





# ***GOLDVISIONPRO***

## ***Version 5.5***

### Program Features



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# V-QuickLink

## **VisionScan**

AutoSummarize scanned documents with on-the-fly **OCR\*** integration for new or existing files in a one step process. **VisionScan**, GoldVisionPro's latest integration with PaperPort® scanning software provides several powerful enhancements to your system. *Keep your original image files intact and accurate*, while adding the summarized OCR text as an index for fast-searching your files.

### **DragDrop-OCR-Summarize-Link**

This new feature let's you drag an existing file to the Send To VisionScan icon on your Windows Desktop, and in one process GoldVisionPro will AUTOMATICALLY:

- OCR the file
- AutoSummarize the retrieved text
- Load the file into the V-QuickLink program and
- Enter the summarized text in the Link Notes field for future text search, ready to link to your contact record with the press of a button
- Auto Retrieval of the new link, ready to email, print, fax or modify

### **SendTo-OCR-Summarize-Link**

This new feature let's you right-click an existing file to select the SendTo menu and **VisionScan**, and in one process GoldVisionPro will AUTOMATICALLY:

- OCR the file
- AutoSummarize the retrieved text
- Load the file into the V-QuickLink program and
- Enter the summarized text in the Link Notes field for future text search, ready to link to your contact record with the press of a button
- Auto Retrieval of the new link, ready to email, print, fax or modify

### **Scan-OCR-Summarize-Link**

This feature enables you to simply place a document in your scanner and have it automatically process through to GoldVisionPro. Setup VxScanDirect as your default in ScanDirect, and in one process it can AUTOMATICALLY:

- Scan the paper document into a PDF file
- OCR the file for available text
- AutoSummarize the retrieved text per your preference
- Load the file in the V-QuickLink program and
- Enter the summarized text in the Link Notes field for future text search, ready to link to your contact record with the press of a button
- Auto Retrieval of the new link, ready to email, print, fax or modify

### **OCR-Summarize EXISTING Links**

- The Link Center AutoSummary button can now perform an OCR process on PDF and other image files to retrieve text when available.

## AutoRename a file to the link Document Title

- When linking a file in GoldVisionPro, users can select the “Use Title As FileName” checkbox (below the Document Title box) to rename the selected file with the displayed Document Title.
- This feature is also configurable as a user preference for automatic renaming whenever a file is linked.
  - To Use: From the MCP (Master Control Panel) menu, select Preferences – User Settings Configuration – File Settings tab

## AutoStore files by the File Create Date, File Modified Date or Current date in network date-sub-folders

- Previous versions of GoldVisionPro's AutoStore options created subfolders and moved files to those locations based on the current-date only.
- Therefore a file created on June 1, 2003 that is then linked on September 1, 2004 would be stored in the subfolder \2004\2004-09.
- Now system administrators or users have the option to configure the File Creation Date or the File Modified Date as the basis for AutoStoring the file.
- In this case, the file created or modified on June 1, 2003 that is then linked on September 1, 2004 would be stored in the subfolder \2003\2003-06.
  - To Use: From the MCP menu, select Preferences – User Settings Configuration – Path Settings tab – Date SubPath Options – File Create Date [or File Modified Date]

## Most Recent Link(s) Enhancements

- View the Most Recent Link titles when setting up a new Link. These MRL titles now appear in the Document Title drop-down list in Linked Document Setup, along with custom lists and existing link titles for this contact. This is very helpful as a starting point in consistent naming terminology, particularly when creating a new link for a contact with NO PREVIOUS LINKS.
- View the Most Recent Links in the Link Center
  - To Use: Select F4 to toggle the Most Recent Link(s) button between retrieving the “Single Most Recent Link” and “Multiple Most Recent Links”

## AutoSet the Link Date to the File Create Date, File Modified Date or current date

- In order to make the Link data more closely aligned with the file data, (similar to the AutoStore option above), system administrators or users now have the option to configure GoldVisionPro to set the Link date to the File Create date or the current date.
  - To Use: From the MCP menu, select Preferences – User Settings Configuration – Link Settings tab – Use File Create Date As Link Date [or File Modified Date]

## Powerful new Link & List, or Link & Launch Modes

- Quickly link a file using V-QuickLink, then immediately view the link in the Link Center list in one step, or quickly display ALL the Links in that contact record.
  - To Use: When linking a file, select F8 in Linked Document Setup and the button will switch from “Link” mode to “Link & List”. This setting will remain active in the current session until

F8 is pressed twice again to deselect. When the link is created, it will be automatically retrieved and displayed in the Link Center.

- When viewing the link in the Link Center, simply select the Search In Results button to immediately retrieve all the links for that contact.
- Add launching the file to the automatic Link & List option. This is particularly useful when linking a new file that is not yet complete. In one step the file is linked, retrieved in the Link Center list and launched in its application.
  - To Use: When linking a file, select F8 in Linked Document Setup and the button will switch from “Link” mode to “Link & List”. Select F8 again and the button will switch from “Link & List” mode to “Link & Launch” .

## Faster AutoSummarize for existing files

- GoldVisionPro’s new AutoSummarize function handles even large documents in the blink-of-an-eye. When linking an existing file, or updating an existing link in the GoldVisionPro Link Center, the AutoSummarize button will instantly process the summary according to the settings in your user preferences.
- Users can select a summary level [% most-important sentences] or a simple listing of words used in the file [unique words-only], plus an overall word-count limit to be used.
- When linking a file, users can temporarily turn the AutoSummarize level off, to retrieve the entire file contents into the Notes field.
- When PaperPort® is present, the button will display “OCR AutoSummarization”, and will OCR both image and PDF files to extract available text for the AutoSummary. In addition, “Extended OCR” mode will start a separate instance of the entire PaperPort application for more difficult file content.
  - To set the AutoSummary Settings: From the MCP menu, select Preferences – User Settings Configuration – User Settings tab – AutoSummarize tab
  - To toggle AutoSummary level off and on: In the V-QuickLink “Link” form, press F9.
  - To Activate “Extended OCR” mode: In the V-QuickLink “Link” form, press Ctrl + F9 to activate or de-activate.

## Relink the last Link Created

- GoldVisionPro now makes linking a single file to multiple contacts even easier, and faster, than before.
  - When linking the file for the first time, simply press Ctrl + F8 in the GoldVisionPro Link screen. The “Link” button changes to “Link and ReLink” mode, allowing the same file, title and notes to be re-linked to the next selected contact(s). F8 returns to the normal “Link” state.
  - In the GoldVisionPro Link Center, pressing F8 initiates the ReLink process for the currently selected link.

## InPlace Link any File

- Authorized users can now create a link to a file in its current location, while utilizing all the added functionality of GoldVisionPro’s titling, summarizing, logging and history. This restricted capability is intended to accommodate files already stored in network-accessible locations. In the V-QuickLink program, press Ctrl + Alt + Shift + F8 to activate this mode. The Link button will change to “IN-PLACE Link”. Press F8 to reset to normal mode.
- IMPORTANT: Files linked in their current location [GoldMine standard process] when stored in local folders, are not accessible throughout the network [orphan links]. Unlike GoldVisionPro’s normal

function, this process relies on the user storing the file on the network, or finding a file stored on the network when creating a link.

- NOTE: Due to the inherent potential adverse outcome of circumventing GoldVisionPro's normal process of automatically moving a file to the designated network location for the user, this feature is restricted. In order to use this feature without Master Access, a System Administrator must:
  - Designate a GoldMine Group that is authorized to use the Browse Folders Access function [Program Settings – Admin Settings – V-QuickLink – Restrictions]
  - Include the User in this group.

## Search for Contacts by over a dozen fields

when linking or retrieving files. GoldVisionPro makes it easy to find the contact(s) you want, even without GoldMine running. Search by any of the primary GoldMine contact record fields, even Key fields.

## Browse to A Specific Network Folder

when linking a file (bypass automatic filing). For those users who demand being able to put each linked file in a customer-named directory or some other multiple-directory design, GoldVisionPro gives you the functionality and control you need. System Administrators can easily designate within GoldVisionPro which user group is allowed to have this functionality, and lockout all others.

- The "Browse" button is visible/accessible only to the approved users.
- Selecting the "Browse" button *takes the user directly to the "parent" directory on the network*, making it easy to quickly find the desired subfolder without "Exploring" the network.

## Automate and Customize Consistent Naming Conventions

Implement consistent document titling [for subsequent searches] with customized drop-down lists of frequently used title prefixes. Or select from titles that already exist for the active contact, in order to use similar wording. See the GoldVisionPro Help file for configuring these options in V-QuickLink.

## Create A New Contact Record

GoldVisionPro allows users to create a new contact record right from the V-QuickLink window, by selecting the "Add Record" button. If the necessary contact doesn't exist, a new contact can be created, even by designated Record Type, without starting GoldMine.

# Link Center

## Multiple Search Criteria

- GoldVisionPro's Link Center now makes Advanced Search on multiple criteria easier than ever.
- After selecting the Advanced Search button, users can input combinations of text search criteria, User/Group search criteria, and field search criteria to refine their search with more specifics than ever before.

## Auto Path-ReDirection for Missing Links / Relocated Files

- Solution Partners and System Administrators can configure GoldVisionPro to launch files from multiple alternate locations when link paths are no longer valid. Contact your GoldVisionPro reseller for more information.

## New Multi-Mode Search In Results

Whenever a link is selected in GoldVisionPro's Link Center list, users can now immediately retrieve ALL the links for that contact record by simply clicking the "Search By Results" button.

- With GoldVisionPro's new Multi-Mode Search by Results, new more powerful functionality in the VisionPak tab allows users perform multi-contact searches:
  - To Use: Select multiple specific links with the mouse left click, hold down the Control Key for selective ranges, or the Shift key for a continuous range.
  - For an entire selection, Click the VisionPak "Select All" button to select every link in GoldVisionPro's Link Center list,

and immediately retrieve ALL the links for ALL those contact records by simply clicking the "Search In Results" button.

## Enhanced VisionPak Selection

- In GoldVisionPro's Link Center list, when selecting links for VisionPak (left-click, or Ctrl + left-click), users can now de-select an item by right-clicking the item in the VisionPak list with their mouse. A subsequent drag-and-drop of the VisionPak items will NOT include the de-selected item(s), until they are re-selected (left-click).
- Items can now be removed from the list by selecting the item in the VisionPak list (right-click or left-click) and pressing the Delete key.

Sort Link List by Notes, Dates, Users, Company, etc.

Unlike the limited link view available in GoldMine, GoldVisionPro allows users to retrieve links from multiple contacts at the same time, and then instantly sort & re-sort them by any of the displayed fields. This includes the extensive 64Kb Notes field, normally not visible in the GoldMine Links tab.

## VisionPak MultiLink Operations

allow users to select multiple files and then drag them to an e-mail, printer, fax, CD/DVD burner etc. The most convenient way to include files from multiple contacts in a single function.

## Dynamic Detail Display

below the link list in the Link Center. Detail for each record is displayed in the Information tab as the individual link is selected in the list above. Additional tabs can be selected for further information and file-related functions for the selected link.

### TreeView Display of Company and Contact

highlights the contact information for the currently selected link. The TreeView display can also be used to select a search for a particular contact, or all records for a particular company, by right-clicking the item in the TreeView display and selecting the appropriate search from the menu.

### Customize and Edit Existing Links

Re-title and AutoIndex existing links with GoldVisionPro's AutoSummary feature, right from the link list in the Link Center. Improve search capabilities on existing links by incorporating the same GoldVisionPro naming conventions with easy-to-use drop-down title lists and one-button functions.

### View Document-Specific History

Track which user, on what computer, and what change occurred. History can be used to find out what an important file "used to be" called or "used to have in notes" by effective use of reporting. History written in GoldVisionPro™ can be used to trigger Automated Processes for further activity.

### Automatically Create An "Orphan" Links Report

of all the missing or inaccessible linked files in your *entire GoldMine database*. Output can be copied to the Clipboard, making it easy to paste into a document/spreadsheet for identifying and repairing missing files. The GoldVisionPro Link Analyzer in the Link Center Tools menu will analyze all the links in the current list.

# Convenience

## PowerKeys for enhanced productivity

- GoldVisionPro has added over 35 shortcut keys for speeding workflow, customizing processes, providing information and fitting appearance to your preference.
- ToolTips throughout the programs' buttons, boxes and titles display PowerUser key alternatives available at each step. Ctrl + F1 displays the entire list of PowerKeys in Help.

## Auto-Install of GoldVisionPro Taskbar Group in GoldMine Taskbar

- The GoldVisionPro Taskbar Group is now automatically added into the GoldMine Taskbar\*\* for all users during program installation, to allow easy access to:
  - launch/switch to the GoldVisionPro Link Center
  - edit User Preferences for GoldVisionPro
  - launch the GoldVision Software website

## Improved GUI Display/Viewing Area

- Each of the GoldVisionPro forms now resizes to let users see more of the information they want.
- From Link Lists, to Notes, to Contact listings -- simply drag the outer edges of the forms to view more of each area.

## Auto-Install of GoldVisionPro Microsoft Office Add-Ins

- The GoldVisionPro Microsoft Office Add-Ins are now automatically installed on new installations, and automatically installed/updated on Repair installs. In addition, users can run the install or uninstall of these add-ins at anytime.
  - Automatic: The Microsoft Office Add-Ins are automatically loaded upon installation and removed upon un-installation of the GoldVisionPro.exe installation program. Note--Some prerequisites in configuring Microsoft Applications are required, please see the GoldVisionPro Help File upon installation.
  - Manual: From the MCP menu, select Preferences – Launch Office Add-In Installer

## Auto-Install of GoldVisionPro Windows shortcuts

- The GoldVisionPro shortcut icons for the Windows Desktop, SendTo menu and Quick Launch taskbar are now automatically installed by user configured preferences in the User Settings.

## WordPerfect integration

- A set of WordPerfect macro files are included with the program install. These files will install menu entries and / or toolbar buttons in the WordPerfect application to directly access GoldVisionPro's Save and Link functionality, as well as the AutoSummary capabilities. Go to [www.GoldVisionSoftware.com](http://www.GoldVisionSoftware.com) for more information on installation.

## Microsoft Office integration

GoldVisionPro's add-ins for Word, Excel and PowerPoint provide one-button access to saving and linking your files during their creation in Microsoft Office, making Automated Document Management a seamless part of your familiar programs. Each application has configurable parameters for the level and type of AutoSummary preferred, and the designated PDF printer for one-step Printing a PDF file and linking.

### Drag-And-Drop or Send-To ease of use

makes storing any file, of any kind, a simple procedure. Any file can be dragged to the GoldVisionPro icon on the Windows desktop, from where it will be automatically stored on a designated network drive, and the appropriate GoldMine link created. Even less-technical users will find GoldVisionPro easy to use for storing or retrieving their files in a company-wide consistent manner.

### Multi-User Configuration On Network

installations, loads your settings wherever you logon to GoldVisionPro, from one workstation to another.

### Auto Start and Auto Logon

Users can configure GoldVisionPro to automatically start the V-QuickLink and Link Center programs, and logon with their user name and password from a shortcut file.

# Administration & Security

## Customized History

GoldVisionPro creates customizable, document-specific History, for use in:

- Automated processes based on History events
- Security audit of file access
- Finding Linked items that “Used to be file name of..., used to have a reference of..., or used to have a note such as...”
- Enabling several System Administrators to seamlessly manage the entire installation.
  - To Use: From the MCP menu, select Program Settings – Admin Settings – Link Center Parameters tab.

## Added Security Settings

- System Administrators have requested the ability to limit user choices to assure standardized implementation.
- GoldVisionPro’s easy-to-implement method of restricting user interaction is based on membership in GoldMine Groups.
- Members of designated Group(s) have access to features that non-members do not.
  - To Use: An Administrator simply designates in the GoldVisionPro System Settings which Group is permitted access to each restricted feature. From the MCP menu, select Program Settings – Admin Settings – V-QuickLink tab & Preference Security tab.
  - The same Group can be used for each feature, or a different Group for each feature. GoldMine Groups are simple to create, and so new Groups can also be created solely for these purposes.

## Administrator Control for User Preferences

- Administrators can now “lockout” user-access to Link Settings, Path Settings, and/or File Settings in the User Settings Configuration. This prevents users from changing these settings, which affect where files will be stored, AutoNaming options, and several date-related features that provide consistency in the way link records are created.
  - To Use: From the MCP menu, select Program Settings – Admin Settings – Preference Security tab
- Path selection when Linking a file. Administrators can now “lockout” users from selecting alternate file paths when linking a file.
- Path selection is not displayed for unauthorized users [an expanded Notes box is displayed instead].
- Files are automatically stored in the user’s designated Primary Link Directory.
  - To Use: From the MCP menu, select Program Settings – Admin Settings – General Settings tab

## New System Recovery Information

- GoldVisionPro is the database solution for accessing all your files, *as well as* the Network Directory Management for storing them. This solution provides System Administrators with the advantage of *automating more scalable and clearly organized* file structures, thereby facilitating better system performance and maintenance.

- GoldVisionPro performs behind the scenes file-by-file, record-by-record tracking, even if a database corruption occurs, by writing event logs that associate each file with its linked contact record. This provides additional assurance to users, particularly those new to document management and previously relying on the inherent limitations of a client-name file folder structure.
- GoldVisionPro's centralized logs provide System Administrators with yet another critical tool in restoring damaged systems and files.
  - See the \GoldVisionPro\logs\ subfolder in the GoldMine System Directory

\* OCR is *Optical Character Recognition*, the conversion of an image to its text equivalent. Requires PaperPort® 9.

\*\* GoldMine versions 5.7 and later

# Appendix

## GoldVision Software PowerKeys Reference Guide

Link Center	VQL Select	VQL Link	Key(s)	Description
X	x	x	<b>F1</b>	Launch the GVP Help File
X	x	x	Ctrl + F1	Launch the GVP PowerKeys Reference File
			<b>F3</b>	<b>Toggle Search Methods</b>
X			F3	Toggle sorting search results by Date or Title
X			Ctrl + F3	Toggle add/remove sort by File Modified Date in Link List
X			Alt + F3	Toggle Find mode / List mode in Advanced Search
		x	<b>F4</b>	Toggle to display Most Recent Link list or Default list in Document Title drop-down box.
		x	Shift + F4	Toggle to display User Defined field list only
X			<b>F4</b>	Toggle to display single or multiple Most Recent Link(s) when user selects the Most Recent Link button.
			<b>F5</b>	<b>QuickSelect</b> 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	x		<b>F6</b>	<b>QuickContact</b> – clears display & gets the active GM contact [links]
			<b>F7</b>	<b>QuickResize</b> 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	<b>F8</b>	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	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			<b>F8</b>	Relink selected link.
X		x	<b>F9</b>	Toggle for getting UnSummarized Text or Summarized Text in the Link Note.
X		x	Ctrl + F9	Toggle "Extended" OCR method – using PP application
			<b>F12</b>	<b>QuickCopy</b> 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	- Filename [in quotes]
X		x	Shift + Alt + F12	- 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]
				<b>Document Title drop-down box</b>
X		x	Esc	Restores original Title
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]