



SMARTindex
End User Guide

Release 6

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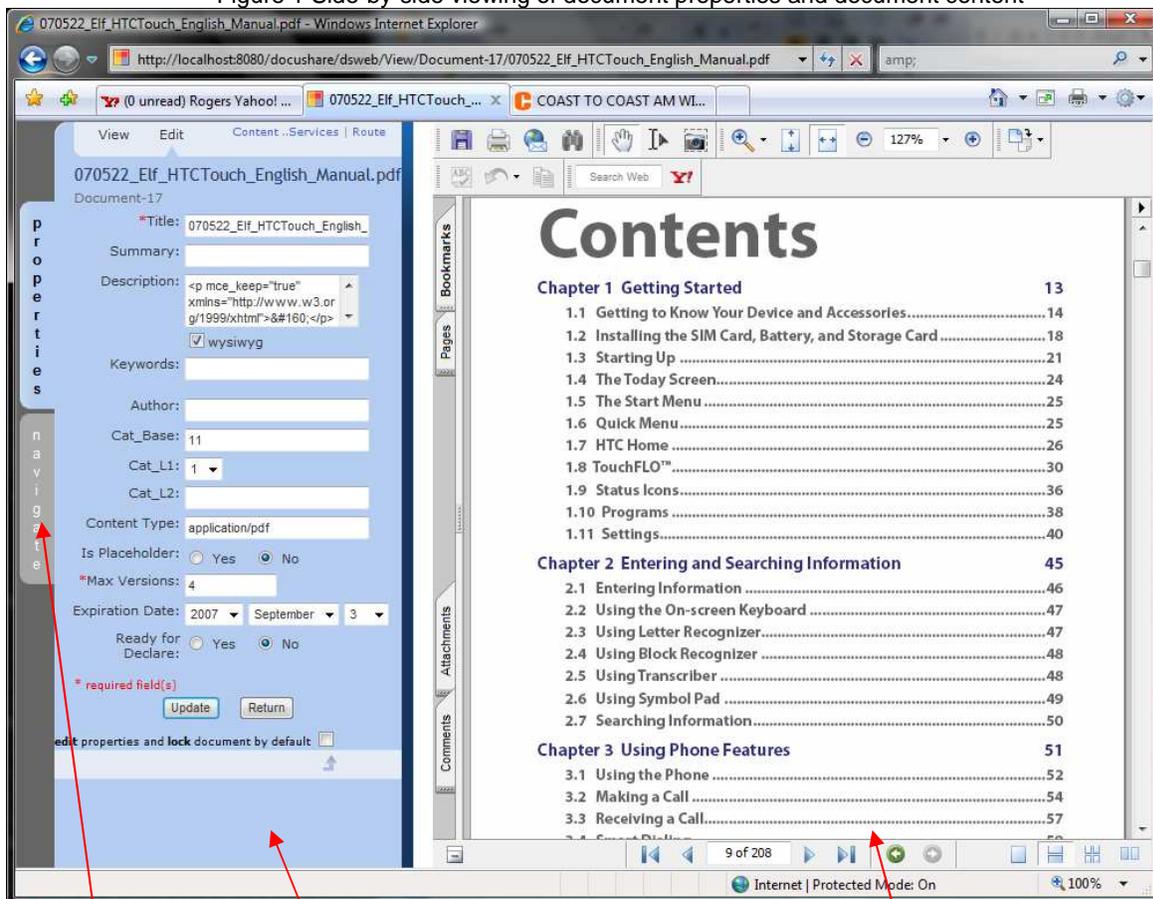
1 WHAT IS SMARTINDEX?

SMARTindex is a productivity add-on to Xerox DocuShare to streamline document indexing operations. It contains a server side process that automatically moves documents to the appropriate DocuShare collections based on specific index criteria that is entered for documents. If the indexes are attached to the document when it enters the system (e.g. when documents are scanned from Xerox multi-function devices with indexes through Xerox SMARTsend scanning application) the document will be automatically moved to the appropriate collection. SMARTindex also provides a set of custom user interfaces to DocuShare to help users easily index the document within the system while they view the document on screen.

The product includes the following components:

1. **Windows Service**
A Window Service that monitors changes to DocuShare objects and moves objects to a self-maintained collection structure based on their property values.
2. **Extended View Interface**
A customized DocuShare user interface to offer side-by-side viewing of a document and document properties. With such capability users may edit document properties while viewing the document content within the same browser window (see Figure 1)

Figure 1 Side-by-side viewing of document properties and document content



Navigation Menu
(Shown minimized)

Property Panel
(Shown in Edit Mode)

View document (PDF shown) within
browser frame

2 USING SMARTINDEX

2.1 How Windows Service works

SMARTindex detects changes to DocuShare object properties and moves objects to a self-generated collection structure. SMARTindex can work with all core object classes such as Document, Collection, Bulletin and Saved Query etc., as well as any Custom Object cloned from valid classes (e.g. Invoice document which is a object cloned from the document class).

SMARTindex relies on three (3) custom properties to operate its logic. These special properties represent a three-level collection structure where the objects will be filed under. SMARTindex recognizes these properties once entered by the use and uses their values to generate the collection structure.

The functionality of this component is described using the example below:

In this example, Accounts Payable will setup DocuShare and SMARTindex to store invoices submitted by vendors into a specific collection in DocuShare. Invoices are scanned using the Xerox multifunction device and SMARTsend into this collection where staff members will enter the invoice and PO numbers. The document properties are defined in the table below (Table 2):

Document Property	Property Label in DocuShare	Type property in DocuShare	Value	Remarks
The year in which the invoice was received	Fiscal Year	Menu Item (drop down list)		Year 2003 represents Collection-27, Year 2004 represents Collection-46 Year 2005 represents Collection-33 are manually created in DocuShare to store invoices.
Vendor ID on the invoice	Vendor ID	String	User input	Collection with the Vendor ID is created under Year folder above
PO number on the invoice	PO No.	String	User input	Collection with the PO number is created under the Vendor ID collection
Invoice number from the invoice	Invoice No.	String	User input	The document is deposited under the PO Number collection with the Title as the invoice number

Table 2 – Document Properties defined for invoice documents

With this setup, invoices are grouped by Fiscal Year, Vendor ID and then PO no. The Vendor collection and PO collection are created automatically as required by the SMARTindex Windows service. The PO collection contains all invoices received for the particular PO. Please note that invoice no. becomes the Title of the document which will finally rest under the PO number folder.

Please contact your System Administrator to understand how the SMARTindex filling structure is setup within your application.



2.2 Auto Unlocking Document

Upon successful moving of document objects, SMARTindex will automatically unlock the document if it is in the locked state. This auto unlocking function is to counter the effect of auto locking of documents by the Extended View Interface as described in section 3.4 Auto Document Lock and Edit.

3 USING EXTENDED VIEW INTERFACE

3.1 Enhanced Layout

SMARTindex includes a set of custom user interface templates that adds two additional frames to the standard DocuShare user interface. On the far left is the **Navigate Panel** which dynamically shows three (3) levels of collection content.

Located in the middle is the **Property Panel** that allows users to view or edit properties while viewing the selected object (document, collection, query etc.) on the right frame. By displaying document property and document content side-by-side, it enables users to update document property with reference to the document content.

[Click here to minimize or maximize panels](#)

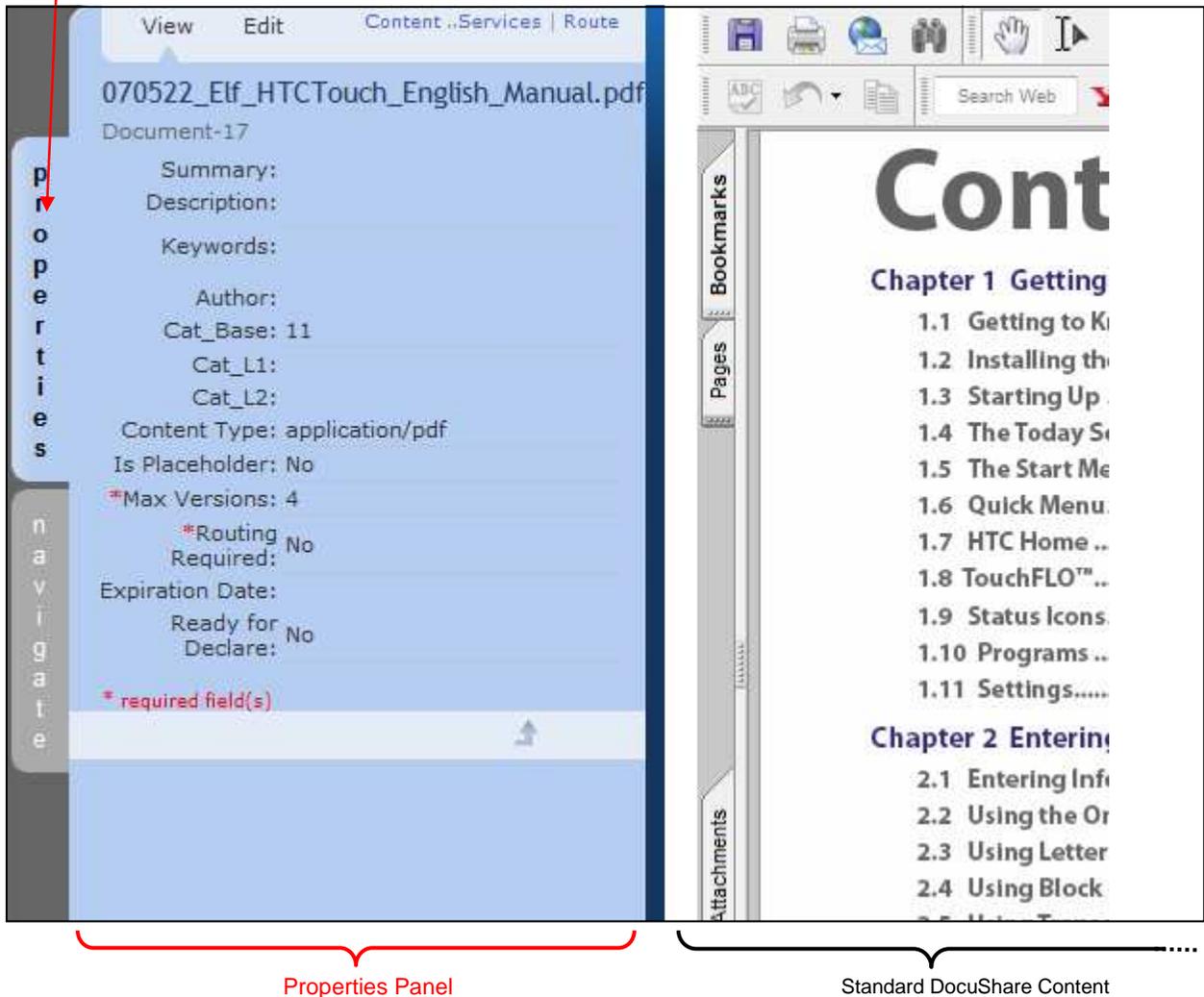


Figure 3.1 – Basic Functions of Extended Interface

NOTE: Both the **Navigate Panel** and **Property Panel** can be minimized and expanded independently to allow for optimal viewing of document content. SMARTindex uses a browser cookie to keep track of current selection of the panel layout. Please ensure that the user web browser is set to save cookies when accessing the DocuShare site where SMARTindex is installed.

3.2 Navigating Objects

The Property Panel can be minimized and expanded to allow for optimal viewing of document content. At the top of the Navigate Panel are links to **My Task**, **My Home Page** (not available in DS3) and **Home**. It also contains a navigation menu that displays three (3) levels of collection content relative to the selected object. When a Collection or Document object is selected, the menu shows its parent objects, peer objects (i.e. objects at its same level) and child objects (i.e. objects within the selected item). It allows user to easily navigate within the proximity of the selected item without traversing through a collection tree.

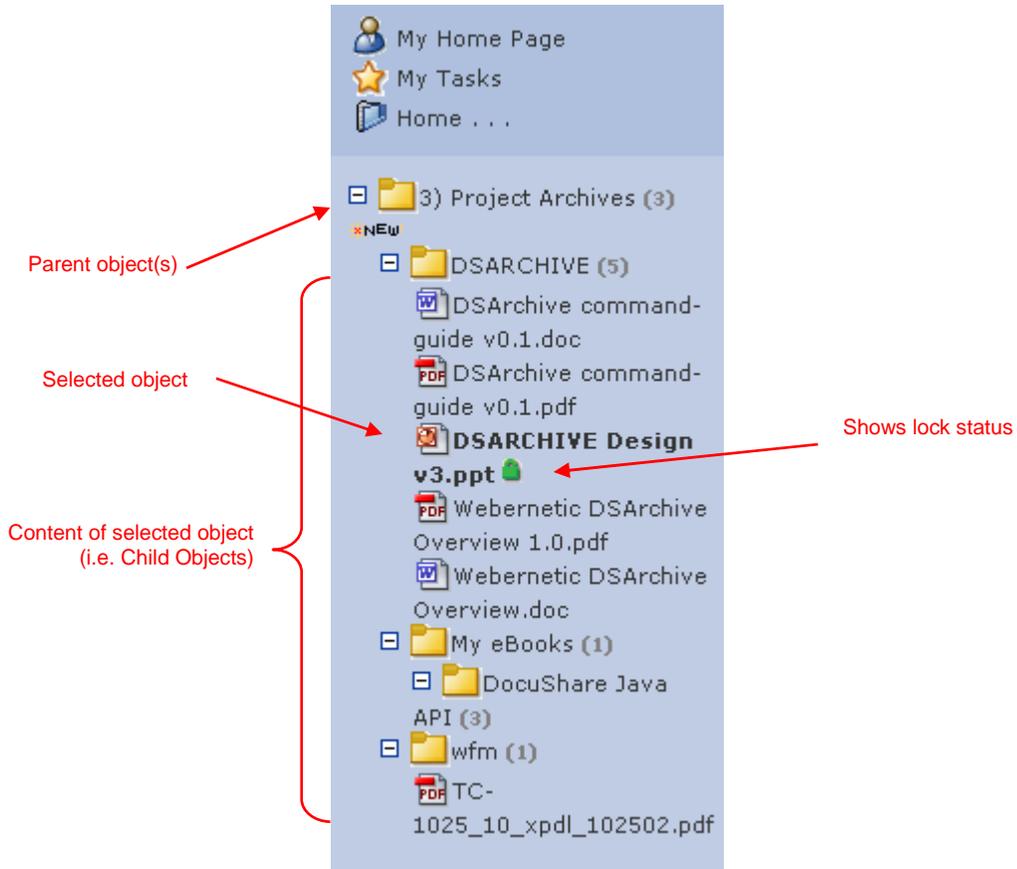


Figure 3.2 – The Navigate Panel

3.3 Updating Object Properties

The Property Panel can be minimized and expanded to allow for optimal viewing of document content. Once expanded, the user has the ability to toggle between the **View** or **Edit** property modes based on their access rights to the object (see Figure 4.2). While in Edit Mode, users can simply update the properties as required and click the **Apply** button. Clicking the Return button will return to the parent collection without saving.

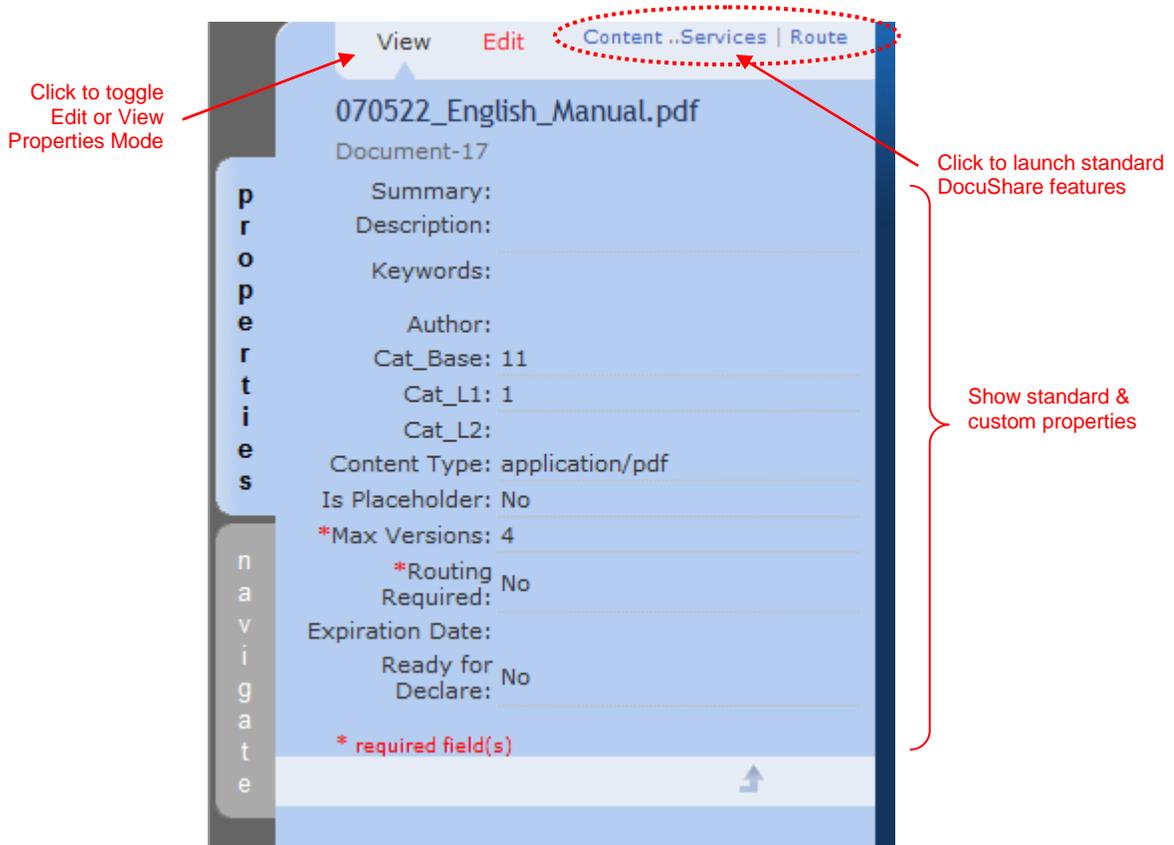


Figure 3.3 – Using Properties Panel



NOTE:

The Property Panel does not work with the following object classes and their clones. Use standard DocuShare Service icon to view and update their properties.

- URL, Calendar and Bulletin types

3.4 Auto Document Lock and Edit

The SMARTindex interface has the ability to automatically lock (i.e. check out) a document when it is opened in Edit Properties mode. Open the property panel, click edit icon, and click the checkbox “**edit** properties and **lock** document by default” (figure 3.4a). This auto edit and lock feature is available only for Document object type. For other object types such as Collection and Bulletin, the Property Panel always opens in View Mode.

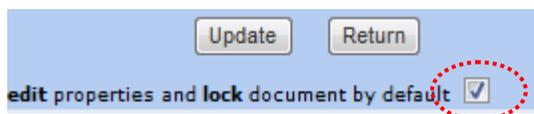


Figure 3.4a – Enable Automatic Edit and Lock

This feature is useful when multiple users are involved in indexing and moving documents from the same Collection. Once a user opens and locks a document, a lock icon appears besides the document in the Navigation Menu. Documents locked by the current login user will show a green lock icon (figure 3.4b). On the contrary, documents locked by other users will show as a red lock icon (figure 3.4c). This prevents users from simultaneously opening and updating the same document.

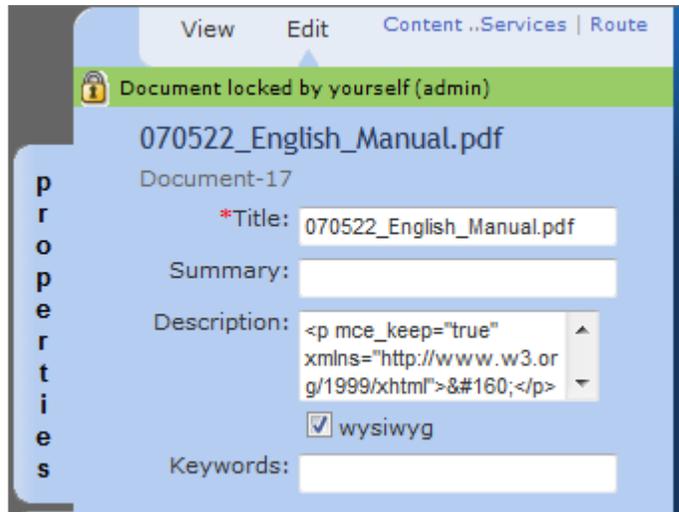


Figure 3.4b – Viewing a Document locks by current user

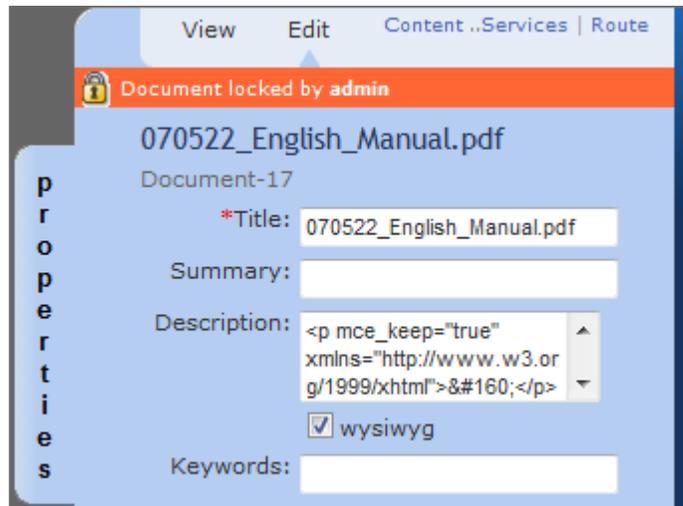


Figure 3.4c – Viewing a document locked by another user



NOTE:

The Extended Interface adds functions to enhance the usability of DocuShare. It does not replace nor alter any standard DocuShare functions such as routing, permission, subscription etc. All standard functions are accessible from the service icon of the object within the standard DocuShare screen.

