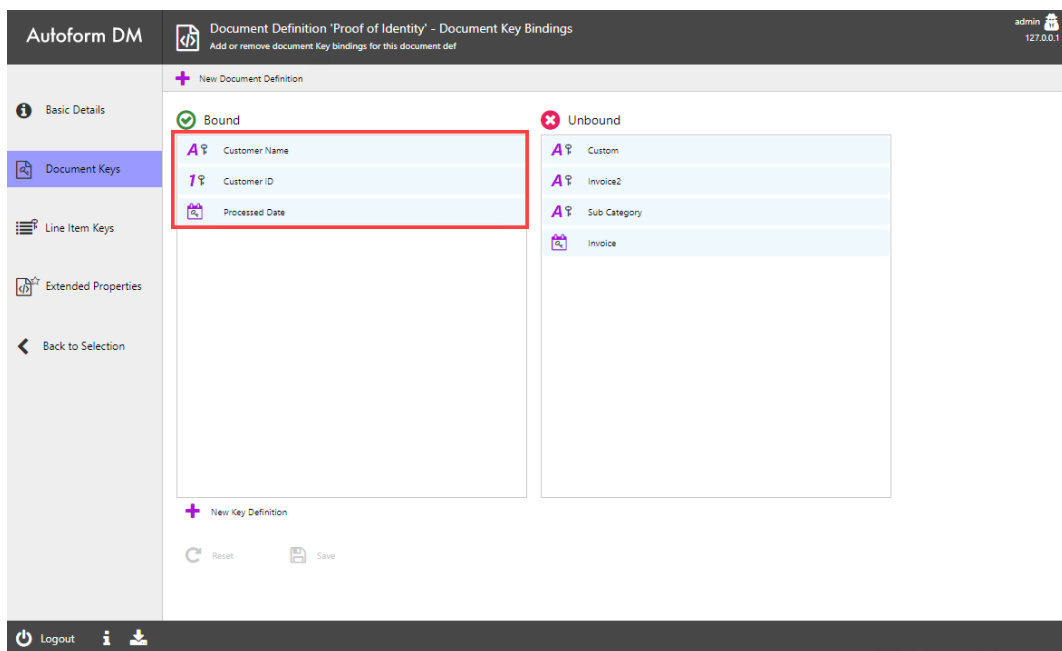# How do you filter the keys shown in the Ad-Hoc Scanning Application?

Alex Clemons - 2024-08-21 - Comments (0) - Autoform DM FAQs

Autoform DM

This article applies to version 10.1.0 and later of the Ad-Hoc Scanning Application.

By default, the Ad-Hoc Scanning Application will display all bound keys for the selected Document Definitions. The full set of bound keys can be viewed in the Autoform DM front-end.

There is an option to filter the keys displayed within the application. Only a limited number of the keys bound to the document type are shown.

Ad-Hoc Scanning Application

Status: Retrieving Document

Select Folder: Local Branch

Select File:

Filename	Date Created
ExampleBill.pdf	11:33:18 15-Apr-2019

Barcode: [   ]   **Match**

Document Definition   Proof of Identity

Customer Name
[   ] ✓

Customer ID
[   ] ✓

Processed Date
[   ] ✓

1

Scan   Refresh   Scan Setup   Process Barcodes   **Save**

AUTOFORM

Customer Name	EFS Technology			
Customer Number	13456			
Billing Address	2 Burlington Park Station Road Foxton Cambridge	Delivery Address	2 Burlington Park Station Road Foxton Cambridge
Postcode	CB22 6SA	Postcode	CB22 6SA
Dispatch Date	01/01/2018	Order Number	0000000000

Item Number	Item Description	Cost	Quantity	Total
TT0924787K	Cash Deposit LCY dep'd in FCY acct	6,250.00	6	37,500.00
TT09247SN	Cash Deposit FCY deposited	30,000.00	36	1,080,000.00
TT09247FK	Cash Deposit FCY deposited	50,000.00	86	4,300,000.00
TT09247KM	Cash Deposit FLCY withdrawn from FCY	750.00	85	63,750.00
TT09247KM	Cash Withdrawal FCY withdrawn	1,500.00	83	124,500.00
SCTRSC092	Securities Purchase 500 - UK GOVT TRES 4 Pct 2016	2,850.00	80	228,000.00
DXTRA8925	Futures Variation DB VARIATION MARGIN	1,450.00	79	114,550.00
DXTRA8924	Futures Variation DB	2,200.00	77	169,400.00
DXTRA8924	Futures Variations Margin CR VARIATION MARGIN	250.00	77	19,250.00

Sub Total	6,136,950.00
VAT Rate	0.20
VAT Total	2,454,780.04
Total Order Value	14,728,680.24

There are two ways to set up the key filter. The first method is to make a global filter that will affect all Document Definitions. The second method is to set up a filter per Document Definition. Both of these options require direct edits to the Autoform DM database. We recommend you conduct a [System Backup](#) before performing any changes. If you are unsure about the impact of these changes, please contact [Formpipe Support](#).

Example: Setting up a global filter

A global filter applies to all Document Definitions and will only show the bound keys from the specified filter set. To set up the filter, follow these steps:

 1. Navigate to the `tblCustomSettings` table (or `tblGlobalSettings` when using Autoform DM 8.3 and earlier) in your Autoform DM Database, then add or amend the following:

name (ConstID)	value (constValue)
7094	skey3,nkey3,dkey1

The `constValue` should be the list of database columns you want to display.

2. Restart the application

3. Select a Document Definition – the keys displayed will match the list added to `tblCustomSettings` (or `tblGlobalSettings` when using Autoform DM 8.3 and earlier) or a subset of them

Example: Setting up individual Document Definition filters

It is possible to filter the keys on a Document Definition basis, so each definition will have its own subset of keys displayed.

Navigate to the `tblCustomSettings` table (or `tblGlobalSettings` when using

Autoform DM 8.3 and earlier) within your Autoform DM Database, then add or amend the following:

name (ConstID) value (constValue)

7094 true

For Autoform DM 8.0 and later

1. Log in to Autoform DM then click `Administration > Document Definition Manager > Extended Properties`

2. Click **New Extended Property** at the top, enter a name (for example, "Document Key Filter") then click **Create**.

3. Select the Document Definition (via the Document Definitions screen) you want to edit.

4. In the **Extended Properties** tab, under Document Key Filter, enter a comma-separated list of database columns, then click **Save**.

Change the keys to Read-Only

It is also possible to set the keys as read-only. To do this, amend or add the following key to `tblCustomSettings` (or `tblGlobalSettings` when using Autoform DM 8.3 and earlier):

name (ConstID)	value (constValue)
7095	true

Binding Legacy Keys

Legacy Keys, created before support of elastic keys in Autoform DM 9.2, or before key migration in Autoform DM 7.3, are supported and can be bound to your keys via the Legacy Key Support tab. Select the legacy key from the drop-down menu next to the key to bind it.

There are three types, with a limit of 55 keys in total:

- SKEY (Strings): SKEY1–SKEY25

- NKEY (Numbers): NKEY1–NKEY15

- DKEY (Dates): DKEY1–DKEY15

Creating Legacy Key definitions

All Mapping will now be updated and all SKEY, NKEY and DKEY columns will be listed.