

ArchivistaDMS 2018/XII with many views

Egg, December 14, 2018: In a discussion more than 10 years ago, a customer asked whether it would not be possible to change the active mask (fields and standard query) in the RichClient during operation. With the RichClient at that time, the effort would indeed have been high, and so the feature was added to the list for the WebClient without being implemented afterwards. In a current accounts payable management project this question came up again, and this time the functionality was realized within two days.



Flexible forms for different roles

For more than a decade, ArchivistaDMS has been able to create various forms to assign them to specific users. An example: Employees in purchasing do not need the fields that make sense in production or sales.

Until now, users changed their profile (with a new login) to work with a different role or form. This is no longer necessary, the desired form can be changed directly in the WebClient. The corresponding forms can also be flexibly assigned to certain users.

Step 1: Set up in WebAdmin

Since version 2018/XII the new form 'Masks for users' is available in WebAdmin:

>New		Name
>Edit	>Delete	english
>Edit	>Delete	mails
>Edit	>Delete	deutsch all
>Edit	>Delete	besr

At the first call there are no entries, with 'New' the first profile can be opened:

In addition to the name of the definition, the following entries must be entered. First the desired mask definition, these are the fields that are displayed. Secondly, it is important to determine which users can access the masks, whereby all users can select the mask if no entries exist. Thirdly, the start definition is selected, i.e. this determines which documents are to be displayed as default after switching to the form.

Step 2: Call the forms

As soon as forms are entered in WebAdmin, they are displayed in the WebClient. The corresponding field can be found at the bottom of the status bar:

After logging in to the WebClient, the user is automatically in the 'Standard' form. This is the definition that is assigned directly in the user profile:

For example, in order to only receive all vendor invoices that can be processed automatically, the 'besr' form can be activated in our example.

The screenshot shows the Archivista web application interface. At the top, there is a navigation bar with various icons and a search field. Below this is a table listing documents with columns for Document ID, Pages, Date, Archive status, BESR number, and Download options (PDF, IMG, PIC).

Document	Pages	Date	Archive	BESR	Download
21803	1	12/13/2018	No	1001010000004190530453293-010412652>	PDF IMG PIC
21801	1	12/13/2018	No	1001010000004190530453293-010412652>	PDF IMG PIC
21597	1	12/13/2018	No	1001010000004190530453293-010412652>	PDF IMG PIC
21595	1	12/13/2018	No	1001010000004190530453293-010412652>	PDF IMG PIC
21593	1	12/13/2018	No	1001010000004190530453293-010412652>	PDF IMG PIC

Below the table, there are tabs for 'View', 'Search', and 'Edit'. The 'View' tab is active, showing a detailed view of document 21803. The view includes fields for Document ID, Pages, Folder, Date, and Archived status. It also displays the Owner (BESR), a Note, and contact information for ASGA (Archivista Schweiz GmbH).

Document: 21803 Pages: 1 Folder: 256 Date: 12/13/2018 Archived: No

Owner: BESR: 1001010000004190530453293-010412652>

Note:

asga, Rosenbergstrasse 16 T +4171228 52 52 info@asga.ch pGDS/OskasSSG Postfach, 9001 St.Gallen F +4171228 52 55 www.asga.ch PC 90 6683-9 PP CH-9001 St. Gallen

pF POST P A-PRIORITY verteil.ch/Personlich BOMW Beitragsrechnung Archivista GmbH Stegstrasse 14 8132 Egg b. Zürich Akzent 4, Quartal 2018 Kontakt: sabrina.knos@asga.ch +41 71 228 52 97 Mitglied-Nr.: 41905 St. Gallen, 08.12.2018 Firma: Archivista GmbH | Seite 1 Folio-Nr.: 38045329 Übertrag: total Beiträge gemäss Beilage Abzüglich Akontorechnung

Database: archivista, Recordset: 1/27, Document: 21803, Page: 3/1, Form: bear

The switching works automatically. If 'Edit' is activated, a query is made so that fields that have not yet been saved are not carelessly discarded.



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