

OnBase - Autofill Keyword Sets

Overview

AutoFill Keyword Sets increase storage and retrieval capabilities of documents. Their function is to associate a group of keywords with one main (primary) keyword. 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 values (Primary and its secondaries) 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 Values.
- When applied to Document Types, AutoFill Keyword Sets increase the speed and accuracy of indexing, especially when indexing large volumes of Documents.

External AutoFill Keyword Sets

With External AutoFill Keyword Sets, you can configure an AutoFill Keyword Set that identifies a Primary value from an external Data Source and pulls corresponding Secondary Keyword values also from that external Data Source for indexing purposes. For example, if users need to index documents with employee data, and an external database already contains all of the necessary values for indexing, you can configure an AutoFill Keyword Set that pulls the necessary Keyword values from the external source.

Values for External AutoFill Keyword Sets will not reside in AutoFill Keyword Manager once configured. You must view the values for these sets externally.

AutoFill Keyword Set Instance

An AutoFill Keyword Set instance is a Primary Keyword and its corresponding Secondary Keywords on a Document.

- A Document may contain one or more instances, depending upon its configuration.
- Many instances can comprise the total AutoFill Keyword Set.

All instances of an AutoFill Keyword Set can be viewed through the AutoFill Keyword Set Management option in OnBase. See your system administrator for details.

Mixed Case Keywords

Keywords configured for an Alphanumeric Data Type must be assigned a Character Case setting. There are two Character Case options that may be assigned to a Keyword Type: Uppercase Values and Mixed Case Values with an option for Case Sensitive Searching.

Keyword Types configured for Uppercase Values store the Keyword Value in uppercase letters, regardless of how the Keyword Value was entered upon indexing. Keyword Types configured for Mixed Case Values store the Keyword Value upon indexing exactly how it was entered, using both upper and lower case characters.

See your system administrator for details on Keyword Types that may be configured for Mixed Case Values.

Applications

AutoFill Keyword Sets can be implemented for any Document Type that contains multiple related keywords, and is especially useful for organizations that index large volumes of documents. For example, consider an organization that indexes a large volume of loan documents with customer information such as social security number, name, address, and telephone number. OnBase is set up with an AutoFill Keyword Set containing all of those items as keywords, and the social security number as the primary keyword. When indexing, each time an operator enters the social security number value, the corresponding name, address, and telephone number values are populated from the AutoFill Keyword Set.

Steps to create an AutoFill Keyword Set

These steps illustrate the basic steps that need to be done to create a new AutoFill Keyword Set. Keep in mind that each instance of an AFKWS has its specific differences and nuances - but these steps should help to guide you in the appropriate direction.

1. In a SQL database, create a View that extracts the data for each of the keywords. In this example, the view was created in the Colleague ODS database because the keyword data lies in Colleague.
2. Create a SELECT statement that runs the view.
3. Create a Powershell script that runs the SELECT statement from #2 above. In this instance, Les created this script on his C: drive. This script will create a text file that gets imported into OnBase
4. Make sure that all of the keywords for your AFKWS exist. If they don't exist, create them in OnBase config.
5. Create a new AutoFill Keyword Set in OnBase config. Make sure that the order of your keywords in the AFKWS match the order of the data in your text file.
6. Go to the document type that needs the AFKWS and find the primary keyword. Make sure that this primary keyword is at the top of the list of keywords. Add any new keywords that you've created. There's a place to indicate an AutoFill Keyword Set. Choose your new AFKWS from the list in the drop-down.
7. From the machine with the text file (Les' in this case), go into OnBase config and choose the Import menu.
8. Choose AutoFill Keyword Processor. Create a new processor for your new AFKWS.
9. Go to OnBase client and Re-launch.
10. Go to the Admin menu and choose AutoFill Keyword Processor. Find your new AFKWS, right-click, and execute. This will bring in the new keywords.

Do lookups on existing AFKWS tables

There was an office at Carleton that wanted to create a correspondence document. It has a Sender ID, Recipient ID, and a Referenced ID on it. We wanted names to go with those IDs as well, but didn't want to type them. All of these people are in the Advance People AFKWS that is updated each night. So here's what I did:

1. Create the new keywords
2. Create the AFKWSs
3. Make them external AFKWS. Look at the SQL code on PRES Sender AFKWS. The user must have the ODBC of OnBase-production, which is the DSN. The user ID is hsi, with the hsi password. Make sure that the SELECT statement columns line up with the keywords on the AFKWS.
4. Attach the AFKWS to each of the ID keywords
5. Put them all on the document - which has no assigned AFKWS. If there's an AFKWS on the document, it will negate the AFKWS on the keywords themselves.
6. Re-launch the client, enter the primary key, hit tab, and the secondary keys will fill in.

You can have as many of these AFKWS on the document as you'd like, as long as they are assigned to the keywords. If there's an AFKWS assigned to the document, it will override the AFKWS on the keywords. Further, if you put AFKWS on the keywords, it will apply to ALL documents that use these keywords, so keep that in mind.