



Tech Note ED0001

eDrawer – Creating a Template

Templates can be useful for capturing information from standard forms for use in populating index fields. In order for a template to work, the fields you need to capture must be in the same position on the first page of each document of that type. Please note that templates must be created from the system you use for the eDrawer Automated Robot (EAR), since the OCR software is required for template testing.

- 1) Scan a sample of the document for template creation from any workstation.
- 2) Open the eDrawer client on the EAR PC. Navigate to the drawer and folder where the sample document from step 1 was saved, and highlight, but don't open it.
- 3) Under the *Documents* pull-down menu, select *Template Manager*.
- 4) Click on the *Add* button to create a new template. You should see your sample document displayed, with a series of fields and controls on the right.
- 5) Enter a name for the template in the *Template Name* field at the top right of the screen. If you are using a document type other than default for this document, select that from the *Doc Type* pull-down box.
- 6) If you enter values in the *Drawer* and *Folder* fields, any documents processed with this template will automatically be stored (or moved if it already exists) to the specified location. If you leave them blank, the document will remain in same the drawer and folder as it currently is.
- 7) For each index field you want to capture from the document, click on the button corresponding to the field name. A drawing symbol will be displayed on the screen. Using your mouse, draw a box around the data on the form to be captured (move the cursor to the top left of the field, and click and drag to the bottom right) . Make sure to draw the box big enough to allow for the longest value you anticipate having. Repeat this process for each field to be captured.
- 8) Click the *Test Template* button at the bottom. The OCR process will be engaged for each field you defined, and the corresponding fields will be populated.

9) If you need to make adjustments in the location or size of a field, click on the button corresponding to the field, and move, expand, or redraw the box.

10) When your template tests correctly, save it.

11) To process a document with the specified template, locate the document in eDrawer, right-click on it, and select the *Process with Template* option. The system will prompt you for the template to be used, and will process it accordingly.