

# productinfo

## AUTOINDEX

### Index Documents Automatically with the Help of External Data

*For many documents to be filed, there are index words already available somewhere in an IT system. For example, the Accounting Department captures a sender's name and record number for an accounts payable invoice. DocuWare AUTOINDEX will take this information and add it to the document's index, becoming part of the overall file cabinet.*

#### Functionality

Assigning documents to an existing database is performed with the help of a matchcode, for example, the record number assigned to an invoice. Using this record number, an invoice is indexed and stored in a DocuWare file cabinet. AUTOINDEX looks for the same record number or matchcode in another external data source, like an accounting program, or within DocuWare. When it finds matching data, AUTOINDEX immediately takes the complete index information about the document and transfers it to create a complete index for this new invoice. External data sources for this information are usually tables stored in an ASCII or dBASE format. DocuWare AUTOINDEX transfers and stores all data that matches the document to an electronic file cabinet. Manual data entry is significantly reduced. In the process described

above, documents were simply stored in a file cabinet using a single matchcode as index word.

There are two methods to help with the indexing part of the process. With manual storage, the document is displayed and the user types the index word, which will be used as the matchcode, directly into the store menu. For automatic storage, a user can turn to the add-on module DocuWare RECOGNITION. It will extract the matchcode, either as text or number, by way of a powerful OCR engine, or it will recognize barcodes applied to a document.

Because of the extremely high accuracy level in recognizing barcodes, this method is recommended by DocuWare. It is a very simple process. For example, record numbers are simply printed on a series of labels, and then placed on incoming invoices.



#### Highlights

- Automatic indexing
- Increased productivity with less manual entry
- Fewer input errors
- Simple file cabinet reorganization

These labels can easily be created internally or purchased from an external supplier.

DocuWare RECOGNITION then processes all the scanned documents found in a DocuWare basket – where they can immediately be stored. Again, DocuWare offers a way to automate this part of the process as well. With the add-on module DocuWare ACTIVE IMPORT, every document can be automatically transferred, right after scanning, to a spot where RECOGNITION automatically opens and extracts the text or barcode, and then stores the document into a pre-set file cabinet, automatically.

### Additional Applications

Besides utilizing AUTOINDEX for incoming invoices, the module is also commonly used for the index enhancement of signed or returned bills of lading and work orders. For these records the index words are already in the system when they are initially printed, so the matchcode can be printed as a barcode during the same process. Once these documents are returned, they can be filed automatically. Another handy application for AUTOINDEX is the reorganization of file cabinets. The complete document database of a file cabinet is exported with DocuWare into a dBASE table, which can then be further edited using tools like Excel, dBASE or Access. Then AUTOINDEX transfers the edited index data back into the file cabinet database by using the document IDs as a matchcode.

### External Data Source

Record No.	Company	Amount	Date	Acct	VAT
870321	Müller KG	235,12 \$	03/15/05	60324	16
870322	FriedmannAG	12,00 \$	03/08/05	60435	16
870323	Hunton&Co	98,03 \$	01/31/05	60872	0
870324	Haniel GmbH	1498,00 \$	11/29/04	60981	7

1. Search for Document Data String

2. Enhance Index Fields

Record No.	Company	Amount	Date	Doc-ID
870355				34021
870412				34022
870323	Hunton&Co	98,03 \$	01/31/05	34023
870321				34024
870324				34025

### DocuWare File Cabinet Database

#### Configuration

Setting up a configuration is managed completely through simple menus. An external data source is selected, its data fields are linked to the index fields of a specified DocuWare file cabinet and one of these fields is selected as the matchcode.

*AUTOINDEX uses a Matchcode (such as an invoice number) to find additional information regarding a document from an external program, then takes it for automatic indexing and filing.*

## Functions

### Configuration

- Selection of DocuWare file cabinets
- Selection of external data source
- Supports following data source formats:  
dBASE III-V, CSV, ASCII with fixed field lengths and number of fields, ASCII with fixed field and data string delimiters, DocuWare file cabinet database
- Linking/transfer external data fields to index fields of the file cabinet database

- Tracking of the transfer/link process via log file
- Deleting transferred external data strings
- Transfer only in cases of unique or multiple hits of the matchcode
- Storage of the configuration

### Processing

- Selection from previously stored configurations

- Optional display of transfer process in monitor field
- Transfer with manual, individual confirmation
- Possible to start program from external applications by using the configuration name as parameter

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