

# Simple just got easier.



Unleash Your Full Business Potential with  
MaxxVault Document Management

## | SEARCH AND INDEX

**The digital age has advanced the collection and compression of information to incredible levels. While keeping all of your organization's information in a central library has huge advantages, it is only as successful as your ability to retrieve that information.**



Ensuring that your information is indexed and filed correctly is essential, and MaxxVault has the tools to accomplish both with ease.

Just as in a paper-based file storage system, correct indexing of a document is vital for identification, filing and retrieval. In MaxxVault you can set any number of index fields with which to identify your document and search against. These fields can be completed manually or indexed automatically.

Manually typing in the index information can be time consuming so MaxxVault has created tools to accelerate the process. Dates can be easily entered using the calendar tool; index information that has a number of options (for instance, document type or employee

name) can be part of a selection list rather than requiring typing it into a blank field. And for those documents where index values repeat, you can hold information so that it automatically appears in the indexes of the subsequent document in the index list, thereby saving you more time.

Of course, automating the indexing is the ideal process, and MaxxVault has several ways to make this happen. Should a document contain a barcode – which serves as index information – it can be read and the value populated into the correct index field. Similarly, MaxxVault can be set to run Optical Character Recognition (OCR) on the document, creating text out of an image. The OCRVault tool pulls information right from the document itself and sends that information to the appropriate index



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field. As well, the OCR tool can be used to create a text layer on a scanned TIFF or PDF document so that it is available not only via index search but through a full text search of the document's contents.

Supplementing the barcodes and OCRVault is a lookup against the database. More often than not, many common index values (such as: customer name, customer number, employee number, date, amount) are already in your database. By indexing only a few index fields (either manually or automatically with barcodes or OCR) the database search can pull the information associated with the unique identifier. It is possible to set up MaxxVault to accept your scanned documents, index them automatically and then either put them in the

appropriate workflow queue or file them in a relevant folder.

MaxxVault makes it easy to find your documents. You can search based on information contained in the index fields or on the textual content of the document. Index field searches can be run against values in one or several fields. You can refine your searches further by restricting the search to a particular folder. Once you get your hit list, you can then sort by index value to help narrow the search. And if you are unsure of the exact value you are searching for or don't have the exact spelling/number, MaxxVault index search supports wild card searching so you can find it fast.

The full text search tool searches the embedded text in the document, the OCR layer, the index values and the notes associated with a document. The MaxxVault full text search engine can search on a word, words, phrases, proximity of words, using Boolean operators, phonic, numeric and fuzzy entries. Search results are ranked by the number of times your search criteria appear in the document and the text highlighted when a document is selected.

1. **Index – Manual**
  - a. Free type fields
  - b. Calendar tool
  - c. Drop down lists
  - d. Stick feature
2. **Index - Automated**
  - a. OCR
  - b. Barcode
  - c. DB lookup (internal and external)
3. **Search Index fields**
  - a. One or several
  - b. Folder search options
  - c. Search results stay open in window
  - d. Wild card
4. **Search full text**
  - a. Word highlights
  - b. Boolean Logic
  - c. Phase searching
  - d. Wildcard
  - e. Range Searches

#### Basic Search Types

- Phrase searching finds phrases like: due process of law.
- Boolean operators like and/or/not can join words and phrases: due process of law and not (equal protection or civil rights).
- Proximity searching finds a word or phrase within "n" words of another word or phrase: apple pie w/38 peach cobbler.
- Phonic searching finds words that sound alike, like Smythe in a search for Smith.
- Stemming finds variations on endings, like applies, applied, applying in a search for apply.
- Numeric range searching finds any number between two numbers, such as between 6 and 36.
- Wildcard support allows "?" to hold a single letter place, and "\*" to hold multiple letter places.



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