

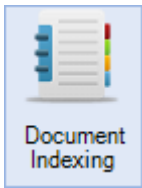


# Document Indexing

## Configuration Guide

## CONFIGURING DOCUMENT INDEXING FIELDS

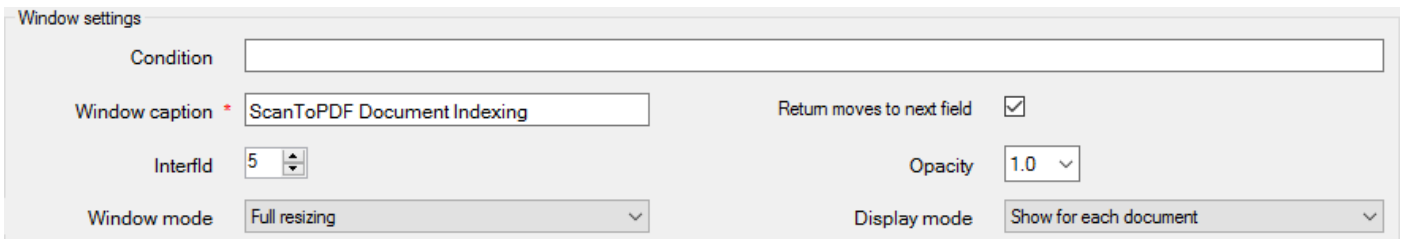
Start ScanToPDF, on the menu bar, click “Edit” and then choose “Options”, then click the “Document Indexing” icon



A preview of the current indexing window will be displayed. Click “Edit” (on the bottom right of the window). This will open the "Document Indexing Configuration" window.

The document indexing configuration has two main settings – "Window Settings" and "Field property" as shown below.

### WINDOW SETTINGS

The "Window settings" dialog box contains several configuration options. At the top is a "Condition" text field. Below it are "Window caption" (with a red asterisk) and "Interfld" (a spinner box set to 5). To the right of "Window caption" is a checked "Return moves to next field" checkbox. Below "Interfld" is a "Window mode" dropdown menu set to "Full resizing". To the right of "Interfld" is an "Opacity" dropdown menu set to "1.0". At the bottom right is a "Display mode" dropdown menu set to "Show for each document".

**Condition** – A condition expression that equates to True or False. When the condition is True the document indexing window will be displayed, when False the window is NOT shown, for example poNumber=null would show the document indexing window if the ScanToPDF variable poNumber was null

**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 PROPERTY SETTINGS

**Field Property**

Select Item To Edit: employee Editing Existing Item employee

Field type: TextBox

Name \* employee  Mandatory

Prompt \* Employee  Include in PDF metadata

Pattern:  Character casing: Normal

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](http://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

**Include in PDF metadata** - Checking this box indicates that the field name and value will be stored in the PDF Metadata visible in the document properties of the PDF. Please note to use this feature your field name should not be ANY of the following standard property names – Author, CreationDate, Creator, Keywords, ModDate, Producer, Subject, Title, Trapped

**Character Casing** – Choose a character casing from the list

**New** – 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

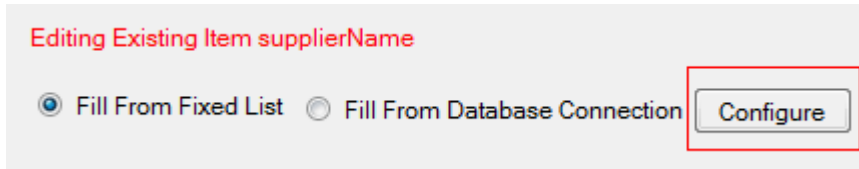
## SAVING SETTINGS

Closing the configuration window will prompt the user to save settings or the user can click "File" and choose "Save as" to save the settings.

## 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”

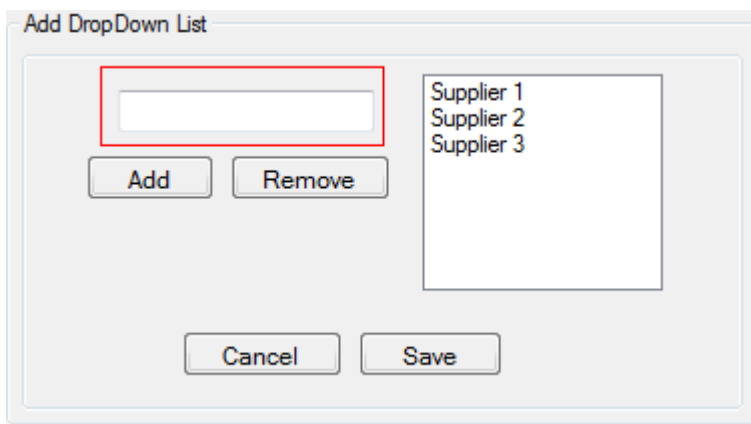


Editing Existing Item supplierName

Fill From Fixed List  Fill From Database Connection

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

This will display the dialog shown below.



Add DropDown List

Supplier 1  
Supplier 2  
Supplier 3

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**”

Editing Existing Item supplierName

Fill From Fixed List  Fill From Database Connection

The following dialog screen will be displayed

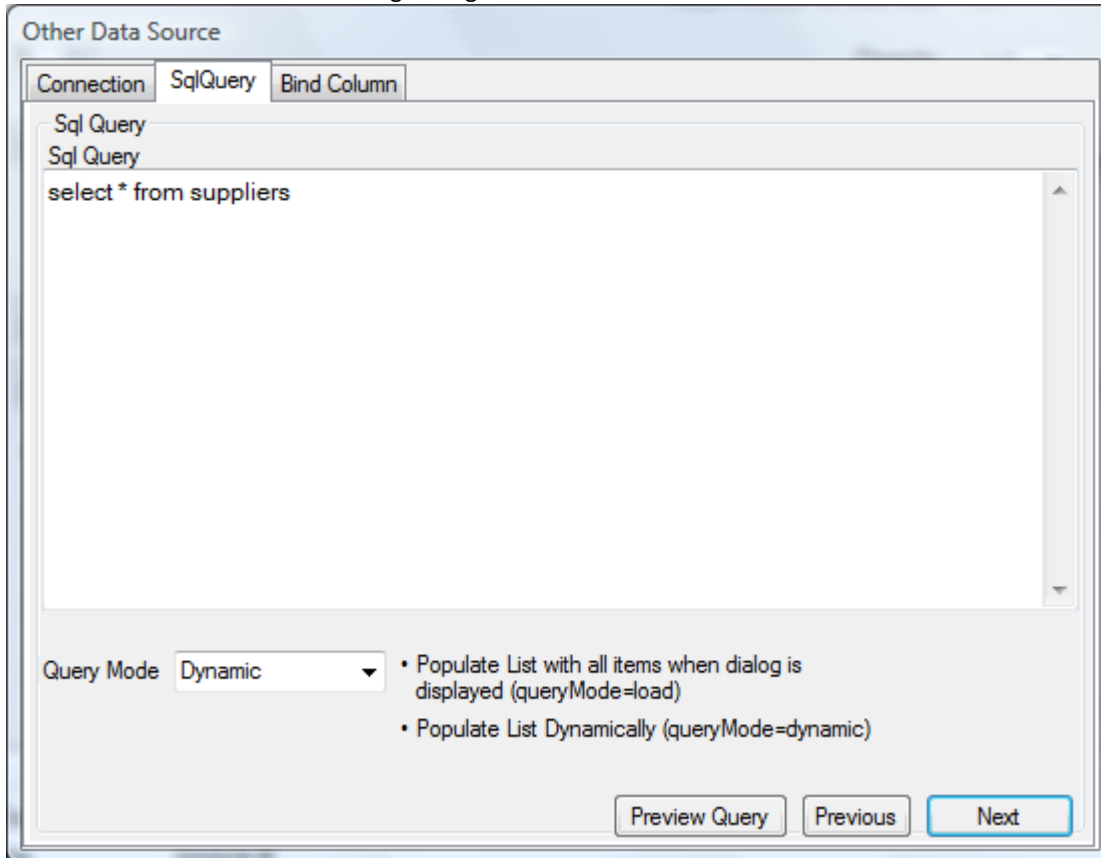
Other Data Source

Connection | SqlQuery | Bind Column

Enter Connection String \*

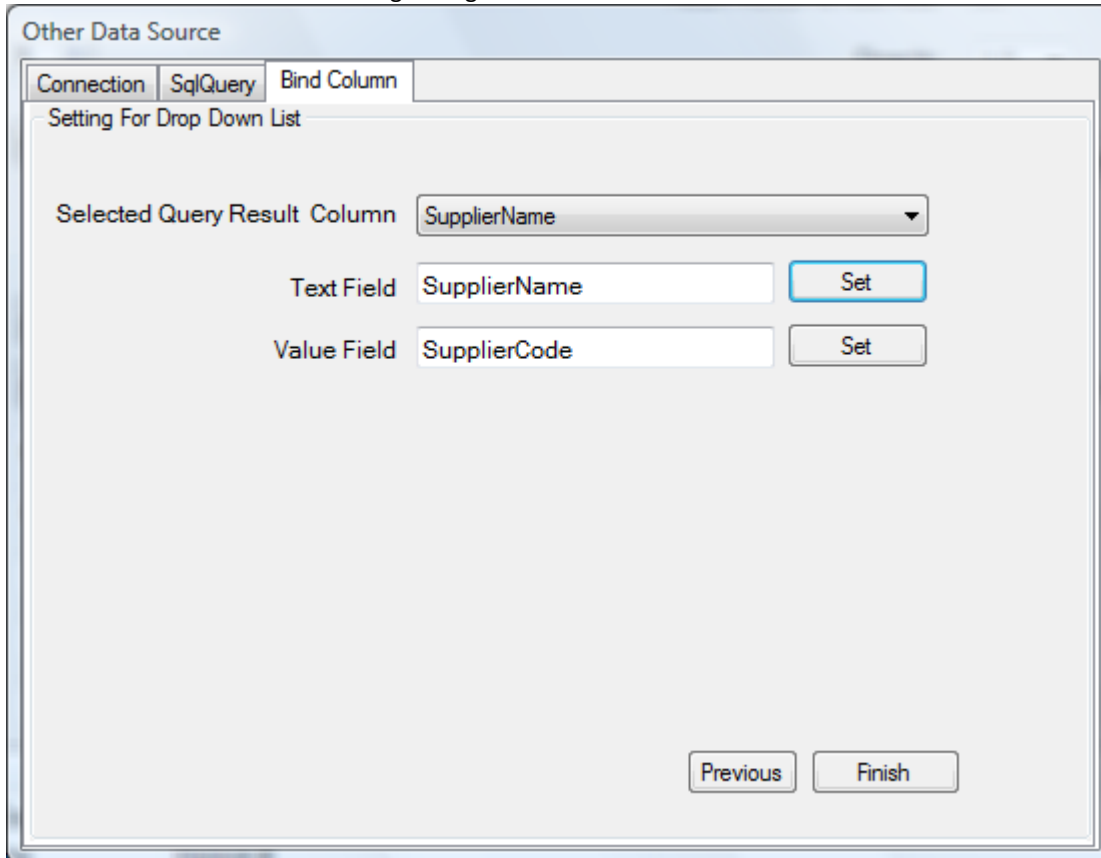
Cancel Next

**Enter Connection String** - Type a valid connection string into the box provided and click “Next”. Contact OiC support as [support@imaging.co.uk](mailto: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 text field is the data displayed to the user to enable selection. The value field is the data returned to the variable following selection by the user.

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.

## USEFUL LINKS

### SEARCH INDEXING OPTIONS FOR SEARCH PDF METADATA

[http://answers.microsoft.com/en-us/windows/forum/windows\\_7-files/searching-on-pdf-metadata-keywords/8de27738-634c-4dfb-97c4-2fcc47bae579?auth=1](http://answers.microsoft.com/en-us/windows/forum/windows_7-files/searching-on-pdf-metadata-keywords/8de27738-634c-4dfb-97c4-2fcc47bae579?auth=1)

### IFILTER CONCEPTS

<https://en.wikipedia.org/wiki/IFilter>

### ACROBAT HELP/SEARCHING PDFS

<https://helpx.adobe.com/acrobat/using/searching-pdfs.html>