KYOCERA NET MANAGER

ADVANCED OCR & WORKFLOW IMPLEMENTATION GUIDE

KYOCERA
Document Solutions

KNM Advanced OCR & Workflow implementation

This document will explain integration features of ScannerVision with KNM.

1. Prerequisite
   ScannerVision version has to be equal or higher than 6.6.0.335. KNM version has to be equal or higher than 5.2.

2. Overview
   ScannerVision provides integration with KNM with a new feature called XML Data Import. XML Data Import allows ScannerVision to read metadata sent in a folder from KNM. Note that XML Data Import is not a dedicated feature for KNM. It can be utilized for other solutions as well.

3. How it works
   XML Data Import allows importing XML files containing metadata which are sent along with a scanned document in a folder. Following diagram illustrates how this feature works with KNM.

4.
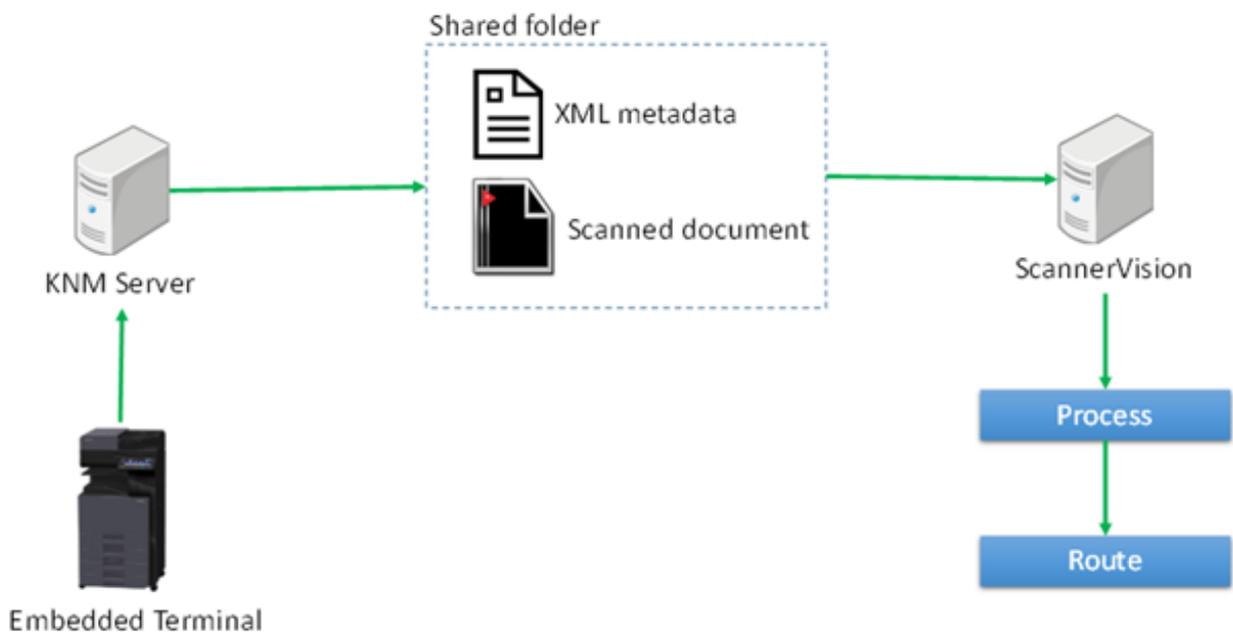
Firs, the user scans document from Embedded Terminal. When scanning, he can also add metadata if you configure scan buttons via Terminal Action. Then the document and metadata are sent through KNM server to a shared folder. ScannerVision monitors this folder and reads XML metadata, then goes to processing and routing routines.

The metadata sent from KNM can be mapped by using XML Data Import functionality so that the metadata can be utilized by ScannerVision. A sample metadata file can be imported to ScannerVision so that user can pick up

metadata which he wants to utilize later as shown below.

5. Example of usage with KNM Terminal Manager
This chapter will show an example of configuration on how this integration feature can be utilized. In this scenario, end user will scan a document from KNM Embedded Terminal where he has to choose the document type of scanned document. Then the scanned document will be automatically routed by ScannerVision to a folder based on document type.

First, create a Code Book called "Document type" from *Settings > Code Book* from KNM. Create a new code list called "Document type" and enter four type of documents; Invoice, Customer info, Ticket and Other as shown below.

Then, from *Settings > Terminal Actions*, create a new Easy Scan node and name it "ScanToFolder." In Destination setting, set *Type* as Folder and destination folder to a shared folder.

Go to *Parameter* setting and select *Code book* as Type and also select *Code book* "Document type" created before. Configure this value as "Required" so that this metadata will always be included. In addition, add *Reference* from *Advanced* tab so that later, this parameter can be reference.


Scan from Embedded Terminal once to acquire a sample XML metadata file. The XML file generated from KNM includes a field called Document type and the actual metadata and reference value is also included as shown below.

```
        <code>1205</code>
    </field>
  - <field>
        <name>Size</name>
        <reference>scan.size</reference>
        <value>Automatic</value>
        <code>1301</code>
    </field>
  - <field>
        <name>Document type</name>
        <reference>documenttype</reference>
        <value/>
        <code>Invoice</code>
    </field>
```

Next, go to ScannerVision admin utility and create a Template. Go to *Capture Settings* and configure Hot Folder settings. The folder should be the same folder as the one configured in KNM.
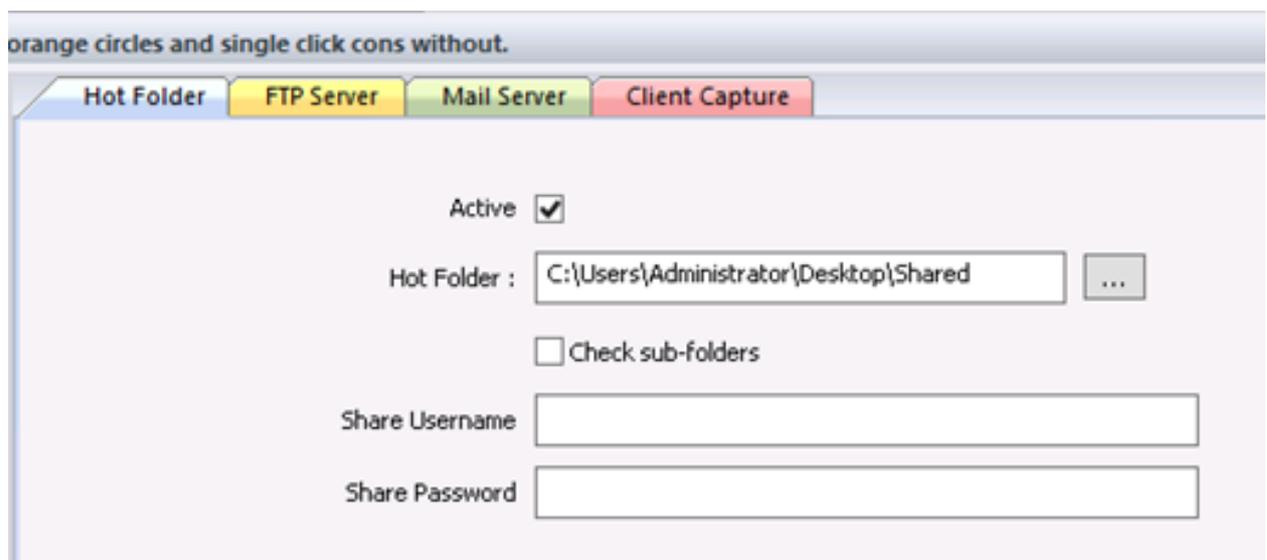
From XML Data Import, import the XML metadata file acquired before from KNM. It will list the XML file structure in the left pane. The element you are picking up as a metadata can be designated using XPath expression and named "Tag Name." This tag will be used later to route the document in the right destination. In this example, Xpath Expression is configured as "./data/fields/field[reference='documenttype']/code. ScannerVision will pick up document type value where reference in field is "documenttype".

Xml Data Import

☑ Enabled

File name: C:\Users\Administrator\Desktop\1_2015-06-19_03-00-23.xml

Xml Nodes

▲ <field>
  <name> Original Image
  <reference> scan.originalImage
  <value> Text + Photo
  <code> 1001
▲ <field>
  <name> Original Orientation
  <reference> scan.originalOrientation
  <value> Top Edge on Top
  <code> 1101
▲ <field>
  <name> Density
  <reference> scan.density
  <value> Normal
  <code> 1205
▲ <field>
  <name> Size
  <reference> scan.size
  <value> Automatic
  <code> 1301
▲ <field>
  <name> Document type
  <reference> documenttype
  <value>
  <code> Invoice

Mappings

Description	XML_CODE
XPath Expression	./data/fields/field[reference='documenttype']/code
Tag Name	DOCUMENTTYPE
Sample value	Invoice

XPath Expression Results

From *Document Store Settings* drag and drop File System to the right pane.

Connector settings

☑ Store template metadata

Available connectors

File System

Dropbox

Connectors to execute

Configure

☑ **File System**

Instance name

⌄ Conditions

⌄ Settings

Configure the settings. In Share/Drive & Folder Name, enter a folder location with [DOCUMENTTYPE] configured before as shown below:

Settings is done. When you go to Embedded Terminal and select *ScanToFolder*, you will be required to enter document type before scanning. The documents will be stored in the folder according to document type as shown below. Folder is automatically created if it does not exist.