



DbScanner - EDM for Sage X3

What is it used for?

The DbScanner client for EDM provides the following functionality:

- Scan barcoded transactional paper documents
- Import from disk transactional images or Scan non barcoded transactional paper documents
- Scan / import and pass images to the PIA or SOA system for OCR processing

Images are stored in the native EDM database termed DbArchive, when exported they are visible directly from within Sage X3 on the same screen as the transaction, from the BP screen or externally in a dedicated web-enabled viewer SmartRetrieve.

How do I use it?

Load the DbScanner client and log in once you have been added as a user.

You have access to 2 types of 'profiles', global and local. The global profiles list all the out the box capability in EDM, a local profile is one you import as a user for day to day processing.

These profiles contain the document types for EDM you can import your images into, or the Invoice types / Sales order profiles for PIA / SOA and OCR processing.

EDM

- Print a barcode from the Sage X3 screen and affix it to the paper copy. Click the profile associated with that transaction and when scanned, the barcode is read and all the index information is found.

OR

- If there's no barcode, click the profile associated with that transaction and when scanned, enter the Sage X3 transaction number to which it relates in the number field, click the lookup button and all the index information is found.

When exported, the images are deposited in to the EDM database and immediately available using SmartRetrieve. The usage of this is covered in the associated crib sheet.

PIA

- Click the profile [PIA] Express and pick the Sage Endpoint applicable for the batch.
- Click OK to either scan in your pages, or import them from a pre-designated location.
- When completed, click the Export icon

SOA

- Click the profile [SOA] Express and pick the Sage Endpoint applicable for the batch.
- Click OK to either scan in your pages, or import them from a pre-designated location.
- When completed, click the Export icon

When exported, the images are ready to be processed using the DbCapture Client, the usage of this is covered in the associated crib sheet.

