

ADVANCED OCR & WORKFLOW IMPLEMENTATION GUIDE





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.



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.

Xml Data Import

Enabled				
File name:	C:\Users\Administrator\Desktop\1_2015-06-18_08-31-34.xml			
Xml Nodes			Mappings	
⊿ <fie< td=""><td>eld></td><td>*</td><td></td><td>_</td></fie<>	eld>	*		_
	<name> Original Image</name>		Description XML_CODE	
	<reference> scan.originalImage</reference>		XPath Expression //data/fields/field/code	
	<value> Text + Photo</value>		Tao Name DOCUMENTTYPE	
	<code> 1001</code>			
⊿ <fie< td=""><td>eld></td><td></td><td>Sample value Invoice</td><td></td></fie<>	eld>		Sample value Invoice	
	<name> Original Orientation</name>			
	<reference> scan.originalOrientation</reference>			
	<value> Top Edge on Top</value>			
	<code> 1101</code>			
⊿ <fie< td=""><td>eld></td><td></td><td></td><td></td></fie<>	eld>			
	<name> Density</name>			
	<reference> scan.density</reference>			
	<value> Normal</value>			
	<code> 1205</code>			
∡ <fie< td=""><td>eld></td><td></td><td></td><td></td></fie<>	eld>			
	<name> Size</name>			
	<reference> scan.size</reference>			
	<value> Automatic</value>			
	<code> 1301</code>			
∡ <fie< td=""><td>eld></td><td></td><td></td><td></td></fie<>	eld>			
	<name> Document type</name>	-	XPath Expression Results	
	<reference></reference>			
	<value></value>			
	<code> Invoice</code>			
4 efflace			1	

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.

III Code Books	
🕂 New code list 🥒 Edit 🛛 🗶 🛛	Delete 🕑 Refresh Search 🔎
Title	Items
Document type	Invoice, Customer info, Ticket, Other

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.

Oestination	×			
Type: *	Folder 🔻			
Filename template: *	%username%_%timestamp%			
	Parameters: %username%, %timestamp%, %originalSubject%			
Title:				
Attach metadata file:	Attach metadata file: 🗹			
⁴ Parameters				
Parameters: %username%, %timestamp%, %originalSubject%				
Destination folder: *	C:\Users\Administrator\Desktop\Shared			
P Advanced Expand				
	Save Cancel			

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.

🗇 Parameter	×
Title: *	Document type
Type: *	Code book 🔻
Code Book: *	Document type 🔹
Default value:	Invoice 🔻
Required:	✓
Prohibit change of value:	
▲ Advanced	
Reference:	documenttype
	Save Cancel

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.

```
</te>
```

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.

5	orange circles and single click cons without.						
	Hot Folder FTP Server Mail Server Client Capture						
	Active 🗸						
	Hot Folder : C:\Users\Administrator\Desktop\Shared						
	Check sub-folders						
	Share Username						
	Share Password						

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 In	nport			
Enabled				
File name:	C:\Users\Administrator\Desktop\1_2015-06-19_03-00-23.xml			
Xml Nodes			Mappings	
⊿ <fie< th=""><th>łd></th><th>٠</th><th></th><th></th></fie<>	łd>	٠		
	<name> Original Image</name>		Description	XML_CODE
	<reference> scan.originalImage</reference>		XPath Expression	/data/fields/field[reference='documenttype']/code
	<value> Text + Photo</value>		Tag Name	DOCUMENTTYPE
	<code> 1001</code>		Samala value	Invision
⊿ <fie< th=""><th>ld></th><th></th><th>Sample value</th><th>invoice</th></fie<>	ld>		Sample value	invoice
	<name> Original Orientation</name>			
	<reference> scan.originalOrientation</reference>			
	<value> Top Edge on Top</value>			
	<code> 1101</code>			
⊿ <fie< th=""><th>ld></th><th></th><th></th><th></th></fie<>	ld>			
	<name> Density</name>			
	<reference> scan.density</reference>			
	<value> Normal</value>			
	<code> 1205</code>			
⊿ <fie< th=""><th>ld></th><th></th><th></th><th></th></fie<>	ld>			
	<name> Size</name>			
	<reference> scan.size</reference>			
	<value> Automatic</value>			
	<code> 1301</code>			
⊿ <fie< th=""><th>ld></th><th></th><th></th><th></th></fie<>	ld>			
	<name> Document type</name>	-	XPath Expression Re	sults
	<reference> documenttype</reference>			
	<value></value>			
	<code> Invoice</code>			

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



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

📧 Windows File System Connector Setup 📃 🗖 🗙						
Destination						
Share/Drive & Folder Name						
\\GSSE-01\Shared\[DOCUMENTTYPE] []						
File Name						
[DOCUMENTTYPE]_[YYYY][MM][DD]_[HH24][NN][SS] []						
Share Credentials Login Name [] Password []						
If the destination exists Overwrite Append Abort Operation WARNING: Characters \/:*?" <> are not allowed in file names, they will be replaced with "~"						
Save Cancel						

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.

👪 l ⊋ 👪 = l		Shared		x
File Home Share	View			~ Q
🔄 🐵 👻 🕆 퉬 🕨 Sh	ared	v	C Search Shared	9
☆ Favorites	Name	Date modified	Туре	Size
Desktop	鷆 Customer info	6/22/2015 7:31 AM	File folder	
〕 Downloads	鷆 Invoice	6/22/2015 7:31 AM	File folder	
💹 Recent places	퉬 Other	6/22/2015 7:32 AM	File folder	
	鷆 Ticket	6/22/2015 7:32 AM	File folder	
🌉 This PC				
🗣 Network				