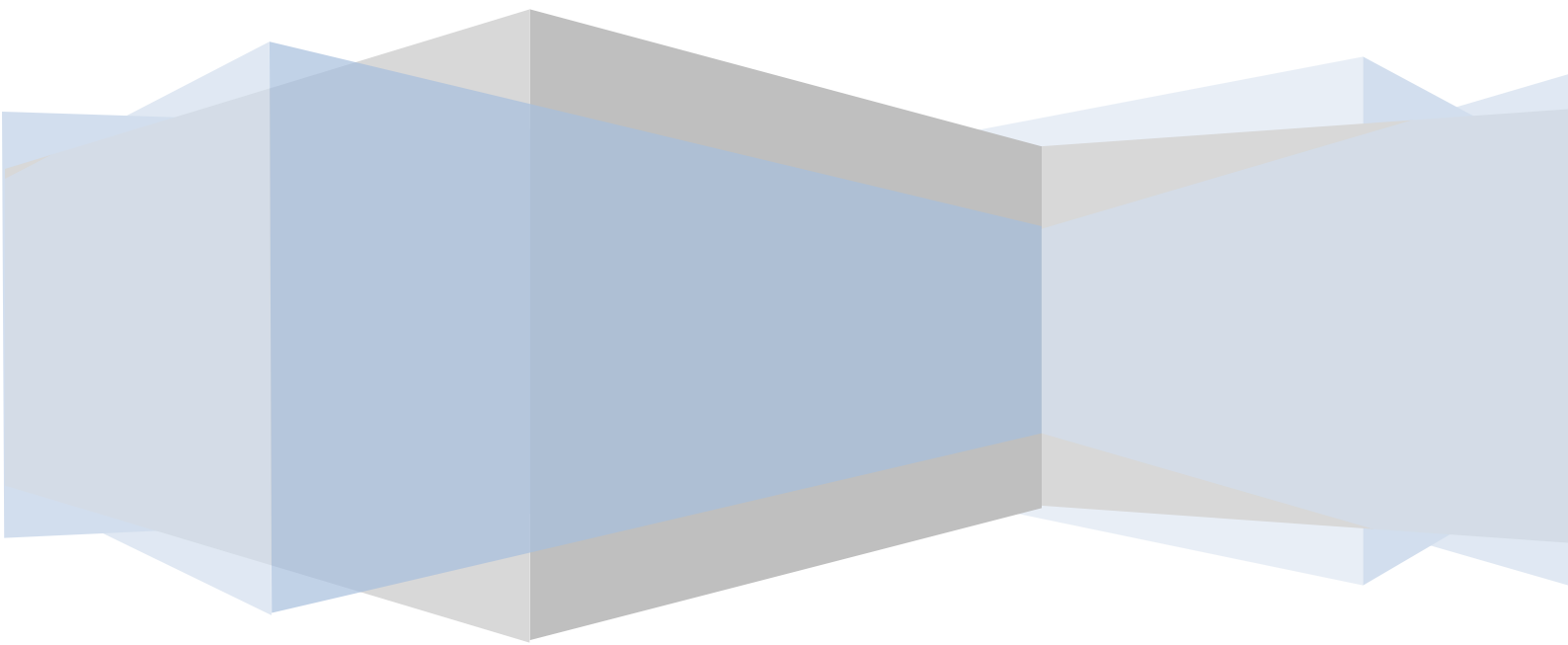




Proven Product, Proven Company

Document Indexing

Configuration Guide



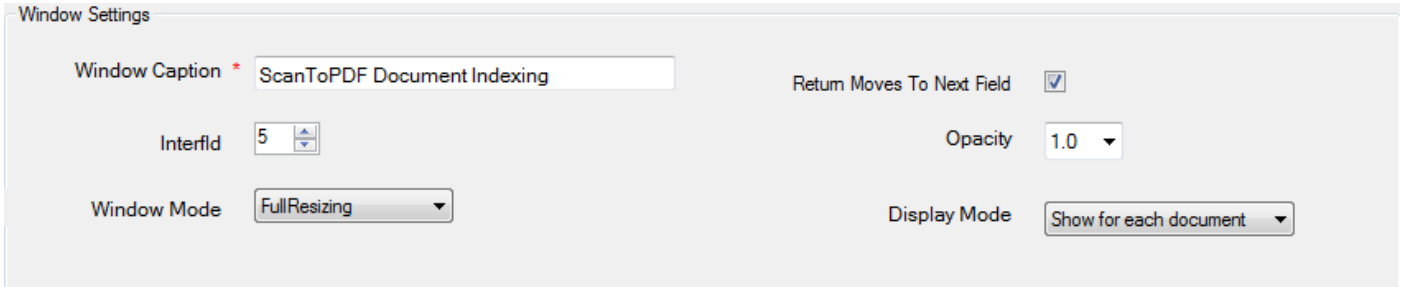
CONFIGURING DOCUMENT INDEXING FIELDS

Start ScanToPDF, click “Tools” and then click “Options”, then click the “MetaData” icon

Select a file from the list of available files and click “Edit”. This will open the MetaData configuration window.

The document indexing configuration has two main settings – Window and Field

WINDOW SETTINGS



The screenshot shows a 'Window Settings' dialog box with the following controls:

- Window Caption**: A text input field containing 'ScanToPDF Document Indexing'.
- Interfld**: A numeric spinner box set to '5'.
- Window Mode**: A dropdown menu currently showing 'FullResizing'.
- Return Moves To Next Field**: A checked checkbox.
- Opacity**: A numeric spinner box set to '1.0'.
- Display Mode**: A dropdown menu currently showing 'Show for each document'.

Window Caption – This is the caption that appears on the document indexing window

Interfld – This setting controls the spacing between the index boxes on the document indexing screen, The higher the value the bigger the spacing

Window Mode – Choose a window mode from the list

- Horizontal Resizing – Allow the box to be stretched horizontally by the user
- Locked – The dialog box size is locked and cannot be changed
- Full Resizing – Allow the dialog box to be stretched vertically and horizontally by the user
- Design Mode – Allow the size of the dialog box and the index fields to be moved by the user (use with caution)

Return Moves To Next Field – Checking this option indicates that pressing the return key will move the cursor to the next index field

Opacity – Control the opaqueness of the dialog box

Display Mode – Choose a display mode from the list

- ShowForEachDocument – Dialog box is displayed for every document
- ShowAtStart – Dialog box is only shown once for each time the Scan button is clicked

FIELD SETTINGS

Field Property

Select Item To Edit: invoiceNumber Editing Existing Item supplierName

Field Type: DropDownCombo
 Fill From Fixed List
 Fill From Database Connection
 Configure

Name *

Prompt * Character Casing: Normal Mandatory:

Pattern:

Error:

Default:

Name	Type	Prompt	Pattern	Error	Default	Defaultlist
supplierName	DropDownCombo	Supplier				List1,List2,List3
invoiceNumber	TextBox	Invoice #				
invoiceDate	Date	Invoice Date				

Double click an item from the lower list or choose the item from the “Select Item To Edit” list to select it and then edit the values in the Field Settings screen.

Field Type – Choose a field type from the list

**** The following options are only available for controls that have lists ****
Fill From Fixed List – Choose this option to populate the drop down list with a fixed list of values (*configured using the Configure button*) – See Appendix One

Fill From Database Connection – Choose this option to populate the list with values selected from an appropriate Database (*configured using the “Configure” button*) – See Appendix Two

Configure – See above. Opens the SQL List Editor or List Editor.

Name – The name of the index field (used in {} in the filename plug-in and also the name of the index field in the Metadata stored in the PDF document)

Prompt – Enter a prompt for the user, usually describes the field name

Pattern – Enter a regular expression pattern match (www.regexlib.com for more details)

Error – Enter a message to show the user when the index data entered does not match the pattern

Default – Enter the default value (leave blank for none, or enter the field name in curly braces to default the value to the previous value entered which makes data entry faster)

Mandatory – Checking this box indicates that the user must enter a value into this index field

Character Casing – Choose a character casing from the list

Add – Add a new index field

Remove – Remove the current selected index field

Preview – Display the dialog box as it will be displayed to the user

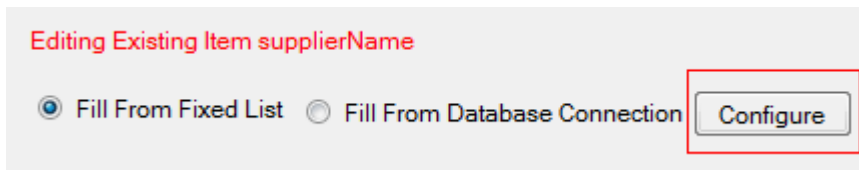
Up – Move the selected index field to the previous horizontal position on the indexing form

Down – Move the selected index field to the next horizontal position on the indexing form

APPENDIX ONE

ENTERING ITEMS INTO A DROP DOWN LIST

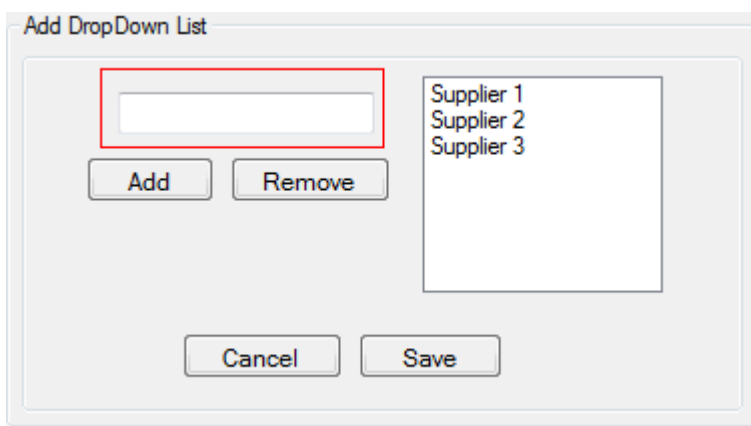
When using a field type of “Drop Down List”, a fixed list of items for selection by the user can be added using the “Fill From Fixed List” option. Select the option and click “Configure”



The screenshot shows a configuration window titled "Editing Existing Item supplierName". It contains two radio button options: "Fill From Fixed List" (which is selected) and "Fill From Database Connection". To the right of these options is a button labeled "Configure", which is highlighted with a red rectangular border.

Click the “Configure” button (shown highlighted in RED)

This will display the dialog shown below.



The screenshot shows a dialog box titled "Add DropDown List". It features a text input field at the top left, which is highlighted with a red rectangular border. Below the input field are two buttons: "Add" and "Remove". To the right of the input field is a list box containing three items: "Supplier 1", "Supplier 2", and "Supplier 3". At the bottom of the dialog are two buttons: "Cancel" and "Save".

The list items are typed into the box (highlighted in RED above). Click Add to add them to the list

When the list is as required, click Save.

This list will then be presented to the user as a list of choices when the document indexing form is displayed.

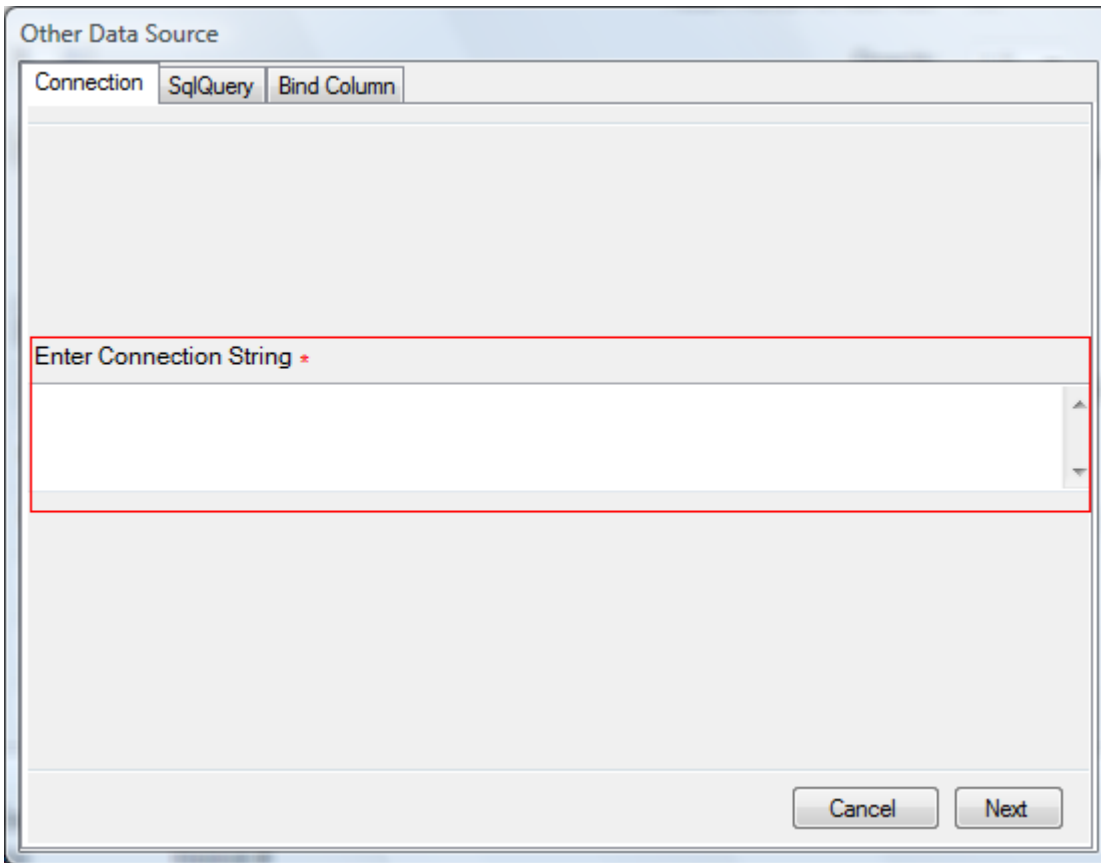
APPENDIX TWO

FILLING A DROP DOWN LIST WITH VALUES FROM A DATABASE CONNECTION

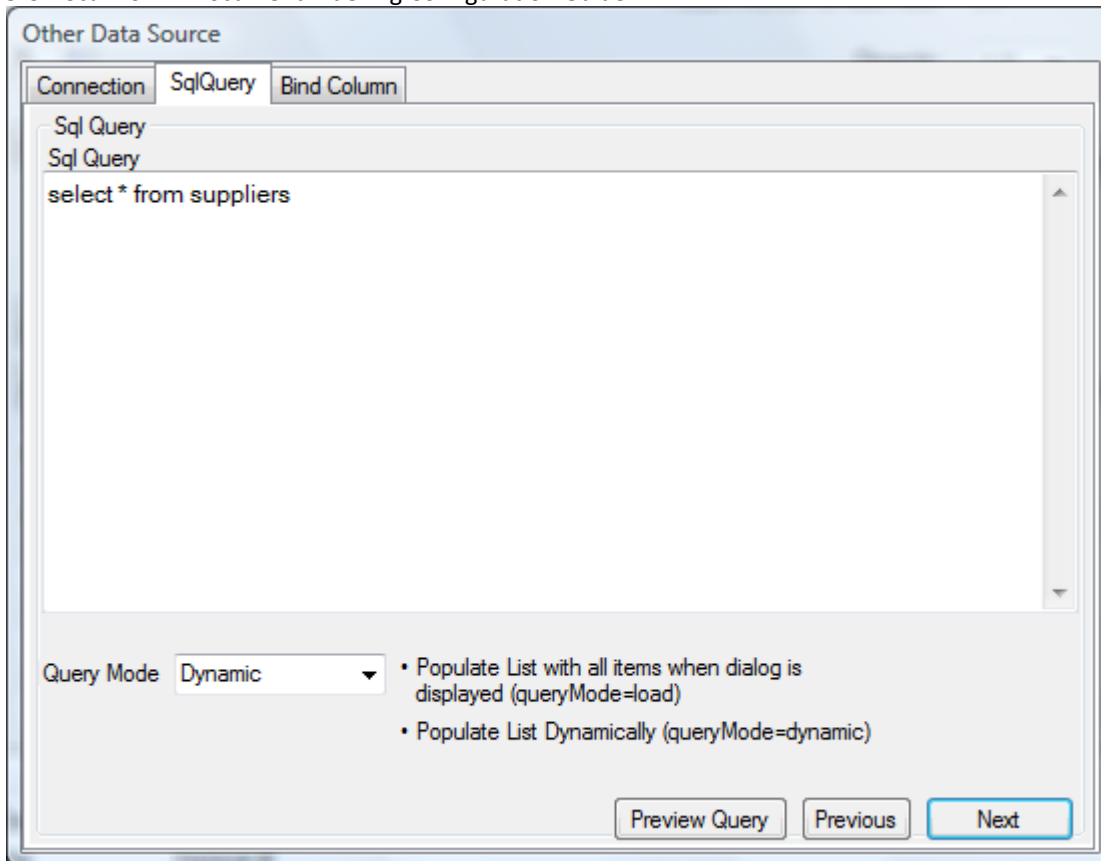
When using a field type of “Drop Down List”, a list of items for selection by the user can be read and added to the list based on configuration using the “**Fill From Database Connection**” option. Select the option and click “**Configure**”



The following dialog screen will be displayed



Enter Connection String - Type a valid connection string into the box provided and click “Next”. Contact OiC support as support@imaging.co.uk if you require advice or help or see this website - <http://www.connectionstrings.com/>



Enter a valid SQL query into the SQL Query text box. You can preview your query to test your SQL statement.

Query Mode – This can be either “**Dynamic**” (populate the list dynamically when the list is selected by the user, this enables the user to only display values that match the text entered into the text box area of the drop down list). “**Load**” – Load the list with the values returned by the SQL statement as soon as the dialog is loaded. When you have entered the SQL query, click “**Next**”

The screenshot shows a configuration window titled "Other Data Source" with three tabs: "Connection", "SqlQuery", and "Bind Column". The "Bind Column" tab is active. Below the tabs is a section titled "Setting For Drop Down List". It contains a "Selected Query Result Column" dropdown menu with "SupplierName" selected. Below this are two rows: "Text Field" with a text box containing "SupplierName" and a "Set" button; and "Value Field" with a text box containing "SupplierCode" and a "Set" button. At the bottom of the window are "Previous" and "Finish" buttons.

To set the Text field and the Value field, select one of the Database columns from the Drop Down list and click set next to the appropriate text box. Click **Finish** to complete the configuration.