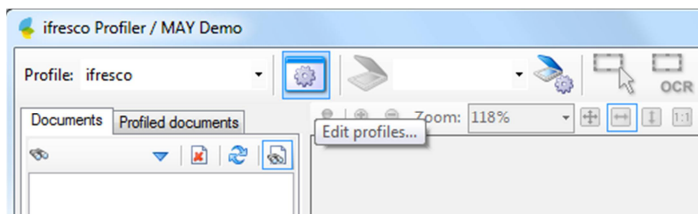


ifresco Profiler – incl. demo plugin – configuration & usage

Requirement: Installation of the content model with the „may:sapDocument“ document type.

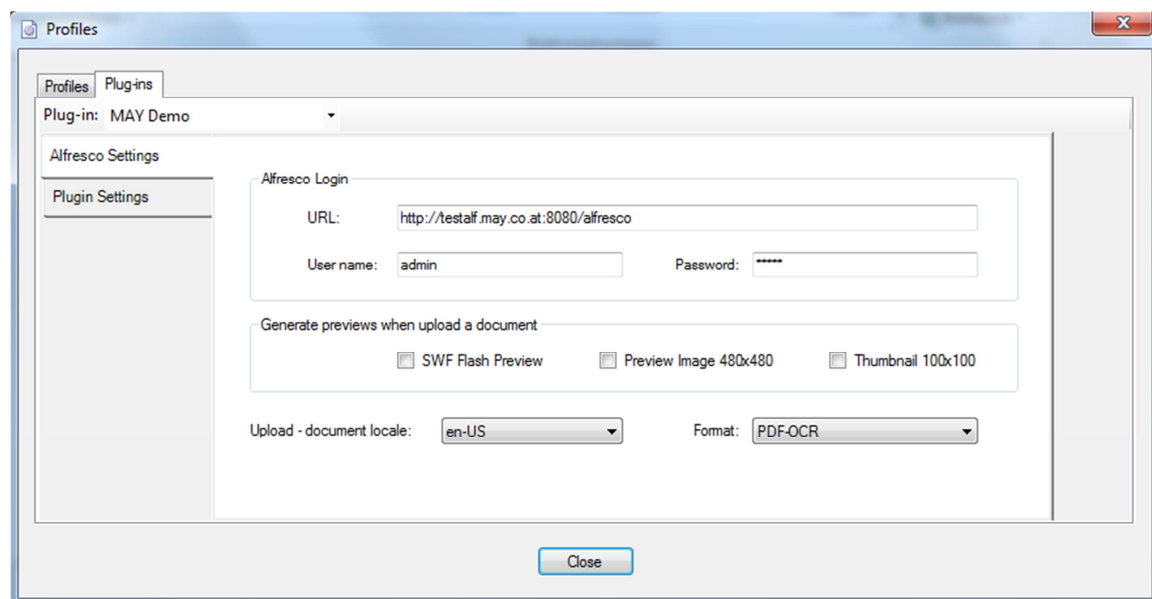
- 1.) Installation ifresco profiler base software
<http://www.may.co.at/webrr/respfile.php?file=MAYComp/Current/RO/ifrescoProfiler.zip>
- 2.) Installation ifresco demo plugin
http://www.may.co.at/webrr/respfile.php?file=MAYComp/Current/RO/ifresco_Demo_plugin.zip
http://www.may.co.at/webrr/respfile.php?file=MAYComp/Current/RO/ifresco_Profiler_Demo_Addon.zip
- 3.) Start of the application / call of the configuration / settings – out of the application with the key-combination „ATL+CTRL+A“ – Edit profiles



Settings – Demo plugin

Choose the “May Demo” plugin in the plug-in tab.

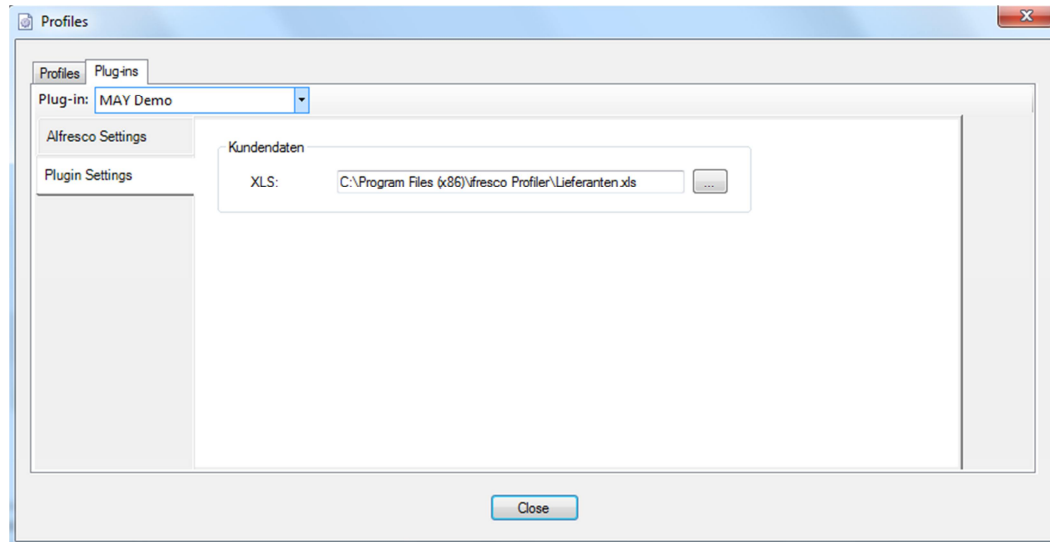
Configure Alfresco URL, User und password, if the documents should be uploaded as searchable PDF choose PDF-OCR. OCR configuration see „Profile / OCR Settings“



Alfresco Demoserver with the content model installed:

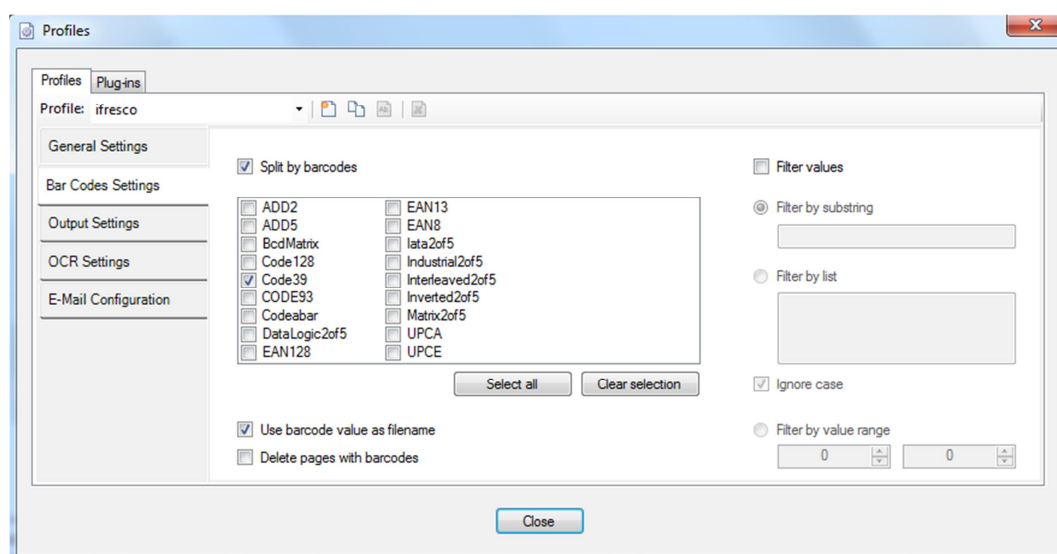
- <http://testalf.may.co.at:8080/alfresco>
- admin / admin

The plugin also installs a XLS file which is used for the lookup values of the suppliers, which can be searched and chosen at the document profile.



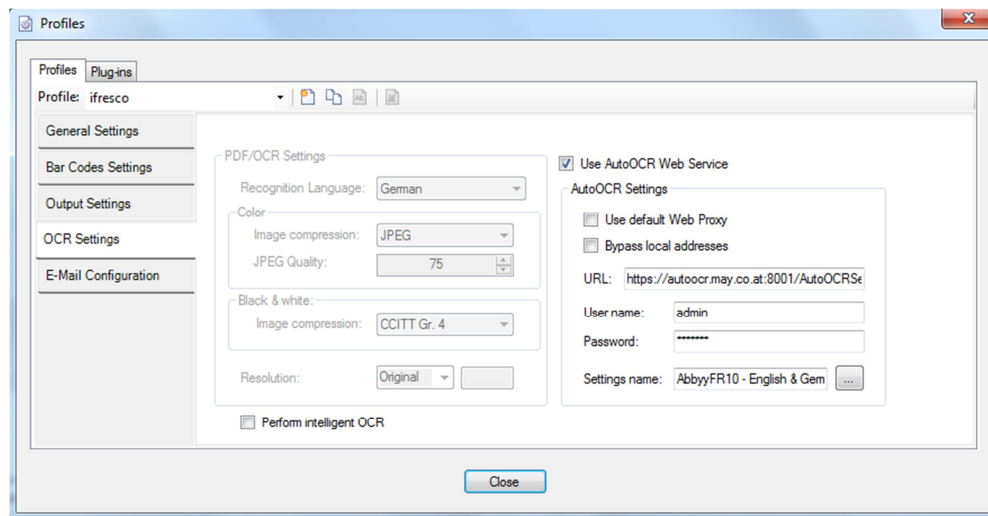
62	92817 ELEKONTA Marek GmbH & Co.KG	Weinstrasse 1/20	Stuttgart		
63	92827 Elektro B-Markt Hausgeräte HandelsGmbH	Weinstrasse 1/21	Aach		
64	92837 element 5 - a digital river company	Weinstrasse 1/22	London		
65	92847 Electric Paper GmbH	Weinstrasse 1/23	Paris		
66	92857 Elfogro GmbH	Weinstrasse 1/24	1010 Wien		
67	92867 Elektro Gönner KG	Weinstrasse 1/25	Berlin		
68	1035 Sommer GmbH	Bäckerstr. 198	86849 Dessau		
69	1861 Neotech GmbH	Weinstrasse 1/26	67566 Weilerbach		
70	4711 ALSO Austria GmbH	Industriestrasse	2301 Groß-Enzersdorf		
71	4712 Tech Data Österreich GmbH	Wienerbergstrasse	1120 Wien		
72	4713 Ingram Micro GmbH	Guglgasse 7-9	1030 Wien		
73					
74					

Bar Codes Settings



With these settings the demo invoices can be automatically splitted and the barcode value will be used as document name.

OCR Settings



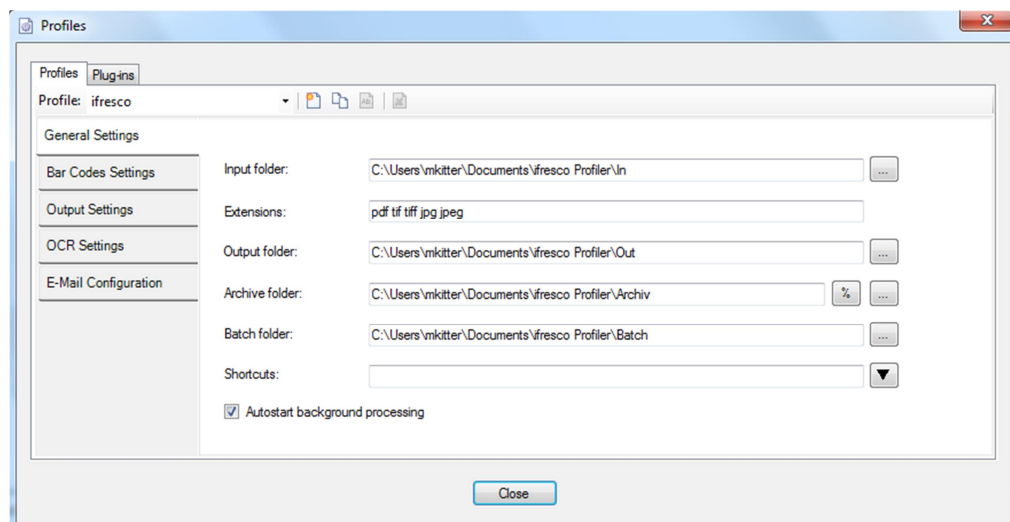
AutoOCR Demo Server:

Our hosted AutoOCR server with Abbyy OCR can be configured and used for the creation of searchable documents at the upload.

- <https://autoocr.may.co.at:8001/AutoOCRService2>
- Username: admin
- Password: autoocr
- OCR Profile = „AbbyyFR10 - English & German“

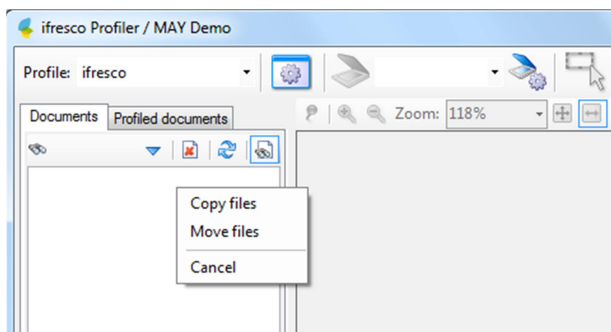
Background processing:

The OCR processing and the upload take some time. For the user, to be able to continue working in the meantime and to do not have to wait until the processing steps are done, there is a background processing. It can be started manually or automatically. Normally the background processing should be started automatically with the application start.

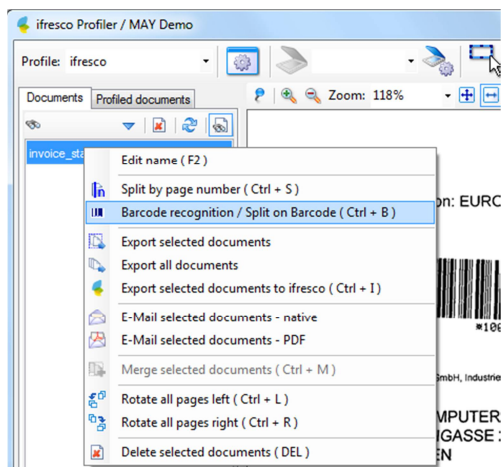


Running capture – demo invoice_stack:

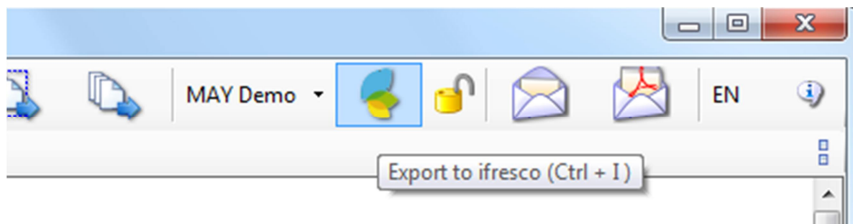
- 1.) Insert the already scanned demo PDF image documents (invoices with barcodes) by drag&drop into the document list. The demo files can be downloaded from here: http://www.may.co.at/webrr/respfile.php?file=MAYComp/Current/RO/ifresco_Profiler_Demo_Addon.zip. It is also possible to move or copy the documents which should be processed into the input folder - Default: C:\Users\Admin\Documents\ifresco Profiler\In



2.) Run function „Split on Barcode“



- 3.) After that, there are 10 documents available in the list – where the barcode value was taken over as file name.
- 4.) Now the documents can be individually profiled and uploaded into Alfresco with metadata.
Function: „Export to ifresco“

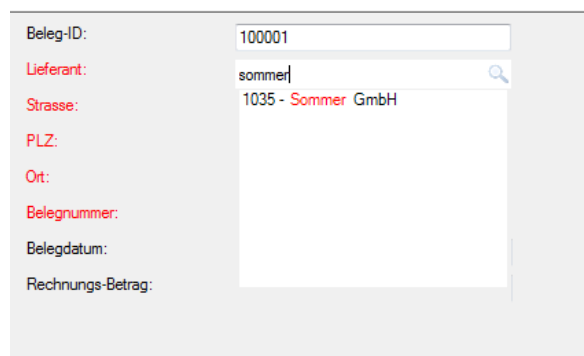


Profiling

The red marked fields are required – as long as these are not filled the „Upload“-button is grayed out and inactive.



For the field „**Lieferant**“ (= supplier) a supplier with the belonging information can be searched and selected from the XLS table using type ahead. All suppliers with the substring in the name are displayed in the list below the search field.



Beleg-ID:	100001
Lieferant:	1035 - Sommer GmbH
Strasse:	Bäckerstr. 198
PLZ:	86849
Ort:	Dessau
Belegnummer:	
Belegdatum:	05.08.2013
Rechnungs-Betrag:	0

The „Belegnummer“ (= invoice number) can be extracted und taken over directly from the document with „Area-OCR“ – therefor the window with the preview has to be chosen and the space bar has to be pressed. Now the cursor changes to a crosshair and the required area can be chosen.

Rechnung	
Nummer	926984859
Zahlungsreferenz	
Datum	25.07.2013
Lieferschein Nr.	6024250820
Auftrag Nr.	1026840013
Referenz Nr.	
Ust.Id Nr. Versender	ATU15164300
Kunden Nr.	10011840
Ust.Id Nr. Kunde	ATU58363835
Ansprechpartner	Christian Muhr
Telefon	+43 2249 7003 302
Seite	1/2

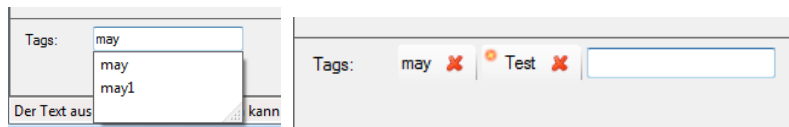
After that, in the input mask position the cursor to the required field and press „F1“ – with that the Area-OCR function is activated and the recognized value inserted into the chosen field.

Beleg-ID:	100001
Lieferant:	1035 - Sommer GmbH
Strasse:	Bäckerstr. 198
PLZ:	86849
Ort:	Dessau
Belegnummer:	926984859
Belegdatum:	25.07.2013
Rechnungs-Betrag:	107,11

Following, capturing also the „Belegdatum“ (= invoice date) and the Rechnungsbetrag (= invoice amount) – the amount has to be captured with a „comma“ as decimal point.

Tags:

In the lower area of the profile mask there also is the possibility to assign and add new tags for the document. With „type-ahead“, already existing tags are displayed and can be chosen. Not existing tags are created new. Tags get separated with the space bar.



Alfresco storage / document path / name

The storage of the documents takes place in the normal „Content Repository“, under the folder „ifresco Import“. Based on the captured profile information, the folder structure, is automatic created.

ifresco Import/%Lieferantennummer% - %Firma%/Eingangsrechnungen/%Belegjahr%/ %Dokumentenname%

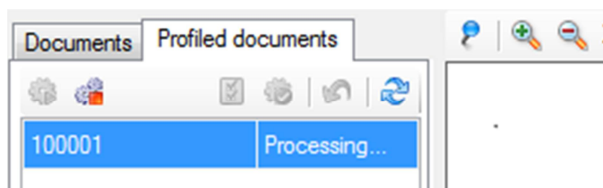
- %Lieferantennummer% - (supplier number) from the XLS table
- %Firma% - (company name) from the XLS table
- %Belegjahr% - (document year) year from the invoice date
- %Dokumentenname% - (document name) gets build from
 - ERG (fix)
 - Belegnummer (=invoice number)
 - Belegdatum (=invoice date)

sample:

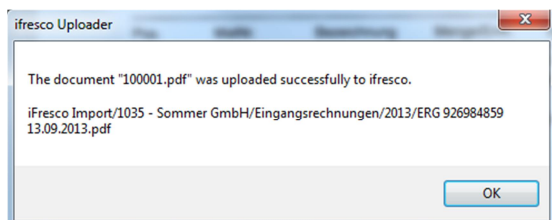
ifresco Import/1035 - Sommer GmbH/Eingangsrechnungen/2013/ERG 926984859
25.07.2013.pdf

Background processing – push button to activate

On the profiling mask there is a push-button „Background processing“ – if it’s activated the document is added into a batch processing-queue and is processed in the background. The User is able to continue his work in foreground, while the documents in the queue get converted to searchable PDF’s and are uploaded to Alfresco with the captured metadata. The queue can be displayed by the tab „Profiled documents“. From this tab the background processing can started and stopped manually. In the column beside the name, the recent processing status or possible occurred errors get displayed. If the background processing is active, the application can’t be closed and a warning comes up. Successfully processed documents disappear from the this list afterwards.



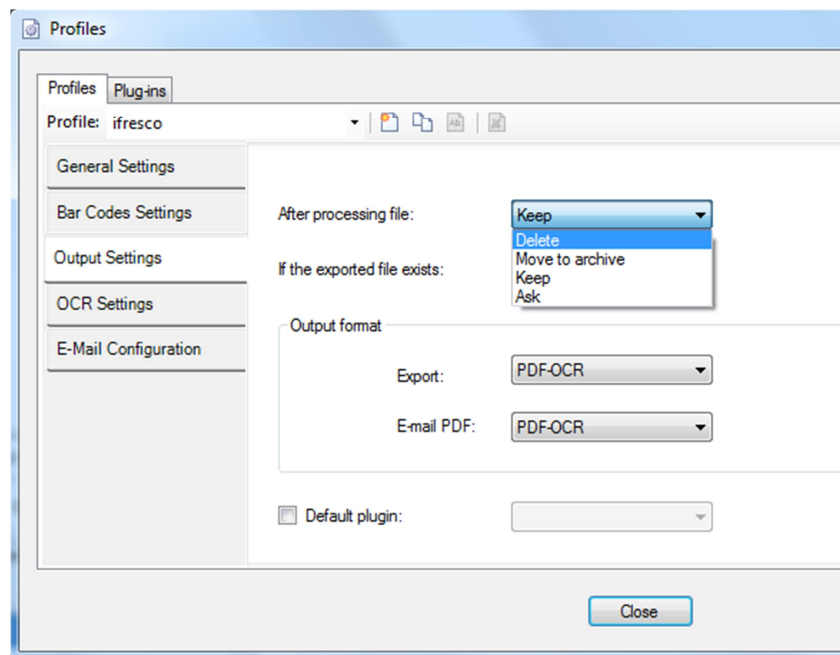
If the background processing isn’t activated, the documents get processed in the foreground and the user has to wait until all work steps (OCR, upload) are finished. This may take, depending on the scope of the documents, more or less time. A confirmation message shows errors or the successful processing – with name and path of the uploaded document.



AutoSelect next – Push Button

If this function is activated, the profile pane stays open; the next document gets loaded and is displayed for profiling. This feature allows to quick and efficient process all documents from the list, document by document.

In this context, it makes sense to set the option “After processing file – Delete” in the “Output Settings” – thereby the profiled document gets deleted from the documents list after it was successful uploaded – alternatively there are the options “Move to archive”, “Keep” and “Ask”



Keep metadata – Push-button

If this function is activated, the profile fields won’t get cleared but taken over for the next document. With this function, similar documents where only few fields differ can be captured faster without filling each field new every time.

Clear

Used to clear all profile fields

Alfresco Share / ifresco Client

The profiled documents can, with usage of our Alfresco / ifresco demo server, be retrieved, searched for and displayed with Alfresco Share or the ifresco Client under the following addresses.

- <http://testalf.may.co.at:8080/share/> - Alfresco Share
- <http://testalf.may.co.at/login> - ifresco Client
- User: admin / Password: admin

