

ACS Technical Bulletin



Adding a Project Cross-Reference Field to an AutoEDMS Form

For use with AutoEDMS v6.5

Version: 1.0.0; May 2, 2003; RLB

The steps that follow describe adding a Project “cross reference” field to an existing AutoEDMS v6.5 Form which does not currently include one. The Project “cross reference” field is essentially a link to the Project database file, *.PDB. Once the Project field is added to the Form, AutoEDMS will display a “Project” pulldown menu item when the Form is loaded.

1. Open your Form in QwikForm.
2. To add the Project field, use the “TextEdit” field tool and place a new field on the form.
3. Double-click on the new field, name it “PROJECT” (or another appropriate name), leave the field type set to “Character”, and set the special functionality to “Project Crossreference”... then pick [OK].
4. When prompted if you want to add the field to the database, do so, and then on the “Data field” properties dialog, set the field length to eight (8), the maximum length for this type field, pick the “Indexed” option checkbox, and pick [OK].
5. From the Edit menu, select “Database Table”. In the Database Table dialog, the new Project field will be shown last in the list, so select it and move it to the very first position, then pick [Close].
6. From the Edit menu, select “Display Items List”. In the Display Items List dialog, the Project field will be shown last in the list, so select it and move it to the very first position, then pick [Close].
7. From the Applets menu, select “Masterkey Maker”. In the Masterkey Maker, modify the selected Masterkey fields to include your new Project file. It is common to assign the 1st field position to the Project field, which means you would need to move all your other fields down one position. When finished, pick [OK].

Please Note: The maximum length of the Masterkey is 128 as indicated in the “Current key length is” item of the Masterkey Maker in QwikForm.

8. From the File menu, select “Form Properties”. In Form Properties, on the NRT tab, make sure the value is set as desired for the new PROJECT field. The most commonly used value for a Project field is < *PROMPT* >.
9. In Form Properties, on the Project tab, make sure the choice “Use ‘classic’ style project” is selected. This should be selected automatically when you added the PROJECT field and assigned it to have the “Project Crossreference” functionality.
10. Save the Form, and when prompted you should select the “Transfer records...” option. In the Database transfer dialog, the PROJECT field will not be assigned, which is normal. Picked [OK] to continue.

11. After the save and transfer of records is complete, close QwikForm, then open up AutoEDMS proper.
12. The AutoEDMS pulldown menus should now include a “Project” menu on your Form.
13. It is important for you to add data to the PROJECT field for each record, because the PROJECT field is now part of the Masterkey. But the *first step* in this process is to create records in the Project database, i.e., you need to create Projects.
Normally, a project will have a path associated with it, and it is common for this project path to identify the folder where managed data files for the project are located.
14. Once you create the appropriate Projects (using the *Insert* option on the Project pulldown menu in AutoEDMS), you can go to each record and select the correct project for the value of the PROJECT field on the Form. If you have many records in the database, you can use the “Database Management Tool” to update multiple records with Project field data.
Please Note: For information on how to use the “Database Management Tool”, run it and pick the *Help* button, which will take you to the appropriate instructions in the online AutoEDMS User’s Manual. Alternately, you can open the User’s Manual from the AE InfoCenter, and search for the text “database management tool” (include the quote marks).
15. After you have created your Project records, and you have updated the Project field in all of your document records, you should test the New Record function to make sure that it works as expected and that the PROJECT field value is filled in for the new record.

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