

# **INFO-INDEX**

User Guide

Version 5.7

## Product Review

Effective document retrieval from a Document Management System (DMS) requires accurate and thorough keyword indexing. Keywords contain information used to filter and locate documents, e.g. document date, account number and account holder. INFO-INDEX facilitates indexing by enabling users throughout an organization to create barcode index sheets via a single interface integrated directly with the DMS. Once printed, barcode sheets are placed in front of each document and routed for scanning. INFO-INDEX is most valuable when combined with Host Sync, which populates and synchronizes DMS document index data obtained from line of business systems.

# Product Support

Support for this product is available from PROFORMANCE. Contact a support specialist by either method listed below.

## Contact Information:

### Phone

281-292-9000 (Monday-Friday, 8:00AM to 5:00PM CST)

This phone number can also be used after hours to contact the On-Call support.

### Email

[support@pf-inc.com](mailto:support@pf-inc.com)

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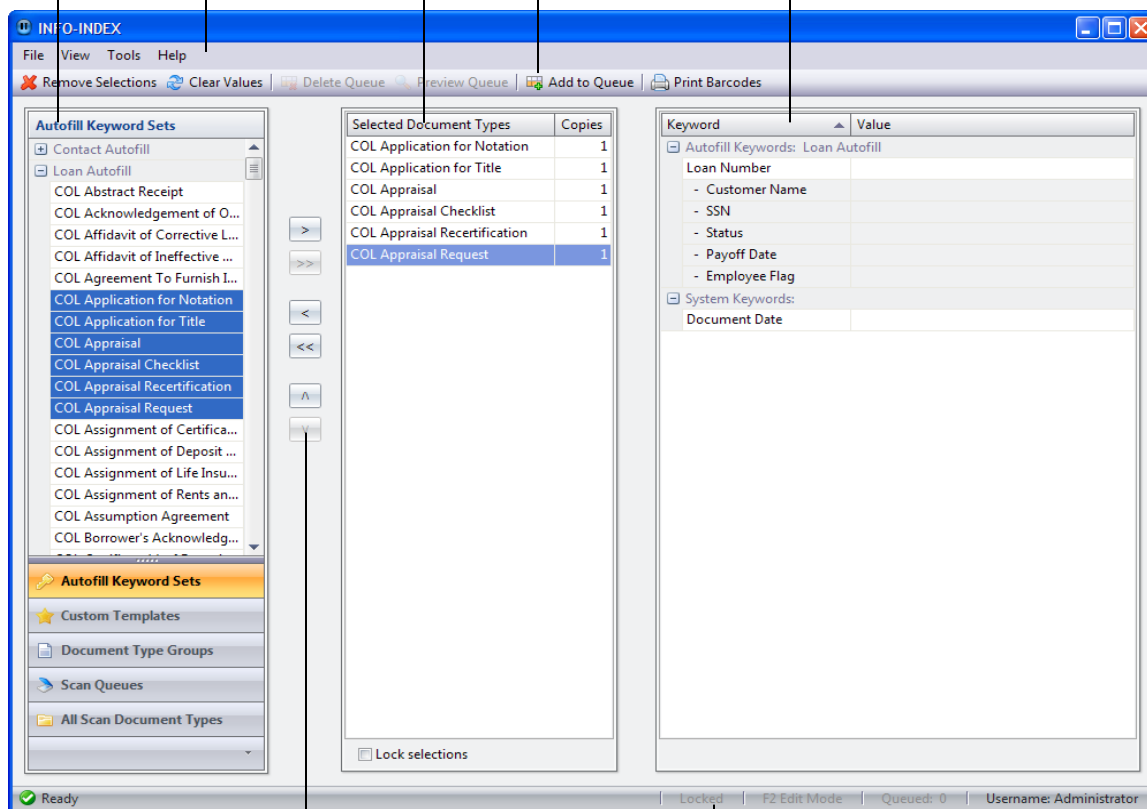
# Exploring the Workspace

## The Workspace Layout

INFO-INDEX provides an integrated single-window workspace layout comprised of the following elements:

1. Available document types
2. Selected document types
3. Keyword value input
4. Menu bar
5. Quick action toolbar
6. Selection buttons
7. Status bar

1. Available document types      2. Selected document types      3. Keyword value input  
4. Menu bar      5. Quick action toolbar



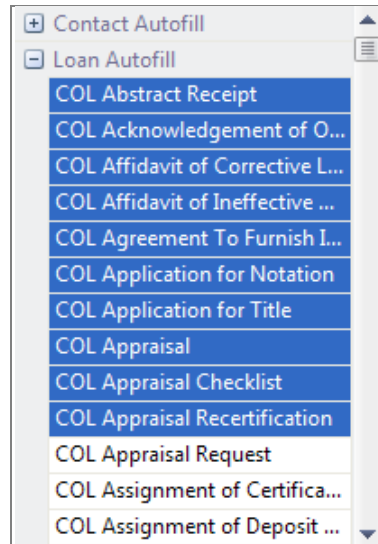
6. Selection buttons

7. Status bar


## Available Document Types

This element contains DMS document types assigned to a scan queue. This list can be organized by Autofill Keyword Sets, Custom Templates, Document Type Groups, Scan Queues and All Scan Document Types.

**NOTE:** Document types presented to users in this list are limited to those defined by DMS user group security.



### To select a single document type:

- Double-click the document type row (or)
- Click the document type row then click the select button 

### To select multiple document types:


- Click the first document type row, hold the Shift key down, then double-click the last document type row (or)
- Click the first document type row, hold the Shift key down, click the last document type row then click the select button (or)
- Click a document type row, while holding the Ctrl key down, click additional document type rows then click the select button

### To select an entire grouping of document types:

- Click the group row indicated by a plus or minus icon then click the select group button 

## Selected Document Types


As document types are selected, they appear in this list along with the number of copies to print. The default number of copies is one. Barcode cover sheets will be printed for document types in the order they appear in this list.

Selected Document Types	Copies
COL Agreement To Furnish Ins...	1
COL Application for Notation	1
COL Application for Title	1
COL Appraisal	1
COL Appraisal Checklist	1 

#### To change the number of print copies:

- Click the cell in the **Copies** column you want to change
- The field is opened for edit and a number spin button appears to the right
- Type the number of copies you want to print (or)
- Use the up/down arrows to change the value


#### To remove a single document type:

- Double-click the document type row (or)
- Click the document type row then click the remove button 



#### To remove multiple document types:

- Click the first document type row, hold the **Shift** key down, then double-click the last document type row (or)
- Click the first document type row, hold the **Shift** key down, click the last document type row then click the remove button (or)
- Click a document type row, while holding the **Ctrl** key down, click additional document type rows then click the remove button

#### To remove all selected document types:

- Click the **Remove Selections** toolbar button (or)
- Click **File > View > Remove Selections** from the menu bar (or)
- Click the remove all button 

#### To change the print order:

- Click a document type row to select
- Click the move up button (or) 
- Click the move down button 

## Keyword Value Input

As document types are selected, keywords assigned to each appear in this list. Keywords are grouped by Autofill Keyword Sets (one group per autofill keyword set), System Keywords, Security Keywords and Document Keywords. This element allows input of keyword values for placement on barcode cover sheets. Keyword names in bold type indicate they are required by the DMS.

**NOTE:** Keyword values are not required to produce “Document Type-only” barcode sheets.



Keyword	Value
[-] Autofill Keywords: Loan Autofill	
Loan Number	10024900 ...
- Customer Name	
- SSN	
- Status	
- Payoff Date	
- Employee Flag	
[-] System Keywords:	
Document Date	

## Autofill Keywords

If the document type is assigned to an autofill, the entire autofill keyword set is displayed. The primary keyword is open for input, while all secondary keywords remain read-only. If the primary keyword value entered appears in the DMS autofill table, the secondary keyword values are automatically displayed as a confirmation. Primary keyword values are usually required. Secondary keyword values are usually not required.

## System Keywords

All document types will contain the system keyword Document Date. Document Date is usually not entered, but is optional.

## Security Keywords

DMS security keywords will be grouped separately to allow user input of values, e.g. Institution ID. If Institution ID is a secondary keyword in an autofill, but the autofill table does not yet contain an entry for the primary keyword value, documents can still be scanned and viewed by the appropriate DMS users. Security keyword values are usually required if the primary keyword value is not present in the DMS autofill table.

## Document Keywords

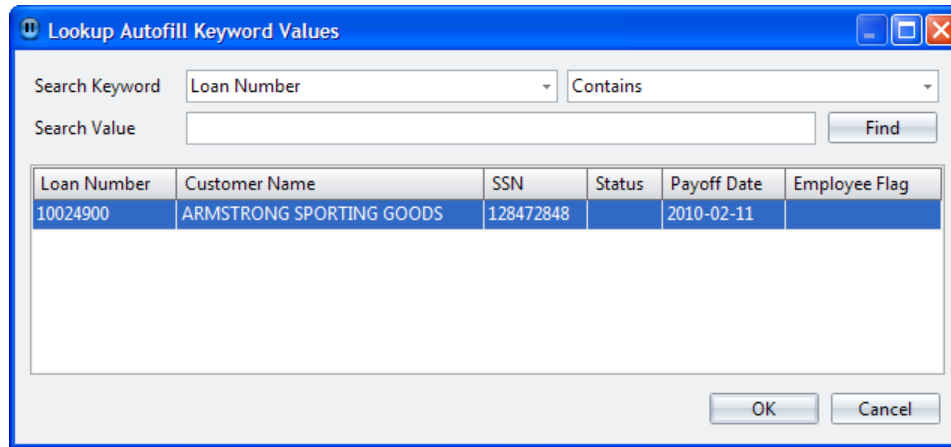
All other document type keywords appear in this group. These keywords are usually entered if available or applicable.

## Entering Keyword Values

Input is allowed for a keyword only if the row is not shaded. Input is validated using the keyword type definitions from the DMS. To navigate down the list, press **TAB**, **ENTER** or use the **DOWN arrow**. To navigate up the list, press **Shift+TAB**, **Shift+ENTER** or use the **UP arrow**. Values may be keyed directly into the cell or selected from a lookup dialog. When the input field has focus, a lookup button appears as either a down arrow for dates or an ellipse for other lookup data types. Clicking the lookup button invokes the appropriate lookup dialog.

## Autofill Keyword Lookup

When performing a lookup on the primary key of an autofill keyword set, the lookup dialog will present data directly from its DMS autofill keyword set table.



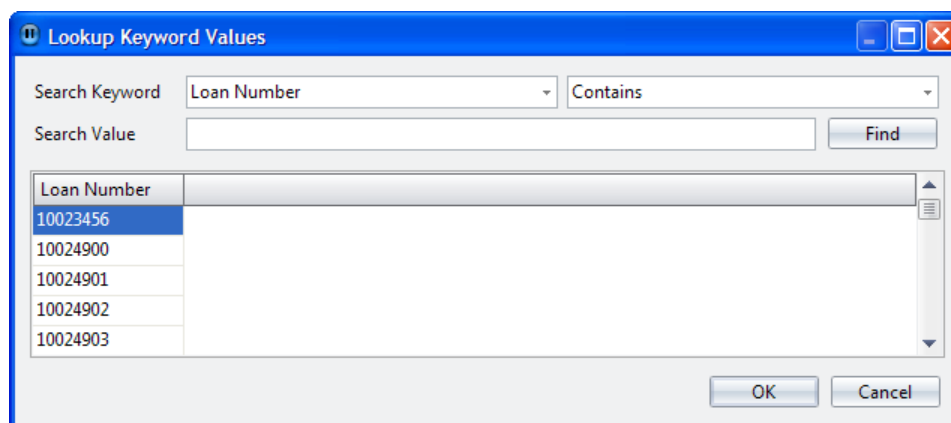
#### Using the Lookup Autofill Keyword Values dialog:

- Select the **Search Keyword** from the dropdown box (default is primary keyword)
- Select how you want to search from the dropdown box to the right of the search keyword (default is **Contains**)
- Enter the **Search Value** and click the **Find** button
- Double-click your selection from the results grid (or)
- Click your selection from the results grid and click **OK**

**NOTE:** If the search value is left blank and the Find button is clicked, all values in the DMS autofill keyword set table are displayed.

## Document Keyword Lookup

When performing a lookup on a document keyword, the lookup dialog will present data directly from its DMS keyword table containing all keyword values stored. Lookups are available for all document keywords with the exception of dates, currency and floating point numbers.



#### Using the Lookup Keyword Values dialog:

- Select how you want to search from the dropdown box to the right of the search keyword (default is **Contains**)
- Enter the **Search Value** and click the **Find** button

- Double-click your selection from the results grid (or)
- Click your selection from the results grid and click **OK**

**NOTE:** If the search value is left blank and the Find button is clicked, all values in the DMS keyword table are displayed.

## Date Selector

For keywords defined as dates in the DMS, a date popup appears when the lookup button is clicked.



### To key a date:

- Click the **Value** cell
- Type the month followed by a "/", the day followed by a "/" and the 2 or 4 digit year

### To select a date:

- Click the **Value** cell dropdown button to display the date selector
- Click a date from the current month (or)
- Use the arrow buttons to navigate the calendar to prior or future months and click a date

### To clear a date:

- Click the **Value** cell dropdown button to display the date selector
- Click the **Clear** button

**NOTE:** When using the date selector, you must click on a date before it will be assigned to the keyword value.

## Clearing Keyword Values

Keyword values may be cleared one at a time or all in one step. See the previous section for clearing date values.

### To clear one keyword value:

- Click the **Value** cell
- Click **Ctrl+A** to select the contents
- Press **Delete**

### To clear all keyword values:

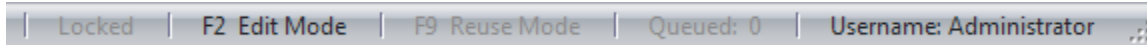
- Click the **Clear Values** toolbar button (or)

- Click **File > View > Clear Values** from the menu bar

## Using F2 Edit Mode

F2 Edit Mode opens secondary keyword values of an autofill keyword set for input. Use the **F2** key or select **View > Edit All Keywords** to toggle this mode on and off. The status bar indicates whether this mode is active. Secondary keyword values are usually not required when bar-coding; however, if Host Sync is not deployed and the host entry does not exist in the autofill keyword set table, they should be entered using this mode.

The status bar will indicate if this feature is active.



## Using F6 to Add Another Keyword Value

Additional instances of numeric and alphanumeric keyword types may be added to barcode cover sheets by using the **F6** key.

### To add another keyword value instance:

- Place the cursor inside a keyword field containing a value and press **F6**

### To delete an unwanted keyword value instance:

- Simply clear the keyword value for any instance you no longer wish to print

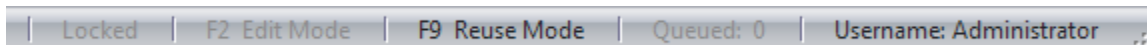
**NOTE:** This feature is only available on numeric and alphanumeric keyword types. It cannot be used for dates, currency or floating point keyword types.

## Using F9 Reuse Mode

Keyword values may be retained and reused for new barcode cover sheets. Use the **F9** key or selecting **View > Reuse Keyword Values** to toggle this mode on and off. The status bar indicates whether this mode is active. When active, an additional column of checkboxes is visible allowing selection of keyword values to retain for reuse. Once added to the queue or printed, the selected keyword value will pre-populate the next time a document type selected contains the keyword.

Reuse?	Keyword	Value
[-] Document Keywords:		
<input type="checkbox"/>	Contact Name	
[-] Security Keywords:		
<input type="checkbox"/>	Branch Code	
[-] System Keywords:		
<input type="checkbox"/>	Document Date	

The status bar will indicate if this feature is active.



**To activate F9 Reuse Mode (if inactive):**

- Press **F9** (or) click **View > Reuse Keyword Values**

**To select and populate Reused Keyword Values:**

- Enter keyword values and check each keyword to reuse
- Click **Add to Queue** (or) **Click Print Barcodes**

**To clear selected Reused Keyword Values:**

- Click **Tools > Reused Keyword Values**
- Check each keyword to remove and click **OK**

**To clear all Reused Keyword Values (if active):**

- Press **F9** (or) click **View > Reuse Keyword Values**

# Using INFO-INDEX

## Generating Barcode Sheets

There are two ways to generate barcode sheets. Barcode sheets for the current selections can be printed immediately or they can be added to a queue and printed later prior to closing INFO-INDEX.

## Printing Current Selections

Barcode sheets for the current selections may be sent directly to the printer. This option is available as long as the queue is empty. If the queue is not empty, you must add the current selections to the queue before they can be printed. After document type selections are printed, they are removed from the selected list unless the **Lock selections** checkbox is activated.

### To print current selections:

- Click the **Print Barcodes** button located on the toolbar (or)
- Click **File > Print Barcodes** from the main menu (or)
- Press **Ctrl+P**

## Adding Current Selections to the Queue

Current selections may be added to the queue to be printed later. The status bar displays a counter indicating the number of selections currently in the queue. After the document type selections are added to the queue, they will be removed from the selected list unless the **Lock selections** checkbox is activated.

**NOTE:** Queued selections must be printed before closing the application or they will be discarded. You will be warned if this situation occurs.

### To add current selections to the queue:

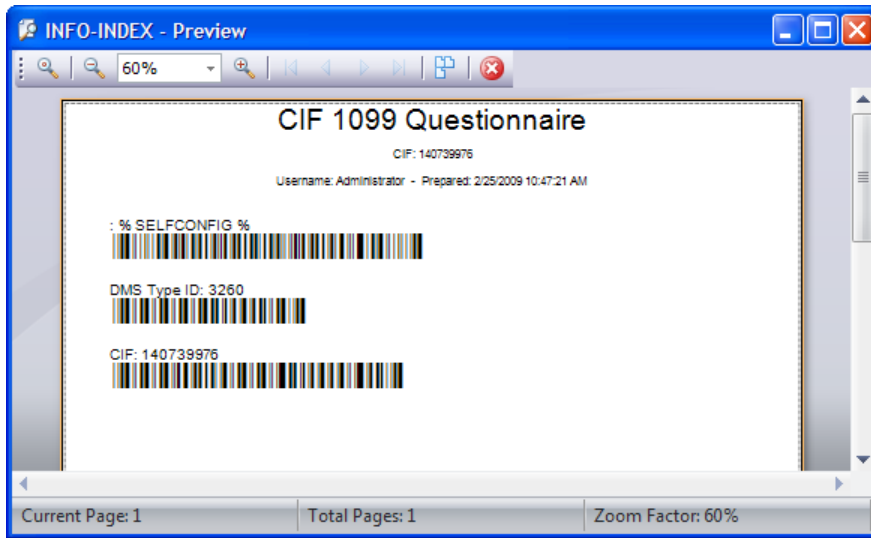
- Click the **Add to Queue** button located on the toolbar (or)
- Click **File > Add to Queue** from the main menu (or)
- Press **Ctrl+S**

## Previewing Queued Selections

Barcode sheets for selections in the queue may be previewed before printing.

### To preview selections in the queue:

- Click the **Preview Barcodes** button located on the toolbar (or)
- Click **File > Preview Barcodes** from the main menu



## Printing Queued Selections

Barcode sheets for the current selections may be printed immediately. The queue is deleted following the print process.

### To print all selections from the queue:

- Click the **Print Barcodes** button located on the toolbar (or)
- Click **File > Print Barcodes** from the main menu (or)
- Press **Ctrl+P**

## Deleting the Queue

All selections may be deleted from the queue. Individual barcode sheets cannot be deleted.

### To delete all selections from the queue:

- Click the **Delete Queue** button located on the toolbar (or)
- Click **File > Delete Queue** from the main menu

## Examples

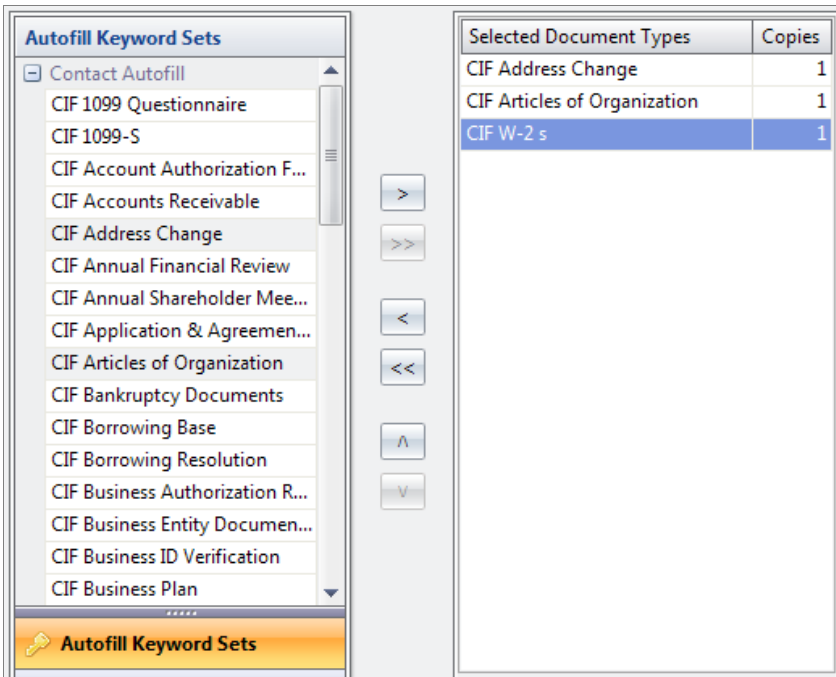
The following examples illustrate two common ways to use INFO-INDEX.

### Preparing Multiple Barcode Sheets for One Customer

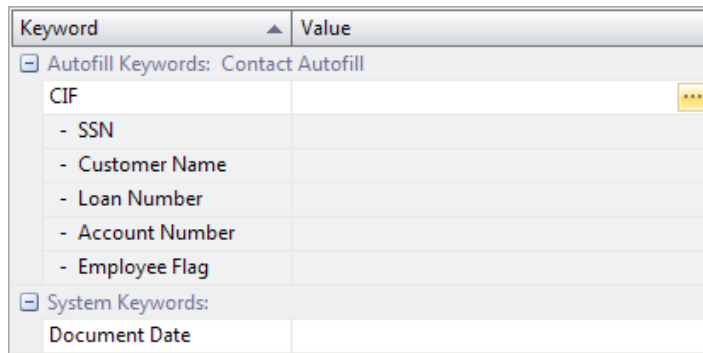
Three documents are to be archived for customer Joe Armstrong. These documents are Address Change, Articles of Incorporation and W-2.

#### Steps:

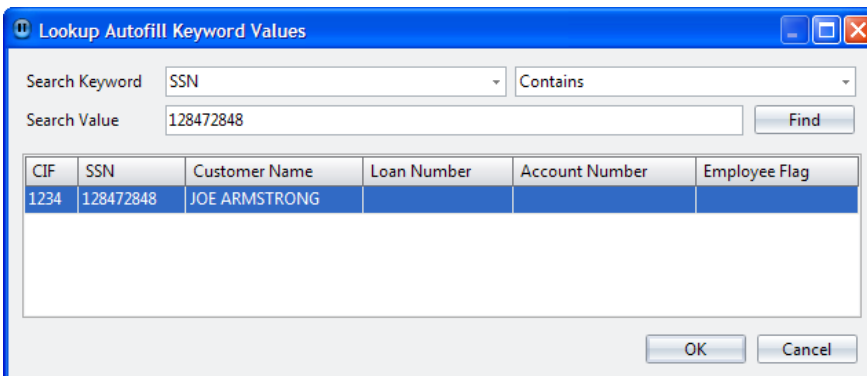
- Click the **Autofill Keyword Sets** navigation bar
- Double-click the **Contact Autofill** to expand the list
- Double-click **CIF Address Change** to add
- Double-click **CIF Articles of Incorporation** to add
- Double-click **CIF W-2 s** to add



- We do not know the customer's CIF number, but we do know the SSN
- Click the **CIF** keyword value input field
- Click the **Edit Button** to the right



- Change the **Search Keyword** dropdown to **SSN**
- Enter Joe Armstrong's SSN in the **Search Value**, click **Find**, then click **OK**





- Keyword values from the CIF Autofill table are populated

Keyword	Value
Autofill Keywords: Contact Autofill	
CIF	1234
- SSN	128472848
- Customer Name	JOE ARMSTRONG
- Loan Number	
- Account Number	
- Employee Flag	
System Keywords:	
Document Date	

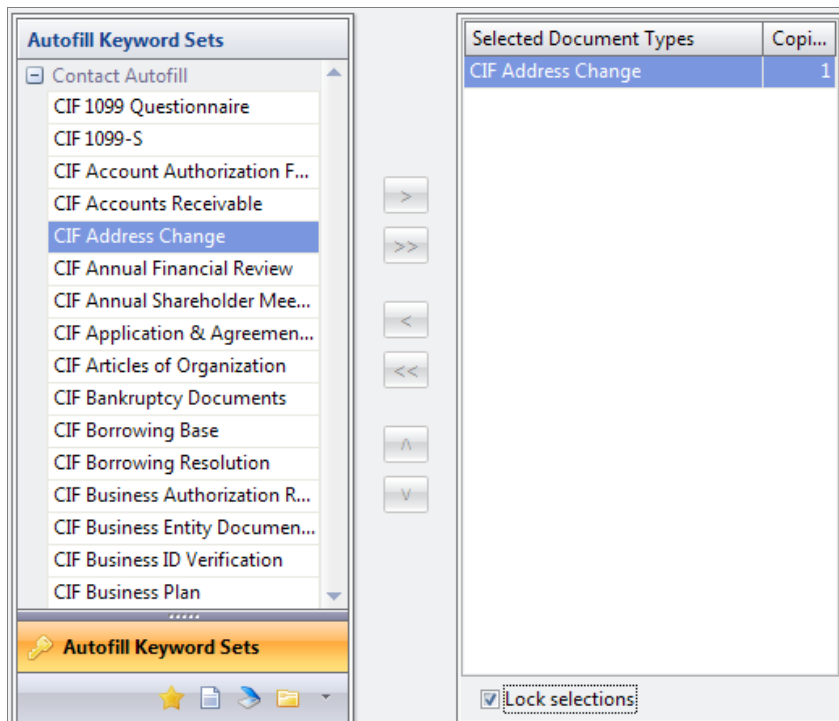
- Click the **Print Barcodes** toolbar button or press **Ctrl+P**
- Insert each barcode sheet in front of their corresponding document and scan them into the DMS

## Preparing Single Barcode Sheets for Multiple Customers

A stack of Address Change forms are to be archived. Each form is for a different customer. This example illustrates INFO-INDEX's capability for rapid user input.

### Steps:

- Click the **Autofill Keyword Sets** navigation bar
- Double-click the **Contact Autofill** to expand the list
- Double-click **CIF Address Change** to add
- Click to check **Lock selections**



- Click the **CIF** keyword value input field
- For each Address Change form, type the CIF number and press **Ctrl+S** to add to the queue
- Click the **Remove Selections** toolbar button to unlock selections and allow printing
- When finished, press **Ctrl+P** to print barcode sheets
- Insert each barcode sheet in front of their corresponding document and scan them into the DMS

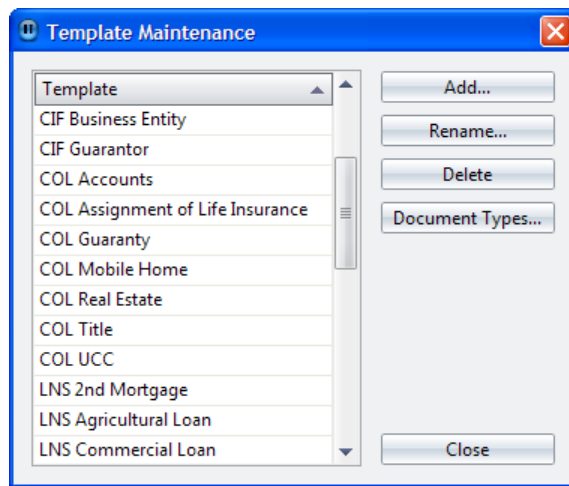
# Program Settings

## Custom Templates

Custom templates are a one-dimensional logical grouping of available document types designed for quick access of repetitively used sets of document types, e.g. Car Loan, Boat Loan and Mobile Home Loan. Document types presented to users in custom templates are limited to those defined by DMS user group security.

**NOTE:** Administration of custom templates requires the **Setup Barcode Template** client action.

From the main menu, click **Tools > Template Maintenance**.



### To add a custom template:

- Click the **Add...** button
- Type the **Template Name** and click **OK**
- Select the appropriate document types from the available list on the left
- When finished, click **OK**

### To rename a custom template:

- Click the **Template** to rename and click **Rename...** (or)
- Double-click the **Template Name**
- Type the new **Template Name** and click **OK**

### To delete a custom template:

- Click the **Template** to remove and click **Delete**
- Click **Yes** to confirm deletion

### To add or remove document types:

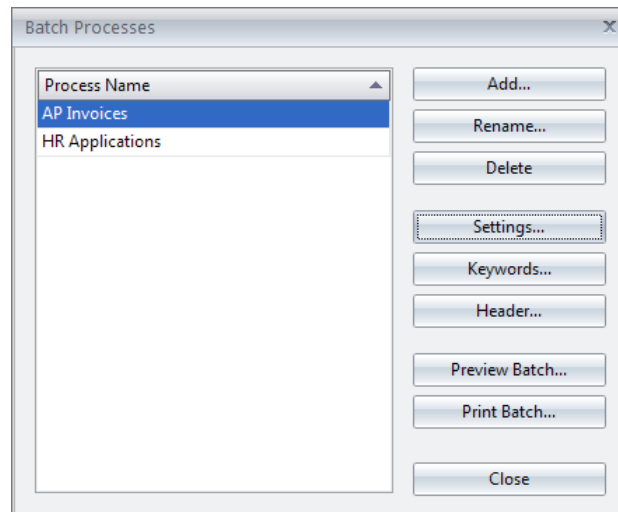
- Click the **Template** to change and click **Document Types...**
- Select the appropriate document types from the available list on the left to add
- Remove the appropriate document types from the selected list on the right to remove
- When finished, click **OK**

## Batch Barcode Processing

Barcodes can be printed in a batch-mode based on input supplied from a line of business system stored in a text file. A batch process can be executed from a command line, from inside the client application or as an unattended scheduled event.

**NOTE:** Administration of batch barcode processing requires the **Setup Barcode Batch** client action.

From the main menu, click > **Batch Process Maintenance**.



### To add a batch process:

- Click the **Add...** button
- Type the **Batch Process Name** and click **OK**
- Enter the **Batch Process Settings** and click **OK**
- Select keywords from the available list that matches the input file definition and click **OK**
- Select keywords from the available list to display in the barcode sheet header and click **OK**

### To rename a batch process:

- Click the **Process** to rename and click **Rename...** (or)
- Double-click the **Process Name**
- Type the new **Process Name** and click **OK**

### To delete a batch process:

- Click the **Process** to remove and click **Delete**
- Click **Yes** to confirm deletion

### To modify batch process settings:

- Click the **Process** to modify and click **Settings...**
- Update the **Batch Process Settings** and click **OK**

### To add or remove file definition keywords:

- Click the **Process** to modify and click **Keywords...**

- Add or remove keywords to matches the input file definition and click **OK**

**To add or remove header keywords:**

- Click the **Process** to modify and click **Header...**
- Add or remove keywords to display in the barcode sheet header and click **OK**

**To preview a batch process:**

- Click the **Process** to preview and click **Preview Batch...**

**To print a batch process:**

- Click the **Process** to print and click **Print Batch...**

## Settings

This dialog defines the batch process settings. These settings apply to the entire batch. All records in the batch process file must have the same field delimiters and separators.

**Delimiter Character** – The character that surrounds each field in the batch process file (optional)

**Separator Character** – The character that separates each field in the batch process file

**Document Type** – The DMS document type associated with each entry in the batch process file

**Batch Process File** – The full path and filename of the batch process file

**Printer** – The printer to which barcode sheets from this batch process will be printed

Process Settings - AP Invoices

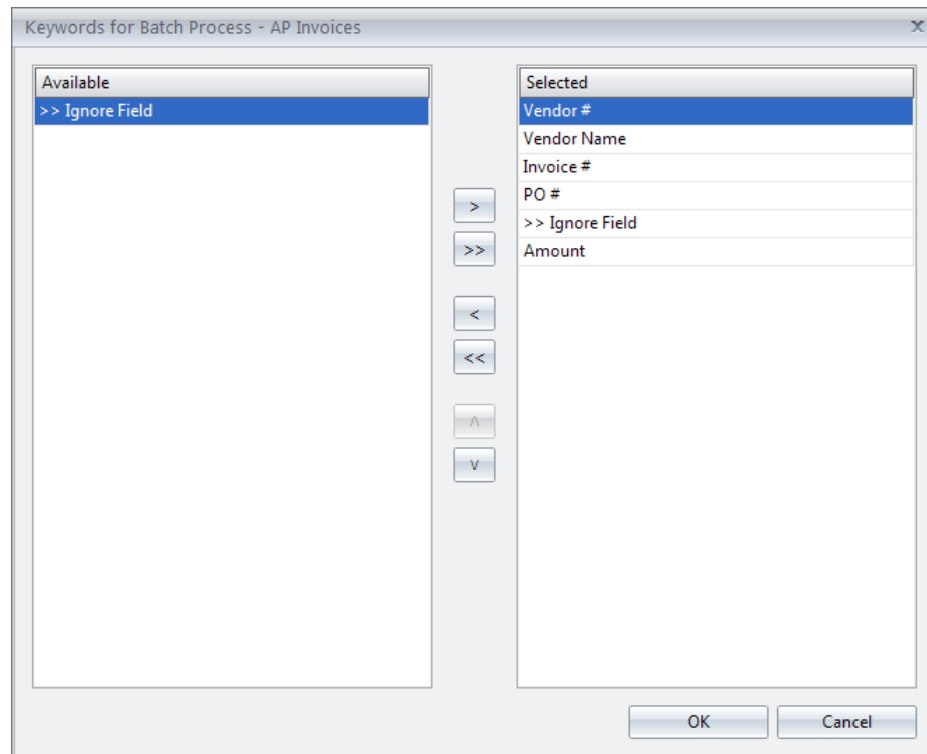
Delimiter Character	<input type="text"/>
Separator Character	<input type="text" value=" "/>
Document Type	AP Invoice
Batch Process File	C:\TEMP\APInvoices.txt ...
Printer	\\pfdc1\HP Color LaserJet 2600n

OK Cancel

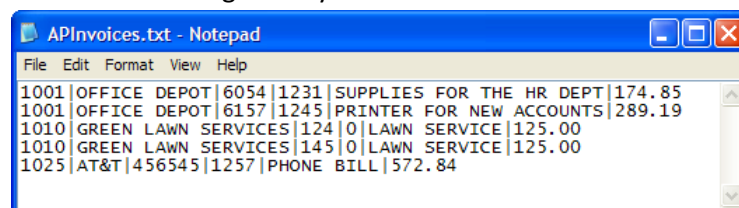
## Keywords

This dialog defines the record layout of the batch process file. Select the DMS keywords from the available list in the order they appear in the batch process file. Select ">> Ignore Field" for fields that do not have a corresponding keyword or that you simply want to ignore.

**NOTE:** The number of selected keywords must match each record in the batch process file.

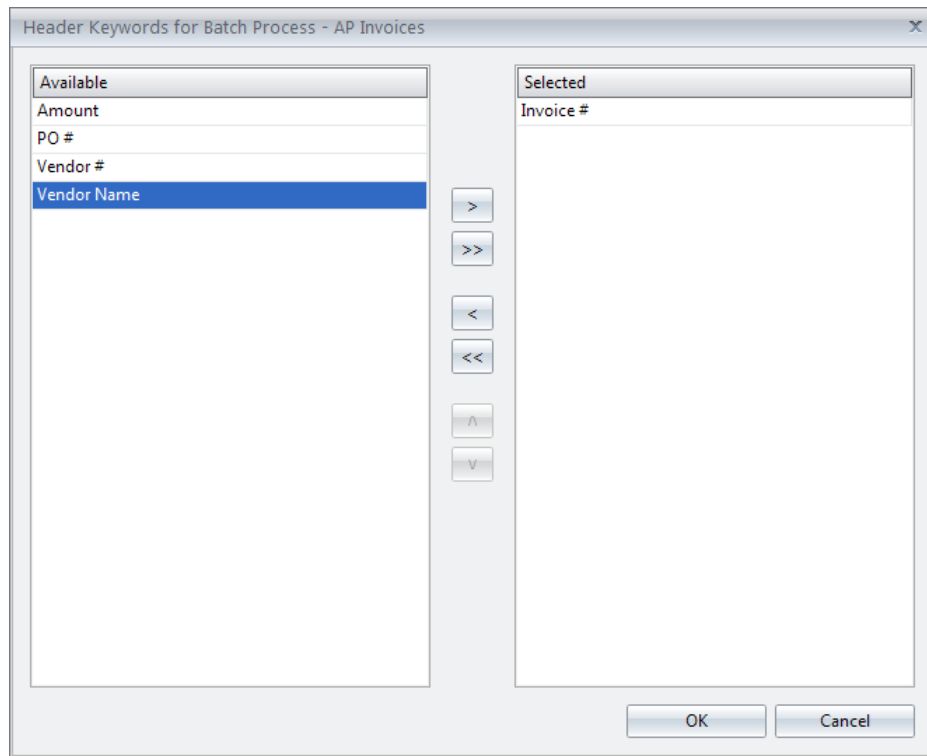


Sample batch process file matching the keyword selections above:

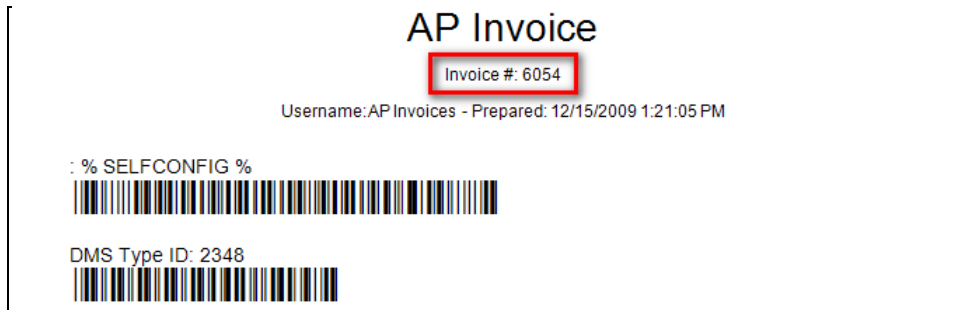


## Header

This dialog identifies keyword values that appear in the barcode sheet header. Both the keyword name and value are printed. More than one keyword may be selected, but depending on the length of the labels and values, may not fit entirely on the page.



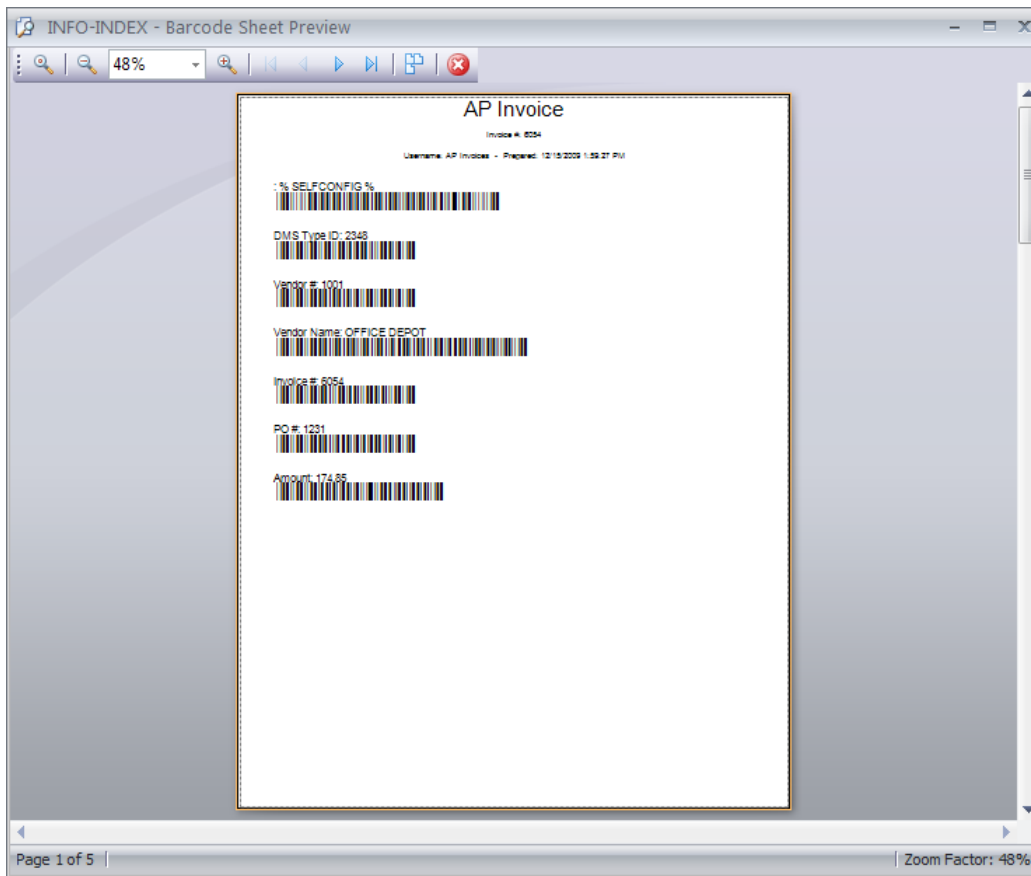
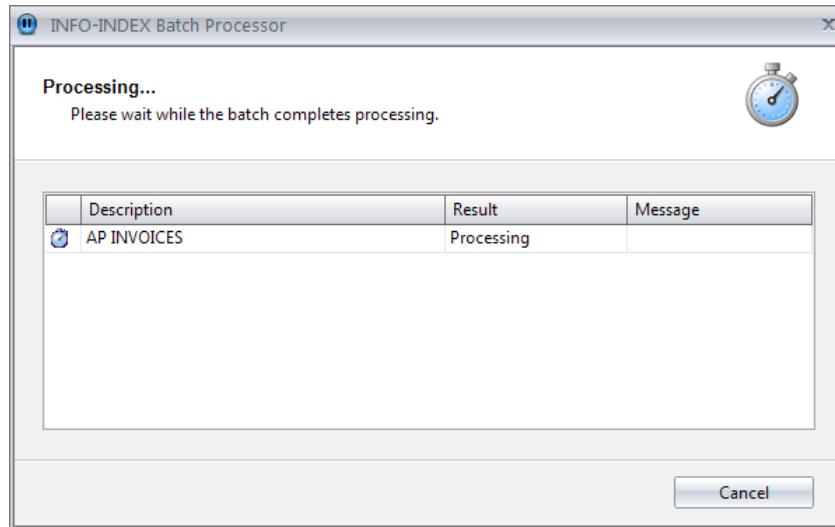
*Sample barcode sheet matching the header selections above:*



**NOTE:** Barcode sheets printed from a batch process will print with the batch process name as the username in the barcode sheet header.

## Preview Batch

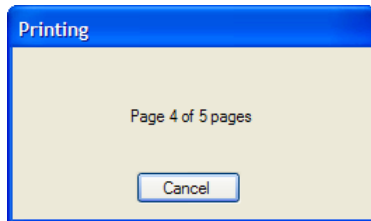
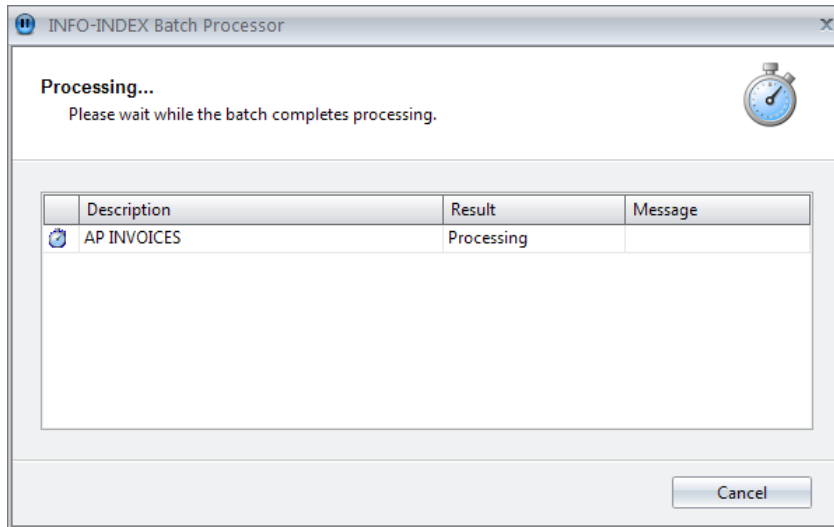
Batch processes may be previewed for testing purposes to ensure that all settings are working as expected. If an error is encountered, a message will appear as a link in the Message column, otherwise the barcode sheets will be presented in the print preview dialog.





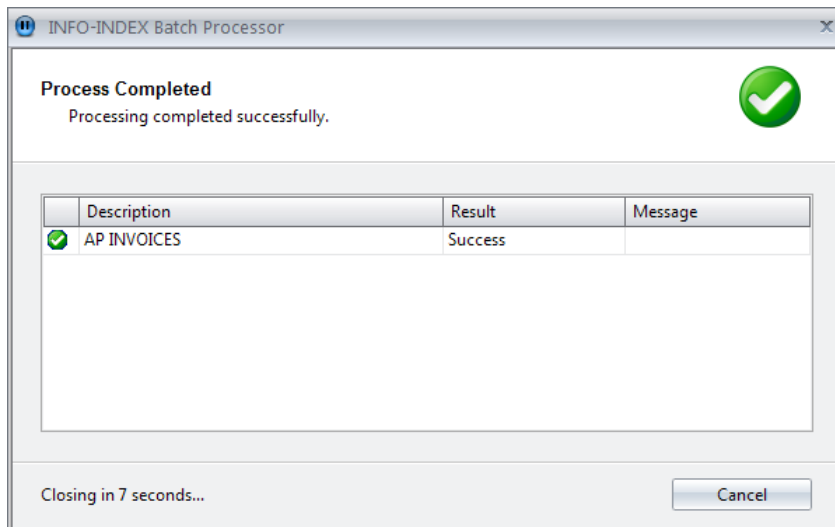
## Print Batch

Batch processes may be printed directly from the application. If an error is encountered, a message will appear as a link in the Message column, otherwise barcode sheets will print directly to the printer specified in the batch process settings.



## Command Line Processing

Batch processes can be executed from a command line. This command line may be placed in a batch file and scheduled as an unattended event. Following execution, the batch process status window will automatically close after 10 seconds.



### Command Syntax:

- `<program_name> <options>`

### Available Options:

- **un="username"** – Valid INFO-INDEX username
- **pw="password"** – Password for username specified in username option
- **process="process name"** – Batch process to execute

### Sample command to execute one batch process:

- `INFO-INDEX.exe un="Administrator" pw="xxx" process="AP Invoices"`

### Sample command to execute two batch processes:

- `INFO-INDEX.exe un="jadams" pw="xxx" process="ap invoices|hr applications"`

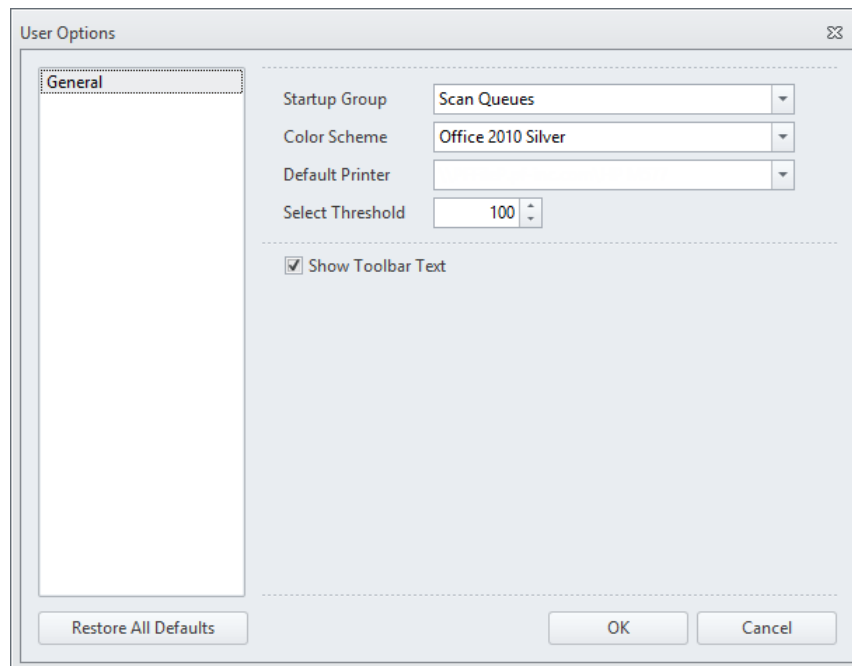
**NOTE:** Command line options are NOT case sensitive, MUST be separated by a space and may appear in any order.

## User Options

Each user has control of selected program settings. These preferences are specific to each workstation and user combination.

### To access the user options dialog:

- Click **Tools > User Options...** from the main menu
- Make desired changes and click **OK**



## Startup Group

The **Startup Group** preference determines the view of the available list presented when INFO-INDEX starts.

### Available selections:

- Autofill Keyword Sets
- Custom Templates
- Document Type Groups
- Scan Queues (initial default)
- All Scan Document Types

## Color Scheme

The **Color Scheme** preference determines the user interface colors and style.

## Default Printer

Unless changed, INFO-INDEX prints to the Windows default printer. The **Default Printer** preference allows another printer to be designated as the default INFO-INDEX printer.

## Select Threshold

The **Select Threshold** specifies the number of document types that can be selected at one time before a warning message is presented to the user. The threshold is designed to prevent users from inadvertently selecting all

document types at one time, since that process may take some time to execute. This preference can be set from 100 to 2000 in increments of 100. The default is 100.

## Show Toolbar Text

If checked, the **Show Toolbar Text** preference allows the toolbar button description to display along with the icon. If unchecked, only the icon will display.

## Restore Defaults

Click the **Restore Defaults** button to set all user preferences back to the factory defaults.