AutoFill Keyword Sets

AutoFill Keyword Sets are used to automate and standardize data entry. An AutoFill Keyword Set is a configuration of Keyword Types that includes a Primary Keyword Type and one or more Secondary Keyword Types. If an AutoFill Keyword Set is assigned to a Document Type, each set of Keyword Values (the Primary Keyword Value and its corresponding Secondary Keyword Values) can be considered an instance. A value entered into the Primary Keyword Type field during indexing of a document triggers the population of the remaining Secondary Keyword Types. When applied to Document Types, AutoFill Keyword Sets increase the speed and accuracy of indexing, especially when indexing large volumes of documents.

Cross Referencing

A cross-reference is a relationship between a Document Type and one or more other Document Type(s). This allows you to view related documents by double-clicking on a word or a document region (an FIDN, for example). Cross-referencing aids research by making all related documents readily available. For example, an I9 form could be configured to allow you to double-click the I9 to retrieve the corresponding W4. The W4 could then in turn be cross referenced with a corresponding W2 form.

Custom Queries

Custom Queries allow you to quickly access your most frequently retrieved documents by conducting pre-defined searches. Custom queries are queries that have been configured for you by your system administrator, so that you can quickly and easily select the kinds of documents that you most frequently work with. Whenever you conduct a custom query, its specifications are automatically recorded in a temporary query history, which is maintained for the duration of your current Web Client session.

Document

A document is a specific record, report, image, file or group of files. A document may be John’s W2 form or Mary’s invoice from office supplies. Documents are the most specific identification in the system. Each document has index values associated with it as well as a unique system identifier.

Document Type

In addition to index values each document is assigned a document type. The document type determines many of the settings and the parameters of the document itself. This includes user rights associated with the document as well as the potential index values associated with the document. Once a Document Type is selected, the Keywords will be available. As more Document Types are selected, the list of keyword types in the Keywords section will be limited only to those Keywords that all the selected Document Types have in common.
Document Type Groups

In order to help organize document types, document type groups can be created. A document type group is a collection of similar document types. For example, HR would be the document type group and I9 form, W2 form and performance evaluation would be the document types assigned to that group. Document type groups allow users to narrow document search by Document Type Group or department.

E-Forms

E-Forms are forms that you complete and submit to the system electronically. E-Forms can be set up to support any business or organizational activity that requires the entry, editing, routing, and approval of information. Because the system maintains complete audit trails for E-Forms, they can be tracked from inception to disposition, and authenticated at every step of the way. E-Forms are completely configurable, so the system can include whatever forms are desired to support your activities. Your system administrator determines who can use which forms, so the forms available to you may differ from those available to others.

ECM

Enterprise Content Management

Keyword Type

In order to use a value to retrieve a document, it must be assigned as a value for a keyword type. Keyword Types are indexes assigned to document types. Each document type can have different keyword types associated and, in many cases, the same keyword types will be used for multiple document types. For example: FIDN, Last Name, Middle initial, First name.

Note Type

A Note is a visual reminder that can be attached to a document. The note can be text based; simply displaying user generated text comments, or can incorporate a graphic image with the comments, referred to as an annotation. Other note formats include the document staple, that indicates the presence of a reference list of documents and the redaction that allows for a specific portion of the image to be visibly blocked from the display.

Scan Queue

A Scan Queue keeps scanned documents organized as they enter the system. Once a batch of documents has been scanned, you may go into the scan queue to view the images in the batch or index them. Indexing information is assigned to the documents either before or after scanning, depending on the configuration of the scan queue. This indexing information determines how you will be able to use the documents stored in the system.
**Sweep**

Sweeping directory is a way to take image files you already have in a directory and place them into a scan queue just as if the images had just been scanned. The image files are copies to the disk group associated with the scan queue. Files not recognized as image files are not processed.

**Workflow Users**

With permissions based on the user’s role staff assigned to this group have the additional privileges of save as and User Workstation options and access to the Workflow system.