

productinfo



AUTOINDEX

Index archived documents automatically from external data source

Many of the documents you need to archive will already have existing categorization criteria and search words in the IT system. DocuWare AUTOINDEX retrieves this data and adds it automatically to the file cabinet as index terms, eliminating the need for manual input.

Application Example

For every accounts payable invoice posted, the accounting department enters the vendor's name, invoice number, date and total value. This information will be used by staff to retrieve the document from the file cabinet at a later date.

Initially, the invoice is stored in the file cabinet with a unique identifying number as the index word. This unique number is then defined as the matchcode to be entered identically in the financial accounting database and in the DocuWare file cabinet. The matchcode – in this case the invoice number – can be used to assign records to one another. AUTOINDEX automatically adds the contents of the external record as index information in DocuWare.

Depending on the configuration, AUTOINDEX either automatically processes the records of the external database and uses the matchcode to search the DocuWare file cabinet for associated documents, or

AUTOINDEX works the other way around and searches for external records associated with the documents in the DocuWare file cabinet. Users can also specify whether to process all external records and documents in DocuWare or whether to filter on specific records and documents.

External data sources supported by AUTOINDEX include DocuWare file cabinets, database tables, database views, SQL commands, and files containing delimiters or fixed field lengths. If the external data source can be edited, i.e. it can be opened in read/write mode, you can use AUTOINDEX to complete and edit fields in that external data source. For example, you can set a status field to show that the record has been edited.

As explained earlier, before using AUTOINDEX you have to store the documents in the file cabinet using the matchcode as the index word. There are two methods of doing this:

Benefits

- Automatic indexing
- Error-free data capture
- Ensure data consistency with other databases
- Optimize processes by writing into other databases
- Reorganize file cabinets

Manual storage: here you type the index word to be used as the matchcode into the store dialog. The document is displayed at the same time.

Automatic storage: the DocuWare RECOGNITION add-on module reads the matchcode from the invoice using OCR or from a barcode. This can be a serial document number on a label, for example. DocuWare RECOGNITION then processes all the scanned invoices in a DocuWare basket. You can store these afterwards as one batch. Alternatively, you can use the DocuWare ACTIVE IMPORT add-on module to process each document completely automatically after it has been scanned and then run RECOGNITION. After the text or barcode has been extracted, the invoice is then automatically indexed and stored in the specified file cabinet.

Other Applications

AUTOINDEX can also be used for adding index words to returning delivery confirmations and work reports. For these documents, the index words are already in the system when you print them. You can print a barcode with the document as the matchcode. When the documents come back, AUTOINDEX will then archive them completely automatically.

You can also use AUTOINDEX to add or change index words within a file cabinet. Set filters determine which documents are to be edited. The file cabinet is specified as the external data source and the new index entry is defined as a fixed entry. AUTOINDEX then inserts the new index word in an empty field or overwrites an existing index entry.

Configuration

AUTOINDEX is executed as a workflow. It is managed from within DocuWare Administration. When you create an AUTOINDEX workflow, a wizard takes you through all the settings you need to define. You can change some of these values afterwards in the settings table in DocuWare Administration. A few of the wizard dialogs are shown here as an example.

Matchcode Definition

You need to specify which index field in the DocuWare file cabinet and which field in the external data source will contain the matchcode. The matchcode is the value used to search for pairs of records that belong together (record in file cabinet and record in external data source). The entry to be used as the matchcode must be identical in both records. Furthermore, the matchcode should only appear once in the DocuWare file cabinet and in the external data source, so that the record and the DocuWare document can be assigned to one another uniquely.

To help you define the matchcode, you can display the first 50 records of the external data source in the lower part of the window.

Options

Here you specify how you want AUTOINDEX to proceed if the matchcode is not unique. You can choose to process only the first record found, to simply make an entry in the log file, or to process all the records found. In the latter case, the index entries are completed using the first record found. You can also define whether external records should be deleted after successful indexing in DocuWare (in the case of AUTOINDEX processing documents in the DocuWare file cabinet using the matchcode to search for associated records in the external data source).

External Data Source

Record No.	Company	Amount	Date	Acct	Vat
870321	Robinson Ltd	235,12 \$	11/13/06	60324	16
870322	US-Steel	1222,78 \$	11/14/06	60435	16
870323	Winter Corp	4536,99 \$	11/12/06	60872	16
870324	Hunton&Co	373,33 \$	11/12/06	60981	16

1. Search for document Data String

2. Enhance Index Fields

Record No.	Company	Amount	Date	DocID
870355				340022242
870412				340022243
870323	Winter Corp	4536,99 \$	11/12/06	340022244
870321				340022245
870324				340022246

DocuWare File Cabinet Database

AUTOINDEX functionality

If no associated records or documents are found, AUTOINDEX can be configured to create such a record in DocuWare or in the external data source.

Assigning Index Words

Specify the data you want DocuWare to use as index words for documents. You can choose between the contents of a field in the external data source, a fixed entry or a predefined entry, such as today's date.

You can also specify whether the data defined should always be written in the index field or only if the index field is empty.

In the case of index fields that contain the matchcode, no data can be added to the indexing.

This dialog also allows you to display the first 50 records of the external data source at the bottom of the window.

AUTOINDEX - Definition Match Code

Specify which fields of the file cabinet and of the external data source will contain the entry to be used as the matchcode. The matchcode is used to search for pairs of records. The entry in both records must be identical.

Index Field	External Fields	Sample
Company	(none)	
Contact	(none)	
Department	(none)	
Status	(none)	
Barcode number	INVOICENUMBER	13456891

Entries external data source

COMPANY	NAME	DIVISION	INVOICENUMBER
Phone Wizard	Mr. Miller	Marketing	13456891
Rapid Transport	Mr. Smith	Marketing	13456892
Storage Experts	Mr. White	Technical Service	13456893
Phone Wizard	Mr. Black	Sales	13456894

Matchcode definition dialog

AUTOINDEX - Options

Specify how you wish to proceed if more than one external record or no external records at all are found for a document. You can also decide whether used records in the external data source should be deleted.

Behavior when multiple matches are found

Process first found entry

No processing - entry in logging destination

Process all external entries

Action when one or more matches are found

Delete assigned records in external data source

Action when no match is found

Add entries to external data source

Options selection dialog

AUTOINDEX - Assignment Index Replacement

Specify which data to use as index words: the field contents of the external data source, fixed entries and/or predefined entries such as today's date. Index enhancement cannot be carried out for index fields containing a matchcode.

Index Field	Entry Type	Replacement	Sample	Match code	Overwrite
Company	Field	COMPANY	Phone Wizard	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contact	Field	NAME	Mr. Miller	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Department	Field	DIVISION	Marketing	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Status	Fixed entry	BOOKED		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Barcode number	(none)	INVOICENUMBER	13456891	<input checked="" type="checkbox"/>	<input type="checkbox"/>

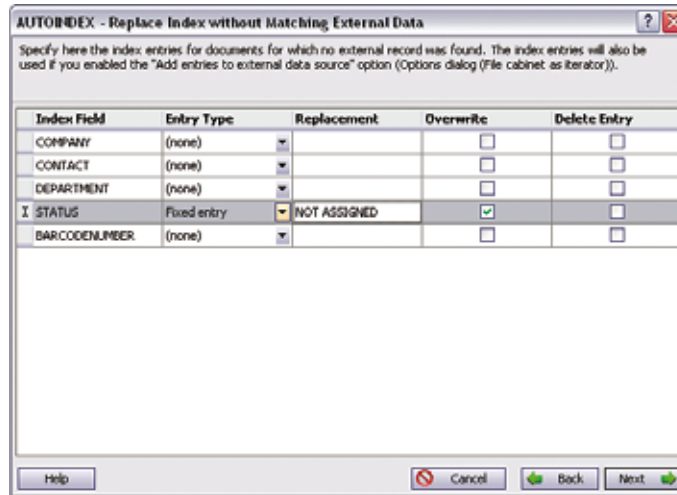
Entries external data source

COMPANY	NAME	DIVISION	INVOICENUMBER
Phone Wizard	Mr. Miller	Marketing	13456891
Rapid Transport	Mr. Smith	Marketing	13456892
Storage Experts	Mr. White	Technical Service	13456893
Phone Wizard	Mr. Black	Sales	13456894
Storage Experts	Mr. Rain	Sales	13456895

Index word assignment dialog

Indexing Without an Associated External Record

In this window you can specify how to index documents for which AUTOINDEX has found no associated external record. For example, you can assign a particular index word to all of these documents. This later allows you to display all the documents that have not been processed by searching the file cabinet for this index word.



Indexing documents with no associated record

Features

- Select a DocuWare file cabinet
- Select an external data source: DocuWare file cabinet, database table, database view, SQL command or file with delimiters or fixed field lengths
- Select whether to find external records associated with DocuWare documents, or DocuWare documents associated with external records
- Filter on documents in the DocuWare file cabinet
- Filter on records in the external data source
- With file as external data source: read/write access or read-only access, move or delete file on completion of workflow
- Assign external data fields to DocuWare index fields
- If more than one external record is found for a document, you can choose to process only the first record, make an entry in the log file or process all

external records (index is expanded using the first external record)

- If more than one document is found for an external record, you can choose to process only the first document, make an entry in the log file or process all documents
- Delete external records after processing
- Create an external record if no external record can be found for a document
- Create a record in DocuWare if no document can be found for an external record
- Add index words always or only when fields are empty
- Add index words from contents of external record, using fixed or dynamic entries
- Add or change field contents of external record using index words of the DocuWare document, fixed or dynamic entries

- Special indexation of documents without associated external record
- Special data completion for external records without associated DocuWare document
- Start workflow using a time trigger, manually or by means of a file event (when file is the external data source)

For more information please visit our website at www.docuware.com