



GoldVisionPro
v6.8

Operation Instructions



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GoldVisionPro Operation Instructions

Overview:

GoldVisionPro is a comprehensive, full-featured Enterprise Content/Document Management system. It is most effective when used by everyone in an organization. In this way, all information is captured, stored, retrieved and managed in a uniform, reliable manner. After all, *if you can't find your information, then having it is useless.*

These instructions anticipate a very basic familiarity with information stored in a GoldMine Customer Relationship Management database.

OPERATING GOLDVISIONPRO

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Recommended General Procedures

As starting any application requires a significant amount of time and resources, we strongly recommend that users leave GoldVisionPro active throughout their entire work schedule. Simply minimizing the GVP windows, instead of closing the application, will maintain quick access for users and therefore more efficiency in their tasks.

The GoldMine application does not need to be running on the workstation in order to start/use GoldVisionPro. However, if GoldMine is active, it is a simple matter to use GVP as if it were windows within GoldMine itself. [See section on the “GoldMine Taskbar icons”, and “Syncing GVP with GoldMine”.]

Starting the Program

In order for users to start GoldVisionPro on their workstations, the VzxService or VzxServer program must already be running on a machine that is network-accessible to each individual workstation. Also, the user's UserID and Workstation Name must already be authorized for access in the VzxLicenseManager, unless using a Concurrent User Activation. System Administrators should see "GoldVisionPro Installation Instructions" for more details.

Depending on how your System Administrator has configured your system, there are several ways to start the application.

The recommended method of starting GoldVisionPro is to have a shortcut to **VzxSelect.exe** in the user's Windows-Programs-Startup folder. This will automatically start the program when the user logs-on to their workstation. Alternatively, the shortcut could also reside on the user's Windows Desktop, and the program could be started by double-clicking the VzxSelect icon with a mouse.

Command Line switches for VzxSelect

The start of VzxSelect can also include optional command line switches after the program path/name in the shortcut, for automating the logon and configuration selection:

*/u:UserID
/p:Password
/c:Configuration Number*

Note 1: Include a single blank space to the left of each switch in the line.

Note 2: If not specifically included, the default Configuration Number is 1. On installation, the first configuration is the default GVP.INI configuration file.

Note 3: If the password is not included, the Logon window appears with the included UserID displayed, for the user to enter the Password.

Note 4: If the User does not have a password, in order to automate the logon, set the command line switch for the password as follows:

/p:GV_NO_PW

As the VzxSelect program launches, it will display the Title of the configuration in use [*System Administrators should see "GoldVisionPro Configuration Instructions" for creating separate configuration files and other options*]. In this way the user can identify the configuration to assure the correct selection is loading.

For example, the "Target" in a shortcut might look like:

G:\ GoldVisionPro\VzxSelect.exe /u:PAUL /p:notech /c:5

The VzxSelect program will load the GoldVisionPro “Master Control Panel” [MCP], which appears as a program icon in the Windows SysTray [bottom-right corner of the screen next to the clock]. The MCP menu can be accessed by right-clicking the icon with a mouse. The MCP provides access to various functions and utilities of GVP, and must be running for other program features to operate. These will be covered in the description of the features and functions themselves.

Additional switches for non-standard startup

The following switches can be used for specific startup situations:

/findUserID

The “/find” switch initiates a search of the local workstation current session Desktop for VzxSelect shortcuts for the specified UserID. If one shortcut is found for this UserID, then the switches in that shortcut are used to start the VzxSelect program. If more than one shortcut is found for this UserID, a window opens with a list of all the shortcuts found, for selection by the user. If no shortcuts are found, the program starts using the default setup.

This switch is particularly helpful in creating a generic icon for VzxSelect on the GoldMine Global Taskbar. When adding the VzxSelect item to the GM taskbar, the “Command Line:” setting can be designated as “/find”, and then select the arrow to the right of the box to select “User details – User name”. This will insert the replaceable parameter “**username**” after the “/find” switch. This will look like:

*/find**username***

When individual users select the icon during their GM session, their active UserID is automatically added to the “/find” switch, and used in the shortcut search. In this way, the program can respond to individual users from a generic setting. In addition, if users store their password in their local Desktop shortcut, then the program can automatically login on startup from this same icon.

/show

The “/show” switch displays all the configurations listed in the VzxCONFIGS file, and allows the user to select an individual configuration for startup. This would be an alternative to the “/c:” switch.

/w:number of seconds

The “/w:” switch sets a delay in the program startup for the number of seconds specified. In some environments [e.g. some Terminal Server configurations] where other programs [e.g., GoldMine] are starting at the same time, this allows time for those programs to startup before GoldVisionPro continues. Typical settings in such cases might be “/w:15” or “/w:30”.

Opening Windows

The Master Control Panel [MCP] icon in the Windows SysTray is the primary access point for activating windows during program operation.

- A right-click of the icon displays the MCP menu for all its functions.
- A double-left-click will display the GoldVisionPro Link Center window
- Pressing the “Ctrl” key + double-left-click will display the GoldVisionPro V-QuickLink window
- Pressing the “Alt” key + double-left-click will display the GoldVisionPro Intelli-Lists Console

Other items accessible through the Master Control Panel menu

Activation Renewal

Any user can now check for an available GoldVisionPro Activation Renewal through this menu. Select the menu item “About GoldVisionPro”, and click the “Update Activation” button. This will check the GoldVision website for the renewal, and update the Activation on the network for all users when the renewed Activation is available.

Note: This same process will run automatically during the final 30-days of the Activation period whenever a user starts GoldVisionPro with the “AutoRun Update Activation” setting configured.

Ending the Program

To exit GoldVisionPro and release all its related support programs, right-click on the MCP icon in the Windows SysTray to display the MCP menu, and select “Exit” from the menu list. *This method is required to assure all the aspects of the program are closed properly, and the user and machine licenses are released for availability.*

Storing Files

GoldVisionPro provides a simple, consistent method for storing any file, and associating relevant information with it, in order to make it then equally simple to retrieve the file when it is needed.

In order to store files in the system, the V-QuickLink [VQL] window must be running/available. If the V-QuickLink is not already running [can be configured to AutoStart when the MCP starts], it can be started by right-clicking the MCP icon, and selecting "Launch V-QuickLink" on the menu. The VQL will display the "Select Filing Designation" window.

The V-QuickLink can also be accessed by clicking on the "GoldVisionPro V-QuickLink" icon in the GoldVisionPro taskbar in GoldMine.

Quick Start Process

- 1) *Drag a file to the "Source File..." textbox in the V-QuickLink window.*
- 2) *If the desired Contact is not displayed in the Contact list, enter the Contact name in the "Enter Search Value" textbox and press Enter.*
- 3) *Select a Contact from the displayed list.*
- 4) *Press the "Create Link..." button in the lower area of the window.*
- 5) *When the "Linked Document Setup" window appears, press the "Link" button in the lower area of the window.*

Passing a file to GoldVisionPro

The first step in storing a file is to "pass" the filename to GoldVisionPro. This can be easily accomplished in both manual and automated processes. The easiest method is to simply select a file with the mouse and drag-drop it on the VQL window in the "Source File and Path" textbox at the bottom of the window. The full path and filename will appear in the textbox.

"Passing" methods include:

1. Drag & Drop to the "V-QuickLink" window "Source File.." textbox
2. Drag & Drop to the "V-QuickLink" icon or "VisionScan" icon on the Windows Desktop
3. Drag & Drop to the "V-QuickLink" icon or "VisionScan" icon in the GoldVisionPro LinkCenter
4. Right-Click file for Windows "Send-To" menu, and select "V-QuickLink"
5. Button-Click on the GVP toolbar in MSO [Word, Excel, PowerPoint]
6. Automated from PaperPort ScanDirect
7. Automated from the VzxQueue file list
8. Right-click from the VzxQueue file list
9. Manually Drag & Drop from a VzxMonitor file list to the VQL window
10. Right-click from a VzxMonitor file list to the VQL window
11. "Add A Link" button from the Wizard tab in the Link Center
12. Copy a path/file name and Paste it in the "Source File..." textbox
13. Execute a command line for: "...\\VQuickLink.exe *filename*"
14. Execute a command line for: "...\\VxOCRstart.exe *filename*" [to include AutoSummary process'

NOTE 1: The V-QuickLink and VisionScan icons in their various locations perform essentially the same process: passing the “dropped” file to the “Source File..” textbox in the V-QuickLink window. The difference between them is that the VisionScan icon will also initiate a text-extraction and AutoSummary of the file contents as the file is passed.

Note 2: If the V-QuickLink is not running/available, “dropping” or “sending” a file to either the V-QuickLink or VisionScan icons will start the V-QuickLink.

Selecting the Contact Record

When the file is stored in the system, it will be “linked” [associated] with an existing Contact Record. The user selects the appropriate Contact Record from a displayed list of records available in the database. If the desired record is not currently displayed in the VQL window, the user can search for available records by matching a name or other criteria of the desired record, or create a new Contact Record.

V-QuickLink Window

Users can expand the viewable area of the V-QuickLink window by dragging the lower right corner to the size desired.

Search for Contact Records

The “Select Search Type” drop-down list provides the names of more than a dozen fields/criteria that can be searched for a match [e.g., “Company, Contact Name, Telephone Number”, etc.]. The user can select which field to use from the list. The selected field will then appear in the “Select Search Type” box. The user may then type the text they wish to match in the “Enter Search Value” box, and press the Enter key on their keyboard.

GoldVisionPro will then retrieve a list of the records that match the entered text.

Create a New Contact Record

If the desired Contact Record does not already exist in the system, a new Contact Record can be created with basic information, by selecting the “Add Record” button in the VQL window.

While in the new contact record information window, text can be quickly copied from the File Preview window into the new record fields. For example, if the desired “Company Name” were part of the extracted text, the user can simply highlight the name in the File Preview window text, and then right-click the label “Company” in the “Add A New Record” window, and the highlighted text will be pasted into the textbox for “Company”. [NOTE: This is not allowed for the last/Key Field].

After entering the information for the new contact and pressing the “Add Record” button in the displayed window, the new contact will appear in the VQL window list.

Create Link For Record

When a file is listed in the “Source File and Path...” textbox and a Contact has been selected in the displayed list, this button will be available. Selecting this button will initiate the setup process, opening the “Link Setup” window for entering additional file-specific information before completing the storage process.

Source File and Path

The full path-name of the source file to be stored in the system.

“**Reset**” button – if GoldMine is currently active on this workstation, left-clicking the “Reset” button will display the name of the contact record currently active in GoldMine, in the VQL list. **Right-clicking** the “Reset” button will reset GoldMine to display the name of the contact currently selected in GoldVisionPro. [**Alt+right-clicking** any contact listed in the Setup window list will reset GoldMine to display that contact.]

File icon functionality

[displayed to the left of the filename in the “Source File and Path” textbox.]

This icon represents the application used for opening this type of file [based on the file extensions configured in Windows].

Left-clicking the icon with a mouse will launch the file in its application.

Right-clicking the icon will display the text available for File Preview.

Program icon functionality

Clicking the gold “eye” icon in the V-QuickLink window launches the Link Center if it is not already running, or brings it to the foreground if it is already running.

Menu Commands

File

Find - searches for contact records that match the input value for the selected field; same as pressing “Enter” key in Search Value textbox

Reset - if GoldMine is currently running, retrieves the active contact record; otherwise clears the window entries.

Add Record – opens window to create a new contact record; same as pressing “Add Record” button.

Create Link – enabled when a contact is selected and a file is ready to be stored. Opens the Link Setup window for describing indexing items and completing the storage process. Same as pressing the “Create Link button”.

Clear File Name – removes the current file displayed in the Source File and Path textbox.

Start Monitoring a Folder – opens the Folder Monitor window for configuring the monitoring of a folder. Can be used multiple times to add additional active monitors.

Load Stored Monitors – Open a user’s stored monitors.

Close All Monitors – end all active monitors and lose their windows.

ReLoad Indexing Forms – refresh the Indexing forms list that is currently loaded, to view changes made while GoldVisionPro is running.

Launch Link Center – open/go to the GoldVisionPro Link Center window.

Display Master Control Panel – shows the MCP menu, [e.g., if Windows System tray is not visible in user’s display.]

Exit – closes the V-QuickLink program

Preferences

Launch Item When Index Window On Top– open file being stored when the Intelli-Entry Window for Indexing Forms is opened, and set to Always on Top.

Warn When Drive Space Low – turn on/off warning when destination storage space is low during Link process. [default = on]

Add Info To Filename – turn on/off adding configured Contact information to the filename when stored. [requires VisionPak-Extended tool set Activation. See Configuration manual.]

Select Columns - allows the user to select the columns/fields that will be displayed for each contact record during a search.

Set to Link-and-List – set the action of the Link button to automatically retrieve the new stored file in Link Center once it is finished being stored in the VQL.

Set to Link-and-Launch– set the action of the Link button to automatically retrieve the new stored file in Link Center once it is finished being stored in the VQL, and open the file in its application.

View

Current Windows – displays active windows that are minimized.

Hide Monitors and Queue – minimizes/hides active Folder Monitors and Queue windows for background processing

Hide All Windows –hides all the open GVP windows; minimizes if “View - In Task Bar” selected.

View In Task Bar - toggles whether the Link Center appears in the Windows Taskbar when running.

Console – opens the Intelli-Lists Console [same as Shift + F11]

Record Type - [only appears on systems using GM Record Typing] – opens the Select Record Type window for user selection to limit searches to a specific record type.

Tools [requires VisionPak-Extended tool set Activation. See Configuration manual.]

Intelli-Process Active -- turn on/off recognition of pre-configured Intelli-Process items during link process. [default value at startup is on.]

Use Partial Title Match For Process -- allows Intelli-Process matching based on finding original selected item within a modified Title, rather than requiring only the exact selection from the Title list.

Match Typed or Selected – as the standard Intelli-Process is triggered by the selection of a Title from the Title list, this setting expands evaluation to Titles

typed by the user without selection from the Title List. [The user input must match a value from the Title list that has a corresponding Intelli-Process configuration.]

Process On List-Select – turns on/off if Intelli-Process display of Intelli-Entry items is activated as soon as the user selects an entry from the Titles list drop-down list. [requires VisionPak-Extended tool set Activation.]

Prompt For Record Values – turns on/off user-prompt when custom Record Values have not been selected. [default value at startup is on.]

Reload Record Values Settings File – clears items loaded on program startup and reloads the settings for the Record Values window from the designated Record Values settings file[s]. [Primarily for making changes in the files and reloading the new settings without restarting the program.]

Tracking Items – [requires Intelli-Tracking Workflows tool set Activation]

Create Tracking Items – displays the Select Intelli-Tracking Items window.

View Intelli-Tracking Items – displays the Intelli-Track Items for the active Contact

Help

Other Functionality

Toggle Display of Titles - F4 PowerKey

Pressing Shift + F4 while in the V-QuickLink window will switch between the active Title list selection, and just displaying the custom User Defined Field list in the Title drop-down list when the Link Setup window appears.

Activate In-Place Linking – F8 PowerKey

The normal GoldVisionPro process moves a file to a designated network location as the file is stored in the system, to assure it is accessible for all users. In-Place linking bypasses the file-move part of the process, creating the link for the file in its current location. Only users with Master access or users included in the “Browse Folder” Group [see GoldVisionPro Configuration Instructions for more details] have access to this feature.

Pressing Ctrl + Alt + Shift + F8 activates the In-Place Linking state. A red box will appear around the “Source File...” frame, with a title indicating that In-Place Linking is active.

Link Setup Window

This window allows the user to specify key information about the file being stored, which will enhance the ways it can be found when needed. Specifically, the Title, Notes and filename are all items that can be matched by key-word-search when a user is looking for a file. Accordingly, GoldVisionPro provides a number of tools in this window to assist the user in selecting/adding useful information about the file.

For reference purposes, the selected contact name and company are displayed at the top of this window.

Title

By default, the filename is offered as the Title for the document. Users can type in any text they would prefer to use, subject to 35-character limit. The drop-down list will display:

- A. A custom list of Titles/prefixes [see System Administrator]
 - a. If multiple Title Lists have been configured, they can be accessed while the cursor is in the Title box by pressing the F2 key. This will display the Title List window.
 - b. The entries for each list in the Title List display can be previewed by:
 - i. selecting a list in the upper pane of the window
 - ii. selecting the drop-down arrow in the lower section of the window to display a drop-down list of all the entries for this list.
 - c. A specific Title List can be activated for ongoing use by:
 - i. selecting a list in the upper pane of the window with the mouse, **or by starting to type the list name [selection will be highlighted]**
 - ii. selecting the Use Selected List button in the lower section of the window, **or pressing the “Enter” key while in the list.**
 - d. If multiple lists have been configured, the default list for each user can be set in the User settings. [see “GoldVisionPro Configuration Instructions”]
 - e. **The name of the active Title List is displayed as [Active Title List: xxxx] right above the Title drop-down box.**
- B. All the document Titles currently stored in the selected Contact Record
- C. The Titles of the last four files this user has stored in the system [Most Recent Links or MRLs]

for user selection as a title. [see the PowerKey reference for F4 selection of which list is displayed.] Additionally, the names of existing GoldMine Projects & Opportunities for this Contact Record can be displayed and selected for insert in the Title. [see the PowerKey reference for F2 selection].

Complete Pending Item

For the function of this button, see the description of Intelli-Tracking Workflows, under the section, “Complete the Item As the File is Stored”.

Paste Clipboard Text

This button will paste any text currently stored in the Windows Clipboard into the Title textbox.

Use Title as Filename

Selecting this checkbox will substitute the current Title text for the current name of the file that will be stored on the system [not the source file]. This provides an easy method for the user to replace uninformative machine-generated file names [e.g., from scanners, digital cameras, etc.] with more descriptive names, with a simple click. The new name appears in the lower of the two textboxes in the “Link File Name” frame at the bottom of the window.

Document Notes

This area stores text later used in key-word searching for the document. Text from the AutoSummarize process is displayed here. Users can enter additional text of their own, make corrections on displayed text, and use various tools to add text from other sources. [see the F2 PowerKey reference for other functionality in this item].

NOTE: see user settings for configuring automatically extracting text from other sources, such as MS Word Bookmarks and Excel Named Ranges.

Paste Clipboard

Selecting this button with a **left**-mouse-click will paste the current contents of the Windows Clipboard into the Notes. Selecting this button with a **right**-mouse-click will paste the text currently selected in the File Preview window into the Notes. [See the button tool-tip for reference].

Intelli-Entry

Selecting this button with a **right** -mouse-click will **paste** the contents of the active Indexing Form into the Notes. NOTE: The title of the active form is displayed in parenthesis in the Notes-frame title just above the Notes entry area.

Selecting this button with a **left**-mouse-click will **display** the active list of Indexing Forms from the file designated in the user’s settings. [see section on “Indexing Forms Window”]

Projects & Opportunities

NOTE: As of v6.8, GoldVisionPro stores the selected Project or Opportunity ID in the link record to facilitate associating files stored in the GoldMine “Links” tab with Projects or Opportunities. See “Retrieving & Working With Files” [Advanced Search] for more information on searching for files by Project or Opportunity.

Selecting this button with a **right**-mouse-click while pressing the “**Shift**” key will display a list of the Projects associated with this Contact [if any].

Selecting this button with a **right**-mouse-click while pressing the “**Shift + Alt**” key will display a list of all the Projects in the system [if any].

Selecting this button with a **right**-mouse-click while` pressing the “**Ctrl**” key will display a list of the Opportunities associated with this Contact [if any].

Selecting this button with a **right**-mouse-click while pressing the “**Ctrl + Alt**” key will display a list of the Opportunities in the system [if any].

Selecting a list item and then selecting the Add button, will insert the text from the selected item into the Notes. Multiple items can be selected by checking the checkboxes next to each item. Items will be displayed in the order selected.

AutoSummarization

When this button displays “AutoSummarization “, selecting it will **run** the AutoSummarize process, according to the settings in the User’s settings file.

When this button displays “Clear Summarization “, selecting it will **delete** the contents from the Notes area.

When this button displays “UnSummarized Text “ [see the F9 PowerKey reference for other functionality in this item], selecting it will **run** the text extraction process without the AutoSummarize process [all available text is displayed].

Available File Paths

If displayed [Sys Admin option], this area shows the two paths designated for this user to store files in the system. These paths are configured in the user’s settings as the Primary and Secondary paths. The default is the upper/Primary path. The selected path is displayed, along with the filename, in the lower of the two textboxes [destination] in the “Link File Name” frame at the bottom of the window.

Bypass all the ‘Path Name’ options

Selecting this checkbox will temporarily ignore the AutoFoldering options in the User’s settings file. These settings designate the additional sub folder(s) that are automatically selected/created [e.g., Year-Month, UserID] below the selected Available Path when storing a file.

Bypass all the ‘File Name’ options

Selecting this checkbox will temporarily ignore the AutoNaming options in the User’s settings file. These settings designate additional information that is automatically added to the filename [e.g., Year-Month, UserID] when storing a file.

Browse

If displayed [Sys Admin option], selecting this button opens a window of the drives/folders available on the system. The window opens directly to the Secondary Path listed in Available Paths. The user can then select the path to be used in storing the current file.

NOTE: Selecting individual paths instead of the displayed ‘Available Paths’ is not recommended. In order to retrieve files, the storage paths must be accessible to all users.

Intelli-Path

As of v6.8, GoldVisionPro enables aliasing storage paths, to present descriptive names for file locations. If the System Administrator has configured this option, users can select the storage location from a list of descriptive names by left-clicking the “Browse”

button. When the path is selected from the list, the button will change to “Set Path”, which the user can select to complete setting the path.

NOTE: Right-clicking the “Browse” button will display the window of drives/folders as previously.

Link File Name

This non-editable area displays the name of the source file [upper] and the destination file [lower] as it will be stored in the system.

Remote Synchronize

Selecting this checkbox sets the Link Record for this file as “Sync-Aware” in GoldMine. This enables users to synchronize files between locations using GoldMine processes.

Delete Source File

Selecting this checkbox [recommended default] causes the source file to be deleted after the destination file is created in the system. This helps assure that users are accessing the same version of the file.

Create History

Selecting this checkbox [recommended default] causes a History record to be created of the file being stored in the system.

Link [UserID]

Selecting this button initiates the storage process, using the information and settings displayed in the “Link Setup” window, and closes the window.

NOTE: If an alternate UserID has been selected for the Link record, the text on the Link button will change to alert the user. The button will display the UserID that will be used for this link.

Record Values [requires VisionPak-Extended tool set Activation. See Configuration manual.]

Selecting this button displays the Record Values window. This allows the user to modify/set specific information for the Link record and the History record that are created in GoldMine as part of the link process, rather than use the default values for these items. In this window users can select/set the following items from the drop-down list that appears for each item [or leave set to default]:

History Items

- Activity Code
- Reference
- Result Code

Link Items

- UserID – the UserID that will be used for the Link record
- Date – the date that will be used for the Link Record

Cancel

Selecting this button aborts the storage process, closing the window and returning to the V-QuickLink window.

Other Functionality

Toggle Display of Titles - F4 PowerKey

Pressing the F4 PowerKey while in the Link Setup window will switch the “Title” drop-down list between displaying the Current Documents list for this Contact, and the Most Recent Links list for this user.

Pressing the Shift +F4 PowerKey while in the Link Setup window will switch between the active selection, and just displaying the custom User Defined Field list.

Toggle Link Process Options – F8 PowerKey

Pressing the F8 PowerKey while in the Link Setup window will cycle the Link button to “Link & List” and Link & Launch” and back to “Link”. The Link & List option will store the current file and then immediately retrieve this new record in the Link Center [e.g., when storing a file and immediately using it for further processing, as in attaching it to an e-mail.] The Link and Launch option will store the file, immediately retrieve it in the Link Center, and launch the file in its native application [e.g., when storing an incomplete file and immediately continuing to work in it.]

Display Active UserID settings – F5 PowerKey

Pressing the F5 PowerKey while in the Link Setup window will display a window listing the currently active settings for UserIDs for Link ID, Intelli-Process ID, and ProcessID. Pressing Shift+F5 will toggle on/off bypassing any alternate IDs to use the default UserID.

File Preview Window

If the file has been processed for Auto Summarization by GoldVisionPro [e.g., processed from a Microsoft Office application by using the GVP toolbar button; dragged to the VisionScan icon for processing, forwarded from the VzxQueue with VisionScan selected, etc.] then “File Preview” text may be available.

File Preview – Get Text button When the “File Preview” window is open and the file in the VQL has not had text extracted, selecting the Get Text button will activate the text extraction. This un-summarized version of text is generally faster to view than opening a file in its application, and is useful in identifying some particular piece of information that may assist the user in selecting the appropriate contact record.

File Preview – Search for Contact with Selected Text When the “File Preview” window is active, pressing the F12 PowerKey will pass the text currently selected in the Preview to the “Enter Search Value” textbox in the “V-QuickLink Select...” window, and also search for that text.

File Preview – Paste Selected Text to Notes When working in the Linked Document Setup window, text selected in the File Preview window can be quickly pasted into the Notes area by *right-clicking* the “Paste Text” button in Linked Document Setup window.

Intelli-Entry+ [Indexing Forms Window]

With the introduction in v6.7.2 of Intelli-Entry+, GoldVisionPro provides a highly customizable method of indexing files with specific criteria. Intelli-Entry+ expands the previous use of Indexing Forms with the ability to display custom drop-down lists, calendar date selection, required input, related-value calculations, restricted values, and abbreviations for displayed values. This ability provides a virtually unlimited number of indexing items, without requiring redesign of the database field structure.

Indexing Forms are a powerful method of further incorporating consistent naming/indexing when storing files. The flexibility of this feature enables Administrators to adapt this capability to a wide number of uses.

An Indexing Form can be a simple text file. The text content of the file is pasted into the Notes area, as the user stores a document in the system. This text is then a searchable item for finding this document in the system.

All of the Indexing forms to be used are listed in another simple text file, the Indexing Forms List file. This list appears in the Indexing Forms window when the user is storing a file. The name/location of this Form List file is configured in each User's settings file.

As of v6.7.5, Intelli-Entry+ lists may be displayed as collapsible/expandable groups. This is useful for organizing various Indexing forms by category, and simplifying user-selection.

Intelli-Entry format

```
\\...\Indexing Forms.Vzx_List  
  
    \\...\IndexingForm_1.txt      My Form 1  
    \\...\IndexingForm_2.txt      My Form 2  
    \\...\IndexingForm_3.txt      My Form 3  
    \\...\IndexingForm_4.txt      My Form 4
```

Intelli-Entry+ format

```
\\...\Lists\COMMONLISTS\IndexingForms\VzxIndexingList.VZX_Lst.txt  
  
;DisplayTxt  Xref_File  
My Form 1    Path:\ IndexingForm_1.txt  
My Form 2    Path:\ IndexingForm_2.txt  
My Form 3    Path:\ IndexingForm_3.txt  
My Form 4    Path:\ IndexingForm_4.txt
```

NOTE: As the text from these Indexing Forms will be searched along with other text extracted from other files, it is a good practice to construct the form's text in such a way as to differentiate it from everyday language. For example, using "AUTHOR_NAME=", rather than just the word "Author", which could appear in other circumstances.

Examples of Using Indexing Forms

1. One-Line Files - Replicating a paper-file folder system

Many businesses have a standard set of “manila folders” that go into each customer’s business file. This enables segregating information within the file into general categories for easy reference, such as “General Correspondence”, “Customer Orders”, “Customer Payments”, “Notes To File”, etc.

Businesses can replicate this already familiar categorization by creating a series of one-line text files, each with just the name used on one of the folders. Then all of the one-line files can be listed in the Indexing Forms List file.

When a user is storing a document, they can simply select the familiar “folder” from the Indexing Forms List, which will then be stored as text in the document’s Notes area. When a user needs a file, this same list can be used to retrieve all the documents “in that folder”, by simply selecting the folder-name in the search criteria.

For Example:

```
Correspondence_Folder
Orders_Folder
Payments_Folder
Notes_To_File_Folder
```

2. Multi-Line Files - Adding key data not already in a file’s contents

Often information that is very relevant to a particular document is not contained in the document itself, and so would not be available in a key-word search.

For example, a repair estimate for an automobile may be part of processing an insurance claim, but the written estimate may not have the claim number on it. A receipt from a restaurant is not likely to detail the business reason for the meal. A handwritten signature and date on a contract may not be recognizable by an OCR process. The author and revision date of a document may not appear within the file and may be different from the user who is storing the file, the date when it is stored, and the linked Contact.

One way to assure that information relevant to various types of documents is captured whenever such a document is stored, is to create an Indexing Form for each such category of document. This multi-line file contains the items you want as the minimum specific information for any document of that type. When storing such a document, the user simply selects the appropriate form, which inserts a list of the items they must complete before putting the document in the system. For example:

```
Claim_Number=
Loss_Date=
Loss_Amount=
Loss_Type=
Policy_Number=          etc.
```

Or
Receipt_Item=
Item_Purpose=
Number_Attendees= etc.

Or
Signature=Complete
Signed_Date= etc.

Or
Author_Name=
Subject=
Revision_Date=
Revision_Number=
Revision_Author= etc.

Completing Content – using the “Intelli-Entry” view to enter data.

When viewing the Indexing Forms List, users can right-click on the desired form to open its Contents for sequential entry. The form’s contents will be displayed as a list of items, with an entry box for the selected item below. As the user completes the entry for that item, selecting the “Enter” key or the down-arrow key will move to the next item in the content list. The active item can also be selected by left-clicking the item in the content list. When finished, selecting the “Paste” button inserts all the items and entries into the Notes area.

On a specific value, pressing Alt+Enter will clear the value from the item. When working with automatic date values, the user can also right-click the date value to clear it [if appropriate].

More than one Form can be used for the same document, if appropriate. If the checkboxes for multiple Forms are selected, the Intelli-Entry view will display them in the order selected by the user.

Additional Forms can also be processed by selecting the “Add Another Entry” button in the Intelli-Entry window. After this button is selected the first time and another Form is added to the previous completed Form, pressing the ‘Enter’ key when completing the last item in the current Intelli-Entry list will select the “Add Another Entry” button again. This is primarily for occasions where multiple items will be added, perhaps of the same type, with different information.

NOTE: In situations where it is more useful for the entered value to appear to the left of the Index entry item, pressing the F2 key after entering the value will reverse the order of the item/ value. If the item has a transitional character [e.g., an “=” sign] at the right end, this single character can also be transposed to the left in this reversal by pressing Ctrl+F2 instead. To undo the transposition and restore the original item, press Alt+F2.

For streamlined processing, while on any value, pressing Shift+Enter will have the same result as selecting the “Paste” button, adding the Intelli-Entry items to the Notes field and returning to the Link Setup window.

Editing Lists and Forms – Authorized users

New Forms can be created and added to existing or new List files right in the Intelli-Entry window. As these can represent changes to files that are accessed by multiple users, in order to access these features the user must be in the GM Group Authorized for this type of access [“Create Index Forms Access” in the GVP Admin Settings - Authorizations].

When Authorized, the user will see a “View” menu item in the Intelli-Entry window, that will open/close the Edit List/Forms window [also accessible by the F7 key].

Automating the Storage Process

“Universal AutoFiler”

GoldVisionPro v6 now provides users with the ability to monitor a file folder on their workstation [or elsewhere on the available network], and process the files that appear [or “arrive”] in those folders. This highly adaptable feature provides a method of automating the passing of a file to GoldVisionPro from any application/program.

TIP: Create a folder on the Windows Desktop specifically for this purpose with a descriptive name [e.g., “StoreTheseFiles”], and then save any file from any application to this folder.

Semi-Automatic

In the simplest method, GoldVisionPro is configured to monitor the default output folder for a particular application. This is the folder where the application will automatically save any file created in the application. [Note: in many applications this will be either the “My Documents” folder or the “Desktop” folder.] In a semi-automatic configuration, when a new file is saved to this folder, it would then appear in the GVP Monitor file list. The user can then simply drag-drop each file from the Monitor to the VQL window or *right-click* the filename to pass the file to the VQL window and begin processing.

Automatic

In a more automated process, the Monitor is configured to automatically Queue the files for processing as they are created. The first file in the Queue is automatically passed to the VQL window for user processing. As soon as this file has been processed, it is removed from the Queue and the next file in the Queue is automatically passed to the VQL window for user processing.

NOTE: The Queue processes files in the order/priority designated from the individual Monitor [plus chronologically, by the time sent to the Queue], with the top entry in the Queue list processed next. However, the user can override the priority by *right-clicking* another file in the list, which will pass the selected file to the VQL window.

The following sections on “Monitor Window(s)” and “Queue Window” explain more of the details of using these features.

Monitor Window[s]

Start Monitoring A Folder

Selecting this item from the File menu in the VQL opens a new window that is used to configure a Folder Monitor. The user browses to the desired folder, and the files in that folder are displayed in the Monitor list. More than one Monitor can be configured, by simply selecting this menu item again.

NOTE: Although multiple Monitors can be Active at the same time, only one Queue is active at any time; all Active Monitors that have been configured to send files to the Queue will add those files to the same one Queue. [see detail on [Queue Priority”]

Load All Stored Monitors

Selecting this menu item opens the user’s designated Active Monitor file, and starts all the previously saved monitors listed in that file. [see “Storing Monitor Settings for Future Use” later on].

Close All Monitors

Selecting this menu item exits all the currently Active monitors in this user’s session.

Configuring a Folder Monitor

After the desired folder is identified/selected, several aspects can be configured to control how the monitoring operates. As **selecting one of the “Monitoring” buttons starts the Monitoring process**, first configure other aspects before selecting the desired button. When the Monitor is started, the window reduces size to display just the list of files to match the configured settings.

Types of files to be monitored:

All New Files – this option ignores any files already present in the folder, and only lists new additions to the folder. Useful in monitoring the Windows Desktop, as it will ignore program shortcuts and other items normally on the Desktop.

Files Not Selected – this option allows the user to first select specific files in the folder that are not wanted for processing, and only list the remaining files, as well as new additions.

Files of Type – this option allows the user to specify the individual file types to be listed, based on the file extension(s). The type is not case sensitive, it must include the same number of characters as the file, and more than one type can be included. When including more than one type, separate the types with a comma [e.g., “doc,pdf,TIF”]

Files Other Than – this option allows the user to simply exclude unwanted types from the list, and capture all others. The unwanted types are specified in the same manner described in “File of Type”, by a comma-separated list of file-types. Also, this setting can be used without any file types excluded, so as to capture both all the existing files in a folder and all new files.

Sending the Files to the VQL from a Monitor

If Queuing has not been activated, files that appear in the monitor list can be dragged with a mouse to the VQL window for processing. Also, right-clicking the file name in the monitor list will send the filename to the VQL window.

NOTE: The activated Monitor list will display “<open>” in the “Status” column to the left of a filename in the list, if that file is still in use by another application. This indicates that the file is not ready to be stored in the system [even though it exists in the monitored folder]. The monitored folder-path will appear in the Status Bar at the bottom on the Active Monitor window.

Activating the Queuing Options to Send Files to the VQL

Auto-Send Monitored Files to: - this option allows the user to create a central Queue of files from this Monitor, and/or other Monitors that are active. NOTE: Whether a Monitor sends files to the Queue or not is an independent setting for each Monitor. There is only one Queue for this workstation/user session. Therefore, if more than one Monitor is configured to send files to the Queue, all Queued files appear in the same Queue list.

Auto-Send Monitored Files to: VQL – this option passes the file from the Queue to the VQL without any additional processing.

Auto-Send Monitored Files to: VisionScan – this option configures the VQL to attempt a text-extraction and AutoSummarization of this file when it is passed to the VQL from the Queue. Extracted text is then available for “File Preview” in the VQL. [right-click file icon]. NOTE: The “File Preview” text is not summarized.

Remove Queued Files When Off – this option allows the user to clear unprocessed files from the Queue if the source monitor is set to Off. This provides the ability to clear some files from the process without clearing all, or if unchecked, leave current files in the Queue but discontinue adding additional files for processing by turning off the source monitor.

Queue Priority – this option allows the user to assign an arbitrary numeric value to the priority of the files from this monitor. Intended primarily for use when multiple monitors are active, it will place files in the Queue list according the largest-priority-number first. This is useful particularly if monitored files are created by some other process [e.g., incoming fax, centralized scanner, etc.] that users would want to process ahead of routine files. For example, if a monitored fax folder were configured with a priority of “3”, a new file created in that folder would be inserted in the Queue list ahead of every other currently listed file with a priority less than “3”, or any file with no priority specified. It would be listed after any currently listed file with a priority of “3” or larger.

The Queue is activated when the Auto-Send Monitored Files to: checkbox is checked and one of the Monitoring option buttons is then selected. The Queue also can be activated after the monitor is activated. When the Queue is active, a Queue-icon appears in the VQL window as a reminder to the user.

Queue Window

The VzxQueue window opens when a Monitor is started with the AutoSend to VQL checkbox selected.

Pause AutoProcessing – this button suspends sending Queued files to the VQL window. This allows the user to process some other file instead of the Queue, and then select the Resume AutoProcessing button to continue. Additionally, while AutoProcessing is in the Paused state, individual files can be manually selected for processing by right-clicking the entry in the Queue list.

Remove Selected Item – this button allows the user to remove an item from the list. This does not delete the file, it merely adds it to the list of files that are ignored in processing.

Remove Stopped Items- this button provides the user with a manual version of the “Removed Queued Files When Off” setting. Files that remain in the Queue even though their source monitor has been turned off, can be removed by selecting this button. Files in the Queue whose source monitor is still active, will remain in the Queue.

Dropping Files on the Queue List

Files from any location can be selected by the user and “dropped” on the open Queue window to be added to the processing. If the checkbox “Default process for dropped files is VisionScan” is checked, then the AutoSummarize process will be performed on each of the dropped files when it is individually passed to the VQL window.

Storing Monitor Settings for Future Use [requires text file designated in User Settings]

After a Monitor has been configured and started, it’s settings can be saved for future use, with a name that is descriptive for the user to recognize. Stored Monitors can be loaded from the VQL File – Load Monitors menu item, and/or AutoStarted when GoldVisionPro starts [AutoStart checkbox in User Settings].

To use this feature, a specific text file that will store the Monitor Settings must already be designated in the User’s GVP settings. This file can have any name, and can be blank to start, but must exist and be available when the User attempts to store the Monitor settings.

While the Monitor /and Queue are active, in the desired Monitor window, select the “File – Store Monitor Settings” menu item, and enter a name for the Monitor. This name will appear in the Monitor title bar while the Monitor is Active, and in the top-center of the “Select Folder” frame while the Monitor is “Off”. NOTE: Only one monitor entry is allowed for each specific folder. Selecting a folder that has an existing entry will cause the user to be prompted to overwrite the existing entry settings, or exit the menu.

Deleting a Stored Monitor

While a Stored Monitor is open [can be paused or inactive], it may be deleted from the Stored Monitors file. In the desired Monitor window, select “File - Delete Stored Monitor Settings” to permanently remove the settings from the file. NOTE: The file used for storing these settings is a text-file. Entries in the file can be “commented-out” so as to

bypass using the entry, but retain the settings for some future use. As the first/leftmost entry in each row is the full path to be monitored, any character/s that cause that path to be invalid can be used as the comment-character [e.g., “;”].

Intelli-Tracking Workflows [Tool Activation Required]

GoldVision has introduced workflow processing in v6.7 with the addition of the optional “Intelli-Tracking Workflows” tool set. This tool set requires the annual purchase of a designated Activation that is incorporated in the overall GoldVisionPro Activation file. Contact GoldVision Software Corp. for more information.

Initiating an Intelli-Tracking Workflow

Intelli-Tracking Workflows must be configured for user access prior to starting GoldVisionPro. For more details, see the “GoldVisionPro Configuration Instructions”.

To initiate an Intelli-Tracking Workflow in either the V-QuickLink or the Link Center windows, it is necessary to first select a Contact. If the window is blank, first perform a search that will return the desired Contact. Click on a Contact displayed in the V-QuickLink list, or click on a Link belonging to the desired Contact in the Link Center.

From the menu Tracking Items, select Create Tracking Items to display the “Select Intelli-Track Items” window. The available workflows will appear in the Item Lists pane. Clicking on a workflow icon will display sublists of items. The last level of sublist in a Concurrent Workflow appears with a dotted line instead of an icon. [In a Sequential Workflow, Values appear with dotted lines.] Clicking on this item name will list its contents in the lower pane, “Items For Selection”, with a checkbox next to each item.

NOTE: The entire window can be resized by dragging the edges/corners, if needed to display more information. Checkboxes below each pane determine if the height of that pane changes when the window is resized. This allows the user to enlarge the view for just the pane needed.

In order for an item to be used in the workflow, its checkbox must be checked. Some items may be pre-designated as checked by default, while others require the user to decide if they should be included for this process. Individual items can be checked, or the “Select All” and “UnSelect All” buttons can be used to quickly select/unselect all the items in the lower pane.

As of v6.8, users can **associate a Project or Opportunity** with their Tracking Items. Checking the box for “Link To”, and then selecting the button for “Project” or “Opportunity”, will open a window to select the Project or Opportunity by name. By default, the window will display all the Projects or Opportunities for the active Contact. Holding the Ctrl key while selecting the button will open the window listing all Projects or Opportunities in the system. After selecting the Project or Opportunity, the “Paste” button will include it in the Tracking items criteria and display the name in the textbox below the Project and Opportunity buttons.

Select the “Store Selected Items” button. This will automatically open the Intelli-Track Items window with all the selected items displayed in the Selected Items pane. The View selection will show “Items To Add” as checked. Clicking on an item will display its individual settings in the lower area of the window. If already preconfigured in the workflow setup files, these settings may not need to be modified. Otherwise they may

be modified as needed. The primary items in this area are the Requested Date, Duration, and Expected Date. [Requested Date + Duration = Expected Date]. In addition to being viewable/sortable in GoldVisionPro, these items can be used in GoldMine Reports to monitor the overall status of outstanding items for all Contacts, and when they are expected.

NOTE: The modifications are not retained in the item until the button “Update This Item” is selected.

Double-clicking the outline of the Modify area [or pressing the F7 key] will toggle expanding/contracting the display of additional information for modification. These items are for special circumstances, as follows:

Set As Private – This checkbox restricts access to this Event record in GoldMine to the User Assigned. While the entry is still visible in the Pending Items view of this window, as well as the Pending tab in GoldMine, the details of this record are only available to the User Assigned. NOTE: As the default User Assigned for Intelli-Tracking Workflows is the non-existent “VZXITEM”, checking this box will have the effect of preventing non-Master users from access to this record, and therefore to making any modifications to its details.

User Assigned – In order to avoid excessive calendar entries for a particular user, the default User Assigned for Intelli-Tracking Workflows is the non-existent “VZXITEM”. However, should it be appropriate for an item to be assigned to a specific user [e.g., as when setting an alarm for a particular item], this drop-down box displays a list of all the active GoldMine UserIDs for selection. [System Administrators may want to add “VZXITEM” as a valid UserID for their own access/Alarming of these records.]

Alarm, Time, Date – the Alarm checkbox when checked allows access to the Alarm Time and Alarm Date settings. Generally, there is no point to setting an Alarm if the User Assigned does not exist.

Find Third Party – this button allows setting a related third-party for this item. Setting this value will cause the creation of a duplicate of this item for another Contact, in addition to the item created for the currently selected Contact. The purpose of this process is to facilitate monitoring items that pertain to the selected Contact, but are provided by another Contact. [e.g., an Appraisal expected for Customer A’s building is actually provided by Appraisal Firm B.] This enables automated reporting showing both *for whom* an item is needed, as well as *from whom* an item is needed. Selecting this button activates the Contact Search window, for retrieving the related Contact. Enter the search criteria, press Enter, and from the Contacts returned, click on the desired Contact in the List. Press the button with “Select *contact name*”, and the Contact name and Company name will now appear in the box “**Third Party Responsible For Item**”. This will also update the item settings, as noted in the pop-up message.

NOTE: To remove a Third Party, delete the entry in the box “Third Party Responsible For Item” and then select the button “Update This Item”.

When all items are configured as needed, confirm that the checkbox for each item wanted in the workflow is checked. **ONLY CHECKED ITEMS WILL BE CREATED.** Then select the button, “Create New Tracking Items”. Each of the items will be created as records in the database.

NOTE: While the selected “Items To Add” will persist as long as GoldVisionPro is active, until the Create New Tracking Items button is selected, no persistent records have been created in the database. Exiting GoldVisionPro without completing this step will require initiating the workflow from the beginning for the process to be implemented.

Viewing Tracking Items in GoldVisionPro

Both Pending and Completed Intelli-Tracking items can be viewed in GoldVisionPro for each Contact. It is necessary to first select a Contact. If the window is blank, first perform a search that will return the desired Contact. Click on a Contact displayed in the V-QuickLink list, or click on a Link belonging to the desired Contact in the Link Center.

From the menu Tracking Items, select View Tracking Items to display the “Intelli-Track Items” window. In the View section, check the checkbox for Pending Items and/or the checkbox for Completed Items, as desired. The items will be listed in the Selected Items pane below. [see “GoldVisionPro Configuration Instructions” for setting a GoldMine Taskbar icon to automatically launch this window and display these items.]

NOTE: The Intelli-Tracking items can also be viewed in the Pending tab [for Pending Items] and the History tab [for Completed Items] of the GoldMine record for this Contact.

Selecting Types and Other Search/Reporting Items

Another feature of Intelli-Tracking Workflows is the ability to select/expand which Activities are to be viewed, and for which Contacts. These settings can be accessed by selecting the menu “Types | Select Search Items” at the top of the window, or by double-clicking the “View” frame.

In the Activity window that opens, each of six Intelli-Tracking Activities can be selected by checking the appropriate boxes [Events, Calls, Appointments, Next Actions, To Do, Other]. Likewise, Activities for either the Active Contact, or All Contacts [and in the Link Center, also the currently “Selected Contacts”] can be retrieved.

As of v6.8, users have several additional options for search settings:

Date Ranges -- users can select date ranges for either or both Requested dates and/or Expected dates. The drop down lists allow operator selection of “After”, “Before”, “Between”, or “Equal To” for the date ranges of each item.

Title – an exact or partial entry of the desired Title can be entered for a Title search by “key-word”.

Project or Opportunity -- Checking the box for “Designate”, and then selecting the button for “Project” or “Opportunity”, will open a window to select the Project or Opportunity by name. The window will display all the Projects or Opportunities for the active Contact[s] per the selected button in the upper section of the window. [Holding the Ctrl key while selecting the button will also open the window listing all Projects or Opportunities in the system.] After selecting the Project or Opportunity, the “Paste” button will include it in the Reference criteria and display its name in the textbox below the Project and Opportunity buttons.

The new settings are active on the next retrieval of items from the system. [For example, after changing any settings, uncheck and then re-check the View Pending or View Complete checkboxes.]

Note: The list of items can be sorted/re-sorted by clicking the top of any column in the list display.

Adding a Project or Opportunity to Tracking Items

As of v6.8, if a Project or Opportunity was not specified when tracking Items were created, users can add that information in this window as appropriate. After

selecting/checking each New, Pending or Completed item in the Items list that should be associated, select the menu “Types | Designate Project or Opportunity”. This will open the Activity window:

Project or Opportunity -- Checking the box for “Designate”, and then selecting the button for “Project” or “Opportunity”, will open a window to select the Project or Opportunity by name. The window will display all the Projects or Opportunities for the active Contact[s] per the selected button in the upper section of the window. [Holding the Ctrl key while selecting the button will also open the window listing all Projects or Opportunities in the system.] After selecting the Project or Opportunity, the “Paste” button will include it in the Reference criteria and display its name in the textbox below the Project and Opportunity buttons. Select the “OK” button to update the selected items with the Project or Opportunity ID.

Creating Reports of Tracking Items from GoldVisionPro

After retrieving items in this display, the Report menu offers options for Saving the results to a text-file, or Copying the results to the Windows Clipboard. Either option allows including either the Standard fields of data [most descriptive] or All fields of data for reference items, or the Custom fields selected as described below.

As of v6.7.5, users can further define the Report output through the following items on the “File” menu:

Include Selected Rows Only – selecting this option will limit the output to the report of only the items selected [checked] in the Item List, rather than all the items.

Select Custom Report Columns – selecting this item will open the “Select Custom Report Columns” window displaying the 22 columns available in the report. Check the box beside each item to be included in the report. When finished, select the “Set Columns” button.

NOTE: Both Save and Copy options transfer easily to a spreadsheet file for further use. For example, after Saving, open MS Excel and drag the report file into Excel. Or after Copying to the Clipboard, select an empty cell in Excel, and then select the Excel menu “Edit | Paste

Completing a Pending Tracking Item in GoldVisionPro

Although other processes can be accommodated, the most common completion of a workflow item corresponds to the receipt of an expected item. This will generally require storing the item in the system, using the standard GoldVisionPro V-QuickLink process.

Complete the Item As the File is Stored

During the standard GoldVisionPro V-QuickLink process for storing a file, as the user views the Link Document Setup window, they can select the button “Complete Pending Item”.

This will display the “Intelli-Track Items” window, listing all the current Intelli-Tracking Pending Items for this Contact. The user selects the Tracking Item that corresponds to the file being stored. **As of v6.8.3, more than one item can be selected/completed simultaneously for the same file, if appropriate.**

If multiple Result Codes exist for this item, the user selects the appropriate Result in the Status box drop-down list. The user then selects the button “Complete Selected Tracking Item” at the bottom of the Intelli-Track Items window. The window will close, returning the user to the Link Document Setup window to complete storing the file with GoldVisionPro, by selecting the Link button.

As the file is stored, GoldVisionPro automatically completes both the Pending item, as well as the related Third Party Pending item, if one exists. A link to this file will also be automatically created for the third party contact.

In the case of a Sequential Workflow, the next Tracking Item is also then automatically created for the Contact. The new sequence item is viewable in the Intelli-Track Items window [when the Pending Items view is checked], as well as the completed item [when the Completed Items view is checked].

Complete the Item After the File is Stored

In the case where a file that completes an item is already stored, the item can be completed from the Link Center. For example, this is often the case when the expected file is received as an e-mail attachment, and so has been automatically stored in GoldMine without yet completing the item.

Retrieve the file in the GoldVisionPro Link Center using any standard retrieval process. Select the file in the list view, and go to the menu Tracking Items – View Tracking Items, and check the Pending Items view.

This will list all the current Intelli-Tracking Pending Items for this Contact. The user selects the Tracking Item that corresponds to the selected file. **As of v6.8.3, more than one item can be selected/completed simultaneously for the same file, if appropriate.**

If multiple Result Codes exist for this item, the user selects the appropriate Result in the Status box drop-down list. The user then selects the button “Complete Selected Tracking Item” at the bottom of the Intelli-Track Items window. A pop-up window will indicate that the process has been completed.

GoldVisionPro automatically completes both the Pending item, as well as the related Third Party Pending item, if one exists. A link to this file will also be automatically created for the third party contact.

In the case of a Sequential Workflow, the next Tracking Item is also then automatically created for the Contact. The new sequence item is viewable in the Intelli-Track Items window [when the Pending Items view is checked], as well as the completed item [when the Completed Items view is checked].

Complete An Item Without Storing A File

If completion of a workflow item does not correspond to storing a new file, the user can follow a process similar to “Complete the Item After the File is Stored” to handle completing the process. For example, a file that has already been tracked as received in the system may still need to be reviewed in an approval process. The approval may not require any additional files stored, just an activity performed. When the activity is

completed, the workflow item can be completed in order to continue the sequence and assure a record of the completion exists.

Following the steps outlined in “Complete the Item After the File is Stored”, simply choose an appropriate file already stored to this contact [if one exists, such as the received file that is now approved], or any file for this contact, and complete the item.

As of v6.8.3, more than one item can be selected/completed simultaneously for the same file, if appropriate. To avoid adding a link to this file for a third party, hold down the Ctrl key while clicking the Complete Selected Tracking Item button.

Retrieving & Working With Files

GoldVisionPro Link Center Window

The GoldVisionPro Link Center Window is the primary working area for users. It consists of a menu area at the top, plus four primary sections:

- The Contact “Tree View” section [left side], which displays a list of the Company name and Contact name [expand/collapse] for the files in the current retrieved search.
- The Search Criteria section [top right], used for initiating a search.
- The File List section [mid right], which displays a list of all the files returned by the search.
- The File Detail Tabs section [lower right], which displays more detail on the file currently selected in the File List section.

Users can expand the viewable area of the Link Center window by dragging the lower right corner to the size desired.

Quick Start

There are three quick-search buttons/keys that will perform simple file searches. Before performing a search, the user should first select the “New Search” button to both clear any existing search criteria and exit the SubSearch mode [if applicable].

Get Contact button – If GoldMine is currently active on the user’s workstation, this button will retrieve all the files linked to the currently active GoldMine Contact Record.

Most Recent Link(s) button – This button will retrieve the last file the user stored in the system. See the F4 PowerKey description in the Reference Guide for more options.

F11 key – selecting this “My Documents” PowerKey will automatically clear the existing search and run a new search based on the user’s UserID. It returns all the files that have been stored in the system by this user.

Individual Search Criteria

Contact Name Quick-Search box – located above the TreeView display, this box can be used to retrieve all the files associated with a specific contact. Simply enter the first and last name of the contact in the box, and press the Enter key on your keyboard.

Search button - General Search criteria

The Search button initiates a search based on all the currently selected/entered criteria. Right-click the Search button to display the Match Any / Match All options [see Text search below for more details]. When a search is returned, the Search button changes to “Sub Search” mode, which initiates searches within the already retrieved information.

User/Group – Search by Attribute

A search can be performed for all the files stored by a specific user, or by all of the users of a particular User Group. This is particularly helpful in retrieving a general list of files, and then SubSearching within that list.

NOTE 1: The F11 “My Documents” PowerKey performs a User search based on the currently logged-in UserID.

NOTE 2: User Groups are often created for each department of a company, enabling quick retrieval of files on a departmental basis.

The available UserID's and User Groups are displayed in the drop-down list, based on the selection of the User or Group button in the Filter by Access area. Inactive Users with files stored in the system are listed below the active User list, separated by the entry “--- Inactive Users ---”. Selecting this entry returns all the files for all Inactive Users, instead of just an individually selected User.

Text Search

The default method of text search is exact-phrase match, within the fields selected in each checkbox [Title, Notes, Filename]. Right-click the Search button to display the Match Any / Match All options.

NOTE: DBF databases are case sensitive in the Notes field; SQL databases are not.

Title – The title of the document/file in the system.

Notes – The indexing text stored for the file, from user input, Indexing Form input and/or the GoldVisionPro AutoSummarize process. On most systems this is the primary field for key-word search.

Filename – The full path and name of the file in the system, enabling advanced users to search within defined path structures as well as file names [e.g., for a particular year or month in a date-structured system].

Search Methods:

An exact phrase match looks for the entire text as entered in the search box.

Match Any returns any file that has any one word of the words entered in the search box, in any of the selected fields.

Match All only returns files that have all of the individual words entered in the search box in at least one of the selected fields, although not necessarily in the order entered.

Advanced Text Search with +OR+, +AND+

A more complex text search can be constructed for phrase-searching using Boolean operators. These operators effectively expand the Match Any [+OR+] and Match All [+AND+] capability to entire phrases, rather than just individual

words. The +OR+ operator performs an “inclusive” search, as it includes every file that has any match [wide return list]. The +AND+ operator performs an “exclusive” search, as it excludes files that do not match all of the specified criteria [narrow return list]. For example:

I would like to match this phrase+OR+this phrase instead+OR+even this one

I would like to match this phrase+AND+this phrase also+AND+this one too

NOTE: Each search must use only one of the operators, either +AND+ or +OR+, not both. However, the desired result of a combination +AND+ / +OR+ search can be accomplished by first performing a +OR+ search, and then performing a subsequent +AND+ SubSearch within the returned files. See “SubSearch” below for further refining search returns.

Advanced Text Search by Text Length

An alternate method of search can be constructed to look for files where indexing information is either missing, inadequate, or not-missing or not-inadequate. Special operators are used to indicate the search is not for specific text, but rather for the length of the text in each text field. The special operators for this functionality are:

+BLANK+
+LESSTHAN+ or +<+
+NOTBLANK+
+MORETHAN+ or +>+

As these items are measuring the number of characters in each selected field, a number is entered for the LessThan and MoreThan options, followed by the “+” sign. For example, when looking for files with less/more than 10 characters in the selected field(s), the syntax would be as follows:

+LESSTHAN+10+ or +<+10+
+MORETHAN+10+ or +>+10+

The +BLANK+ and +NOTBLANK+ operators are equivalent to minimal character searches, as follows:

+BLANK+ == +LESSTHAN+1+ == +<+1+
+NOTBLANK+ == +MORETHAN+0+ == +>+0+

Entering text for search

In addition to simply entering the desired search text, the text search box includes a drop-down list feature to facilitate user selection of anticipated search criteria. An item can be selected from the list to be the search text, or selected and then more text added by the user for a more specific definition. The sequence of the list items is as follows, separated in the list by dashed-lines:

Previous text entered/selected for searches during this session. This is simply a historical list of the searches the user has performed since program startup. If the user would like to clear this list to start a new list, select the menu item “Tools – Clear Recent Text Search List”.

Custom Title prefixes configured for this user. This is the same list that appears in the drop-down list of the Title box in the Information Tab, as well as in the Link Setup window when storing a file in the system. This reinforces the usefulness of the consistent naming conventions used when storing files, by providing the user with the same list for file retrieval.

NOTE: This list only appears in the text search box if the Title checkbox is selected.

Intelli-Entry+ text configured for this user. This is the same text provided in all of the Intelli-Entry+ Indexing Forms, in the order the forms appear in the user’s Indexing Forms List file, with each form’s text separated from the previous form by a dashed-line.

NOTE: This list only appears in the text search box if the Notes checkbox is selected.

Selecting specific Intelli-Entry+ values for searches

As of v6.75, GoldVisionPro assists users in quickly selecting the specific items for an Intelli-Entry+ item-search. With this capability, users can select specific search values from Intelli-Entry+ items that have a Values list.

After selecting an Intelli-Entry+ item, while in the Text Search box, selecting Alt+F2 will reset the drop-down list for every value that pertains to the selected item. For example:

The items in an Intelli-Entry+ form for “Insurance Claim Information” are:

```
CLAIM#=  
POLICY#=  
LOSS_TYPE=  
LOSS_DATE=
```

After selecting “LOSS_TYPE=”, and then Alt+F2, the drop-down list resets to display:

```
LOSS_TYPE=AUTO  
LOSS_TYPE=HO  
LOSS_TYPE=MOTORCYCLE  
LOSS_TYPE=RV  
LOSS_TYPE=WATERCRAFT
```

The user can then select the specific item for the search [e.g., LOSS_TYPE=AUTO] to focus the search on the exact items desired.

In addition to the drop-down list, users can view lists of Project and Opportunity names, to search for files associated with these items. In the text search box, pressing Shift+F2 displays a list of Project names, Ctrl+F2 displays a list of Opportunity names.

These lists are correlated with the User or Group selected. If no individual user or group is selected [“All”], then all Projects/Opportunities in the system are displayed. If a

single User or Group is selected, only Projects/ Opportunities associated with that User, or Users that are members of the selected Group, are displayed.

When in SubSearch mode, the list is correlated with the Contact Record of the file currently selected in the File List section [and highlighted in the Contact “TreeView”]. In this way, users can also restrict the list to display only Projects/Opportunities associated with that individual Contact.

NOTE: This is not a search of links in the Project or Opportunity itself. [See Advanced Search for this capability] GoldVisionPro facilitates storing Project/Opportunity names in the link record when a file is stored in the system. It is this text that is searched to find files associated with Projects and Opportunities.

Using a Searches title list [if available; see Configuration manual for setup]

A “Searches” title list is a GoldVisionPro Title list intended to provide users with an easy form of selecting specific search criteria from a descriptive list. The list is accessed from the same Title List window [displayed by F2 key while in Text Search box] as all other configured Title lists [although it is not used for setting titles in a new document.]

After selecting the list, select the “Use Selected List” button, as when activating any other Title list. The available searches will then appear in the drop-down list of the Text Search box for selection. For example, the following entries might be in the list:

Document Files ///.do+OR+.pdf
Graphics Files ///.png+OR+.gif+OR+.jpg+OR+.bmp+OR+.ico
Web Pages ///.htm+OR+cookie_

When the user selects the first entry, only “.do+OR+.pdf” will appear in the Text Search box, as the portion “Document Files” is only a description of the search criteria. The Search can then be run.

Another use of these searches is to refine a standard search [e.g., by Contact, Company, or UserID] in the SubSearch process. For example, if a search is run for all links for a specified Company, many unwanted links might be included. GoldVisionPro provides a quick “Exclude” capability to remove these items from the working list. [see section on “SubSearch, Exclude and Add Search”] If “Exclude” is activated, then selecting the second entry in the example Searches list would be useful in quickly running a SubSearch that removes all unwanted “Graphic Files” that appear in the original search.

Advanced Search

In addition to searching by Contact name, GoldVisionPro provides the ability to search for files by other Primary fields, **as well as by Project or Opportunity.**

This capability is accessed by selecting the “Advanced” search button, which displays the Advanced Search tab. Users can then select the field to be searched in the “Search By” drop-down list.

Additionally, users can **select a Project or Opportunity for their link search.**

Checking the box for “Search By”, and then selecting the button for “Project” or “Opportunity”, will open a window to select the Project or Opportunity by name. This search will return all links specifically stored in the Project or Opportunity, as well as all the “normal” links for files stored with GoldVisionPro where the Project or Opportunity

was specified. Right-clicking the box will turn on/off the option to “Search Only”. This search will only return all the links specifically stored in the Project or Opportunity.

Hot-Key Field Selection

Alternately, users can quick-select a preferred field for searching without using the “Advanced” button and the drop-down list. In this case, a hot-key is used to select one of the primary fields for an Advanced search. This list displays the local names of these fields and keys, which represent the following fields in the system:

Company	F5
Contact Name [full]	
Contact Last Name	Shift + F5
City	Ctrl + Shift + F5
State	
Zip	Alt + Shift + F5
Country	
Phone 1	Alt + F5
<i>Local Name 1</i> [KEY 1]	
<i>Local Name 2</i> [KEY 2]	
<i>Local Name 3</i> [KEY 3]	
<i>Local Name 4</i> [KEY 4]	Ctrl + Shift + F5
<i>Local Name 5</i> [KEY 5]	Ctrl + F5

The value to be matched should then be entered in the “Enter Search Value” textbox. Pressing the “Enter” key or selecting the Find” button [or List & Find button, if displayed] initiates the search.

Find All vs. List + Find

Users can elect to directly return all the files for all the contacts matching the entered search criteria [default – Find All button], or *first* return a list of all the contact records that match the entered search and then *second*, select from this list which contact records to include in the subsequent file search [List + Find button].

When using the List + Find mode, all the displayed records can be included by using the “Select All” button. Alternately, a group of contacts can be selected in the displayed list by holding the Ctrl key and left-clicking the item desired. When finished selecting, press the “Select These” button to retrieve the files.

NOTE 1: GoldVisionPro will perform partial matches of entered text for each field. In this way, searches can be broadened or narrowed to fit user preference. For example, when searching by Zip Code, using the first three digits alone will return a broader geographic area than using a five-digit number. A similar result applies for telephone numbers. Depending on system-design, Key field searching can be similarly broadened or narrowed.

NOTE 2: Entering the “%” character as the first character in either the Contact Name Quick-Search textbox or the Enter Search Value textbox, is used to broaden the search. [A standard search matches the input value to the left-most characters in the designated field.] With a leading “%” character, the subsequent input text is matched anywhere within the field. For example: searching by Company for “%soft” would return “GoldVision Software”, “Microsoft”, etc..

“Tree View”-based Quick searches

Within the Contact “TreeView” list, users can quickly initiate searches based on a selected Company or Contact name. Right-clicking an entry in the “Tree View” displays a menu for these functions.

In large lists, the “TreeView” displays each Company associated with the files returned in the current search [collapsed view]. In smaller searches, the “Tree View” displays both the Company and the Contact name for the search files [expanded view]. The F10 PowerKey toggles expanding or collapsing the view regardless of list size. The entire list can also be expanded or collapsed by right-clicking an entry and choosing the menu items “Expand All” or “Collapse All”. Individual entries can be expanded or collapsed by double-clicking [left-button] the Company entry.

Right-clicking a Company name in the “Tree View” enables the user to initiate either:

a “SubSearch” within the existing list of files for only those associated with this Company [all listed contacts for this Company] by selecting the menu item “View This Company Within THIS Search”, or

a new search for all the files associated with this Company [all Contacts with this Company name] by selecting the menu item “Select This Company For NEW Search”.

Right-clicking a Contact name in the “Tree View” enables a similar SubSearch or new search for the files of one specific Contact, by selecting the menu items “View This Contact Name Within THIS Search” or “Select This Contact Name For NEW Search”

Search by Results/Date

After a search is performed, the “Most Recent Link” button changes functionality to “Search by Results/Date”.

In the File List section, users can select a file, then *left*-click the “Search by Results” button to quickly initiate a new search for all the files for the Contact of that file entry.

NOTE 1: This search retrieves all the files based on a match of the Contact Name. If more than one contact record has the same Contact Name, then all files for all matching contact records are returned. See Note 2 for limiting the search to only the exact selected contact record [by ACCOUNTNO].

NOTE 2: When the VisionPak Tab is displayed, one or more files can be selected in the File List section by holding down the Shift or Ctrl keys while left-clicking each file entry. Left-clicking the “Search by Results” button then initiates a new search for all the files for all the Contacts of those selected file entries. This search retrieves all files based on a match of the ACCOUNTNO for each link.

Alternatively, *right*-clicking the “Search by Results/Date” button displays the Date Sub Search window for defining a SubSearch of the current File List. Users can select which date to be used in the search:

“Link Date” – stored date in the system [as configured for the user that stored the file]
“File Created Date” – date the file was first created

“File Modified Date” – date the file was last modified

Users can also select various Date Ranges, entering specific “From” and “To” dates to include. If the “From” checkbox is unchecked, then files for all existing dates up to the “To” date are included. If the “To” checkbox is unchecked, then files for all existing dates from the “From” date are included.

NOTE: See the discussion on SubSearch for more details.

Multiple Criteria Searches – Advanced Search

Criteria in each of the main categories [Attributes, Text fields, Primary fields] can be combined in a single search, for more specific results. For example, a search can be constructed based on a particular zip code or state, for only the files stored by a particular user or user group, and only those that have a particular phrase in the Title or Notes.

SubSearch, Exclude, Remove and Add Search

A powerful feature of GoldVisionPro is the ability to “drill-down” in existing search-results to further refine the search to ever-more specific criteria. GoldVisionPro keeps track of the search level [displayed in the bottom of the Link Center window], letting users move freely back and forth from one level to the next/previous. A list can also be “accumulated” by “Retaining” search results while another search is performed.

NOTE: The search is retained only while the program is active. Once the program is ended, the search results are released from memory.

Current and Retained searches can be added together, thereby “accumulating” file lists that meet various criteria. This is particularly useful when a number of files with less-obvious commonality are needed, perhaps temporarily. This can be accomplished in a single process [Add A New Search], or in repetitive “Retain” and “Add” processes.

When the “New Search” button is selected, all active SubSearches are cleared. [The “Retained search” remains unaffected, until deleted by selecting the menu item “Tools” then “Clear Retained Search” or when the program is exited.]

After the “New Search” button is selected, the next search is a primary search of the GoldMine database. When the results of the primary search are displayed, the “Search” button changes to “SubSearch”, indicating that subsequent searches are subsets of the primary search list. The “Advanced” button also changes to “Add A New Search”. Selecting the “Add A New Search” button retains the current search, clears any other active SubSearches, and waits for another primary search. When the next search is initiated, the Retained Search is automatically added to the new primary search, and duplicates records are only displayed once.

SubSearches can be by Company, Contact, UserID, Title text, Notes text, File Name text, Link Date, File Create Date or File Modified Date.

NOTE: With the significant amount of indexing information that can be stored in the Notes field, this is often the most useful area for SubSearches.

In order to move from one active SubSearch to another, select the menu item “Tools” and then “Show Next SubSearch” or “Show Previous SubSearch”. The SubSearch currently in view is indicated at the bottom of the Link Center window, as the search “level”. The later the search, the higher the number. The last search will be the same level as the total [e.g., “Level 4 of 4”].

Furthermore, *right*-clicking the “Sub-Search” button while pressing the Alt key toggles on/off activating the “**Exclude**” search state [red “Exclude” indicator appears over Sub-Search button when activated]. Alternatively, *right*-clicking the “Sub-Search” button while pressing the Ctrl key toggles on/off activating the “**Remove Contact**” search state [red “Remove Contact” indicator appears over Sub-Search button when activated].

In these states, any items that meet the search criteria are excluded/removed from the results. The “Exclude” search removes the single matching items. The “Remove Contacts” search removes all links for the Contact that had a matching item. This is particularly useful for limiting search results when the resulting list will be used for other processes [e.g., Creating a Contact Group based on the remaining items; eliminating Contacts that have the target items].

Note: The Exclude and Remove settings also apply to the date[s] entered in the Date Sub-Search window.

The active search level can be retained for later viewing or for adding to other searches by selecting the menu item “Tools”, and then “Retain Current Search Results”. The Retained Search can be added a current search by selecting “Add Retained Search To This Search” from the same menu.

Other Column Searches

A SubSearch can also “drill-down” within the items displayed in the list, by any value that appears in any column of the list. This allows searching any selected column by the value entered in the Text Search Value textbox. This feature is activated/deactivated by right-clicking the label “Search Within:”, which then identifies the selected Column as “SubSearch Within Selected List Column: xxxx “. Any column can be selected while this feature is activated. The primary use for this feature is to search columns that are not otherwise available in the SubSearch [e.g., Company, Contact, Path, etc.]

Designated Value Search [PARSE]

This feature allows the User to limit the Notes values displayed in a Search/SubSearch to only the information in the row of the data that contains the search item. For files indexed with multiple descriptive items using GoldVisionPro’s Intelli-Entry-Plus capabilities, a single item can be displayed, facilitating subsequent sorting by that item. For example, files with three items in the Notes field might appear as:

```
SaleQuantity=1,000  
SaleTotal=$10,000  
ExpirationDate=2010-01-01
```

This feature would allow for a Notes Search of “ExpirationDate “ and then display only that one item of each file’s record, such as:

ExpirationDate=2010-01-01

enabling the user to subsequently sort all the files by just those date values.

This method of searching is activated/deactivated by right-clicking the Notes checkbox. When Active, a yellow background appears around "Notes". The search value is entered in the Text Search Value textbox.

File List Display

This section in the middle-right of the Link Center window displays all the files in the active search. It is also the primary re-sizable area of the window, so that dragging the edge of the window increases the size of the list displayed.

The File List displays the file:

- Title
- Created On [Link Date]
- Notes
- Company [field name]
- Contact [field name]
- Created By [UserID]
- File Type
- File Name
- File Path
- File Modified Date [optional – see Ctrl + F3 PowerKey]

The default sort of this display is by Title, ascending. The default sort can be reset to/from "Link Date", descending, with the F3 PowerKey. The active list can be instantly re-sorted by any column, simply by left-clicking the column name. Re-clicking the same column reverses the ascending/descending order of the sort. The sorted column displays an "*" next to the column name for identification.

The File Modified Date can be added to the standard list for sorting by the most recent file activity.

NOTE: The File Modified Date is a dynamic value, not stored in the database. Activating this option may slow system response in retrieving primary searches, as an additional process retrieves the date for each file after the initial search is completed.

Double-clicking [left-button] a row in the list will launch the associated file in its native application.

Right-clicking a row in the list will display the "File Details" menu, which corresponds to the File Details Tabs below.

Hold the Alt key to drag a selected file to another application/location.

The selected entry can be deleted from the File List [display only, not from the system] by using the "Delete" key.

During a “List + Find” search, this area will also display individual Contact records for selection in the search process.

Tab Information & Processes

The File Details Tabs are the lower right section of the Link Center window. Each tab displays information about the individual file currently selected in the File List section above it.

Information Tab

The default display, this tab provides a scrollable-view of the entire Notes field. The associated file can be opened in its native application using the “Launch File” button, or by clicking the icon to the left of the filename.

This tab also allows the user to modify the Title and Notes for the selected file. This can be useful in updating existing information, and/or incorporating the standardized naming conventions used in GoldVisionPro with linked files that do have this information.

Text can be manually typed in the Title or Notes boxes, or selected from a drop-down list [Title] or the “Indexing Forms” list [Notes] for insertion, as in the Link setup Window of the V-QuickLink when storing a file [see “Storing Files”]. Additionally, the “AutoSummarize” button will run the GoldVisionPro AutoSummarize process to attempt to extract and summarize text in the selected file, and insert it in the Notes area.

NOTE: Changes to the existing Title and Notes for a selected item are NOT saved in the system until the “update” buttons to the right of the Title and the Notes are selected. When completed, the new text will then be visible for this entry in the File List section above.

View History Tab

Selecting this tab runs a retrieval of all the History items for the selected file record. While collectively visible for all files in the History tab of the GoldMine Contact record, GoldVisionPro further tracks the History to the specific file records, differentiating each file’s History from other files for the same Contact. Double-clicking an individual History event will open the History Details window to view further detail.

If activated by the System Administrator, changes to a file record Title or Notes will be recorded as History events, storing the text that existed prior to the change.

Valet Tab

This tab allows the user to perform several *file-related* functions.

A file can be renamed in the system, with the appropriate update of the database record, by typing a new name and selecting the “Rename” button.

A file can be moved to another location by selecting the “Relocate” button, which will open a “Browse for Folder” window, for the user to select another location.

NOTE: When renaming or relocating a file, GoldVisionPro checks the database for other links to this same file that would be affected by such a change. If another links exists for this same, an message window appears and the process is cancelled.

For convenience in various file processing activities, the “Copy File Name” button copies just the file name and extension to the Windows Clipboard, for pasting

elsewhere. Likewise, the “Copy Path” button copies the entire path, file name and extension to the Windows Clipboard, for pasting elsewhere [see Shift + Alt + F12 PowerKey also for copying the path and filename].

As in other displays, clicking the icon next to the file name will launch the file in its native application.

VisionPak Tab

This tab allows the user to create a specific file list “on-the-fly”, which can be dragged-and-dropped to another application/location and/or used for batch processing [see section on Intelli-Process]. Files are added to the VisionPak list by selecting entries in the File List above. The Ctrl key and Shift key can be used to select multiple files from the File List, to add to the VisionPak list. The entire VisionPak list can be cleared by selecting the “Clear All” button.

When dragging entries from the VisionPak list, only the selected files [highlighted] will be included in the drag group. Individual files can be un-selected by right-clicking the entry in the VisionPak list, and re-selected by left-clicking the entry. This is particularly useful when a group of files is to be e-mailed to several different individuals, but not everyone receives the entire group. Excluding a file(s) from the drag group is a simple process. Additionally, an entry that is no longer needed or that was mistakenly added can be removed from the VisionPak list by selecting it with the mouse and then pressing the “Delete” key.

NOTE: When dragging files to GM E-Mail, dragging the mouse-pointer to the e-mail header will attach the files to the e-mail. Alternately, dragging the mouse-pointer to the e-mail body will copy the link record information into the body of the e-mail.

Retain VP Selection [Tool Activation Required] – when checked, the items selected in the VisionPak tab are retained so that the user can then select the Information tab and revise the Title and/or Notes for all the selected items. This is another feature of the Intelli-Process capability, but differs from the other Intelli-Process functions. In these processes, all selected records are changed to the one designated Title or Notes. This is primarily for revising similar items that were mis-Titled or perhaps created with machine-generated names [e.g., e-mail attachments, scanned or faxed items, etc.]. When this checkbox has been selected, in the Information tab the Title-update button and the Notes-update button are outlined in red, indicating all selected records will be changed.

Wizard Tab

This tab allows the user to perform several *record-related* functions.

The “Copy Title” button copies the Title to the Windows Clipboard for pasting elsewhere.

The “Add New Link” button allows a user to associate the same file with another Contact Record [see F8 PowerKey]. The existing Title and Notes are carried over to the V-QuickLink, where the user can then select another contact record to add to this file. When the link is stored, the file remains at its current location. Both records will now point to the same file at the same location. This is the simple process for associating one file with several different Contacts.

The “Delete Link” button [displayed for Master-level users, or members of the Delete Link Group only] removes the selected link record from the system. This does not delete the file.

The “**Move Link To**” button [displayed for Master-level users, or members of the Delete Link Group only] displays the Select Contact window, for finding and selecting the Contact to move the record to. The window allows for searching by the usual fields in order to find the desired Contact. After selecting the Contact from the list, select the “Select” button. The record will be moved to the selected contact. The file is unaffected.

Menu Commands

File

New Search – active SubSearches are cleared. [same as “New Search” button.]

Advanced Search – goes to Advanced Search tab [same as “Advanced” button]

Display Master Control Panel – shows the MCP menu, if Windows System tray is not visible

Exit – closes the Link Center

Tools

Administrator Tools - [Tool Activations Required]

Analyze Links – analyzes the availability of each file in the search list, and prepares a report of the files that were not accessible to this workstation. The results can be copied to the Windows Clipboard and then pasted into another application for viewing/processing.

NOTE: Files in the results are marked as UNACCESSIBLE in the Notes field of the File List section. This is not an update of the database record; it is just a temporary display for user convenience.

View File Association Data – displays a window with the record information “tagged” to this file

Load Intelli-File List Records – prompts for user to Browse to an Intelli-File List in the file storage area. When selected, all the link records for the files in the list are retrieved in GoldVisionPro.

Load UNPROCESSED File Records – prompts the User to Browse to the list file created of all items unable to be processed in a previous Intelli-Process routine. When selected, all the link records for the files in the list are retrieved in GoldVisionPro.

Intelli-Process – routines for batch-processing multiple files/records, incorporating GoldVisionPro features. The records to be processed must first be selected in the VisionPak tab list [except for the Find Duplicate Links process]. Create this list by performing a search for the desired records, selecting the VisionPak tab, and then selecting the items to be processed from the File List [see previous description of VisionPak tab].

Existing GoldVisionPro settings are incorporated in these processes [e.g., Date/UserID subfolder creation, History, Intelli-File List Update, etc.]

NOTE: *Any process that makes permanent changes to existing records should be approached with caution and complete understanding of the change being implemented. GoldVision Software Corp. and its affiliated entities are not*

responsible for changes made in these processes that result in inaccessibility to the files or their records.

Update Folder Lists – checks and updates the appropriate Intelli-File List for each item currently selected in the VisionPak list. [Primarily for updating Lists for items stored prior to/without activating the Intelli-File option of the VisionPak-Plus Tool Set.]

AutoSummarize Selected Items – runs GoldVisionPro's AutoSummarize function for each item currently selected in the VisionPak list. The resulting text extracted from the file is added to the contents of the Notes field of the record. [Primarily for key-word-indexing a file. Note: Subject to ability to extract text.]

Setup File Process – opens window to configure and run the Move, Copy, or Update process for each item currently selected in the VisionPak list:

Move File – this process will Move files from their current location to the location designated in the Destination Path textbox, and then update each GoldMine record with the new path-filename. By default, the destination initially displayed is the GoldVisionPro Primary Path configured for this user. The “Example” displayed is the first selected file name, with the new selected Path, plus any configured GoldVisionPro subfolder options included. Editing the Destination Path will also change the Example. The user can also Browse to select a different base Path.

Copy File – similar to the Move File process, this process leaves the file in its original location, and makes a copy at the new location. The existing GoldMine record is changed to the new path-filename.

Update Path in Record Only – this process only modifies the path-filename stored in the GoldMine record; it does not copy or move the file. This process is primarily for updating outdated records.

Move Record to Another Contact – this process moves all the selected link records in the VisionPak tab from the current Contact[s] to a newly-selected Contact. Selecting the “Find” button opens the “Select Contact” window for choosing the Contact to receive the records.

Find Duplicate Link Records – this process will perform a series of record-searches based on the name of every file in a folder structure [user-selected folder, and all sub-folders of that folder]. The user designates the “Selected Folder” with the Browse button in the upper section of the window. A separate search is performed for each file in the structure. The result is a list of all the links for all the files in the folder structure that have more than one link. [i.e., multiple link records referencing the same file.] The Match-Type must be selected for this process:

Match Number of Folders [n] – the search will look for the full filename plus the number of “parent-folders” designated. This is intended to more-quickly capture records that contain both drive-letter paths and UNC paths that are referencing the same location. For example, using the default search setting of three folders for the file:

G:\Network\Files\Public\2011\2011-02\TestFile.doc

would search for records containing:

\Public\2011\2011-02\TestFile.doc

Any Path-Match – the search will look for any records containing the same filename-only, regardless of the path.

NOTE: This setting may return records for different files that have the same name, but are stored in separate locations specifically for differentiation. [e.g., “Monthly Report”.] Use caution in selecting this type.

Full Path-Match – the search will look for any records containing the full drive-path and filename. It will then search again for any record containing the equivalent UNC-path and filename. This can be time consuming, as it may require twice as many searches.

Partial Name-Match – the search will look for any records containing each partial filename [name excluding: path, file extension, bracket or parenthesis-values].

NOTE: This setting is primarily for identifying records for the same file that has numeric versions specifically for differentiation. [e.g., “Monthly Report (2)”] or the same file in different formats [e.g., doc or PDF].

Rename File With Title -- this process will rename all the referenced files in the link records selected in the VisionPak tab, using the link Title as the new filename. Unique file-naming is employed to avoid overwriting similarly named files. The link record is also updated to the new filename as part of this process.

NOTE: This batch process is the equivalent of the “Use Title As Filename” option available when storing a file in the Link Setup window of the V-QuickLink application. It is used primarily for replacing machine-generated/numbered file names with the more descriptive information in the link Title

Delete Selected Link Records [only] -- this process will delete all the link records selected in the VisionPak tab, while leaving the files intact.

Delete Selected Link Records and Files -- this process will delete all the link records selected in the VisionPak tab, along with deleting the associated files.

AutoSummarize File Contents - this option works in conjunction with the selected primary process. When checked, during the processing of the

selected file, GoldVisionPro will attempt to extract the text in the file and summarize it for key-word-indexing. The summarized text will be added to the contents of the Notes field. [Note: Subject to ability to extract text.]

Process Related Records – this option works in conjunction with the selected primary process. When checked, during the processing of the selected file, GoldVisionPro will look for other links to the same file, so that those links can be updated as well. As part of this process, GoldVisionPro will also look for another network path that represents this file's path [e.g., when the file path "G:\Files..." is also represented as "\\corp_server\apps\Files..."]

Process Related E-Mail for Contact – this option works in conjunction with the selected primary process. When checked, during the processing of the selected file, GoldVisionPro will look for e-mail links to the same file, so that those links can be updated as well. As part of this process, GoldVisionPro will also look for another network path that represents this file's path [e.g., when the file path "G:\Files..." is also represented as "\\corp_server\apps\Files..."]

Note: The "AutoSummarize File Contents", "Process Related Records" and "Process Related E-Mail" options may lengthen the overall processing time significantly.

Note: When no duplicate records exist for the selected files, it is not necessary to activate the "Process Related Records" option.

Note: In using the AutoSummarize option with image files, an OCR capability must be active in GoldVisionPro. Text extraction from image files is significantly more time-consuming than from text-based files, and may result in unacceptable processing times.

Restore Original Search – restores the last search, if cleared with "New Search" but no search initiated.

Show Previous SubSearch – displays the previous SubSearch results

Show Next SubSearch – displays the next SubSearch results

Retain Current Search Results – holds the current search results in memory, even when new searches are performed.

Add Retained Search to This Search – combines the Retained Search results with the currently displayed search results.

Clear Retained Search – discards the current Retained Search

Clear Recent Text Search List – clears the drop-down search list of previous search criteria.

Intelli-Copy Options

Notify When Item in Clipboard – window-prompt user when copying data

Include List File of Drag Items – *see VisionPak Plus tool set*

Prompt When Duplicate File For Drag – alert user that selected files have same name [e.g., periodically-generated files in separate folders but same file name] for GoldVision auto-renaming of new copies at drop location.

Append Date to Duplicate File Name – *see VisionPak Plus tool set*

On VisionPak Link Copy – toggles on/off whether Notes are included when copying Link information, or if only a limited amount of the Notes are included. *Only applies to VisionPak Plus multiple-link copy.*

Do Not Include Notes

Limit Notes - enter the number words to be included

Order Data As Column formats the Link information when copied [e.g., to Clipboard] as a single column, rather than a single row.

Intelli-Process Active -- turn on/off recognition of pre-configured Intelli-Process items during Title-change process. [default value at startup is on.]

Reload Indexing Forms – refreshes the Indexing Forms List, for any changes made while the current session is active.

Create Contact Group – **[Tool Activation Required]** – *see VisionPak Plus tool set*
Allows an authorized user to automatically create a GoldMine Contact Group of the Contacts represented by the files selected in the VisionPak list. [Duplicates are automatically omitted.]

While the VisionPak tab is active, select Ctrl + F12, or this menu item “Tools - Create Contact Group”, to open the “Create New Contact Group” window. The Contact records associated with the files listed in the VisionPak list are displayed. Enter the Group Name, Group Code [if applicable], and the Group Owner. Select the “Create Group” button. The group is now available in GoldMine for all other GoldMine Contact Group processes.

AutoLink On Drag To TreeView – **[Tool Activation Required]** turn on/off automatic linking process when a file is dragged [e.g., from the Desktop] to a Contact in the TreeView. As the Contact is already selected, the process will automatically proceed until it prompts the user at the Link Setup window. Alternately, if an existing link is dragged from the List view in GoldVisionPro to another Contact in the TreeView, the process will complete entirely without further user-interaction.

Preferences

Many of the items on this menu simply provide keyboard methods of accessing search items.

Use Alternate Search Path – Select to substitute the alternate path designated in the User’s settings file for the stored path of the file. [Often used to access a web-address instead of the network file location.]

Insert ID and PW in Alt Path – Select to include an encoded version of the User’s GoldMine UserID and Password as part of the web-address when accessing a file with a web address. [When a web-address is used instead of the local drive path, a UserID and Password may be required to access the website as the file is launched from GoldVisionPro. The user’s GoldMine UserID and Password can be used for this purpose. See the “GoldVisionPro Configuration Instructions” manual for more details on encoded UserIDs and Passwords.]

File Addresses Only on Drag – turn on/off limiting the information included [file name only] when dragging a link to another location.

NOTE: This setting was originally created to address a Microsoft change in Outlook 2007 from its previous versions. Use this setting when dragging files to attach to e-mails in MS Outlook 2007 or later.

Default Sort By – Title, Date, Notes, Company, Contact, UserID, File Modified Date

Save Active Field as Default for Advanced Search -- Selecting this item will save the search field currently selected in the Advanced Search setup as the user’s default field at program startup.

Minimize Link Center When Index Window On Top – minimizes the Link Center window when the Intelli-Entry Window for Indexing Forms is opened, and set to Always on Top.

Launch Item When Index Window On Top– open the selected link-file when the Intelli-Entry Window for Indexing Forms is opened, and set to Always on Top.

Filter by Access

User or Group – selects which list appears in the drop-down list.

Search Within Title – selects the checkbox to include the Title field in a text search.

Search Within Notes -- selects the checkbox to include the Notes field in a text search.

Search Within File Name -- selects the checkbox to include the File Name field in a text search.

Sync Contact – turns on automatic syncing of the GoldMine-displayed Contact to the contact of the file selected in the GoldVisionPro Link Center File List.

Sync V-QuickLink – turns on automatic syncing of the V-QuickLink-displayed Contact to the contact of the file selected in the GoldVisionPro Link Center File List.

Select Columns -- allows the user to select the columns/fields that will be displayed for each contact record during a “List & Find” process.

Use Standard Process on Drag to TreeView – turn on/off using the standard V-QuickLink process when a file is dragged to a Contact the TreeView.

Use AutoSummarize Process on Drag to TreeView – turn on/off using the AutoSummarize process in the V-QuickLink when a file is dragged to a Contact in the TreeView.

View

Tree – toggles whether the “Tree View” is visible or not. [same as double-click left-edge of Link Center Window]

Tabs – toggles whether the “Tabs” area is visible or not. [same as double-click bottom-edge of Tabs in Search Center]

In Task Bar - toggles whether the Link Center appears in the Windows Taskbar when running.

Hide All Windows –hides all the open GVP windows; minimizes if “View - In Task Bar” selected.

View Item File Contents – displays the View Files window for creating/editing file lists [see “GoldVisionPro Configuration Instructions”]

Console – opens the Intelli-Lists Console [same as Shift + F11]

Record Type - [only appears on systems using GM Record Typing] – opens the Select Record Type window for user selection to limit searches to a specific record type.

Tracking Items – [requires Intelli-Tracking Workflows tool set Activation]

Create Tracking Items – displays the Select Intelli-Tracking Items window.

View Intelli-Tracking Items – displays the Intelli-Track Items for the active Contact

Help

Using the Program icon

The Link Center displays both a V-QuickLink icon and a VisionScan icon at the bottom of the Contact “Tree View” section of the window. As a convenience, files can be stored in the system by simply dragging the file to either of these icons to open the VQL Select Contact window. This allows the user to work primarily from the Link Center window.

Using the “Intelli-Lists Console”

The Intelli-Lists Console is opened from either the VQL or the Link Center, by clicking the “Console” item in the menu, or pressing the Shift + F11 keys. The Console displays lists of User-specific items that can be retrieved individually, as a group of selected items, or as all items in the list. The number of items that appear in each list is configured in the User Settings.

“Recent” items are ones that have been most recently processed, and are replaced by newer items as the configured list maximum is reached

“Favorite” items are ones that the User selected from a “Recent” list, and chose to Add to the corresponding Favorites list, to be retained beyond recent activity.

Item List – all items for the currently active List

Item Description – description of the currently selected item in the active list

Active list selection area:

- Storage – items originally processed in the V-QuickLink window
 - Recent Files Stored
 - Recent Record Searches
 - Favorite Record Searches

- Access – items originally processed in the Link Center window
 - Recent Files Launched
 - Favorite Files
 - Recent File Searches
 - Favorite File Searches

Add/Delete Item button – when a “Recent” list is active, adds the currently selected “Recent” item to the corresponding [File/Search] “Favorites” list, along with the text entered in the Item Description box. When a “Favorites” list is active, deletes the currently selected item from the “Favorites” list.

Retrieve Selection button – retrieves the currently selected item(s) in the active list. If the active list is a “...Searches” list, then the original search(es) criteria are run to retrieve the matching files. [Right-clicking file item(s) in the list will both retrieve the item(s) and launch the files(s) in a single process.]

Retrieve All button – similar to the “Retrieve Selection” button, but retrieves all the items in the active list.

Close This Window button – closes the Intelli-Lists Console window.

Mini-View area – moving the mouse over this corner area minimizes the Intelli-Lists Console to a “mini-view” size. The previous size is restored when the user moves the mouse over the mini-view logo.

Always On Top checkbox – when checked, the Intelli-List Console is kept on top of all other windows in view, even as the user moves to other windows. This setting applies to the mini-view as well.

VisionPak-Plus [VP+] tool set [Tool Activation Required]

This tool set includes the following features/functions that are available when the annual VisionPak-Plus tool set activation is purchased:

Intelli-Groups

Allows an authorized user to automatically create a GoldMine Contact Group of the Contacts represented by the files selected in the VisionPak list. [Duplicates are automatically omitted.] While the VisionPak tab is active, select Ctrl + F12, or the menu item "Tools - Create Contact Group", to open the "Create New Contact Group" window. The Contact records associated with the files listed in the VisionPak list are displayed. Enter the Group Name, Group Code [if applicable], and the Group Owner. Select the "Create Group" button. The group is now available in GoldMine for all other GoldMine Contact Group processes.

Intelli-Link

Automatically link a file by dragging it to a Contact name in the Link Center TreeView. The user is presented with the Link Setup window to complete the link process. In the case where an existing link is dragged from the File List to a different Contact in the TreeView, a new link with the default information is automatically created for the contact. For a file dragged to a Company name, the user is presented with the V-QuickLink window list of all records for that company, for selecting the appropriate record to complete the link.

Intelli-File

Automatically creates an archive list file in every stored file folder and parent folder, with the filename, Company, Contact, Title, AccountNo, RecID, UserID of each file as it is stored in the folder. This enables a System Administrator to simply drag a folder[s] to a CD/DVD and have a copy of the database record info for those files in the archive [as FileStream info is lost when moved off NTFS media]. Intelli-File is configured in the Sys Admin settings.

Intelli-Copy

- A. Creates an archive list-file "on-the-fly" as files are dragged from the VisionPak to another location [e.g., CD burner], with the filename, Company, Contact, Title, AccountNo, RecID, UserID of each of the selected files, added as an additional file to the group.
- B. Copy a list of the link record information of all the links selected in the VisionPak to the ClipBoard, for pasting into other sources [spreadsheets, e-mail, etc.].
- C. Automatically append the file Create Date to the file name when copying multiple files with the same name. Useful for files that are regularly stored and provided to others, e.g. "Monthly Statement", "Outstanding Items", "Daily/Weekly Report", etc

Intelli-Folder

- A. Automatically creates new date-structure folders when any user logs into GVP. Particularly useful for sync-users to assure local folder structure

accommodates remote office structure for synced files. Intelli-Folder is configured in the Sys Admin settings.

- B. System Administrator Tool to mass-create date-structure folders on any accessible drive, for a designated date range. Accessed from the Sys Admin settings window, from the Tools menu.

Intelli-View

GoldVisionPro “tags” each file as it is stored in the system, with record information from the associated Contact record. The Intelli-View lets the user view the File Streams Information of the associated Contact record tagged to a linked file, by Browsing to a particular file. Accessed from the Link Center menu, “Tools – Administrator Tools – View File Association Data”.

Intelli-Validate

Analyze the link records in the Link Center for valid access. [Previous Link Analyzer, moved to Tools in v6.5] Accessed from the Link Center menu, “Tools – Administrator Tools – Analyze Links”.

VisionPak-Extended [VP+X] tool set [Tool Activation Required]

This tool set includes the following features/functions that are available when the annual VisionPak-Extended tool set activation is purchased as an addition to the VisionPak-Plus tool set:

Intelli-Process for Existing Links

Update Titles, Notes, File Paths/Names and Intelli-File lists en masse for all the links selected in the GoldVisionPro Link Center. Also, AutoSummarize linked-file contents for key-word searching and update the link records in GoldMine en masse. Enables users to update/move/copy their existing linked files with GoldVisionPro enhancements. [see details in the VisionPak tab section, and the Menu Commands - Intelli-Process section, of this manual.]

Intelli-Process - When Storing Files

When pre-configured by the System Administrator, these capabilities will prompt the user when storing files to complete specific information for that file. These include custom Record Values, specific UserIDs, designated dates, and an unlimited variety of custom Intelli-Entry items. . [see details in the Record Values section, and the Intelli-Entry section, of this manual.]

Intelli-Tracking Workflows [Tool Activation Required]

Accessible from either the GoldVisionPro Link Center or the V-QuickLink window, the Intelli-Tracking workflows are a powerful and fully-customizable addition to the functionality of GoldVisionPro. For more details, see “Intelli-Tracking Workflows” in the **Storing Files** section of this document.

Appendix

PowerKeys Reference Guide

Link Center	VQL Select	VQL Link	Key(s)	Description
X	x	x	F1	Launch the GVP Help File
X	x	x	Ctrl + F1	Launch the GVP PowerKeys Reference File
			F3	Toggle Search Methods
X			F3	Toggle sorting search results by Date or Title
X			Alt + F3	Toggle Find mode / List mode in Advanced Search
X			Ctrl + F3	Toggle add/remove sort by File Modified Date in Link List
		x	F4	Toggle to display Most Recent Link list or Default list in Document Title drop-down box.
	x	x	Shift + F4	Toggle to display User Defined field list only
		x	Ctrl + F4	Get Projects & Opportunities list
X			F4	Run Most Recent Link(s)
		x	Shift + F4	Toggle to Run and display single or multiple Most Recent Link(s) when user selects the Most Recent Link button.
			F5	QuickSelect Field Search – sets the field for searching [Contact is the Default; last field used is retained]
X	x		F5	- Company
X	x		Shift + F5	- Last Name
X	x		Alt + F5	- Phone 1
X	x		Ctrl + F5	- Key5
X	x		Ctrl + Shift + F5	- Key4
X	x		Alt + Shift + F5	- ZipCode
X	x		Ctrl + Alt + F5	- City
		X	F5	Display currently active UserID settings
		X	Shift + F5	- Toggle on/off Bypass selected UserID to use default UserID
X	x		F6	QuickContact – clears display & gets the active GM contact [links]
			F7	QuickResize Column Display
X	x		F7	- Increase all column widths by 20%
X	x		Shift + F7	- Decrease all column widths by 10%
X	x		Alt + F7	- Reset all column widths
X	x		Ctrl + F7	- Fit left 3 columns to display; all others to default
X	x		Ctrl + Shift + F7	- Fit left 2 columns to display; all others to default
X	x		Ctrl + Alt + F7	- Fit left first column to display; all others to default
X	x		Alt + Shift + F7	- Fit all columns to viewable display
		x	F7	Quick Minimize Link Setup Items
		x	F7	- Show / Hide Available Paths and Link File Names
		x	Alt + F7	- Show / Hide Available Paths
		x	Ctrl + F7	- Show / Hide Link File Names

PowerKeys Reference Guide [continued]

Link Center	VQL Select	VQL Link	Key(s)	Description
		x	F8	Toggle for Link, Link & List, or Link & Launch. The Link & List button will create the link, and then open the Link Center with the new link displayed. Link & Launch adds launching the file to the Link & List function. Clears [also from VQL Select] other F8 states.
		x	Alt + F8	Activates ReLink state of InPlace Linking – remains in Select window
		x	Ctrl + F8	Activates ReLink state of InPlace Linking – relinks current file
	x	x	Ctrl + Alt + Shift + F8	Activates InPlace linking for any file. Master user or member of [mandatory] Browse Folder Group
X			F8	Relink selected link.
X		x	F9	Toggle for getting UnSummarized Text or Summarized Text in the Link Note.
X		x	Ctrl + F9	Toggle “Extended” OCR method – using PP application
X			F10	Toggle Tree View and Tabs Show/Hide [both]
X			Shift + F10	Toggle Tree View display expand/collapse
X			Ctrl + F10	Toggle Tree View Show/Hide
X			Alt + F10	Toggle Tabs Show/Hide
			Ctrl + Alt + F10	Toggle Window Always on Top
		x	F10	- Show / Hide Available Paths and Link File Names
		x	Alt + F10	- Show / Hide Available Paths
		x	Ctrl + F10	- Show / Hide Link File Names
X			F11	“My Documents” [search by current UserID]
X	x		Shift + F11	- Launch Intelli-Lists Console
			F12	QuickCopy current Link information to Windows Clipboard
X		x	F12	- Basic Link Information [Company, Contact, Title, Filename, Notes]
X		x	Shift + F12	- Title
X		x	Alt + F12	- Path & Filename [in quotes]
X		x	Shift + Alt + F12	- Path & Filename [no quotes]
X		x	Ctrl + F12	- Notes
X		x	Ctrl + Alt + F12	- Title, Filename, Notes
X			Ctrl + Alt + Shift + F12	- Basic & supplemental Link information [ACCOUNT #, RECID #, Link Owner, Link Date, Record Type, Sync Value]
X			Shift+Ctrl+F12	Toggle Copy Launch File URL to Clipboard

PowerKeys Reference Guide [continued]

Link Center	VQL Select	VQL Link	Key(s)	Description
	x			Add Record Window [VQL button] Company, Contact Name , Phone 1 labels
	x		Right-click	Text selected in File Preview window pasted into textbox
	x			Monitor Window [VQL menu – File – Start Monitoring...] “Select SubFolder” listbox
	x		F3	Browse to new drive/folder
				“Files In Selected Folder” listbox / “Files Monitored” list
	x		Right-click	Selected file passed to VQL
				File Preview Window [right-click file icon]
			F12	Text selected is pasted into VQL and runs search
				Document Title drop-down box
X		x	Esc	Restores original Title
X		x	Enter	Proceed with Intelli-Process [Activation required]
X		x	Alt + “+”	Appends original Title to prefix selected from drop-down list [excess of 35-character maximum deleted from left side of original Title]
X		x	Ctrl + “+”	Appends original Title to prefix selected from drop-down list [excess of 35-character maximum deleted from right side of original Title]
X		X	F2	Display available Title Lists window for selection
				Notes textbox
		x	Shift + Delete	Clear Notes
		x	Shift +Left-click	Restore prior Note text
x		x	F2	Open Indexing Forms Intelli-Entry view with blank form
X		x	Alt + F2	Display Indexing Forms window for selection
				Document Title drop-down & Notes textbox
X		X	Alt+D	Append date AFTER text [CreateDate prompt, Esc = Now]
X		X	Ctrl+D	Appends date BEFORE text [CreateDate prompt, Esc = Now]
x		x	Shift + F2	Display Project list of this Contact for selection
x		x	Ctrl + F2	Display Opportunities list of this Contact for selection
x		x	Alt + Shift + F2	Display all Projects list
x		x	Alt + Ctrl + F2	Display all Opportunities list
				Paste Text button
		x	Left-Click	Text in Clipboard pasted into Notes
		x	Right-Click	Text selected in File Preview window pasted into Notes
				Intelli-Entry button
		x	Left-Click	Open Indexing Forms List for selection
x		x	Right-Click	Text from active Indexing Form pasted into Notes
x		x	Alt + Left-Click	Open active Indexing Form in Intelli-Entry view
				Indexing Forms List window [right-click Paste Forms button]
			F7	Toggle Expand/Collapse Forms List for Add Forms [authorization required]
			Shift + F7	Toggle Always On Top
			Right-Click	Form in List – go to Intelli-Entry view with this form
			Alt + Right-Click	Form in List – accumulate form’s value(s) for later Paste
			Right-Click	Enter Values button go to Intelli-Entry view with blank form
			Alt + Right-Click	Enter Values button go to Intelli-Entry view and show all accumulated entries

PowerKeys Reference Guide [continued]

Link Center	VQL Select	VQL Link	Key(s)	Description
X		X		Intelli-Entry window [Enter Values button in Indexing Forms List
				Add Another Entry button
X		X	Right-Click	clears all accumulated entries
X		X	Left-click	after selecting Add Entry once, Enter on last item performs Add Another
				Cancel button
X		X	Right-Click	Return to Intelli-Entry Forms List view
X		X	Left-click	Exit Intelli-Entry and return to original program window
				Value Textbox]
X		X	Right-click	Delete value from item [e.g., DateValue]
X		X	F2	swap current item and value [re-order]
X		X	Ctrl + F2	Move last character of Item to first place [re-order operator]
X		X	Alt + F2	Reverse Ctrl+F2 transposition
X		X	Shift + Enter	Paste Values
x	x			Intelli-Lists Console [Shift + F11]
			F3	Toggle minimize Console when Retrieve item
			F5	Retrieve the currently selected item
			Shift + F7	Toggle Always On Top
			Right-Click	on Item[s] in list – Retrieve Selected Items
				New Search Button
X			Right-Click	Launch Intelli-Lists Console
				Add Search Button
X			Right-Click	Restore Original Search
X			Ctrl + Right-Click	Show Previous SubSearch [as available]
X			Alt + Right-Click	Show Next SubSearch [as available]
				Search Button
X			Right-Click	Toggle Match Any / Match All
				Sub-Search button
X			Right-Click	Toggle Match Any / Match All
X			Alt + Right-Click	Toggle “Exclude” matching items in sub-search
			Ctrl + Right-Click	Toggle “Remove Contacts” exclude all when one match found
				Search by Results / Date button
X			Right-Click	SubSearch by Date
			Left-click	SubSearch by Accountno
				User: selection
			Right-Click	Runs active user search
X				Text Search Value section
				Text Search box
			F2	Open the Title List window for new list selection
			Alt+F2	Toggle add VALUES list to selected Intelli-Entry item
				Notes checkbox [yellow when active]
			Right-Click	Toggel Search+Display one row of item matching search
				File Name Checkbox
			Right-Click	Toggle SubSearch for Path=Path, File=File
				File List
X				
X			Left-double-click	Launch file in associated application
X			Right-Click	Open Tab selection menu
X			Alt + left-drag	Drag file to another application / location

PowerKeys Reference Guide [continued]

Link Center	VQL Select	VQL Link	Key(s)	Description
				VisionPak tab
X			Drag	Drag file(s) to another application / location [*]
X			F12	Copies All link info of selected entry to Windows Clipboard [**]
			Alt + F12	Copies ACCOUNTNO of selected entry to Windows Clipboard
			Shift + F12	Copies ACCOUNTNO all entries to Windows Clipboard
			Ctrl + F12	Open Create GM Group window [authorization required]
			Left-click	Area below tab – toggle Hide/View Tabs
				* Intelli-Copy creates archive list file [Activation required]
				**Intelli-Copy creates records list file [Activation required]
X				Contact “Tree View”
			Right-Click	Open Search and Expand/Collapse menu for this entry
			Left-click	left edge of window – toggle Hide/View Tree View
				Intelli-Track Items
X	X		F2	Toggle Select/Unselect All items
			F4	Select Columns for Custom Report
			F5	Toggle to get Related Contact Items
			F6	Get Current Contact Items
			F7	Expand/Collapse Modify section
			F8	Display Activity selection window
			Right-Click	Find Third Party button: bypass auto search
x				View Files window [menu Tracking Items – View Item File Contents]
			F3	Insert Row Above
			F4	Insert Row Below
				MSO toolbar
				User Settings – with cursor in the Printer textbox
			F2	Toggles viewing the current settings