

Complete integration of ArchivistaDMS & ArchivistaERP

Egg, Switzerland, 11 June 2015: Updated versions of ArchivistaDMS and ArchivistaERP are now available. Both products now work seamlessly together in the basic configuration, thus eliminating the need for individual adjustments. The following blog post highlights the possibilities of using ArchivistaERP in connection with ArchivistaDMS.

**From individual pathways to automated integration**

ArchivistaDMS and ArchivistaERP have existed side-by-side on the ArchivistaBox for many years. Since 1998, ArchivistaDMS has offered standardised interfaces for automated processing of documents from ERP solutions. Likewise, thanks to its PDF functionality, ArchivistaERP has so far been able to transfer documents to ArchivistaDMS. Automatic indexing has also been available since 2008 (see cust-folder and then erp-folder).

Until now, automated access to vouchers from ArchivistaERP to ArchivistaDMS had not yet been realised. With the ArchivistaBox 2015/V, the integration of ArchivistaERP with ArchivistaDMS will be fundamentally enhanced and simplified. Everyone knows that the best solution is the one that users do not even notice in the background. Therefore, as we present the new features here, it is obvious from the length of the blog post that the implemented solution is extremely simple.

Setting up ArchivistaERP for ArchivistaDMS

In the current version, under "Set up" and "Preferences", ArchivistaERP recognises several new fields under "ArchivistaDMS":

| ArchivistaDMS | |
|--------------------------------------|------------|
| Database for archival and retrieval: | archive827 |
| Processing (Job, optional): | |
| Field for address number: | AdrNr |
| Field for address name: | AdrName |
| Field for document number: | DocNr |
| Field for document type number: | TypNr |
| Field for document type name: | TypName |

This screen contains the settings for connecting ArchivistaERP to ArchivistaDMS. In the first field, the requested database for ArchivistaDMS is defined. The second field defines the scan definition, which is optional. The other fields specify the field names that are to be used in ArchivistaDMS for archiving or indexing.

Important: Users in the ArchivistaCloud complete the registration process again. All the settings are thereby automatically applied. Archiving an order or invoice

All vouchers printed from ArchivistaERP are automatically filed in ArchivistaDMS. A voucher that is printed multiple times only ends up in ArchivistaDMS if changes were also made to the document before printing. An ERP connection to a document management system (DMS) could not be any easier.

Customer (DMS):

Branch:

Accessing vouchers in ArchivistaDMS from ArchivistaERP

Archived vouchers can be accessed directly from ArchivistaERP. Wherever the "DMS" link appears in ArchivistaERP, a direct query for ArchivistaDMS can be submitted by clicking on this link.

The requested vouchers are thereby automatically activated in ArchivistaDMS:

The screenshot shows a web browser window displaying a search result in ArchivistaDMS. The search results table has the following data:

| Akte | Seiten | Datum | Archiviert | Titel | AdressName | AdrNr | TypName | TypNr | DocNr | Dateiname | Download |
|------|--------|------------|------------|-------|------------|-------|--------------------|-------|-------|-----------|-------------|
| 5 | 1 | 28.05.2015 | Nein | | Meili + Co | 1 | Verkaufsbestellung | 30 | 2 | | PDF IMG PIC |

Below the table, there are buttons for 'Ansicht', 'Suchen', 'Ersetzen', and 'Bearbeiten'. A detailed view of the document is shown, including the following information:

- Akte: 5, Seiten: 1, Ordner: 1, Datum: 28.05.2015, Archiviert: Nein
- Eigentümer: [empty]
- Titel: [empty]
- AdressName: Meili + Co
- AdressNr: 1
- TypName: Verkaufsbestellung
- TypNr: 30
- DocNr: 2
- Dateiname: [empty]

At the bottom of the document view, there is a metadata section:

```
@@@Datum=28.05.2015@@@
@@@TypNr=30@@@
@@@DocNr=2@@@
@@@AdrNr=1@@@
```

The document preview on the right shows a scanned invoice with a header and a table of items.

Datenbank: archive827, Datensatz: 1/1, Akte: 5, Seite: 1/1

Note: For functional access, there must be an open session in ArchivistaDMS. Customers are indexed in Archivista using their customer name and customer number. The corresponding list entries are automatically stored in ArchivistaDMS and are made conveniently available for searches:

| | |
|-----------------|--------------------------------|
| AddrName | m |
| TypNo | Meili + Co |
| TypName | Money Makers Ltd. Muster AG |
| Note | |

Incidentally: If a customer record is changed in ArchivistaERP, ArchivistaDMS is automatically updated. Further, the drop down menus are also available for document types:

| | |
|----------------|------------------------------|
| TypName | sa |
| Note | Sales Invoice Sales Order |

This ensures fast, easy and uncomplicated access from ArchivistaERP via the **“DMS”** button as well as separate access in ArchivistaDMS.



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