

Advanced Profiles Add-on

To find your documents effectively and handle various document life cycle events in a document management system, you often need to index/profile them. However, manual profiling of documents can be cumbersome and repetitive and simply a waste of time if you already have the necessary data in your other applications. The Docsvault Advanced Profiles add-on allows you to fetch value lists for filling up profiles from external databases like your CRM, ERP, Accounting and other LOB applications. The Advanced Profiles Add-on allows two types of index fetching methods:

Primary/External Index: For Indexes defined as Primary/External Indexes their list of values is fetched from external databases. Example: list of customers, vendors, IDs, PO #, etc.

Secondary/Dependent Index: For Indexes defined as Secondary/Dependent Indexes their index values are filled/filtered up automatically as per rules based on a value selected in a previous index field. For example, filling up of customer information automatically based on the customer name or ID selected in previous index field or filtering out list of vendors by region/type of products selected in a previous index field.

Highlights

- ✓ Supports custom queries for fetching values from more than one tables and merge/sort/convert data before they are listed
- ✓ Supports fetching data from practically any SQL based database using linked servers, ODBC or db providers
- ✓ Allows back to back dependencies. For example, dynamic values automatically filled in secondary indexes (triggered by selection of primary index value) in turn will trigger filling of tertiary indexes and so on
- ✓ Speedup document profiling for users and maintain consistency of your profiling

Solutions

- **Document Automation**
Ensures documents are well organized and can be easily automated
- **Fast Retrieval**
When your documents are neatly organized and quickly retrievable, the time spent on searching documents significantly reduces

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What it means for you?

Not only are document profiles helpful in filing, retrieving and searching for documents but they also help a great deal in other document related automation processes and workflows. So also, document profiles can serve as a vital link between data in different applications. Docsvault Advanced Profiles offer flexible and custom query capabilities along with multi-level dependencies that allow you to practically trigger a full profile fill up with just one value selection even though values for your profiles are fetched from different tables. This results in accurate and consistent profiling of documents. Advanced profile significantly speeds up indexing and prevents errors.

External Database

EMP_No	Emp_Name	Position	Join_Date	Dept	Salary
7369	Keith Smith	Sales Executive	12/17/2011	Marketing	\$75296
7370	Bob Allen	Clerk	02/01/2011	Admin	\$41473
7371	Alicia Martin	Manager	03/02/2010	Marketing	\$108132
7372	Joe Blake	Sales Executive	04/04/2011	Marketing	\$70482

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Name	Employee Na...	Employee...	Designation	Department	Salary	Doc_ID
EM7369_Keith Smith.pdf	Keith Smith	7369	Sales Executive	Marketing	75296	FL00000126
EM7370_Bob Allen.pdf	Bob Allen	7370	Clerk	Accounting	41473	FL00000127
EM7371_Alicia Martin.pdf	Alicia Martin	7371	Manager	Marketing	108132	FL00000128
EM7371_Joe Blake.pdf	Joe Blake	7372	Sales Executive	Marketing	70482	FL00000129

Auto Indexing from External Data Source

Fast facts

- This feature is only available as an add-on module and requires separate purchase and activation
- One time setup on server side only – does not require separate setups for Desktop clients and web clients
- Can use any linked server, ODBC drivers or DB providers for connections to external databases

Related Features

- **Document Profiling**
Set custom index fields and enter corresponding values for different types of documents for easy categorization, search and retrieval.
- **Document Relations**
Setting relations between documents makes associated data easily accessible saving time on search and retrieval.
- **Document Workflow**
Automate business processes depending on the document profile.

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