

Archiving Electronic Files in the Imaging System

There are several ways to submit an electronic document or file into the imaging system. The most common are Import, Drag and Drop, and ODMA. Each technique has its advantages based on the file type and accessibility.

Importing

You can submit (import) any document that is currently saved on your computer or network. Importing allows you to simply locate the electronic file and bring it into the imaging system which saves time because it is not required to print and scan the file.

Advantages with Importing

1. Save Paper – no need to print
2. Save Time – no need to scan
3. Convenient – 100% accessible and can be update easily
4. Accessible – can be routed or e-mail for review



⇒ To learn more about importing a document, See *Importing a Document into ApplicationXtender*

Drag & Drop

Drag and drop is a quick way to import a file into ApplicationXtender. You drag a document from a directory folder and drop it into the work area of ApplicationXtender (just make sure you have the correct AX application open), this features makes it simple to archive electronic documents that are located on your computer or network.

ODMA

Using ODMA (**O**pen **D**atabase **M**anagement **A**PI) to archive a document allows saving it in AX while you are in another program. For example, if you are create a “contract” in Microsoft Word and you want to archive it in ApplicationXtender, click the “SAVE” Button in Microsoft Word and a window that allows you to save it directly in ApplicationXtender appears.

Advantages with ODMA

1. Save Paper – no need to print
2. Save Time – no need to launch AX / no need to scan
3. Convenient – 100% accessible and can be updated easily
4. Accessible – search AX using additional values such as author, title or Keyword

⇒ To learn more about ODMA, See *Using ODMA with ApplicationXtender*

The table below outlines common files that are archived in an imaging system

Program	Import	Drag & Drop	ODMA
Word	X	X	X
Excel	X	X	
PDF	X	X	
PowerPoint	X	X	X
Outlook	X	X	

Please note:

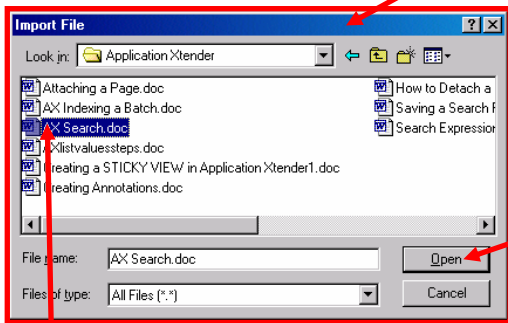
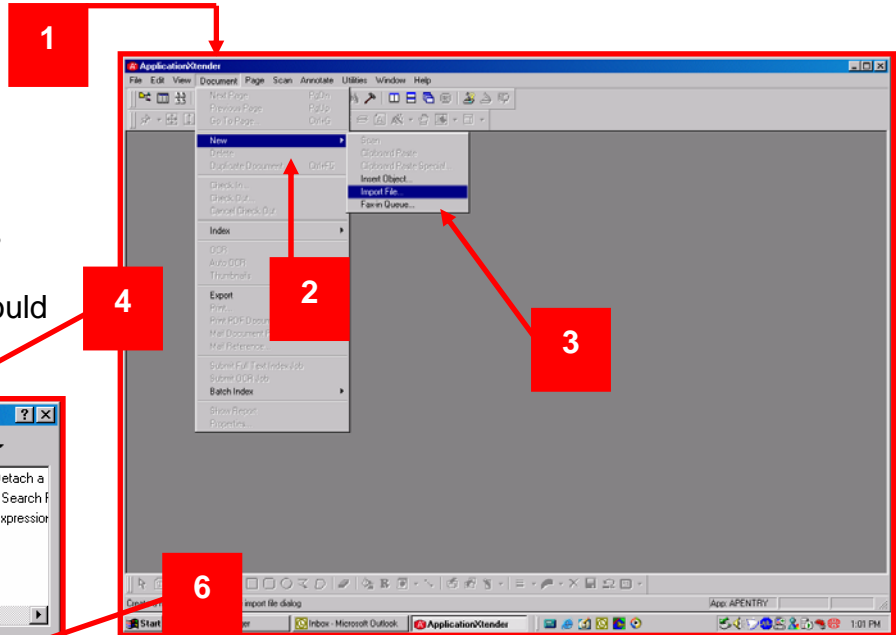
⇒ When importing from Microsoft Outlook, you need to Export the mail message first (only if you want to see the body of the e-mail in the AX window).

⇒ When you Drag & Drop from Outlook into AX, an icon appears in the AX workspace, double-click the icon to launch Outlook – e-mail message automatically appears.



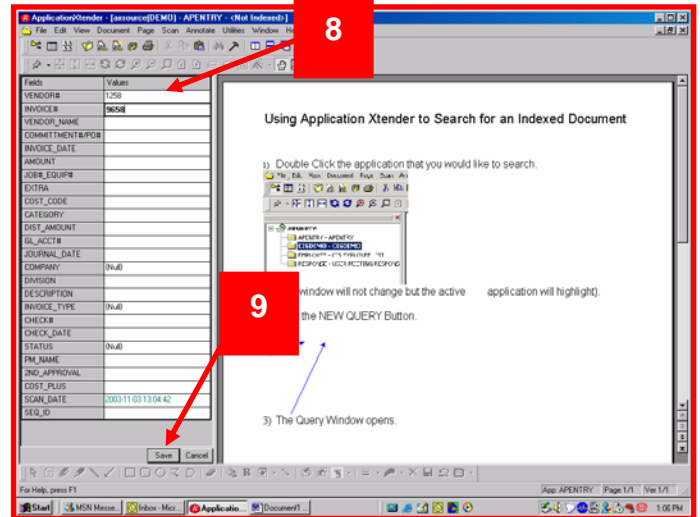
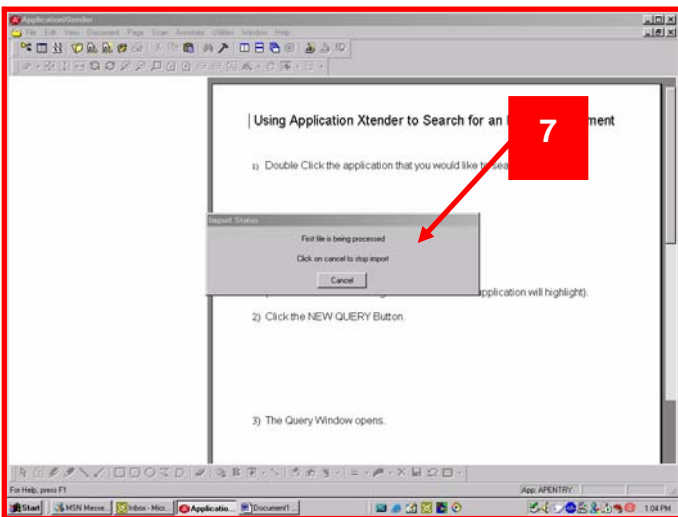
Importing a Document into ApplicationXtender

- 1) Click **DOCUMENT**
- 2) Select **NEW**
- 3) Select **IMPORT FILE**
- 4) "Import File" Window Opens
- 5) Select the document you would like to import



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- 6) Click **OPEN**
- 7) "Import Status" Window appears
- 8) Enter the index information
- 9) Click **SAVE**



Using ODMA with ApplicationXtender®

To use the ApplicationXtender® ODMA feature, ODMA support must be enabled in ApplicationXtender®

- ⇒ User must have Admin rights
- ⇒ ODMA is enabled or disabled using the Data tab in the AX Configuration dialog box.



1. From the AX File menu, click CONFIGURATION.
2. Click the DATA tab to activate it.
3. Click the ODMA support check box to enable or disable the option
4. Click OK

Please note: setup is at each individual workstation

Purpose: An alternate way to create, index and retrieve documents.

Background: The **Open Document Management API (ODMA)** is the standard method for desktop programs to integrate with a **Document Management System (DMS)** such as **ApplicationXtender®**.



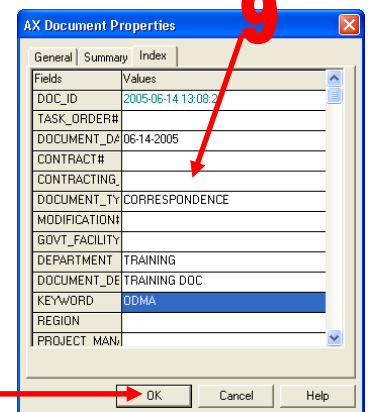
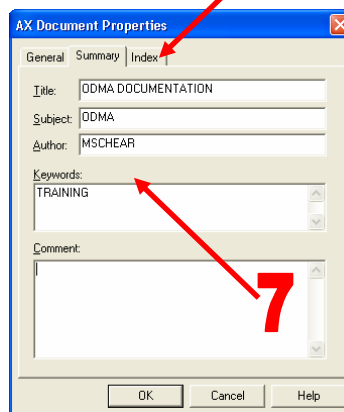
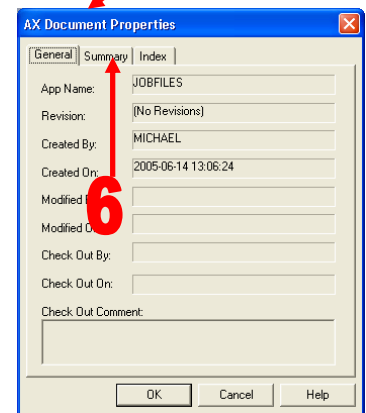
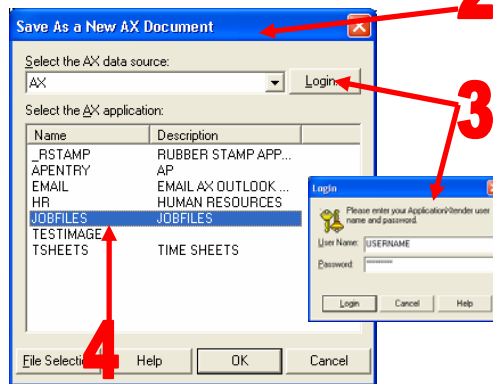
IMPORTANT: Use of ODMA with any of the Corel Office 2000 suite of products causes system failure and is not supported with AX.

FORMAT	PROGRAM
Word Processing	Microsoft Word 2000 Microsoft Word 2000 (XP) Microsoft Word 2003 Word Perfect 12
Standard Graphic	Visio 2000 Visio 2002 Visio 2003
Presentation	Microsoft PowerPoint 2000 Microsoft PowerPoint 2002 (XP) Microsoft PowerPoint 2003
Other	Microsoft Project 2000

Procedure: Follow the steps below to Index or Retrieve a Document:

Indexing a Document Using ODMA

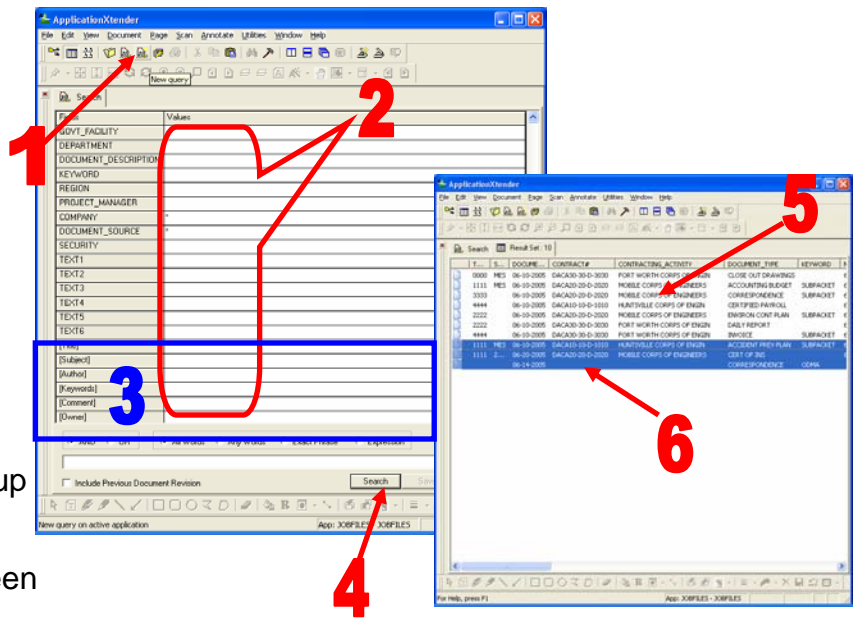
1. Click the Save button in the open document program (Word, Visio...)
2. "Save As New Document" Window opens
3. If necessary, click the Log In Button
4. Double-click the appropriate AX Application
5. The AX Document Properties Window appears (the General Tab is shown)
6. Click the Summary Tab
7. Add any information (you can search by this info within AX)
8. Click the Index Tab
9. Add any index information (you can search by this info within AX)
10. Click OK



Using ODMA with ApplicationXtender® Continued

Retrieving a Document Using ODMA

1. Click the NEW QUERY Button in AX
2. Enter the data you are searching for
3. The Indexes at the end of the list are ODMA fields that will help narrow your search
4. Click the SEARCH Button
5. The list of archived documents appears
6. Double-click a document or select a group of documents
7. The archived image appears on the screen



Exporting a Document using ODMA

You must retrieve the document in AX by following the above steps

With the archived image on the AX screen...

1. Click DOCUMENT
2. Select EXPORT
3. Select IMAGES
4. The Export Document Pages Window opens
5. Choose the location of where you are saving the exported document
6. Give the document an export file name
7. Click Save
8. The File will be restored to its original format (Word, PowerPoint, Visio...)
9. Find the document on your computer (Desktop, My Documents, C:, etc)

