101620", "1", "Parking Fine INF00001", "06-02-2017", "PROP/12345". Red arrows point to the "KFI Output file" and the "KFI Output" section.

Figure 21 - output file displays it's content

COLUMN NAMES FROM

1. The next step is to select the KFI that was used.
 - a) In this instance the KFI is called **HPE Content Manager KFI Test**
 - b) Select your respective KFI option from the “Column names from” pulldown

Upload Properties	
Upload to	HPE Content Manager
Use Global Connection Settings	<input checked="" type="checkbox"/>
Database ID	45
SDK Bitness	Auto Detect
Impersonate Login	
Container Record Type Name	Folder
Create Missing Containers	<input checked="" type="checkbox"/>
Bypass Document Upload	<input type="checkbox"/>
Attach Document To Record	<input type="checkbox"/>
Run Command	
Index File	
Column names from	HPE Content Manager Upload Test

Figure 22 - select the KFI (to facilitate mapping KFI to EDRMS mapping)

NOTE: If your KFI is using a custom output your KFI will not show here. Therefore this option should be ignored.

When a custom KFI output has been used the operator will be required to reference the index file to map to the respective EDRMS fields.

TIP: There are several key points to remember when choosing the Input Fields list box values that you want to map across to an Upload.

1. Each KFI output index file contains comma separated index field values.
2. When the KFI is using a **Default CSV Output format...**
 - a) the first 5 list fields (Field #1 to Field #5 - as shown in Figure 21) are system generated by the KFI processing code itself and contain the following...
 - filenamefield #1e.g. image1_tif
 - scanned byfield #2e.g. n.alexander
 - datefield #3e.g. 20170206
 - timefield #4e.g. 101620
 - N° of pages in documentfield #5e.g. 1
 - b) The following fields (Field #6 onwards) are the user defined KFI fields. For example (as shown in Figure 21)...
 - Titlefield #6e.g. Parking Fine INF00001
 - Date Receivedfield #7e.g. 06-02-2017
 - Folderfield #8e.g. PROP/12345
3. The Document Path is default set to the **File Path** as this contains the filename.

NOTE: If a **custom KFI** output is used this would need to be set to **field #1**.

Document Path
Value from (File Path)

Figure 23 - showing default setting for the document's path

MAPPING THE KFI FIELDS

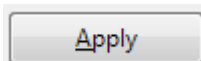
The next steps are to match the KFI fields against the HPE Content Manager Upload fields.

1. The mandatory **Record Type** should default to an existing record type.
 - a) To change this, click in the Database ID field then click the browse button [...] and select the required record type for the document
2. Match the **Title** Source (KFI) field to the corresponding mandatory (Title)Target field
3. Match the **Folder** Source (KFI) field to the corresponding (Container)Target field
4. Match the **Date Received** Source (KFI) field to the corresponding (Date Created) Target field

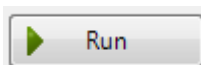
Field Mappings					
Source Field	Field Value	Target Field	Type		Mandatory
(static value)	Document	Record Type	String		<input checked="" type="checkbox"/>
Title	Parking Fine INF00001	Title	String		<input checked="" type="checkbox"/>
Folder	PROP/12345	Container	String		<input type="checkbox"/>
Date Received	06-02-2017	Date Created	Date/Time		<input type="checkbox"/>

Figure 24

5. Configuration of the job type is complete.
6. Press the **APPLY** button to save the changes.



7. You may now press the **Run** button to manually test the Upload type mapping that you have just setup.



8. EzeScan should display an **Upload Completed** message, and the document is saved into HPE Content Manager.

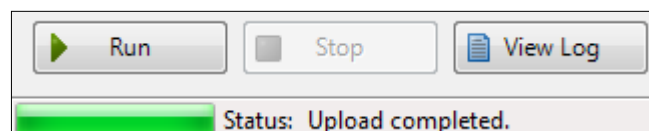


Figure 25 - Run process is succesful

- a) If the Upload shows a message **Upload completed with errors**.
 - This will usually mean that there is a mapping problem.
 - Click the View Log button to view more information on the error
9. Record in HPE Content Manager

Record Number	Title	Date Created	Container
G17/15	Parking Fine INF00001	6/02/2017	PROP/12345

Figure 26 - the new record is now in HPE Content Manager

3.2 EzeScan Archiver Upload

EzeScan Archiver is a simple web retrieval tool for storing documents and metadata. It provides a web interface to allow an operator to search and retrieve documents.

Warning: Please read the following...

- EzeScan ARCHIVER does not replace an existing EDRMS (Electronic Document Records Management System).
 - It is designed for back scanning projects or low volume storage of documents.
 - The EzeScan Archiver is designed for up to 50,000 documents (with **5 metadata fields**).
 - Anything over this will incur a decrease of performance.
 - It is also recommended to use the **Firefox web browser** for search and retrieval of documents.

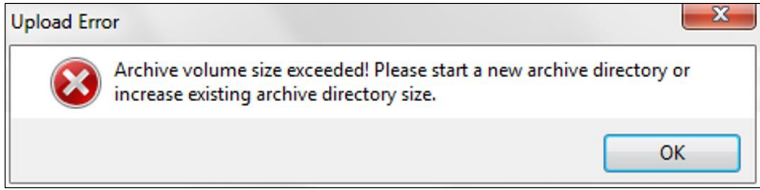
Configuring EzeScan Archiver Properties

The properties for the EzeScan Archiver Database are required to be configured. When the first document is Uploaded, the database and supporting files are created in the Disc Path folder.

Upload Properties	
Upload to	EzeScan Archiver
Archive path	C:\EzeScan\Archive\General
Use original filenames	<input checked="" type="checkbox"/>
Store index files	<input checked="" type="checkbox"/>
Custom HTML path	...
Max archive size (MB)	0
Max file count	1000

Figure 27 - EzeScan Archiver Upload (with Archive path & Default settings shown)

Upload to	This is required to be set to EzeScan Archiver
Archive Path	<p>The path of where the archive database is saved to.</p> <p>When first run EzeScan will create the database, it's supporting files and a documents folder.</p> <p>The Archive Path also supports placeholders. For example...</p> <ul style="list-style-type: none"> if the requirement is to create a new archiver database automatically at the start of every year the value could be something like <ul style="list-style-type: none"> C:\EzeScan\Archive\General\<<S3(MMYYYY)>>
Use original filenames	<ul style="list-style-type: none"> If set to Yes (default), will use the filename created from the JOB/KFI. If set to No, EzeScan Archiver will use its own file numbering method which is sequentially generated from the number 1. <p>NOTE: Cannot be changed after archive creation</p>
Store index files	<ul style="list-style-type: none"> If set to Yes (default), will save a copy of the index file with the scanned document into the documents folder. It is <u>recommended</u> to have this setting set to Yes. <ul style="list-style-type: none"> i.e. if required, it provides an easy way to upgrade or migrate the data at a later time
Custom HTML path	<p>This option allows for the creation of a customized index.html search page.</p> <ul style="list-style-type: none"> If set to yes the operator needs to supply the custom files into "C:\ProgramData\Outback Imaging\EzeScan\Archiver" <p>NOTE: Only available when creating a new archive</p>

Maximum archive size (MB)	<p>This option allows the operator to set a maximum size (MB) of the documents store in the Archiver database.</p> <p>When the document limit is met the operator will be prompted with the following message...</p>  <p>Figure 28 - Error message appears when archive volume is exceeded</p>
Max file count	<p>Limits the number of files in a single document directory and create new directories as required. Choose from...</p> <ul style="list-style-type: none"> • 1000 (Default) • 5000 • 10000 <p>This is recommended for larger size Archive stores as it will provide a small improvement on searching.</p>

Configuring EzeScan Archiver Upload Field Mappings

By default there are no target fields as there is no database to browse.

When the first document is Uploaded to EzeScan Archiver the database gets created.

NOTE: Once the EzeScan database is created the operator cannot make any changes to it (i.e. add or remove fields). If fields are required to be changed, a new database needs to be created.

1. To create the field mappings click the  button.

a) The following will display...

Field Mappings					
Source Field	Field Value	Target Field	Type	Mandatory	Max. Length
(ignore) ▾		Custom Field 1	String ▾	<input type="checkbox"/>	0

Figure 29 - this appears after clicking on the  button

2. The Target Field is the name of the field that will appear in the web retrieval screen.
 - a) Click on where it says "Custom Field 1" and rename it to respective name that is required to be viewed by the search operator. (e.g. Title)
3. Use the *Column Names From* setting to set the name of the KFI that the Upload will be using. E.g. the KFI source field value is *Title* so the Target Field will also be *Title*.
 - a) Refer to the [Index File section](#) on page 10 for more information on these settings.

Field Mappings					
Source Field	Field Value	Target Field	Type	Mandatory	Max. Length
Title ▾		Title	String ▾	<input type="checkbox"/>	0

Figure 30 - rename Custom Field 1 to required name (e.g. Title) & map to KFI field

4. Click Apply to save the changes.
5. Repeat steps 1 to 4 for any additional Fields (e.g. Date Received, From etc)
6. When complete, click OK to close the Upload screen.
7. Refer to the [Configuring a Job Type to use an Upload Type section](#) on page 40 for details on how to configure a job to use the Upload.

Viewing an EzeScan Archiver database

When a document is Uploaded into the Archive Path (e.g. C:\EzeScan\Archive\General) the following files are created...

- Resources Folder
 - archiver.js
 - ezescan_logo.png
 - jquery.js
 - progress.gif
 - styles.css
- Documents Folder
 - The Output images (e.g. Image_1.tif)
 - The Output text file (e.g. Image_1.txt)
- index.html
- store.xml
- \Documents (folder) (if specified in the Upload set-up)

The operator can double click on index.html and the following will appear in the browser (if asked to run an ActiveX control select Yes).

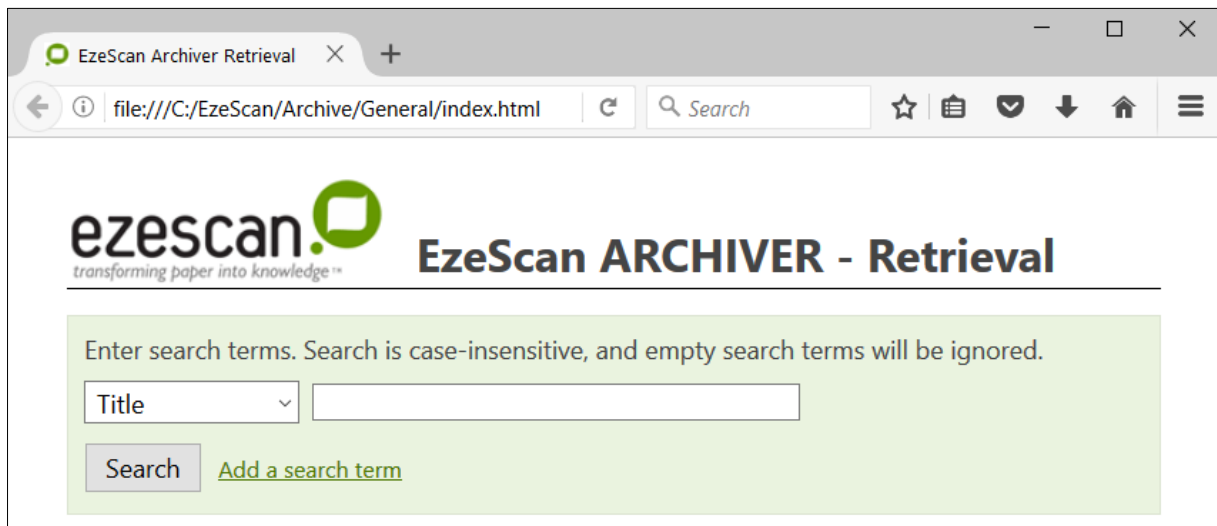


Figure 31 - the Archiver appears in the browser when the index.html is opens (Firefox shown)

TIP: The Archive database can be viewed as an http:// web link.
This would require an administrator to host the above files on a web server.
Please refer to your local administrator for more information.

The operator can then perform a search by selecting a metadata field and enter a value.

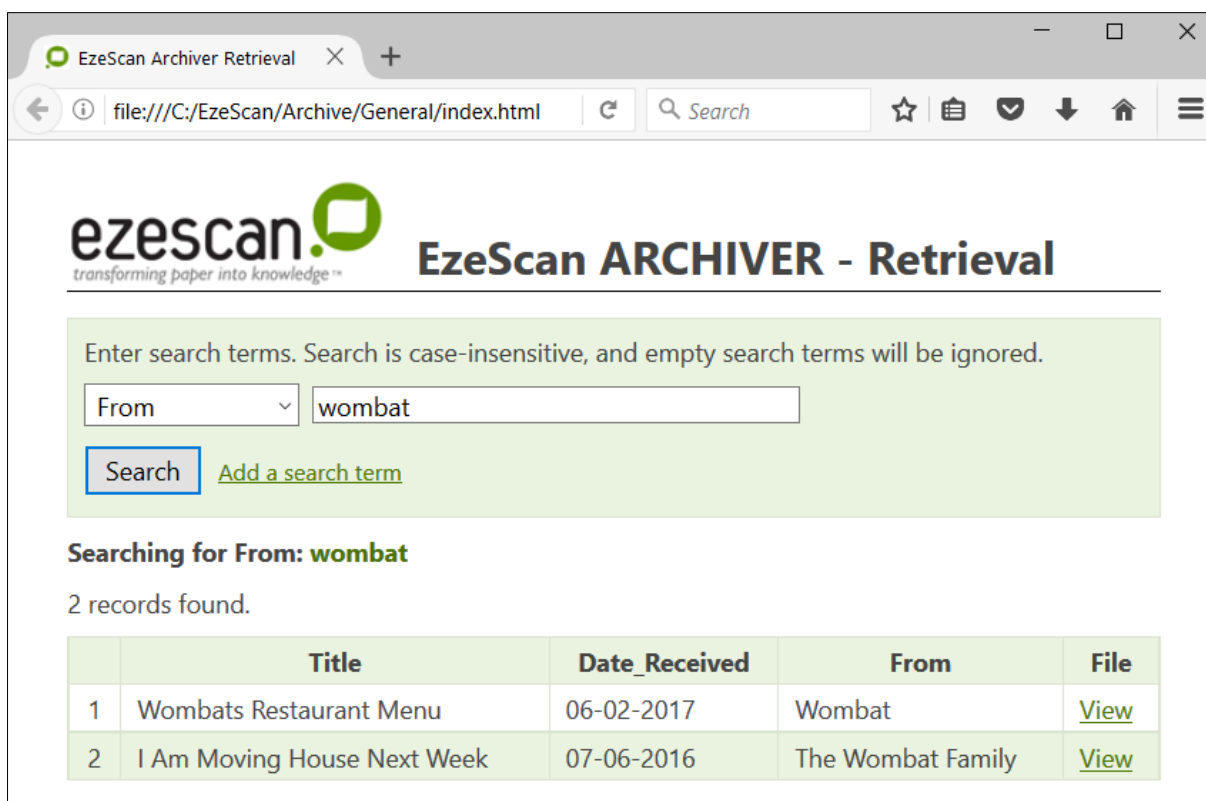


Figure 32 - searching on the "From" field using a search term of "wombat" finds 2 records

EzeScan Archiver will display the result/s.

The operator can click on the [View](#) link to view the document...



Figure 33 - viewing the 1st file in the search screen

The operator can also add more search terms by clicking on the [Add a search term](#) link.
e.g. this would allow to search on two or more fields.

3.3 ODBC Upload

NOTE: It is assumed that the operator undertaking the tasks below has access to an SQL database. An SQL database running in something like Microsoft SQL Server Management Studio will suffice. The operator must also have full rights in order to create and write to the database.

Pre requisites

CREATE AN SQL DATABASE TO USE

In order to facilitate an ODBC Upload we need to have an SQL database in which to Upload to

We will need the database to include the following:

- Database name *e.g. ezescandb*
- Table name..... *e.g. suppliers*
- Table fields *supplier_name; invoice_number & file_path*
- SQL login credentials..... *Username (e.g. sa) & Password (e.g. password)*

SQL TO CREATE TABLE IN EZESCANDB

```
CREATE TABLE [ezescandb].[dbo].[Suppliers](  
    [supplier_name] [varchar](100) NULL,  
    [invoice_number] [varchar](100) NULL,  
    [file_path] [varchar](100) NULL  
) ON [PRIMARY]
```

Finally create an ODBC Connection (e.g. System DSN = Suppliers) to the database from the ODBC Data Source Administrator in the Control Panel. Note the Data source name.

CREATE A JOB AND KFI

1. Create a Job, KFI and Upload
 - a) Open the jobs screen (press F6) and click on the new button
 - b) Give the job a name e.g. **ODBC Upload Test**
2. When prompted; select **Yes** to create a **KFI**
3. When prompted; select **No** to create the **Upload** (*we will do this later*)
4. Leave the job with the standard defaults and take note of the output folder's path

EDIT THE KFI - ADD FIELDS

1. Create two fields - **Supplier** and **Invoice Number** using the standard processes as set out in the **EzeScan KFI** (available via the Help menu)

RUN THE JOB AND PROCESS THE KFI

1. Either scan a document or import one using the (above) job
2. Complete the 2 fields; for example...
 - a) Supplier *Outback Imaging Pty Ltd*
 - b) Invoice Number..... *123456*
3. Click submit
4. Make sure that you have an output image and index file created from your Job / KFI.
For example - **Image_1.tif** and **Image_1.txt**

Create the Upload

NAME

1. Start the Upload Admin form by pressing **F8** whilst in the EzeScan viewer window.
2. Following the steps outlined in the [Create New Upload section](#) on page 8
3. Press the **Add** button to create a new Upload Type

TIP: if you use the same name for the Upload Type, the KFI Type and the Job Type, it will make it much easier for you to manage the linkage between the these 3 types.

- a) We have called our new Upload - **ODBC Upload Test**.

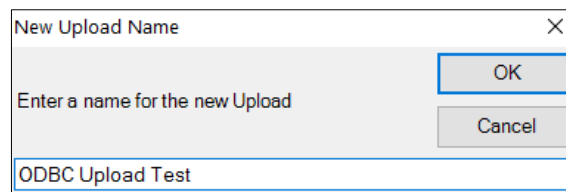



Figure 34 - Tip - keep the Upload name the same as your Job & KFI

SELECT KFI OUTPUT FILE TO TEST AGAINST

1. We need a KFI output index file test file (e.g. **Image_1.txt**) to use when testing the Upload
 - a) **Browse** and find the KFI output index file that you want to use with this Upload type.
 - The file is required because it is going to contain the KFI index field data that is going to be mapped across to the SQL database properties as the file is Uploaded.
 - b) Click on the browse button  and browse to the file...

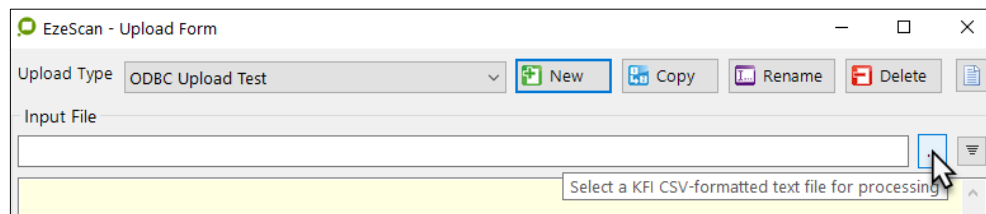


Figure 35 - browse fro the output file

- c) The KFI output should show in the pane below.

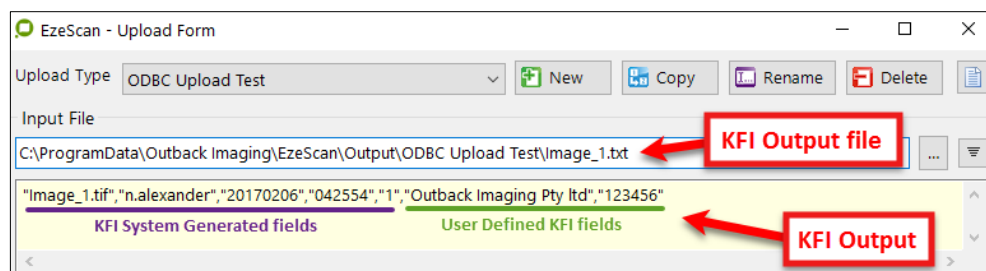


Figure 36 - output file displays it's content

COLUMN NAMES FROM

1. The next step is to select the KFI that was used.
 - a) In this instance the KFI is called **ODBC Upload Test**
 - b) Select your respective KFI option from the “Column names from” pulldown

Figure 37 - select the KFI (to facilitate mapping KFI to EDRMS mapping)

NOTE: If your KFI is using a custom output your KFI will not show here.
Therefore this option should be ignored.

TIP: There are several key points to remember when choosing the Input Fields list box values that you want to map across to an Upload.

2. Each KFI output index file contains comma separated index field values.
3. When the KFI is using a **Default CSV Output format...**
 - a) the first 5 list fields (Field #1 to Field #5 - as shown in Figure 36) are system generated by the KFI processing code itself and contain the following...
 - filenamefield #1e.g. image1_tif
 - scanned byfield #2e.g. n.alexander
 - datefield #3e.g. 20170206
 - timefield #4e.g. 042554
 - N° of pages in documentfield #5e.g. 1
 - b) The following fields (Field #6 onwards) are the user defined KFI fields.
For example (as shown in Figure 36)...
 - Supplierfield #6e.g. Outback Imaging Pty Ltd
 - Invoice Numberfield #7e.g. 123456
4. The Document Path is default set to the **File Path** as this contains the filename.

NOTE: If a **custom KFI** output is used this would need to be set to **field #1**.

Figure 38 - showing default setting for the document's path

SET-UP THE UPLOAD PROPERTIES SECTION

Complete the setting as set-out below...


Upload to	ODBC
DSN	suppliers
User	sa
Password	password
Copy to Folder	C:\EzeScan\ODBC Upload Test\Invoices
SQL Statement (more info below)	<pre>insert into suppliers (supplier_name, invoice_number, file_path) values ('<<Supplier Name>>','<<Invoice Number>>','[Output File path]\<<Supplier Name>>\<<(File Path)>>')</pre> <p>NOTE: [Output File Path] is the path as set in the Job's Output folder</p>

ABOUT THE SQL STATEMENT

The SQL Statement shown in the above table can be broken down to two components

1. The SQL commands:
`insert into suppliers (supplier_name, invoice_number, file_path) values`
2. The KFI fields:
`('<<Supplier Name>>', '<<Invoice Number>>', 'C:\ProgramData\Outback Imaging\EzeScan\Output\ODBC Upload Test\<<Supplier Name>>\<<(File Path)>>')`

CREATING THE SQL STATEMENT

1. The SQL Statement can be generated by clicking into the field and then the browse button  to display the screen shown in Figure 39.

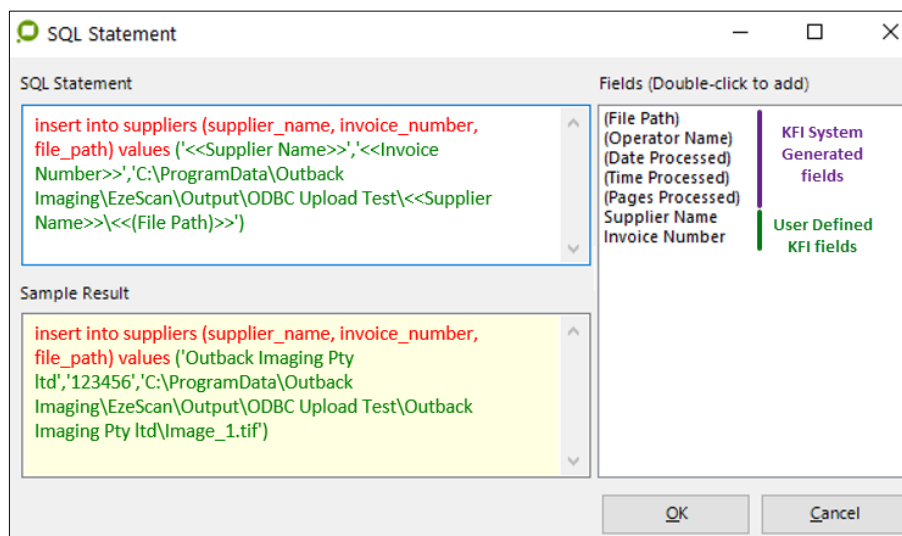
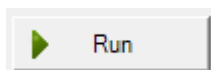


Figure 39 - Red text are SQL commands & Green text are KFI values (colour used for display purposes only)

2. The end result we know want to achieve is this...
 - a) the Supplier Name KFI field gets Uploaded to the supplier_name SQL field.
 - b) the Invoice Number KFI field gets Uploaded to the invoice_number SQL field.
 - c) the output file path gets Uploaded to the file_path SQL field.
 - A sample result is shown above in Figure 39.
3. Click **OK** to save and close the SQL Statement screen
4. Click **Apply**.

RUN A TEST UPLOAD

You may now press the **Run** button to manually test the Upload that you have just setup.



This screen will appear.

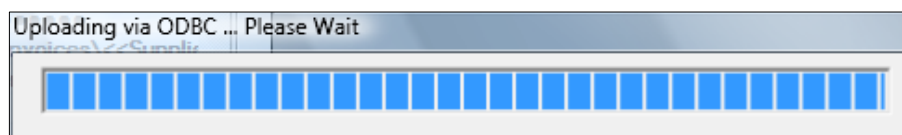


Figure 40

EzeScan should display an **Upload Completed** message, the data should be saved into the database and the file should be saved to the designated folder.

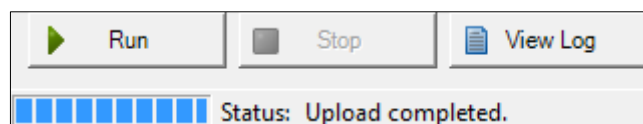


Figure 41 - success message appears at bottom LH side of screen

Running a query on the SQL database shows that a new record has been created in the Suppliers database.

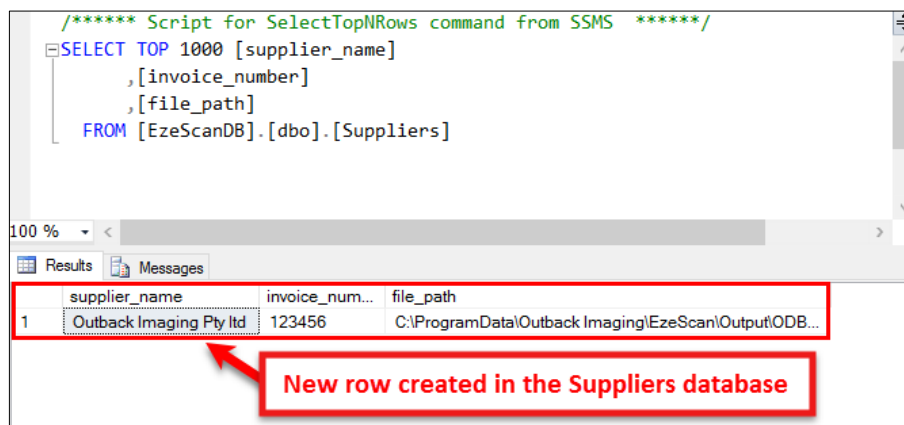


Figure 42 - run an SQL query on database to see if it loaded OK

4. Appendices

4.1 Configuring a Job Type to use an Upload Type

The Job Type used in this example is available for Download on the [EzeScan web site](http://www.ezescan.com.au).

- Login to the [EzeScan web site](http://www.ezescan.com.au) (www.ezescan.com.au) and navigate to...
- Downloads > Software Downloads > Sample Jobs > EzeScan Archiver Jobs > Archiver - Zone OCR Job
- Download the [EzeScan Archive - Zone OCR Demo.zip](#) file.



Figure 43 - Download the EzeScan - Zone OCR Demo.zip file

The Zip file contains the Job, KFI & Upload and “read me” document.

1. Unzip the downloaded file and import the [EzeScan Archiver - Zone OCR demo.cfg](#) file into EzeScan.
2. In EzeScan press **F6** to launch the Jobs Form
3. Select the [EzeScan Archiver - Zone OCR demo](#) job type which we use in this use Upload
4. Select the **Output** tab

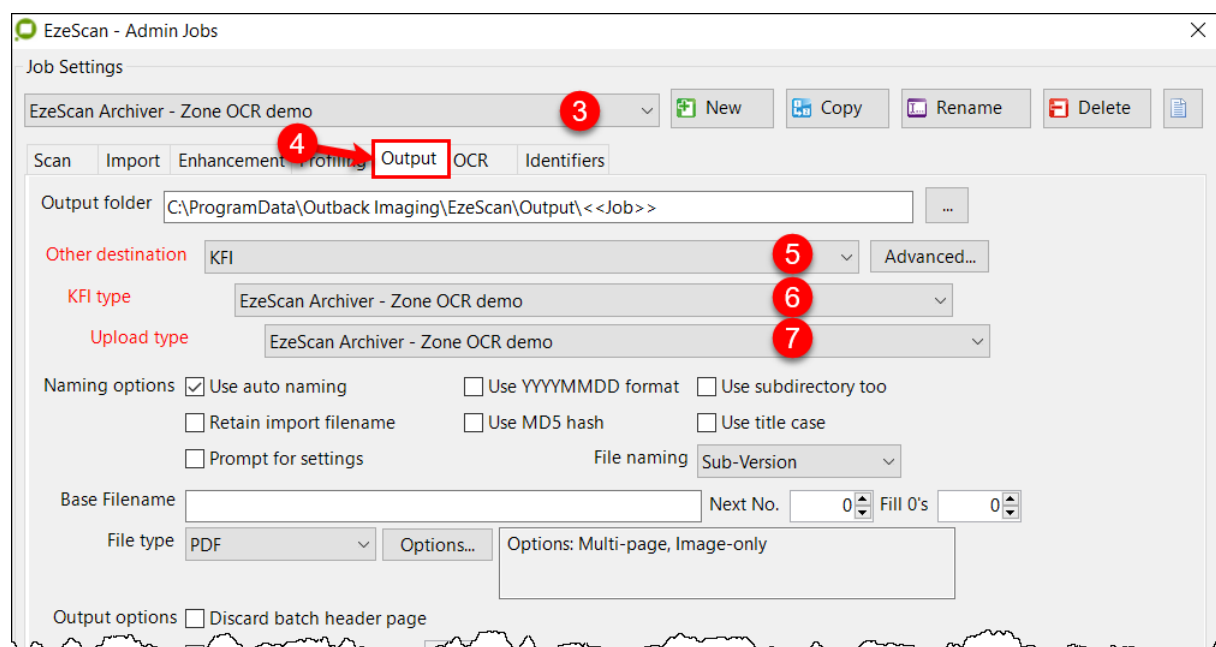



Figure 44

5. From the **Other Destination** list choose **KFI**.
6. From the **Available KFI Types** choose the [EzeScan Archiver - Zone OCR demo](#) type.
7. From the **Available Upload Types** choose the [EzeScan Archiver - Zone OCR demo](#) type.
8. Click the **Save** button to complete the setup. You are now ready to run the job.

4.2 Running the EzeScan KFI & Upload job

1. In EzeScan press **F2** to launch the Operator Actions form.
2. Then select the job type that you have configured for use with KFI. In this case it's the **EzeScan Archiver - Zone OCR demo** job type.
3. Then press the **File Import** button to acquire a batch of documents for KFI processing.
4. In this example you need to select the file called **EzeScan Archiver - Zone OCR demo.tif**.
5. Open the selected file and it is displayed in the viewer.
 - a) This example consists of a batch of 3 documents.
6. Press the **F4** button (or press ) to profile the document, the KFI form is loaded into the viewer window panel as shown in Figure 45 below.

TIP: As the name indicates; this is an OCR job and EzeScan will use a KFI template to capture the fields from specific areas on each of the "structured" documents.

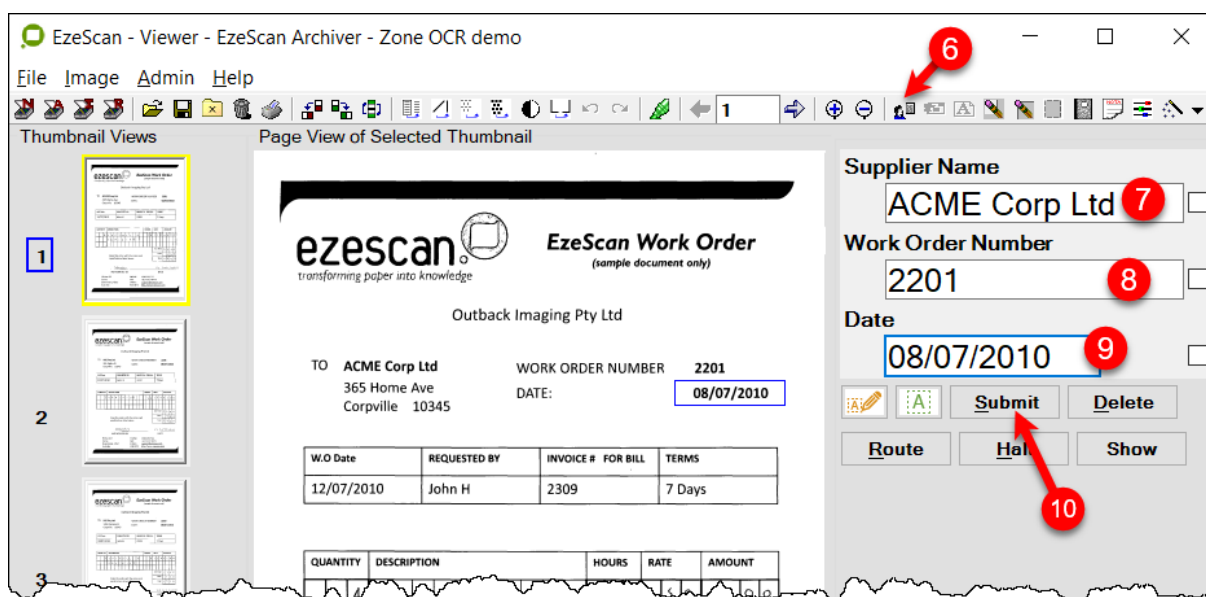


Figure 45 - the imported documents are presented to the viewer and we begin profiling the 1st one

7. In this example the OCR has picked up the **Supplier Name ACME Corp Ltd** as the value.
8. Hit the **Enter** key and the **Work Order Number 2201** will be captured
9. Hit the **Enter** key and the **Date 08/07/2010** will be captured
10. Then the operator can either press **Enter twice** or click the **Submit** button.
 - In this example EzeScan converts the file from TIF to PDF and then writes the indexes out to the KFI output index file.
 - KFI then calls Upload which opens the KFI output index file and proceeds to connect to the Upload destination transferring the file and index fields as required.
 - If the transfer to the Upload destination worked okay, the document is removed from the viewer and the next document in the batch (if any) will be selected for processing.
 - If the Upload fails for any reason, the current document will remain selected in the viewer and an error message will be displayed to the operator.
 - The process is repeated for each document in the batch.

4.3 Running an Upload as a batch task

The Upload can be run as a separate task.

This is usually done if there is a bottleneck in the PDF OCR or Upload process.

Setting the Upload to be run as a separate task means that the PDF OCR and Uploading to the respective system can be scheduled to run outside of the operator scanning / index times. (e.g. outside of business hours)

NOTE: To run an Upload as a batch task it is recommend that the **KFI** output setting **Use a single index file for all documents** is enabled.

If the Upload module is planned to perform the OCR,

- the job needs to be set to TIF
- the Upload setting Convert File Format To needs to be set.
 - Please refer to the [Run Command section](#) on page 10 for more information.

SPLIT THE JOB / KFI AND UPLOAD

To split the JOB / KFI and Upload job so Upload becomes it's own task is easily done.

Is it shown below in our example job type **EzeScan Invoice - Zone OCR**

1. Firstly we select the Upload Type on the Output Tab.

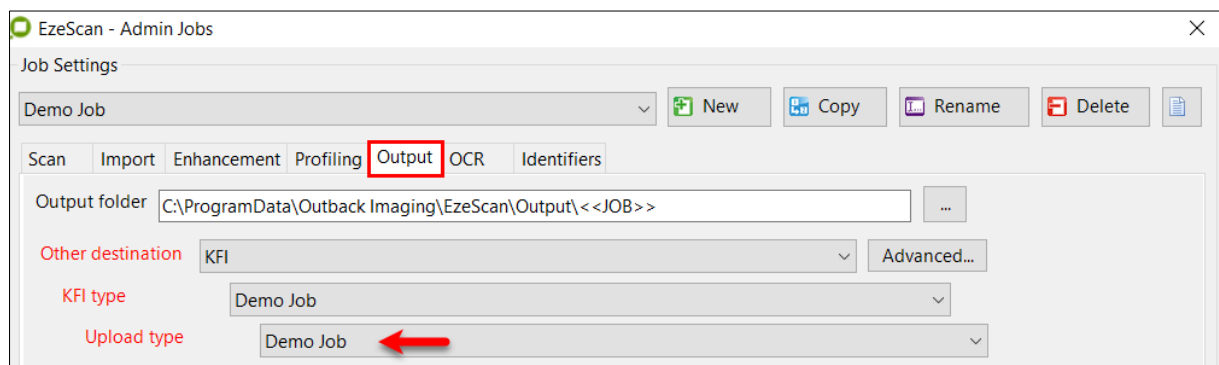


Figure 46

2. Then we set the Upload Type to **None**.

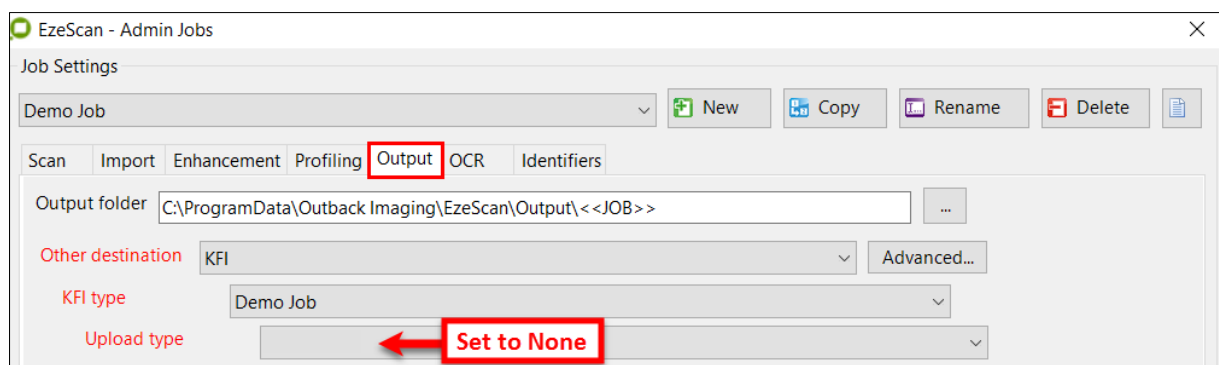


Figure 47 - set the Upload to "None"

3. Click **Save** then **Close**.

Now when this job type is run, the output index file and images will be queued up in the job type output directory.

In the Upload module, the operator needs to set the index file to be used.

4. Select **Admin** then **Upload** and browse the output index file.

e.g. this is the Input File setting.

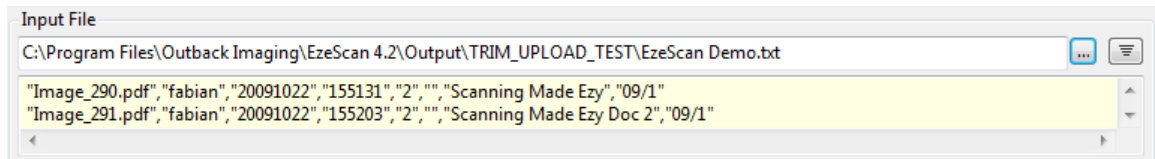


Figure 48

The Upload can now be run two ways...

1. **Manually** by running from the File Menu

- a) Select **File, Run Upload** and then click the **Run** button.

OR

- b) Select **Admin, Upload**, select the Upload job from the dropdown list and click the **Run** button.

2. **Run as a scheduled task**

- a) The task could also be automated by running as a scheduled task.
- b) A batch file needs to be created and the following commands can be used in it.

Command	Usage
-Upload	The Upload job name
-Uploadindex (single index file)	This is the name of the index file. This setting would need to have the Upload Source Type is set to file.
-Uploadindex (index file per document)	This is the name of the folder of where the documents and index files reside. This setting would need to have the Upload Source Type is set to folder and the Source Folder set to the same folder path.
-closeafter	This will close EzeScan after the Uploading has completed.
-closeotherinstances	This will close all other instances of EzeScan (if open) before the Upload task begins to run.

This is a sample command with all the options used (for a single index file).

```
C:\Program Files\Outback Imaging\EzeScan 4.2\ezescan.exe -Upload "Upload Job Name"
-Uploadindex "C:\folderpath\indexoutput.txt" -closeafter -closeotherinstances
```

4.4 Setting up an SMTP Email Notification Upload

NOTE: The processes and examples documented here have been provided to act as a guide only for setting up your own SMTP email notification Uploads.

If there is a requirement to send notification emails as part of the Upload process then the steps below need to be followed.

The first requirement is to have the SMTP component set-up on the EzeScan client and/or Server; depending on where the Uploads have been set to run.

SMTP mail settings on EzeScan Client

The screenshot shows the 'EzeScan - Workstation Options' dialog box with the 'Email' tab selected. The 'SMTP Mail Settings' section includes fields for Server, Port, Username, Password, Authentication Method, Security Type, From Name, Reply Address, and Request Receipt. The 'Routing Service Mail Settings' section includes fields for Attempt to Send Aborting Email and Send Aborting Email to Addresses. Red arrows highlight the 'Email' tab, the 'Port' field (587), and the 'Security Type' dropdown (Implicit SSL/TLS).

SMTP Mail Settings	
Server	mail.ouremailserver.com.au
Port	587
Username	username
Password	*****
Authentication Method	Auto
Security Type	Implicit SSL/TLS
From Name	username@ouremailserver.com.au
Reply Address	username@ouremailserver.com.au
Request Receipt	<input type="checkbox"/>

Routing Service Mail Settings	
Attempt to Send Aborting Email	<input type="checkbox"/>
Send Aborting Email to Addresses	

Figure 49 - Workstation options > Email tab

1. Select **Admin > Workstation Options** and click on the **Email** tab
2. Enter the hostname or IP address of the SMTP server
3. Enter the server port (default is 25)
4. Enter the login/username and password to access your SMTP mail server account
5. Select the Security Type to use when connecting to the SMTP server, default is None
6. Enter the "Senders (From)" name you want to use in the emails (e.g. John Smith)
7. Enter the "Reply" email address you want to use in the emails

Add the SMTP Email fields to your KFI

The email addresses used by the Upload to SMTP process can be configured in either the Upload or the associated KFI

- Adding it to the Upload means that all processed documents will always be sent to the same email address
- Adding it to the KFI means that the operator then has the flexibility to select who should receive the email - **recommended option**
 - There are 3 different methods which could be used for the operator to add/select an email address in the KFI field...
 - Operator manually types the email address into the field - can be an onerous task if this functionality is to be used a lot
 - A list of email addresses are added into the **Display a list of values > List** field of the Format tab (refer to the KFI User Guide for process to create a list)
 - Set up an "LDAP" connection on the KFI field which will provide the operator with a search function to select email addresses from your corporate email system.

TIP: Suggest using the LDAP function as there will be no ongoing maintenance required of the KFI field. This is the option used in the example below.

NOTE: Please refer to the **"Use an LDAP Lookup Form"** section in the **KFI User Guide** for details on how to create an LDAP Lookup Form in your associated KFI.

Add the following fields into your KFI...

Send FYI Email Notification	<ul style="list-style-type: none"> • Format tab..... Add Yes & No values to the Display a list of values > List field <ul style="list-style-type: none"> ○ make the field Mandatory
Select Send Email To address	<ul style="list-style-type: none"> • Format tab..... make the field Mandatory • EDRMS tab..... set the Alternative EDRMS to LDAP • LDAP tab configure the settings as covered in the "Use an LDAP Lookup Form" section in the KFI User Guide • Automation tab. tick <input checked="" type="checkbox"/> Automatically move to next field... box • Action tab tick <input checked="" type="checkbox"/> Enable conditional processing of field box <ul style="list-style-type: none"> ○ select Hide and skip field when "Send FYI Email Notification" field Equals No
Select Email From Address	<ul style="list-style-type: none"> • Same settings as above
Select Send CC To address	<ul style="list-style-type: none"> • Same settings as above • This is a Non-Mandatory field (in case there is no requirement to CC someone)
Any additional Email comments?	<ul style="list-style-type: none"> • This field will allow the operator to add additional details for the email. <ul style="list-style-type: none"> ○ If the field is left blank then the email will just have a blank line in it. • Format tab..... this is a non-mandatory field • Output tab click the Regex Edit button - copy & paste the value below "^(.+)\$", "<
><
>Additional information - \$1" <ul style="list-style-type: none"> ○ This will add any value added to this field into a new line in the email (prefaced with Additional information -) ○ This will <u>not</u> add an additional line to the email if this field is left blank • Automation tab. tick <input checked="" type="checkbox"/> Automatically move to next field... box • Action tab tick <input checked="" type="checkbox"/> Enable conditional processing of field box <ul style="list-style-type: none"> ○ select Hide and skip field when "Send FYI Email Notification" field Equals No

Template EDRMS Fields Groups Output Viewer Exceptions		
Fields		
	Field Name	Default Value (or list of values)
1	Folder/Container	
2	Title	
3	Date Document Written	
4	Date Document Received	
5	Author	
6	Author Name	
7	Notes	
8	Send FYI Email Notification	"Yes";"No"
9	Select Send Email To address	
10	Select Email From Address	
11	Select Send CC To address	
12	Any additional Email comments?	

New fields added
for SMTP emails

Figure 50 - Example of additional fields for use in SMTP email notifications

Creating the SMTP Upload

EMAIL BODY CREATED USING "PLAIN TEXT"

EzeScan - Upload Form

Upload Type: Sample SMTP Emails Upload

Input File:

Upload Properties

Upload to: SMTP

Server: 25

User:

Password:

Authentication Method: Auto

Security Type: None

Attach Document: ☐

Run Command

Run Pre Upload Application

Run Post Upload Application

Application State: Hide

Index File

Column names from: HPE CM - Simple Job with Email notifi...

Index File Number: 1

Document Path

Value from: (Output File Name) Static value

Field Mappings

Source Field	Field Value	Target Field	Type
(static value)	New correspondence - FYI	Subject	String
Select Send Email To address		To	String
Select Send CC To address		CC	String
(static value)	The attached correspondence was rec...	Message Body Text	String
Select Email From Address		From	String
(static value)	<<S1>>	Attachments	String
(ignore)		BCC	String
(ignore)		Message Body HTML	String
(ignore)		Reply To	String
(ignore)		Read Receipt	Boolean

Figure 51 - Sample SMTP Emails Upload

1. Create a new Upload (in this example it's called **Sample SMTP Emails**)
2. Select **Upload to > SMTP**
3. Select the KFI which the column names will get their "Source Field" values from
4. Map the Source Fields to the Target Fields (using either static or KFI field values):

Source Field	Field Value	Target Field	Comments
(static value)	New Correspondence - FYI	Subject	See a) below
Select Send Email To address		To	See b) below
Select Send Email To address		CC	See b) below
(static value)	The attached corresponde...	Message Body Text	See c) below
Select from Email Address		From	See b) below
(static value)	<<S1>>	Attachments	See d) below

Details of the Upload Mapping

- a) This text is what will appear in the email “Subject” line.
 - You could use free text as shown above or you could select a KFI field (e.g. Title)
 - You could also use multiple fields such as Title and Date Received (set as static value)
 - For example based on the KFI shown in Figure 50 it would be <<IF7>> received <<IF9>>
- b) This will take the value from the KFI field.
 - If the KFI field is blank (e.g. “Select Send Email To address” and/or “Select from Email Address”) then the Upload will then skip this part of the Upload.
- c) The message body needs to be constructed so it is easy to understand therefore consideration needs to be given in its development. It should be clear, concise and easy to understand (refer to Figure 52 for an example of the email).

TIP: It probably easier to create the email in MS Word or Notepad then paste it into the Upload field when finished editing.

NOTE: This example is using the “Message Body Text” option which will create the email body with plain text. If you need to “format” the body with coloured fonts, document links, tables etc then you will need to use the “Message Body HTML” option as outlined on page .

- To create a line break (new paragraph) you must use this value at the end of the line <
>
 - Using 2 of these will give 2 line breaks <
><
> which was used in Figure 52.
- To use a KFI field you must add 5 to the field number and use <<IFn>> instead of <<Fn>>
 - In this example
 - **Date Received** <<F4>> is <<IF9>>
 - **Authors Name** <<F6>> is <<IF11>>
 - **Additional Information** <<F12>> is <<IF17>>
 - The text used in the example used in Figure 52 is shown below
 - It is important that the text is one continuous string as shown in the 2nd box below...

How it looks in the editor (MS Word/Notepad)...

The attached correspondence was received on <<IF9>> from <<IF11>> and processed by the Information Management Team.<<IF17>>
<
><
>
This email has been sent to you as the correspondence may be of interest to you.
<
><
>
The correspondence has also been forwarded to the appropriate department for action.
<
><
>
regards,
<
>
Information Management
<
><
>
There is no need to reply to this email

Table 1 - Plain text email body completed but still needs to be finished off as shown below

How it needs to look before copy & paste into the Upload field...

The attached correspondence was received on <<IF9>> from <<IF11>> and processed by the Information Management Team.<<IF17>><
><
>This email has been sent to you as the correspondence may be of interest to you.<
><
>The correspondence has also been forwarded to the appropriate department for action.<
><
>regards,<
>Information Management<
><
>There is no need to reply to this email

Table 2 - Plain text email body now ready to be pasted into the Upload Target field

d) **<<S1>>** is the filename created by the process and will attach it to the email.

- As this email body is “plain text” you cannot use document (hyper)links but you can if using the **Message Body HTML** option (see below) instead of **Message Body HTML** as used in this example

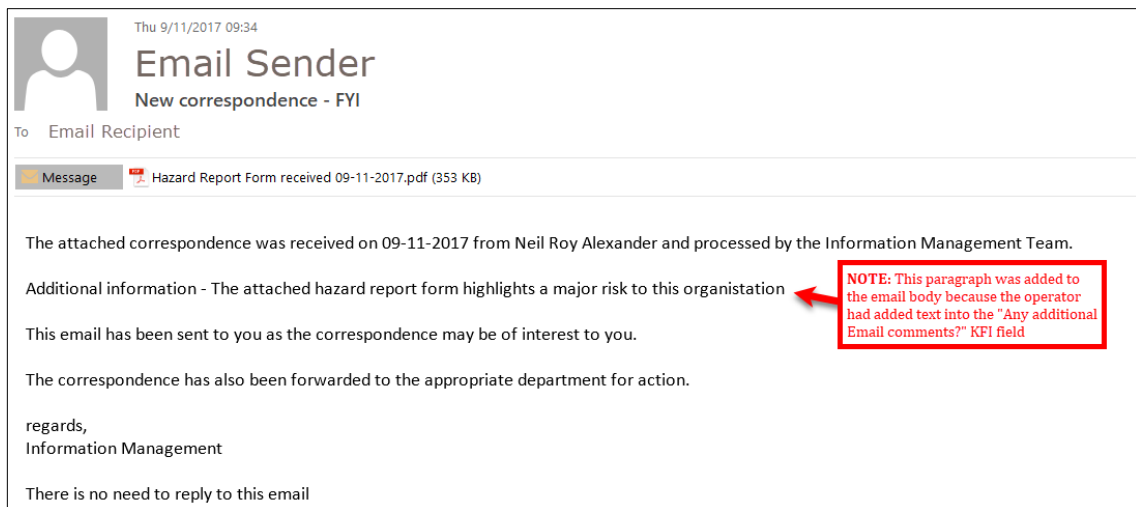


Figure 52 - Example of an email sent by the SMTP Email Upload (plain text email)

EMAIL BODY CREATED USING “HTML”

The process for creating the Upload is exactly the same as outlined in the previous section but the Upload Target field will be **Email Body HTML** instead of **Email Body Text**

Warning: Even though it may be nice to use the HTML option for the email body text you must have someone within your organisation who knows how to create and manage the HTML code.

In this example we will use the same email body as used in the previous example but we will send the email with some formatting along with a document hyperlink and no attachment.

- This would need to rely on the “output location” of the document
 - i.e. it is saved to a location where the receiver will also be able to access it
 - they have read access (at minimum) to the network folder where it is saved)
- If the document is Uploaded to an EDRMS then a hyperlink to the document in the EDRMS could be sent - *only if the EDRMS supports that functionality*

The same KFI may be used **but** the Regex on the Output tab of the “Any additional email comments?” field must be changed to **"^(.+)\$", "<p>Additional information - \$1</p>**

HTML (Hypertext Markup Language) uses tags as a means to “mark-up” a web page. This example is using very basic HTML to create the text for the email body and has not used a CSS (Cascading Style Sheet). The HTML tags used in this example are:

<body>	Start of the body of text	</body>	End of the body of text
	Start of font used in the body		End of font style of text
	Start of colour of specific text (text is blue)		End of colour of specific text
	Start of colour of specific text (text is red)		End of colour of specific text
<p>	Start of a paragraph	</p>	End of a paragraph

	Line break		No </BR> is required here
	Start of bolded text		End of bolded text
<i>	Turns text into italics	</i>	End of italics
	Web link - link to the field - <<S1>> used		End of web link

TIP: Using an HTML editor to create your email body will make it easier to build and format the text to meet your corporate design standards **but** you cannot just copy and paste it into the Upload field you will need to do a bit more editing just like shown Table 4 on page 49 (below).

How it looks in the editor ...

```
<body>
<span style="font-family:Arial">
  <span style="color:#0000ff">
    <p>New correspondence has been received and processed by the Information Management Team and this
    email has been sent to you as the correspondence may be of interest to you.</p><<IF17>>
    <p>Access the correspondence using this <a href="<<S1>>"><strong>link</strong></a>.</p>
    <p>The correspondence has also been forwarded to the appropriate department for
    action.</p><p>regards,<br><strong>Information Management</strong></p>
    <p><i><span style="color:#ff0000">There is no need to reply to this email</i></span></p>
  </span>
</span>
</body>
```

Table 3 - HTML formatted email body completed but still needs to be finished off as shown below

How it needs to look before copy & paste into the Upload field...

```
<body><span style="font-family:Arial"><span style="color:#0000ff"><p>New correspondence has been
received and processed by the Information Management Team and this email has been sent to you as the
correspondence may be of interest to you.</p><<IF17>><p>Access the correspondence using this <a
href="<<S1>>"><strong>link</strong></a>.</p><p>The correspondence has also been forwarded to the
appropriate department for action.</p><p>regards,<br><strong>Information
Management</strong></p><p><i><span style="color:#ff0000">There is no need to reply to this
email</i></span></p></span></body>
```

Table 4 - HTML formatted email body now ready to be pasted into the Upload Target field

NOTE: The hyperlink shown in this example is using the file name & filepath <<S1>> of the processed document. This will naturally change if using a hyperlink to a document saved to an EDRMS (if the EDRMS has this functionality).

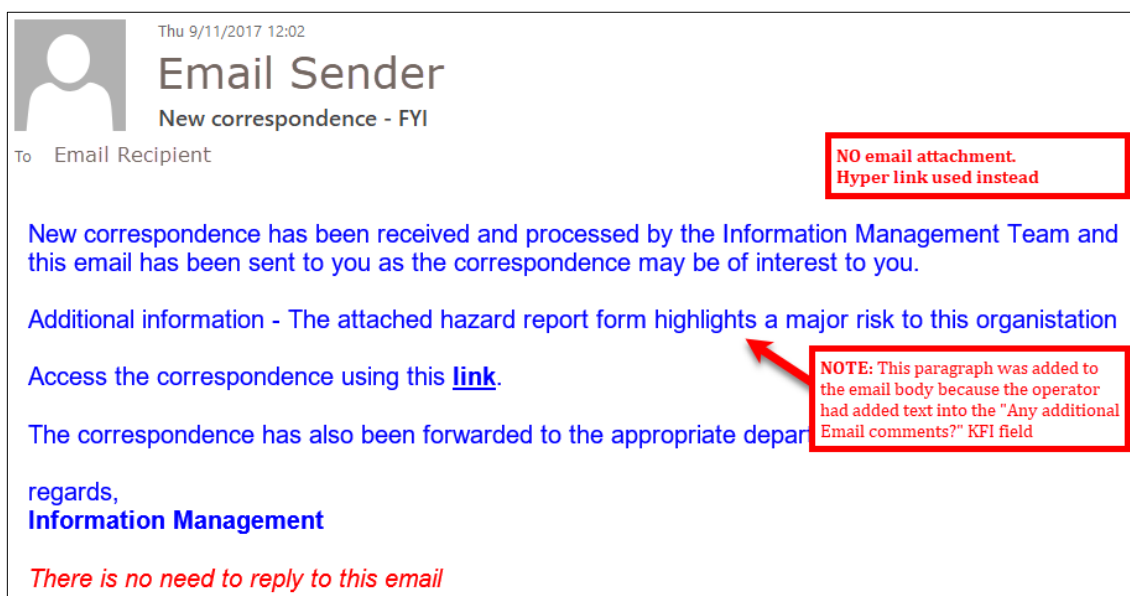


Figure 53 - Example of an email sent by the SMTP Email Upload (HTML text email)

4.5 Upload Placeholders

An EzeScan Upload Placeholder is a value that is temporarily stored when EzeScan is processing a document.

Standard Placeholders

Below are the Placeholders that can be used in the Upload module.

<<FILE>>	To pass the output file path use <<FILE>>
<<UPLOADINDEXFILE>>	<p>To access the index file name. This can be utilised in the following ways.</p> <p><<UPLOADINDEXFILE(PATH)>> - Full path</p> <p><<UPLOADINDEXFILE(NAME)>> - File name including extension</p> <p><<UPLOADINDEXFILE(BASE)>> - File name without extension</p> <p><<UPLOADINDEXFILE(EXT)>> - Just the extension</p> <p><<UPLOADINDEXFILE(-EXT)>> - The full path without the extension</p>
<<IF>>	<p>- This is the index file field number; for example...</p> <p><<IF1>> = First field in output file</p> <p><<IF2>> = Second field in output file</p> <ul style="list-style-type: none"> • These placeholders can be very valuable for when need to combine multiple KFI values at the Upload stage. • It also eliminates the need to create additional KFI fields to combine them during the KFI process.
<<DOCBLOBDATA>>	<p>The is the binary data used for when Uploading BLOB values into an ODBC database.</p> <ul style="list-style-type: none"> • Used with the Upload to ODBC connector only.

Calculated Placeholders

To add two numeric fields in Upload.

<<=IF6+IF7>>

Subtract (-), Multiply (×), and divide (/) are also supported.

Prefix calculations with [0.00] to ensure always 2 decimal places.

<<=[0.00]F1*F2>>

NOTE: Only numeric field values are supported and empty field values are treated as 0 in equations.

TIP: System placeholders can also be used. Please refer to the **System Placeholders** section in the **Appendices of the EzeScan User Guide**