

Pinnacle Workflow Instructions

The Pinnacle workflow uses one of vFiler's sample workflows with the addition of the PublishToKMS process. These instructions assume vFiler, TOCR and IP (Imaging Professional) have all been installed along with copying the latest demo version of vFiler into > C:\Work area and demodata

The vFiler demo version will allow 50 launches and 500 documents to be Published. The OCR license will allow around 200 documents to be OCR'd You may need to remove the OCR process from the Workflow below in the event the license expires.

The Pinnacle workflow is designed to:

- 1: Capture AR invoices scanned to an input folder directly from a MFP in batch or one at a time
- 2: Read the barcode on the invoice to separate multiple invoices if scanned in a batch or individually and read the invoice number from the barcode
- 3: OCR all content (Demo version of OCR installed – if re-running workflow repeatedly, remove OCR process and “Full Page” from ConvertToPDF metadata)
- 4: ODBC connect to an Access database inside the database folder to lookup the invoice number and all other corresponding metadata (index fields)
- 5: Convert the images to searchable pdf (When OCR is running Full Page)
- 6: Publish to Windows folders (back up – redundant documents)
- 7: Publish to Pinnacle via the watchfolder001 (DWI Service)

vFiler Preparation Instructions:

- 1: Download the Pinnacle.zip file
- 2: Unzip the file into the C:\Work area and demodata\My Input folder
- 3: Run / Launch vFiler Demo version 3.1.44 (latest Demo version) located in: C:\Work area and demodata
- 4: Click Load on the vFiler Toolbar and navigate to:
C:\Work area and demodata\My Input\Pinnacle\Workflows
and load the “AR Invoice Filing System workflow.”

KT / Pinnacle Preparation Instructions:

1: Ensure you have configured DWI >

C:\KTDWI\watchfolder001

C:\KTDWI\failurefolder001

C:\KTDWI\archivefolder001

2: Setup Fieldset = POD Fields

3: Setup Fields under POD Fields Fieldset

InvoiceNumber

CustomerID

SalesmanCode

InvoiceDate

CustomerPONumber

CustomerName

SalesmanName

4: Setup Document Type = POD and associate POD document type to POD Fields Fieldset.

This will provide KT / Pinnacle with an input folder (watchfolder001) for documents to automatically populate KT / Pinnacle folders based on the metadata contained in vFiler's xml output file arriving in the watchfolder001 with the same file name as the image file (pdf). Indexed data extracted during vFiler's ODBC connection will create metadata inside KT / Pinnacle's repository associated with each individual document.

**Test Running the Pinnacle Workflow (AR Invoice Filing System)
With individual invoices (single page tiffs)
Instructions**

1: After installing vFiler and downloading the Pinnacle.zip there are (5) individual invoices (single page tif images) inside the vFiler capture input folder and (1) multi-invoice (multipage tif image) at >

C:\Work area and demodata\My Input\Pinnacle\Input\Samples

2: Before test running the workflow, copy 11072.tif, 11073.tif, 11074.tif, 11075.tif and 11076.tif from:

C:\Work area and demodata\My Input\Pinnacle\Input\Samples

To

C:\Work area and demodata\My Input\Pinnacle\Input

3: From the vFiler Toolbar click RUN in the upper right corner. Click Ok at the Run Options screen (pop up) and leave the default "Capture, Index and Process (Batch)."

The workflow will start capturing the (5) individual documents as if someone scanned them to the input folder from an MFP individually.

You will see that vFiler will remove the files from:

C:\Work area and demodata\My Input\Pinnacle\Input
after the capture process and the images will go to:

- 1: C:\Work area and demodata\My Input\Pinnacle\Output\Accounting\Receivables\2007\September
- 2: C:\KTDWI\watchfolder001
- 3: Pinnacle Repository after the watchfolder001

You can login to KT / Pinnacle to see the folders and documents in pdf format vFiler created via DWI and the xml file's metadata. Verify all images from watchfolder001 have been moved to archivefolder001.

**Test Running the Pinnacle Workflow (AR Invoice Filing System)
With multiple invoices and supporting documents (multi-page tiffs)
Instructions**

1: After installing vFiler and downloading the Pinnacle.zip there are (5) individual invoices (single page tif images) inside the vFiler capture input folder and (1) multi-invoice (multipage tif image) at >

C:\Work area and demodata\My Input\Pinnacle\Input\Samples

2: Before test running the workflow, multi-invoice.tif from:

C:\Work area and demodata\My Input\Pinnacle\Input\Samples

To

C:\Work area and demodata\My Input\Pinnacle\Input

3: From the vFiler Toolbar click RUN in the upper right corner. Click Ok at the Run Options screen (pop up) and leave the default "Capture, Index and Process (Batch)."

The workflow will start capturing the (1) individual document as if someone scanned (5) invoices and supporting documents to the input folder from an MFP in a batch.

You will see that vFiler will remove the file from:

C:\Work area and demodata\My Input\Pinnacle\Input

after the capture process the barcode reader will separate the multi-page tif image into individual invoices along with their supporting documents and the images will go to:

1: C:\Work area and demodata\My

Input\Pinnacle\Output\Accounting\Receivables\2007\September

2: C:\KTDWI\watchfolder001

3: Pinnacle Repository after the watchfolder001

You can login to KT / Pinnacle to see the folders and documents in pdf format vFiler created via DWI and the xml file's metadata. Verify all images from watchfolder001 have been moved to archivefolder001

**Continuous - Test Running the Pinnacle Workflow (AR Invoice Filing System)
With individual invoices (single page tiffs)
Instructions**

1: After installing vFiler and downloading the Pinnacle.zip there are (5) individual invoices (single page tif images) inside the vFiler capture input folder and (1) multi-invoice (multipage tif image) at >

C:\Work area and demodata\My Input\Pinnacle\Input\Samples

2: Before test running the workflow, copy 11072.tif from:

C:\Work area and demodata\My Input\Pinnacle\Input\Samples

To

C:\Work area and demodata\My Input\Pinnacle\Input

3: Navigate to:

C:\Work area and demodata\My Input\Pinnacle\Input

And copy 11072.tif repeatedly into the same folder:

C:\Work area and demodata\My Input\Pinnacle\Input

This will create multiple copies of the same document in the input folder. Keep copying the same file into this folder until there are at least 200 images for vFiler to capture.

4: From the vFiler Toolbar click RUN in the upper right corner. Click Ok at the Run Options screen (pop up) and leave the default "Capture, Index and Process (Batch)."

The workflow will start capturing the (MANY) individual documents as if someone scanned them to the input folder from an MFP individually.

You will see that vFiler will remove the files from:

C:\Work area and demodata\My Input\Pinnacle\Input

after the capture process and the images will go to:

1: C:\Work area and demodata\My

Input\Pinnacle\Output\Accounting\Receivables\2007\September

2: C:\KTDWI\watchfolder001

3: Pinnacle Repository after the watchfolder001

You can login to KT / Pinnacle to see the folders and documents in pdf format vFiler created via DWI and the xml file's metadata. Verify all images from watchfolder001 have been moved to archivefolder001

NOTE: Keep an eye on DWI Service Controller to watch how the error occurs. DWI will start off working great, but after around 20-30 documents the watchfolder001 will begin to fill faster than it can empty and the error in DWI will occur. Documents then will start filling into the failurefolder001 versus the archivefolder001.