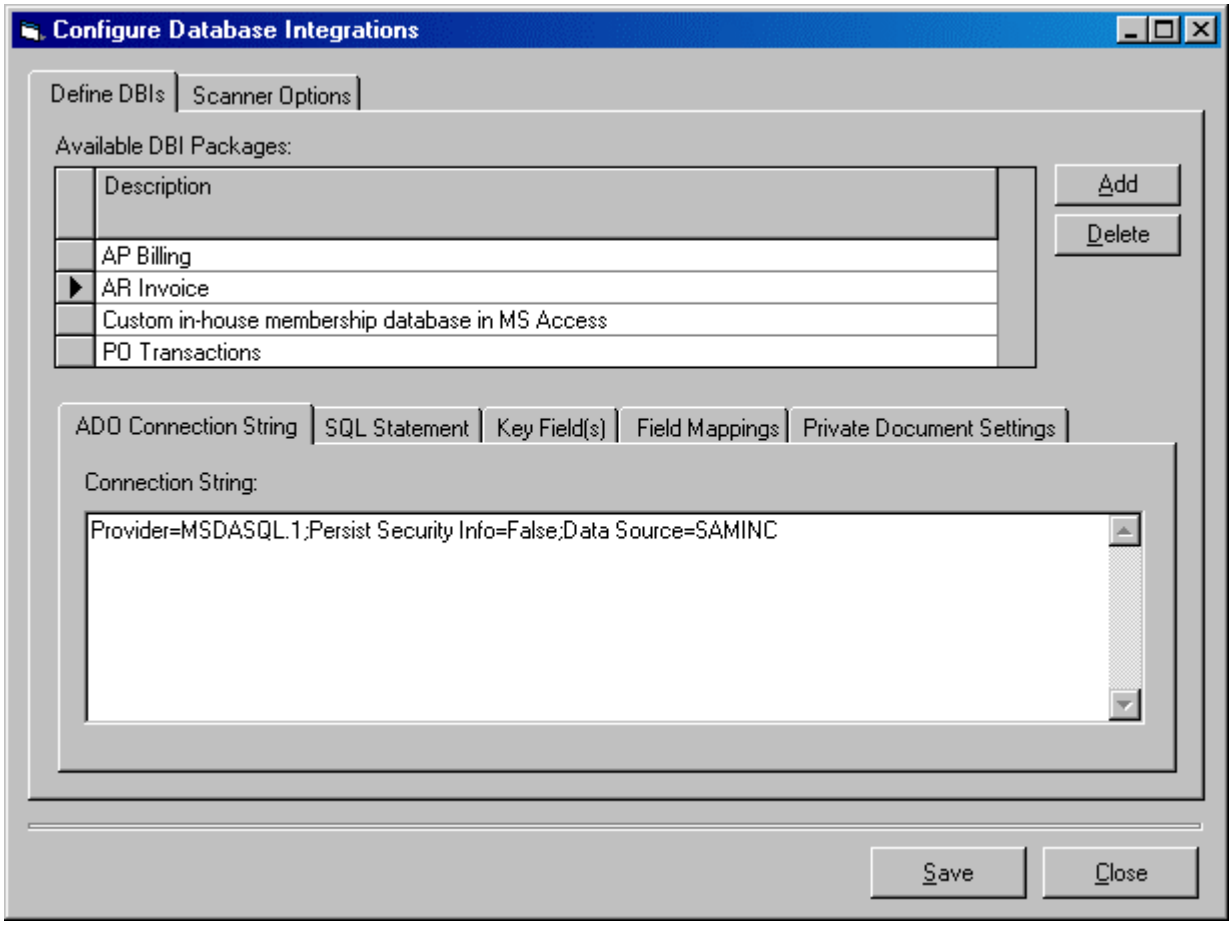
DocMan Database Integration Tool

One of the most powerful add-on modules to Digital DocMan is the Database Integration Tool (DBI). The DBI provides a data entry method to significantly reduce the amount of information the user must double enter when adding documents to DocMan that relate to other software packages. The DocMan DBI tool can pull data directly from any database application that can be accessed via OLE DB or ODBC. Simply teach DocMan DBI how to retrieve your external data, and the user only has to enter a key field in order to have all the DocMan document attributes automatically populated with data from that external application.

Defining a DBI Package:

The Connection String

Start by defining the ActiveX Data Object (ADO) Connection string. Your external application documentation should be able to indicate what this should be. Below is an example of an ADO connection string that opens a sample database via OLE DB's ODBC driver or provider (MSDASQL.1).



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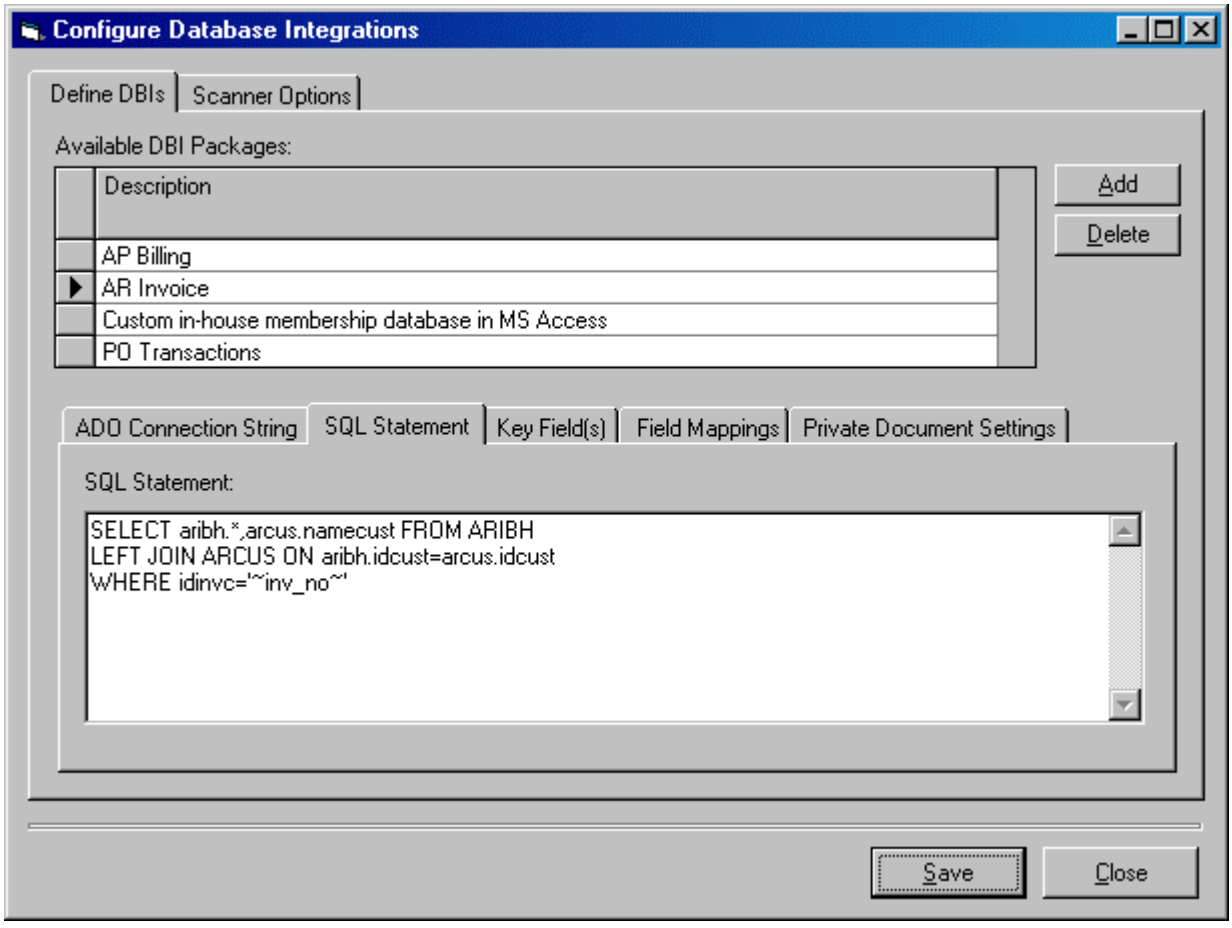
The SQL Statement

The next step is to define the SQL statement to retrieve the desired data. Below is an example that queries an AR Invoice table (ARIBH), and joins the AR Customer table (ARCUS) to provide a full text name (arcus.namecust) for the customer id. The WHERE clause, that determines what records to retrieve from the database, will look for the record where the Invoice Number (idinvc) is equal to the value the user provides during the scanning process. The ~inv_no~ value (set by you on the Key Field(s) screen discussed next) should be some unique string that will never naturally occur in the table structures of your external database, and will be replaced by the user's data input before submitting the query to the external database. As you add key fields to the DBI definition, you will also add expressions to the WHERE clause here. You can have as many key fields as is necessary.



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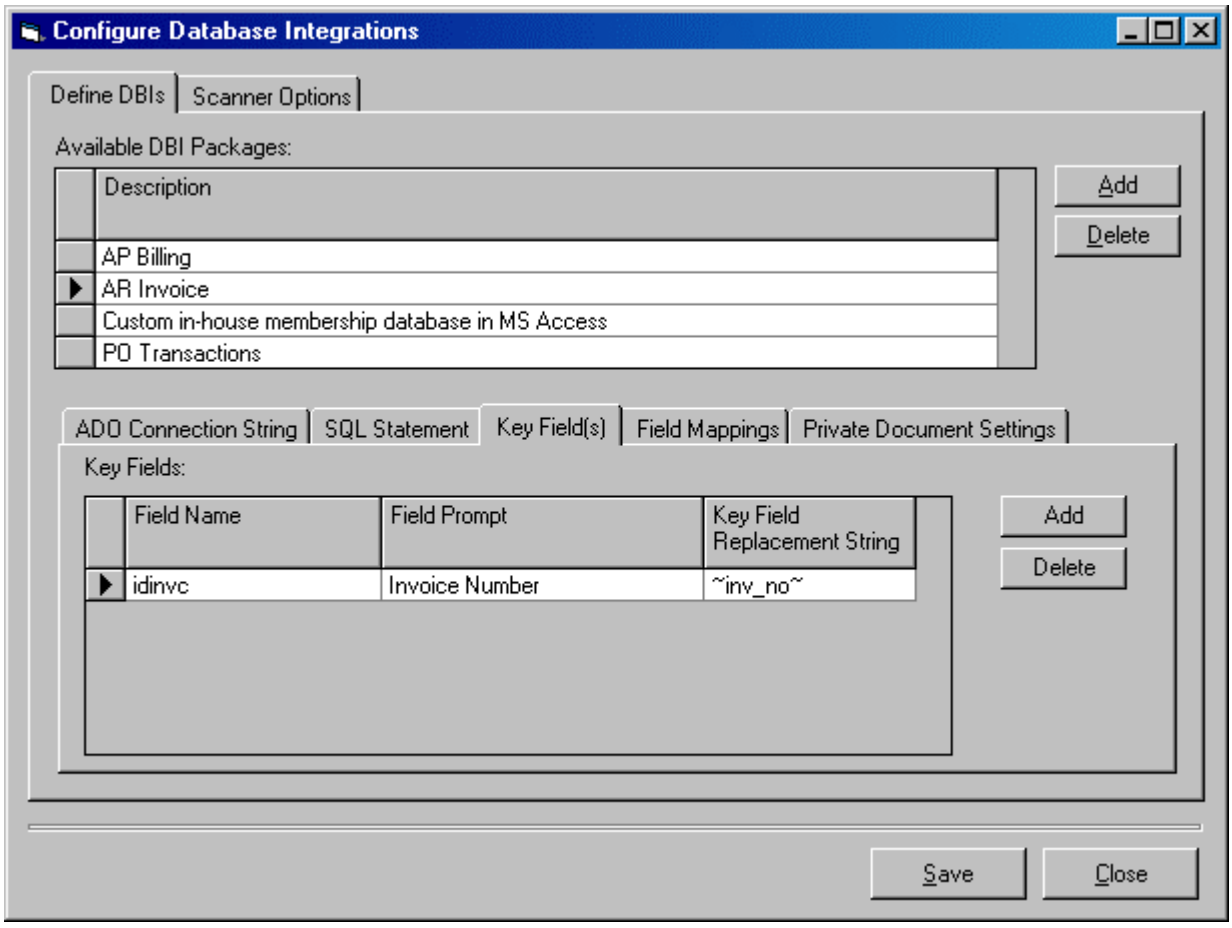
Defining Key Fields

Next you will see the configuration of the Key Field(s). You can prompt the user for as many key fields as is necessary to uniquely identify the desired record in the external database. In this example, you can see that only one field is required and that is Invoice Number (idinvc). Prompting the user for "idinvc" is a bit too cryptic. Therefore, you can enter in a Field Prompt value for the data entry screen. The Key Field Replacement String relates to the SQL Statement. This string literal will be replaced in the SQL query with the value the user enters when prompted for "Invoice Number".



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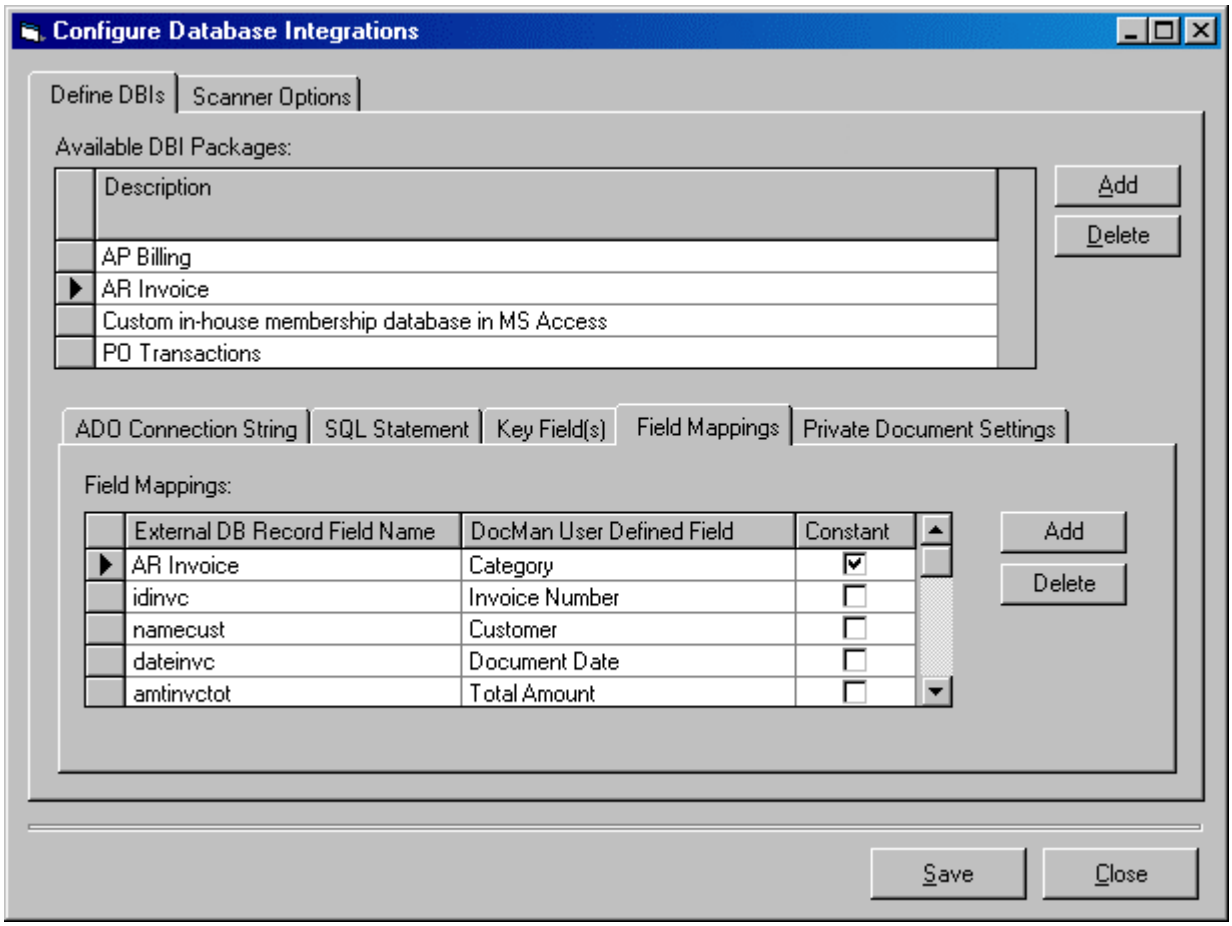
Defining Field Mappings

The next step is to tell DocMan DBI what fields in the external database should be placed in which fields in the DocMan document attribute fields. This is referred to as field mapping. The application you wish to pull data from should be able to provide documentation on the tables and fields within those tables. You will need this information in order to identify data source fields. As you can see below, there are field names listed on the left and their corresponding DocMan field on the right. You might also notice the "Constant" option. Within each DBI you define, there will naturally be values in the DocMan document attributes that should be populated with a constant value. Here is an example that will write the value "AR Invoice" into every "Category" attribute for every document added via the AR Invoice DBI.



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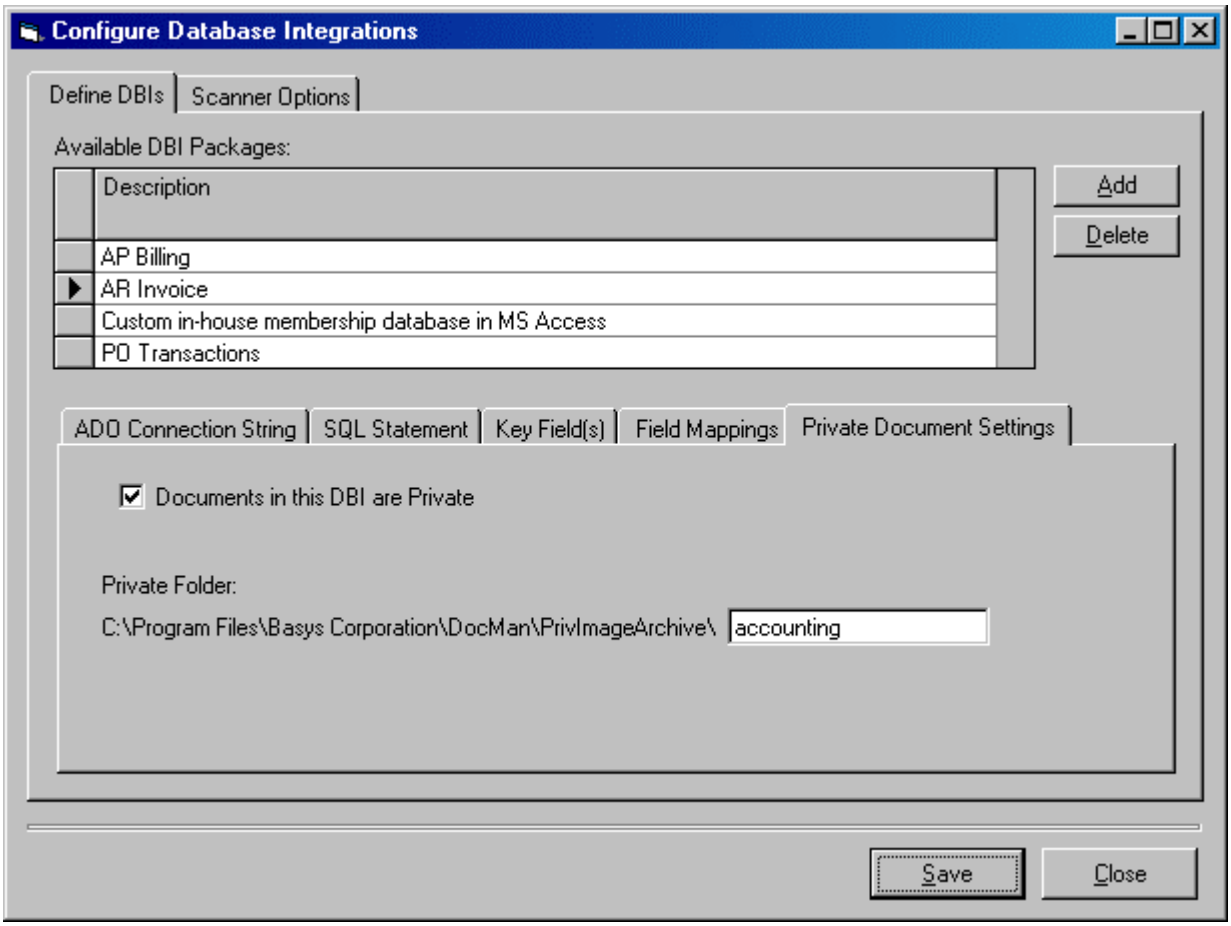
Designating documents as Private

Some documents should be designated as Private and access to these should be controlled. There is an option within the DBI definition that allows you to mark all documents scanned under the specific DBI as private. It will also allow you to specify a folder below the current default private folder in which to store the physical image file. The private subfolder is optional and if left blank, the image will simply be stored in the default private folder as defined in DocMan.



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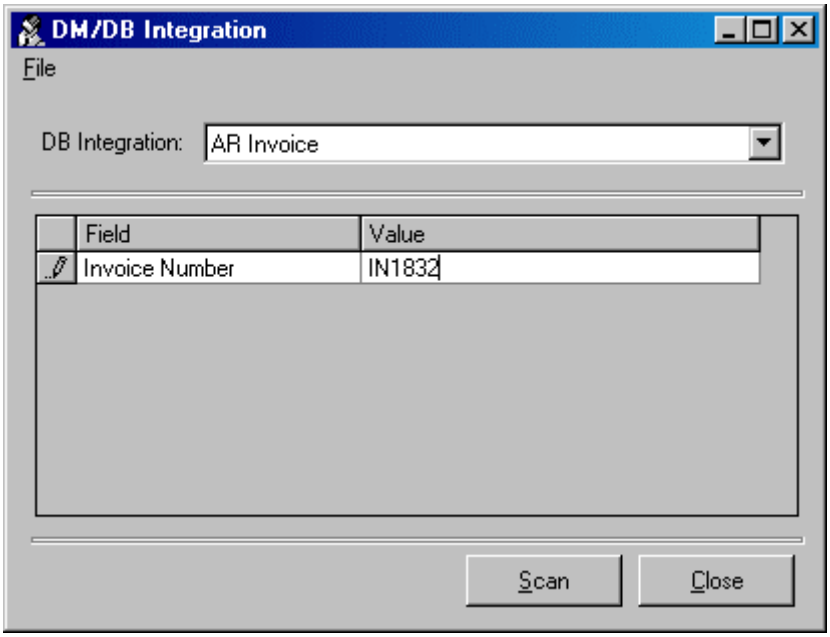
The Scanning Process with a DBI

Now that the DocMan DBI knows how to retrieve data from your external database application, scanning related documents into DocMan becomes very easy. All the user needs is a unique key field for each document to be scanned. The DBI does the rest. No more double entry, typos are eliminated, and time is saved.

Here's a sample scanning screen using the AR Invoice DBI as defined above. As you can see, the user has to simply enter in an invoice number, and click on the Scan button.



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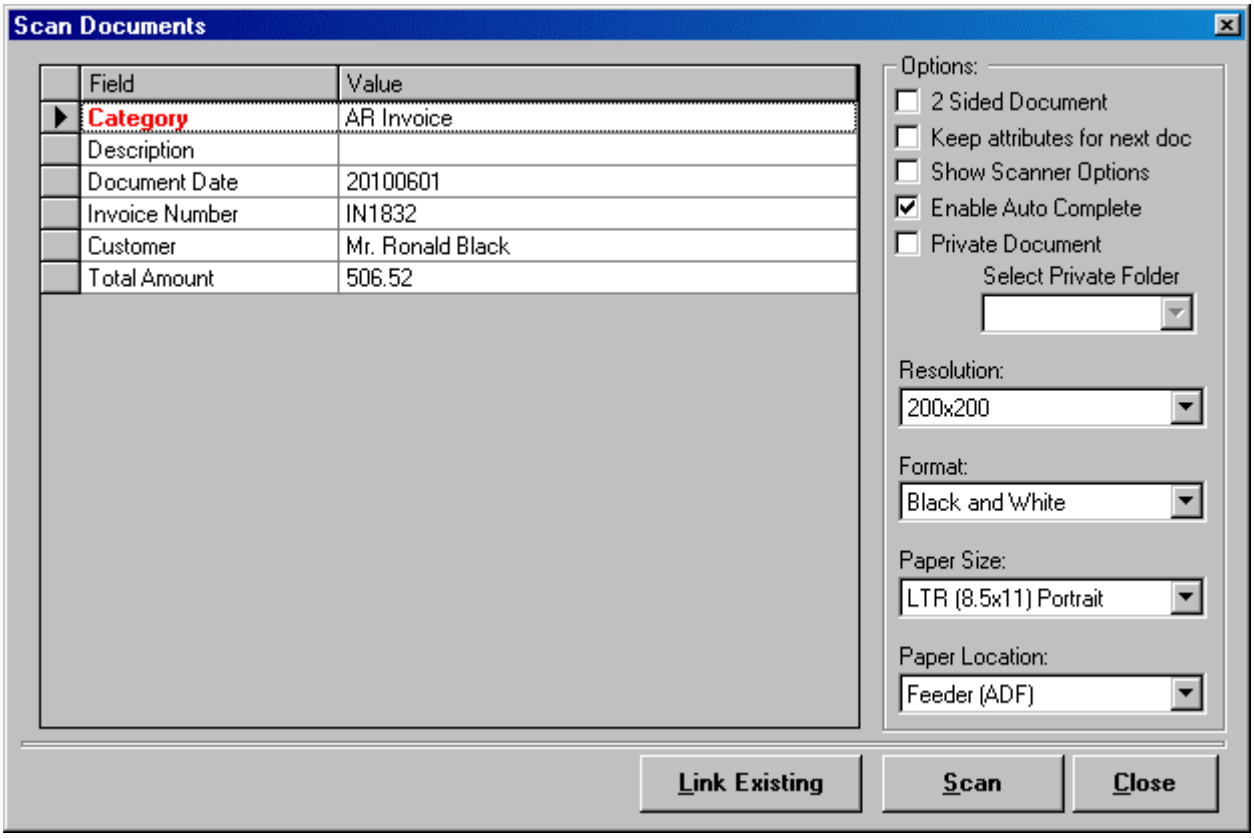
DocMan's Scan Screen with data populated

The DBI will perform the lookup into the external database and populate the following screen automatically with values from that external database. Here you can see that the DocMan document attribute values are already populated with data. A quick look to confirm the accuracy of the data, a click on the Scan button, and this document is in DocMan fully populated with the appropriate attribute values.



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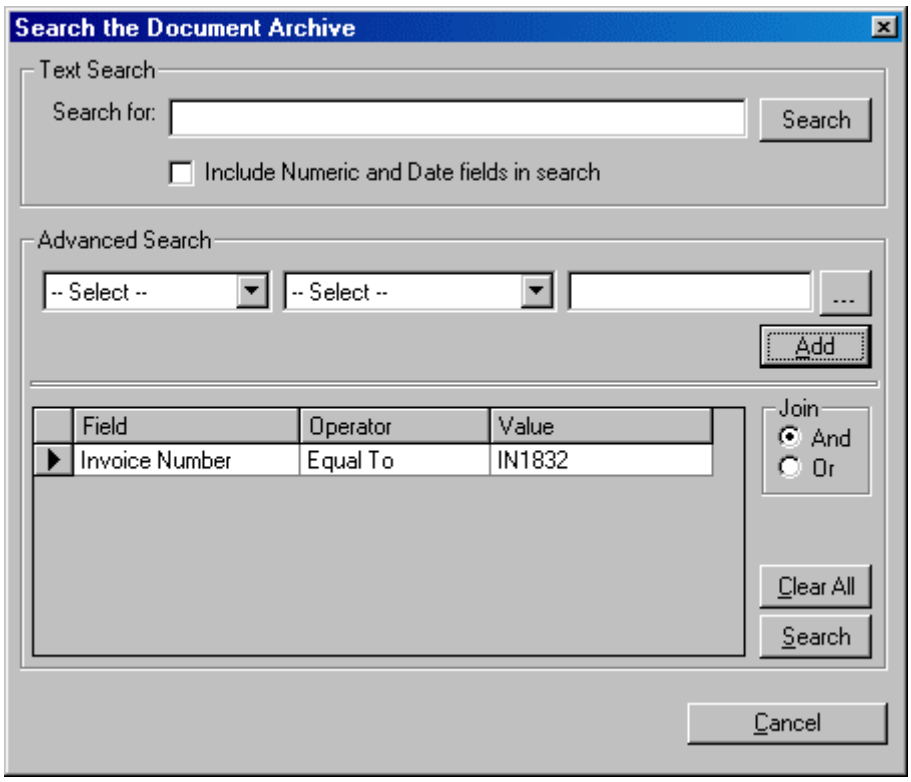
A Quick DocMan Search

Once in the DocMan system, an advanced search for the invoice number used above returns the results and the scanned image of that document is immediately available.



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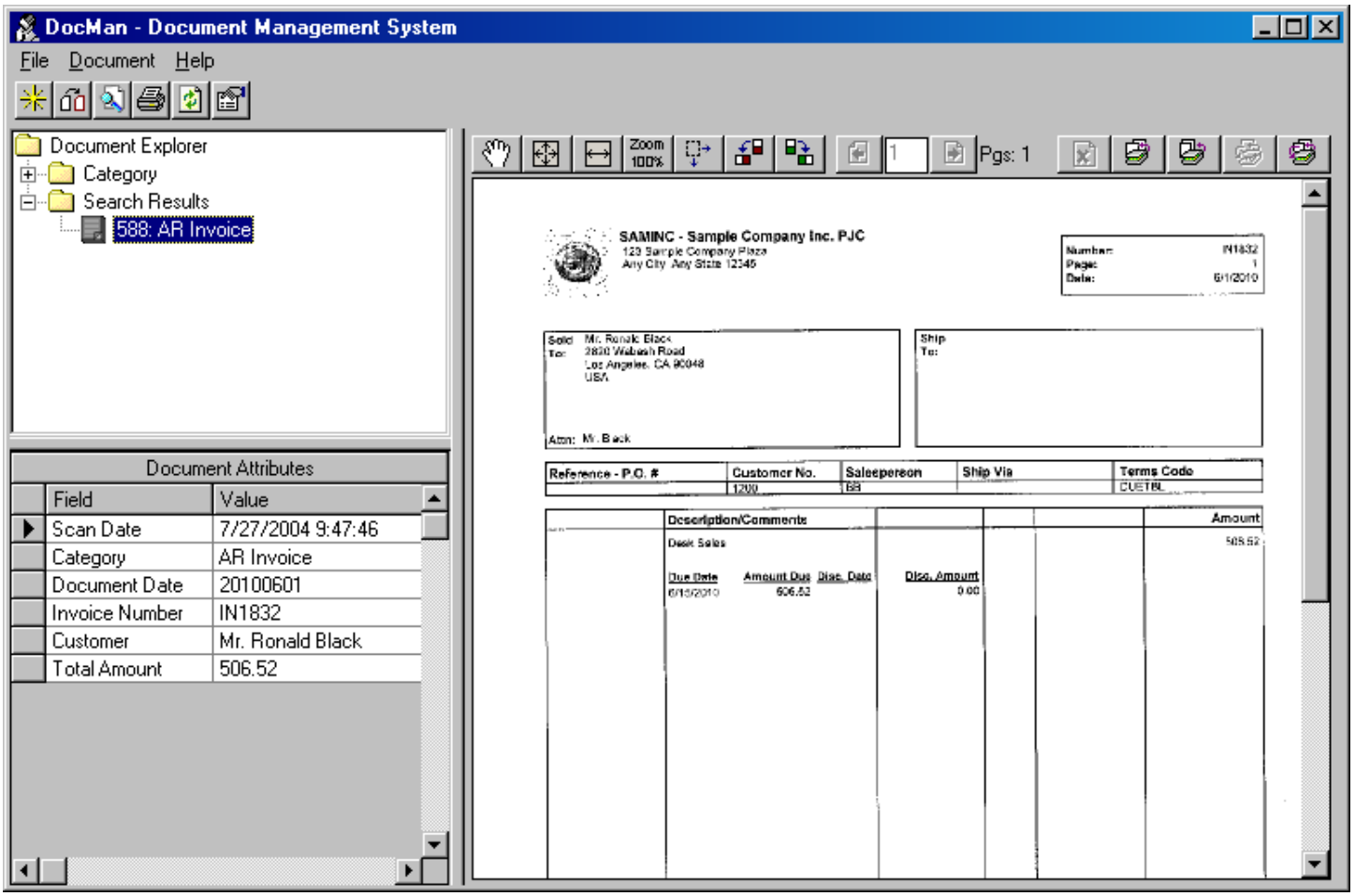
Viewing the document in DocMan

Here is the document scanned in the process from above as seen from the main DocMan User Interface.



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