

How to Import Electronic Documents into AppXtender


Q: How do I store/convert electronic documents into AX?

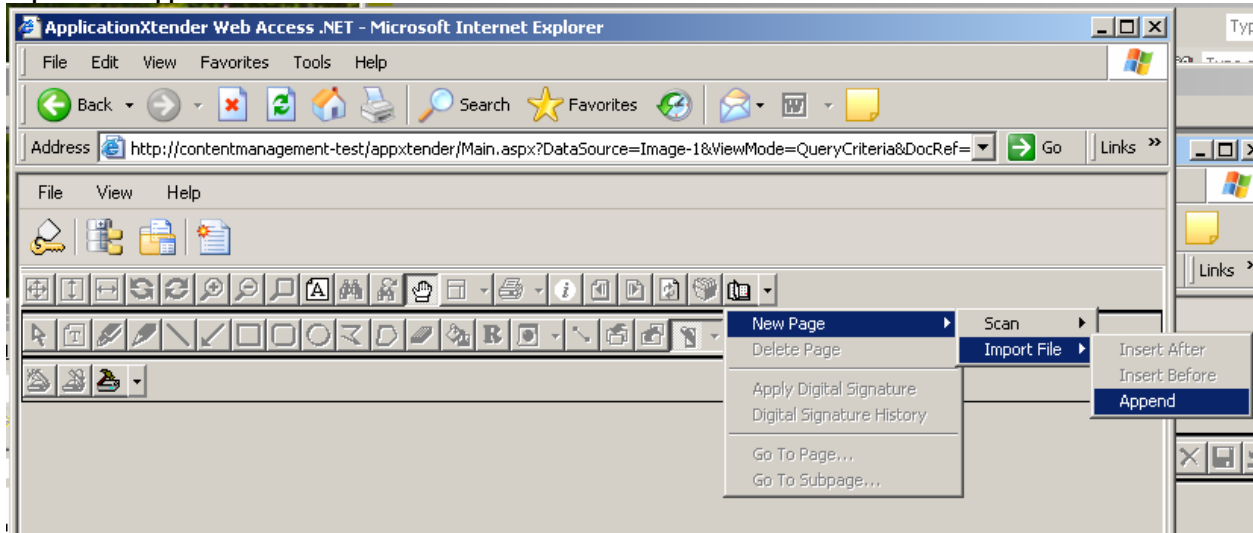
A: Electronic files of any type can be imported into AX as long as they are in a readable format. Prior to importing documents into AX, you will need to know which application you would like to use and the index values that will be stored with it. The following steps will guide you through the import:

For AX Documents Manager Clients:

1. Open AX Document Manager Client
2. Right click on the application where you want to import the documents
3. Select **Set as Active Application**.
4. From the AX menu, select **Document> New> Import file**
5. Navigate to the documents/files to be imported and select the files to be transferred. If you would like multiple files combined into one document, select all files at one time by clicking on the first file. Then hold down the ctrl button while clicking on the other files. All files to be imported should be highlighted.
6. Click on Open
7. Fill in the required index values (bold text) and any other values that are available.
8. Click the Save button at the bottom of the index values window.

For AX Web Access .NET users:

1. Open AX Web Access .NET and go to the Application List screen.
2. Right click on the application where you want to import the documents and select **New Document**.
3. From the upper toolbar, select the Page Menu icon  (the open book at the rightmost position on the top toolbar). Select **NewPage> Import File > Append**



4. Navigate to the documents/files to be imported and select the files to be transferred. If you would like multiple files combined into one document, select all files at one time by clicking on the first file. Then hold down the ctrl button while clicking on the other files. All files to be imported should be highlighted.
5. Click on the New icon (Paper with orange star)



This will display the index fields related to the application you are importing your document to..

ApplicationXtender Web Access .NET - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://contentmanagement-test/appxtender/BatchView.aspx?DataSource=Image-1&AppId=328&Cre...

Search web...

ApplicationXtender W...

File View Batch Help

Index Name	Field Value
BUSINESS ENTITY	
FUNCTIONAL AREA	
FUNCTIONAL ACTIVITY	
DOCUMENT TYPE	
JURISDICTIONS	
LINE OF BUSINESS	
SOURCE NAME	
TOPIC-DESCRIPTION	
AGREEMENT-CONTRACT ENTITY NAME	
HEARING OR ACTION TITLE	
FINE AND PENALTY TITLE	
INQUIRER OR COMPLAINANT NAME	
CIRCULAR OR BULLETIN NUMBER	
FILING NUMBER	
COMMENCED DATE	
COMPLETED DATE	
DOCUMENT DATE	
EFFECTIVE DATE	
FILING EFFECTIVE DATE	
RECEIVED DATE	
INDEXED DATE-TIME	2007-09-04 11:04:43

Save

Application: GOVERNMENTAL-AFFAIRS-REGULAT Page

Image-1; Batch Id: 4

Local intranet

Fill in the appropriate index values. All bold index fields are mandatory and MUST be filled in before the document can be saved.

- Click the Save button at the bottom of the index values window.

7. Log out of AX when completed.