

OpenText Automatic Document Numbering

Consistent document number generation and tracking

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Automatic Document Numbering also enables users to quickly filter, find and select values from huge pre-defined multi-column pick lists for Categories, Forms, and Workflow Attributes with Enhanced Table Key Lookup (TKL) functionality.

Automatic Document Numbering maintains a complete list of all numbers generated ensuring that naming sequences are unique across the department or system. For each number generated, a record of who requested the number and its status are tracked. The status allows for reporting on whether the name is currently being used or reserved to be assigned to a future document as it is brought into Content Server. Unused reserved numbers can be released back into circulation to be re-used for future requests.

Numbers can be assigned to a single document by simply assigning a category. As numbers are assigned, there is the option to rename the Content Server document and its associated file. Or by utilizing Content Server Forms to generate the numbers, multiple numbers can be requested for immediate use or reserved to be assigned for future documents coming in. Add OpenText workflows and the numbering request can be managed by a robust and controlled business process engine.

Quickly search, filter and select values from huge pre-defined lists

With the Enhanced TLK feature, users can quickly search, filter, find and select values from huge pre-defined pick lists for Categories, Forms, and Workflow Attributes. The TKL function also includes multi-column pick-list displays (i.e. value code, full name, description, etc.) and dynamic filtering that can be applied both before and/or after the database returns the values, which greatly improves performance for very large lists. The search text

BENEFITS

- **Assures document naming consistency and uniqueness:** Automates customer's "facility specific" document numbering policies, supporting simple to complex naming schemes
- **Improves document introduction efficiency and uniformity:** Automatically names documents added to Content Server via folder- or category-based assignment schemes
- **Provides a controlled naming process:** Content Server workflows manage the numbering request process, assuring document number approval prior to assignment
- **Increases productivity and reduces ramp-up training:** Intuitive attribute selection through dynamically filtered multi-column pick-lists

Sample of number being generated from a Category

Sample of number being generated from a Form

can be applied to all displayed columns and not just the selectable value, allowing users to efficiently filter the list even if the selectable code name is unknown.

The Dependent TKL function automatically filters the list of values shown for a field based on the values already selected for previous fields, which ensures data integrity and increases productivity by showing only the relevant values. For example, if users select "USA" for the Country field, then the State/Province list will only display the states within the USA. Once the State is selected, then only the available cities for that State will be listed in the Cities field, and so on.

Features

Automatic Document Numbering includes the following features:

- **Faceted Browsing:** Leverage TKL-based metadata and standard automatic document numbering to navigate through vast volumes of content more efficiently.
- **An integration solution:** Automatic Document Numbering is fully integrated with OpenText Records Management, OpenText Case Management, and

OpenText Template Workspaces, providing even more consistency and control to your document management processes.

- **Custom Columns:** Enhance browsing experience by displaying the ADN ID attribute in custom column displays. Customize which attribute columns your users see in a browse view of folder content. Now the information that they need is exactly where they want it, when they want it as a column in a detailed list view.

Automatic Document Numbering also supports a variety of numbering structures:

- Control uniqueness of numbering at a global, departmental, or application level
- Use unlimited prefix components, constant and suffix components
- Use structured and sequential components in any combination

Works with any system object with categories

Automatic Document Numbering can be used to assign a defined number for standard documents, CAD documents, physical records or any object that has assigned attributes in Content Server.

Supports multiple numbering schemes

Simple to complex numbering schemes can be supported. With the various ways to assign a document number (category, forms, workflows), multiple numbering schemes can be defined based on document type, object type, etc.

Manages numbers independently of document creation

Automatic Document Numbering manages numbers independently of document creation, allowing document numbers to be reserved prior to document creation and paired with the documents when created. Multiple document numbers can be assigned in a batch process.

Numbers can be assigned in a controlled process

Automatic Document Numbering extends standard functionality utilizing Content Server workflows to create a managed and controlled numbering request process.

The screenshot shows a web interface for document numbering. At the top, there are tabs: General, Specific, Audit, Categories, Composed Of, ProcessFlow, Ratings, References, Versions, WebDAV, and Who. Below these is a 'locations' section with form fields for Country (USA), State (California), City, Facility_Code, and Region. To the right, a 'Query Results' window is open, displaying a table with columns CITY, FACILITY_CODE, and REGION. The table contains several rows of data, with some cells highlighted in yellow. A filter 'san' is applied to the CITY column.

CITY	FACILITY_CODE	REGION
Santa Rosa	sono1	Sonoma
Santee	sand4	San Diego
Saratoga	santc4	Santa Clara
Scotts Valley	santc5	Santa Cruz
Selma	sandproc	Fresno
Solana Beach	sdieg	San Diego
Solvang	santb3	Santa Barbara

Sample of Dependent Table Key Lookup

Reporting and tracking

The requestor of each document number and its status is recorded by the Automatic Document Numbering module storing this information within a database for reporting.

- Use new or existing categories to create numbering structures based on the assigned attributes
- Support extended attribute descriptions (code and description values displayed)
- Filter attributes dependent on other attribute values
- Benefit from six number generation/validation options:
 - *Auto Sequence Generation*—Sequential components are generated based on prefix and suffix selections
 - *Select Allocated Sequence*—Allows for the selection of pre-reserved numbers and maps the object to the document number once selected
- *Sheet Number Generation*—Allows for a second numeric sequential component to be generated for existing document numbers that may require more than one document or object
- *Alpha Sheet Number Generation*—Allows for a second alpha sequential component to be generated for existing document numbers that may require more than one document or object (new)
- *Freestyle Input Validation*—Type in any document number and the system will validate that it is unique
- *Freestyle Input Generation*—Type in any document prefix and the system will select the next valid number
- *No Sequence Number*—Allows for complex attribute structures to be created, but does not generate sequential component or enforce uniqueness
- Apply numbers to object names, file version names and attributes
- Release unused reserved numbers for reuse
- Interface with forms, workflow, attributes, and metadata attributes:
 - Flexibly configure template files, creation location, naming and metadata using workflows
 - Pair template or seed files with number requests, in combination with OpenText Document Management or OpenText Content Lifecycle Management Item Handler
- Easily control numbering requests and approvals with workflows
- Track numbering:
 - Track reserved and used numbers
 - Track owner and status of number ■

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