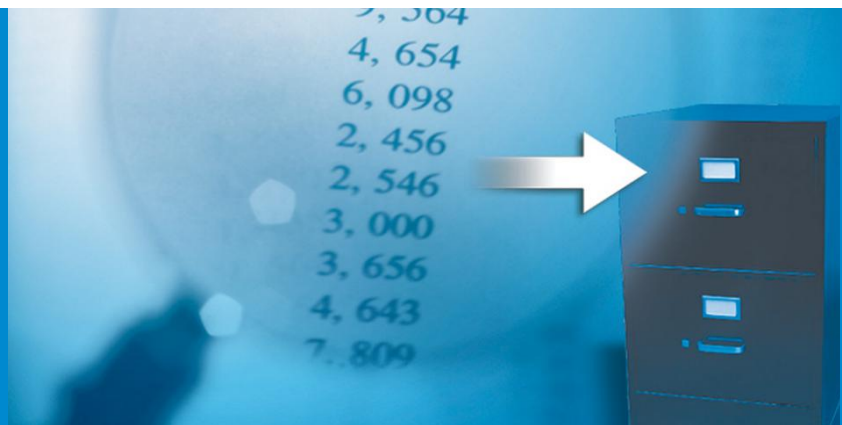


Autoindex

ProductInfo



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 transfers the data and adds it to the file cabinet as index words. Manual input is eliminated and storage is also automatic.

Use the data records which are already available in the IT system to index documents automatically in DocuWare. For example, Accounting records an invoice in the accounting system with the sender, document number, date, and amount. If this invoice is archived in DocuWare, Autoindex can access the content of the external data record and add it as index information in DocuWare – without the user having to type the index words in first.

Autoindex can also be used in the other direction to add index words to returning work reports. For these documents, the index words are already in the system when you print them. When the completed work report is returned, the new document can be automatically assigned to the available data records.

Autoindex is useful for doing research. It reconciles the external database with the documents in the DocuWare file cabinet and displays related documents. The user can also limit the search by filtering for particular documents.

Benefits

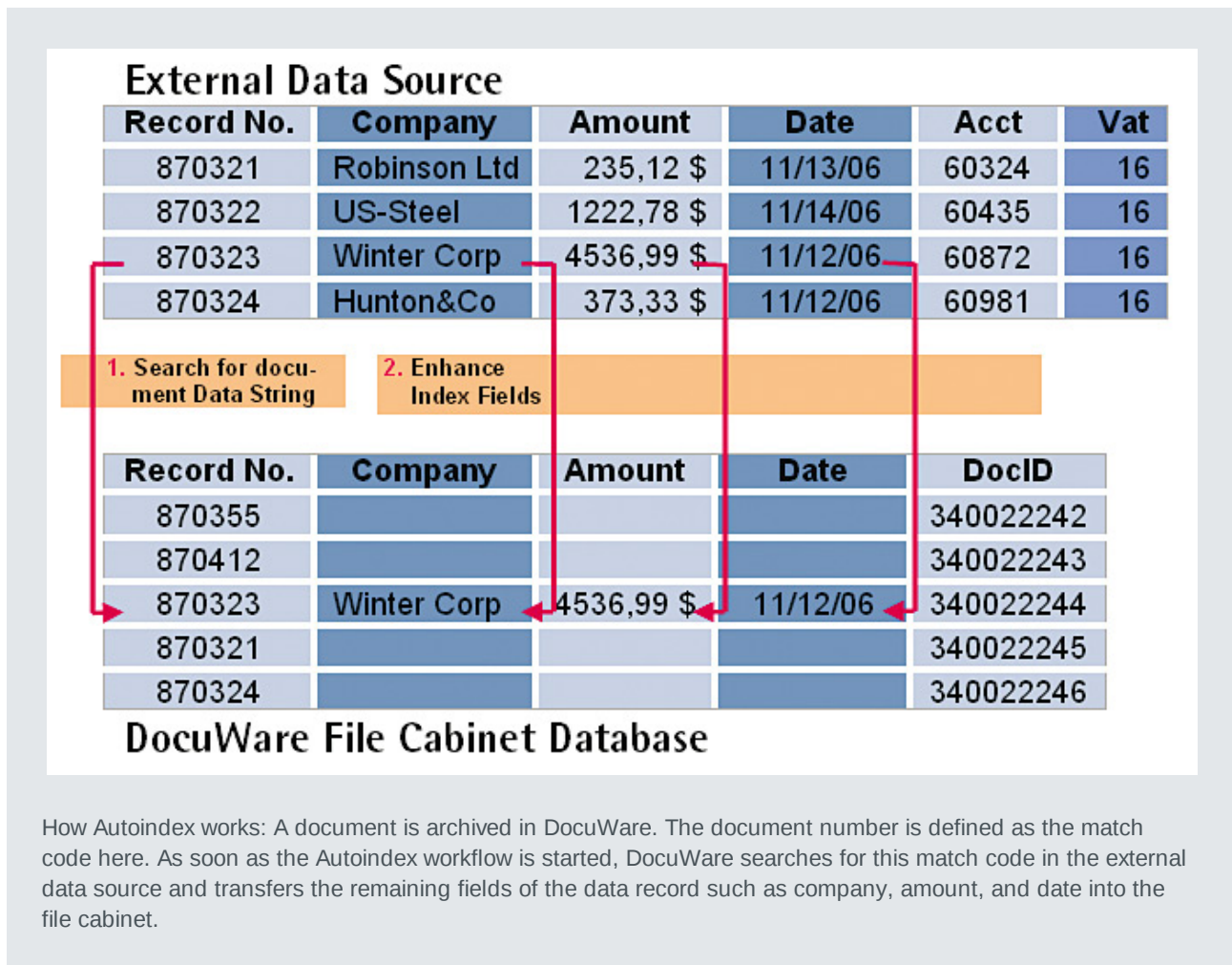
- Automatic indexing
- Error-free data capture
- Ensure data consistency with other databases
- Optimize processes by writing in other databases
- Reorganize file cabinets

Autoindex Functionality

The data records are assigned based on a match code. A match code is a simple sequence of characters. For example, you can define an invoice or document number or a barcode as a match code. You can specify which index field corresponds to the match code yourself. It is important that the match code appears in both the external database and the DocuWare file cabinet as an index word. Autoindex uses the match code of a document in the DocuWare file cabinet in order to find the related data record in the external database. Elements such as company or invoice amount are transferred into DocuWare as index words from this data record.

The indexing is especially simple if you set the barcode as the match code. With the additional license "Barcode & Forms," DocuWare Scan App can even read the barcode during scanning. Autoindex then completes the indexing as usual. If the documents do not have a barcode, serial document numbers can be stuck on using a label, for example. DocuWare Import also reads barcodes. The "Import" license is also required for this.

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, 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.



Configuration

Autoindex is executed as a workflow for a file cabinet. User-friendly wizards help you to create these Autoindex workflows. Here you define the match code and specify the external data source and the index values to be imported. With the Autoindex license you can create unlimited Autoindex workflows – for example, to link several external data sources.

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

Record 1 of 8

Help Cancel Back Next

Match code definition dialog: The entry to be used as the match code must be identical in both data records. To help you define the match code, you can display the first 50 data records of the external data source in the lower part of the window.

The Autoindex workflow can be flexibly adjusted to the external data sources. Here you can specify, for example, how you want Autoindex to proceed if the match code 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 data records should be deleted once the index enhancement of the documents in DocuWare has been successfully completed. If no associated data record or document is found, Autoindex can be configured accordingly to create such a data record.

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.

Functions

- 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 the external record using index words of the DocuWare document using 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)



This document can also be found here:

<http://pub.docuware.com/en/autoindex>

For more information please visit our website at

www.docuware.com