

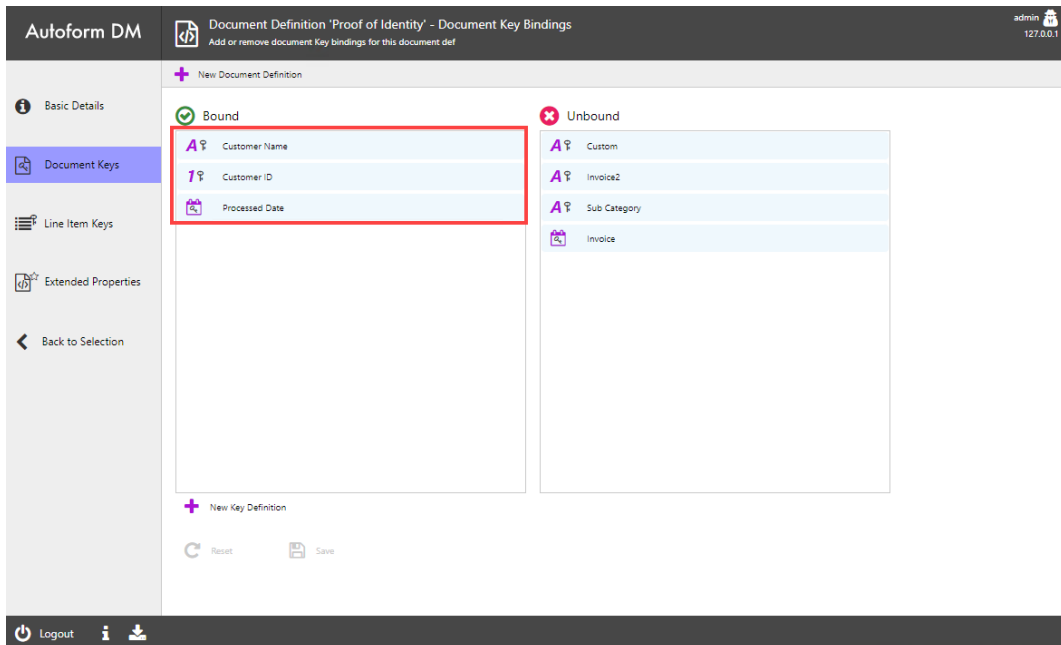
How do you filter the keys shown in the Ad-Hoc Scanning Application?

Alex Clemons - 2022-11-04 - Comments (0) - Autoform DM FAQs



This article applies to version 10.1.0 and later of the Ad-Hoc Scanning Application.

By default, the Ad-Hoc Scanning Application will display all bound keys for the selected Document Definitions. The full set of bound keys can be viewed in the Autoform DM front-end.



The screenshot displays the 'Document Definition 'Proof of Identity' - Document Key Bindings' interface. The interface is divided into two main sections: 'Bound' and 'Unbound'. The 'Bound' section is highlighted with a red box and contains three items: 'Customer Name', 'Customer ID', and 'Processed Date'. The 'Unbound' section contains four items: 'Custom', 'Invoice2', 'Sub Category', and 'Invoice'. The interface also includes a sidebar with navigation options like 'Basic Details', 'Document Keys', 'Line Item Keys', and 'Extended Properties'. At the bottom, there are 'Reset' and 'Save' buttons.

There is an option to filter the keys displayed within the application. Only a limited number of the keys bound to the document type are shown.

Select Folder: **Local Branch**

Local Branch

Filename	Date Created
ExampleBill.pdf	11:33:18 15-Apr-2019

Filename	Date Created
ExampleBill.pdf	11:33:18 15-Apr-2019

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Match

Proof of Identity

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1



Customer Name		BTV Technology		Customer Name		BTV Technology	
Customer Number		1046		Customer Number		1046	
Billing Address				Delivery Address			
2 Burlington Park Sutton Road Sutton Coldfield Birmingham				2 Burlington Park Sutton Road Sutton Coldfield Birmingham			
Postcode				Postcode			
CB22 8BA				CB22 8BA			
Dispatch Date				Order Number			
2010/01/28				0000000000			
Item Number	Item Description	Cost	Quantity	Total	Unit	Price	Value
TT000476N	Cash Deposit LCY Road FCV deposit	6,200.00	6	37,200.00			
TT000476N	Cash Deposit FCV deposit	1,500.00	26	1,500.00			
TT000476N	Cash Deposit FCV deposit	60,000.00	60	4,300,000.00			
TT000476N	Cash Deposit FCV deposit	700.00	65	63,750.00			
TT000476M	Cash Withdrawal FCV withdrawal	1,500.00	63	104,500.00			
SC7000000	Securities Portfolio BMO UK EQUITY TRAIL & PUL 2010	2,800.00	60	208,000.00			
EXTRA0000	Futures Variation OR VARIATION MARGIN	1,400.00	79	114,500.00			
EXTRA0004	Futures Variation OR VARIATION MARGIN	2,200.00	77	169,400.00			
EXTRA0006	Futures Variations Margin OR VARIATION MARGIN	200.00	77	16,200.00			
Sub Total				6,104,900.00			
VAT Rate				2.20			
VAT Total				134,306.00			
Total Order Value				6,239,206.00			

Sub Total	6,136,950.00
VAT Rate	0.20
VAT Total	2,454,780.04
Total Order Value	14,728,680.24

Refresh

Scan Setup

Process Barcodes

Save

There are two ways to set up the key filter. The first method is to make a global filter that will affect all Document Definitions. The second method is to set up a filter per Document Definition. Both of these options require direct edits to the Autoform DM database. We recommend you conduct a [System Backup](#) before performing any changes. If you are unsure about the impact of these changes, please contact [Formpipe Support](#).

Example: Setting up a global filter

A global filter applies to all Document Definitions and will only show the bound keys from the specified filter set. To set up the filter, follow these steps:

1. Navigate to the `tblCustomSettings` table (or `tblGlobalSettings` when using Autoform DM 8.3 and earlier) in your Autoform DM Database, then add or amend the following:

name (ConstID)	value (constValue)
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7094	skey3,nkey3,dkey1
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The `constValue` should be the list of database columns you want to display.

2. Restart the application

3. Select a Document Definition – the keys displayed will match the list added to `tblCustomSettings` (or `tblGlobalSettings` when using Autoform DM 8.3 and earlier) or a subset of them

Example: Setting up individual Document Definition filters

It is possible to filter the keys on a Document Definition basis, so each definition will have its own subset of keys displayed.

Navigate to the `tblCustomSettings` table (or `tblGlobalSettings` when using

Autoform DM 8.3 and earlier) within your Autoform DM Database, then add or amend the following:

name (ConstID) value (constValue)

7094 true

For Autoform DM 8.0 and later

1. Log in to Autoform DM then click **Administration > Document Definition Manager > Extended Properties**
2. Click **New Extended Property** at the top, enter a name (for example, “Document Key Filter”) then click **Create**.
3. Select the Document Definition (via the Document Definitions screen) you want to edit.
4. In the **Extended Properties** tab, under Document Key Filter, enter a comma-separated list of database columns, then click **Save**.

The screenshot shows the 'Document Definition 'Account Statement' - Extended Property Values' screen in Autoform DM. The left sidebar contains navigation options: 'Basic Details', 'Document Keys', 'Line Item Keys', 'Extended Properties' (selected), and 'Back to Selection'. The main content area has a header 'Document Definition 'Account Statement' - Extended Property Values' with a sub-header 'Set extended property values for document definition'. Below this is a '+ New Document Definition' button. The 'Document Subtype' field contains 'Passport,Drivers License,Utility Bill,Statement'. The 'Document Key Filter' field is highlighted with a red box and contains 'SKEY3,NKEY3,DKEY1'. The 'test1:' field contains 'No value set'. At the bottom are 'Reset' and 'Save' buttons.

5. Check the Autoform DM database table `tblExtendedDataDef` for the ID linked to the new Extended Definition:

	id	type	name	regex	regexFailureMsg	label
1	73014444057	0	document-key-filter			Document Key Filter

Change the keys to Read-Only

It is also possible to set the keys as read-only. To do this, amend or add the following key to `tblCustomSettings` (or `tblGlobalSettings` when using Autoform DM 8.3 and earlier):

name (ConstID) value (constValue)

7095 true


Binding Legacy Keys


Legacy Keys, created before support of elastic keys in Autoform DM 9.2, or before key migration in Autoform DM 7.3, are supported and can be bound to your keys via the Legacy Key Support tab. Select the legacy key from the drop-down menu next to the key to bind it.


There are three types, with a limit of 55 keys in total:


- SKEY (Strings): SKEY1-SKEY25
- NKEY (Numbers): NKEY1-NKEY15
- DKEY (Dates): DKEY1-DKEY15

Autoform DM

Key Definition - Mapping
Configure legacy key mapping

Key Definitions

Legacy Key Support


Strings


Customer Name

SKEY2

string

SKEY1

Reset

Save

Creating Legacy Key definitions

All Mapping will now be updated and all SKEY, NKEY and DKEY columns will be listed.