

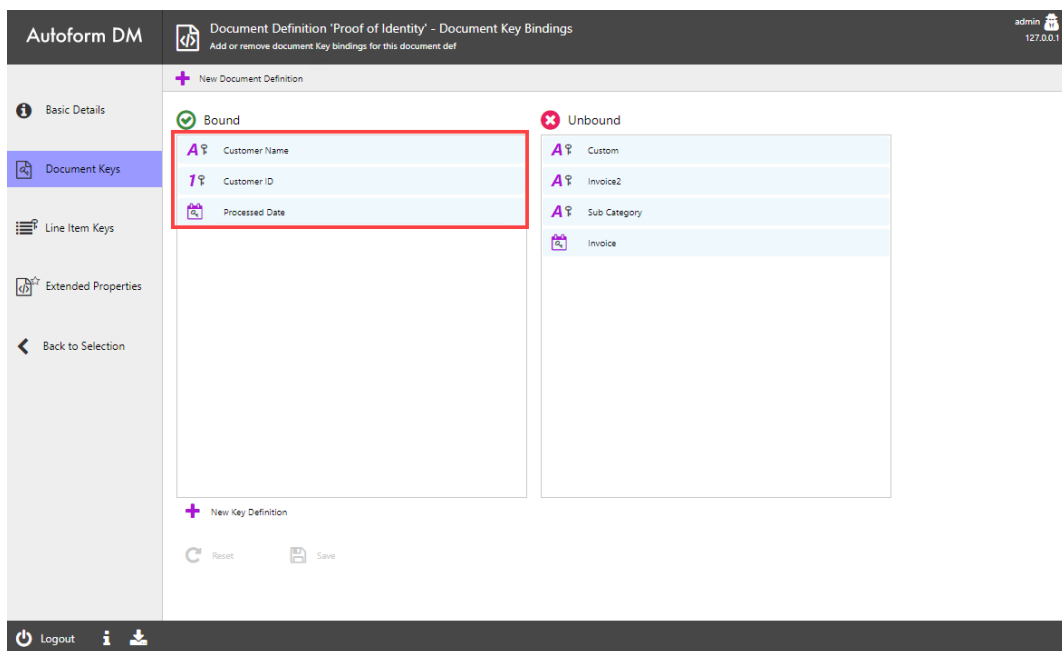
How do you filter the keys shown in the Ad-Hoc Scanning Application?

Alex Clemons - 2024-08-21 - Comments (0) - Autoform DM FAQs

Autoform DM

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' page in the Autoform DM application. The interface is divided into a left sidebar and a main content area. The sidebar includes navigation options: 'Basic Details', 'Document Keys' (highlighted), 'Line Item Keys', 'Extended Properties', and 'Back to Selection'. The main content area shows a table of key bindings, categorized into 'Bound' and 'Unbound'. The 'Bound' section contains three entries: 'Customer Name', 'Customer ID', and 'Processed Date'. The 'Unbound' section contains four entries: 'Custom', 'Invoice2', 'Sub Category', and 'Invoice'. A red box highlights the 'Bound' section. At the bottom of the main content area, there are buttons for 'Reset' and 'Save', and a 'Logout' button in the footer.

Bound	Unbound
Customer Name	Custom
Customer ID	Invoice2
Processed Date	Sub Category
	Invoice

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.

Status: Retrieving Document

Select Folder: **Local Branch**

Select File:

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

Barcode: **Match**

Document Definition **Proof of Identity**

Customer Name ✓

Customer ID ✓

Processed Date ✓



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Customer Name	EFS Technology		
Customer Number	1348		
Billing Address	2 Burlington Park Station Road Cambridge	Delivery Address	2 Burlington Park Station Road Cambridge
Postcode	CB2 6SA		
Dispatch Date	01/01/2018	Order Number	000000000

Item Number	Item Description	Cost	Quantity	Total
TT30K47676	Cash Deposit	6,250.00	6	37,500.00
	LCV Rep'd FCY asset			
TT30K47676	Cash Deposit	30,000.00	36	1,080,000.00
	FCY deposited			
TT30K47676	Cash Deposit	50,000.00	96	4,500,000.00
	FCY deposited			
TT30K47676	Cash Deposit	750.00	85	63,750.00
	FCY withdrawn from FCY			
TT30K47676	Cash Withdrawal	1,500.00	80	124,500.00
	FCY withdrawn			
SCTP30C030	Securities Purchase	2,850.00	80	228,000.00
	800 - UK GOVT TREAS 4 Jul 2016			
DXTRAB0205	Futures Variation DR	1,450.00	79	114,550.00
	VARIATION MARGIN			
DXTRAB0204	Futures Variation DR	2,200.00	77	169,400.00
	VARIATION MARGIN			
DXTRAB0204	Futures Variation Margin CR	200.00	77	16,250.00
	VARIATION MARGIN			
Sub Total				6,136,500.00
VAT Rate				0.00
VAT Total				2,454,750.00
Total Order Value				14,728,680.00

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)

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 'Extended Properties' configuration screen for a document definition named 'Account Statement'. The interface includes a sidebar with navigation options: 'Basic Details', 'Document Keys', 'Line Item Keys', 'Extended Properties' (which is currently selected), and 'Back to Selection'. The main content area is titled 'Document Definition 'Account Statement' - Extended Property Values' and contains three input fields, each with a red 'X' icon on the right side. The first field is labeled 'Document Subtype' and contains the text 'Passport,Drivers License,Utility Bill,Statement'. The second field is labeled 'Document Key Filter' and contains the text 'SKEY3,NKEY3,DKEY1'; this field is highlighted with a red rectangular border. The third field is labeled 'test1' and contains the text 'No value set'. At the bottom of the form, there are two buttons: 'Reset' and 'Save'.

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

The screenshot shows the 'Key Definition - Mapping' interface in Autoform DM. The sidebar on the left has two tabs: 'Key Definitions' and 'Legacy Key Support', with the latter being selected. The main content area is titled 'Key Definition - Mapping' and 'Configure legacy key mapping'. It features a section for 'Strings' with a key definition for 'Customer Name' mapped to 'SKEY2' and a 'string' field mapped to 'SKEY1'. At the bottom, there are 'Reset' and 'Save' buttons.

Creating Legacy Key definitions

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