

DIRECTIONS ON INDEXING A DOCUMENT **USING ANY VERSION OF AX NEWER THAN AX 6.52**

Activity Date Not Recognized as part of Unique Key when Indexing Documents with AX 6.52

Background:

With the upgrade of Application Xtender to version 6.52, Activity Date (a timestamp field) is no longer recognized as part of the unique key when indexing documents. Up to now, Activity Date was used to create a unique index key for documents, so whenever a user added a new document the system automatically created it with the current date as part of the unique index.

When attempting to save a new index, if the same index already exists Application Xtender will inform you, “You already have a document with that index”. Users have 2 options:

1. Create a new document by:
 - a) Click OK then Cancel to have it work the same as it did before the upgrade (create a separate document with the current activity date) Or
 - b) Click Cancel then modify the index

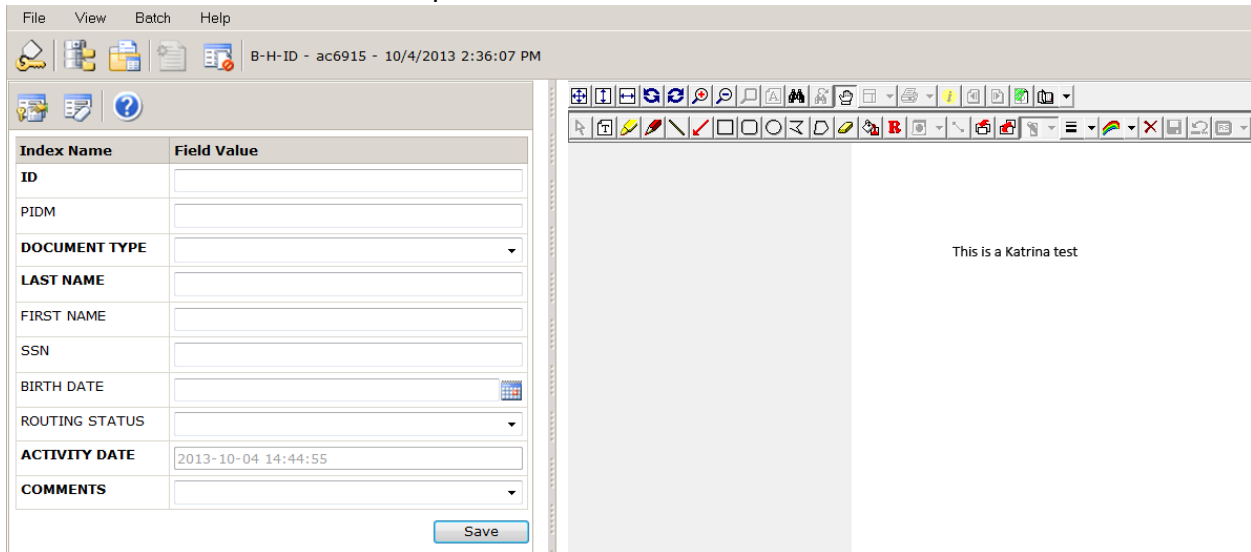
2. Append a document to an existing document by:
 - a) Click OK then OK to have it append to an existing document. Index (including activity date) remains unchanged. Or
 - b) Click Cancel then click select indexes to attach it to an existing document that you choose from a list. Index (including activity date) remains unchanged

NOTE: There are no messages or changes to process when indexing a new document that has no previous document indexed with the same values like id, document type, etc.

Below are steps and screenshots to help you visualize the new popup messages that users will need to take action on (using a sample Banner scenario)

STEP 1: Enter in the values for the index and click the “Save” button.

Note: fields that are bold are required.



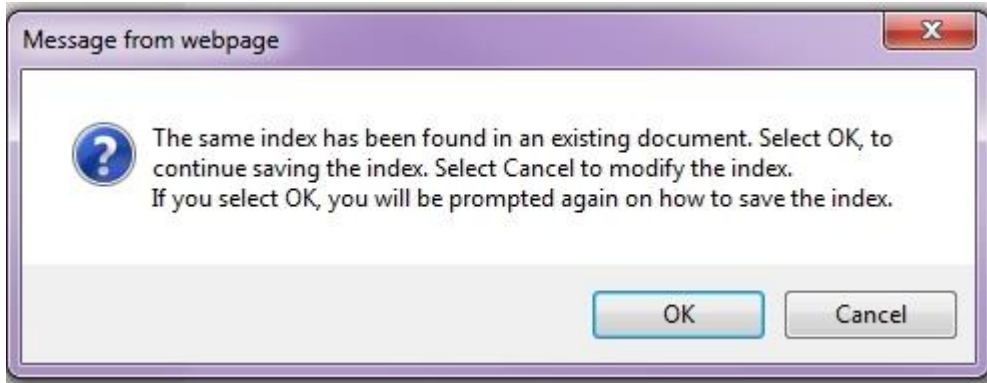
The screenshot shows a software application window with a menu bar (File, View, Batch, Help) and a toolbar. The main area is divided into two sections. On the left is a form with the following fields:

Index Name	Field Value
ID	<input type="text"/>
PIDM	<input type="text"/>
DOCUMENT TYPE	<input type="text"/>
LAST NAME	<input type="text"/>
FIRST NAME	<input type="text"/>
SSN	<input type="text"/>
BIRTH DATE	<input type="text"/>
ROUTING STATUS	<input type="text"/>
ACTIVITY DATE	2013-10-04 14:44:55
COMMENTS	<input type="text"/>

At the bottom of the form is a "Save" button. On the right is a preview area with the text "This is a Katrina test".

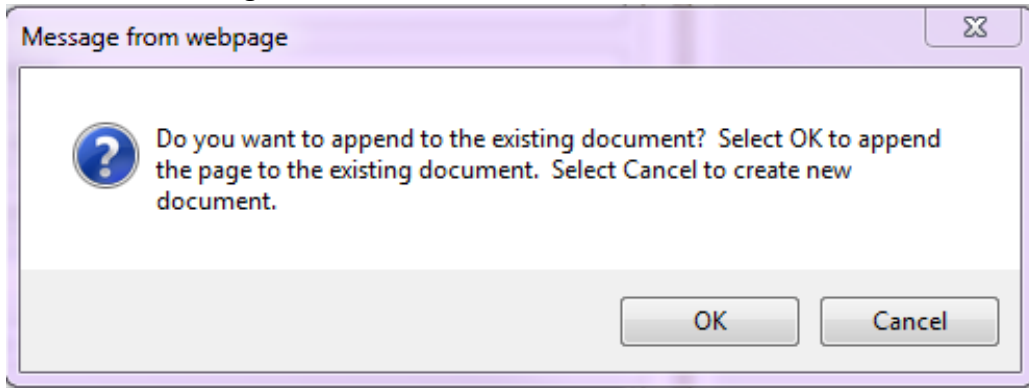
STEP 2: You will receive a message notifying you that a document is already indexed with those values. You will choose the “Ok” button to continue saving or the “Cancel” button if you want to change the index values before saving.

The first message:

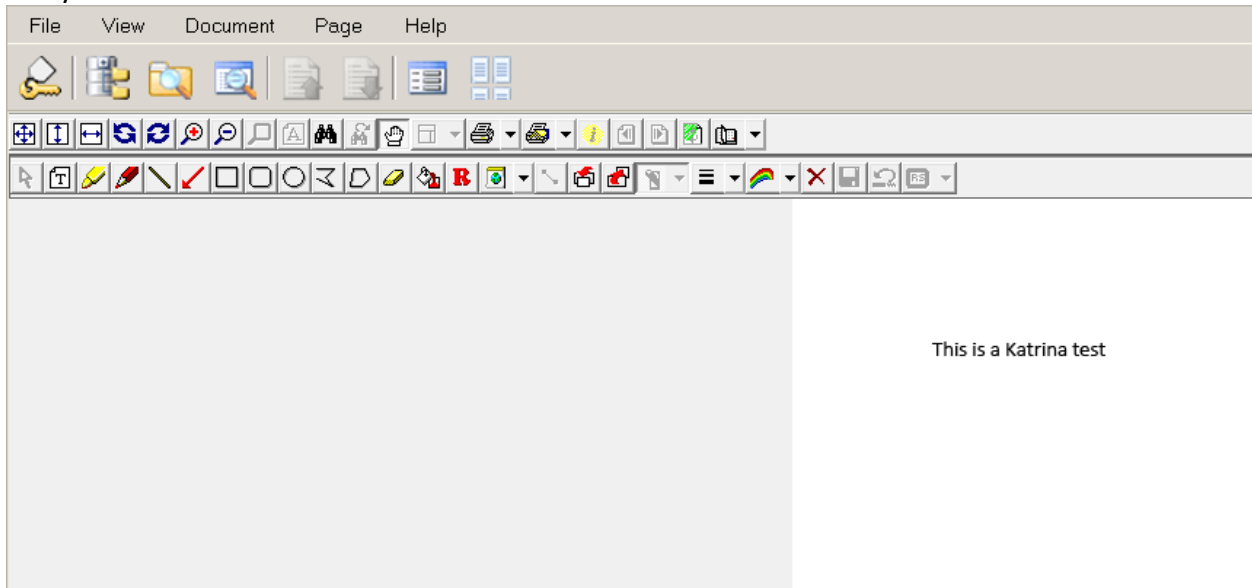


Step 3: If you clicked the “OK” button, you will receive another message asking you if you want to append this new document to an already existing document. You will choose the “Cancel” button if you want to proceed with creating this document as a brand new document with the same indexes as an existing document but different activity date.

The second message:



Step 4: If you chose “Cancel” button, a new document is created and the index window goes away.



Now it shows two entries in the Query Results window with the same index values except activity date.

Query Results for Application 'B-H-ID'

ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	ROUTING STATUS	ACTIVITY DATE*	COMMENTS	Document ID	Pages
000		BENEFIT DOCS	COLE	KATRINA				2013-10-04 14:49:39	BD-MISC	250143	1
000		BENEFIT DOCS	COLE	KATRINA				2013-10-04 13:38:22	BD-MISC	250120	3

Alternate Scenario 1: If you chose the “CANCEL” button to modify the index, you would be returned to the indexing pane. Here you would modify the index key values and then save. Query results would have a new record.

Alternate Scenario 2: If you chose the “OK” button to continue saving the document, but then chose the “OK” button to append to the existing document of the same index, the document will get appended to the oldest document with the same index values as the values you entered and the index window goes away. Query results would be unchanged.

Alternate Scenario 3: If you chose the “CANCEL” button you would be returned to the indexing pane. From here click the “select indexes” icon to view a list of existing indexes and then click which index you want to attach the document. Query results would be unchanged.