

## 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:

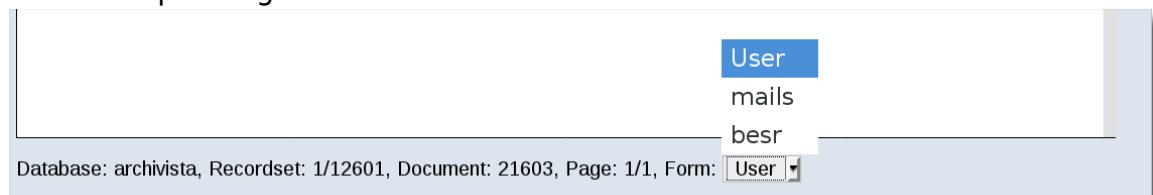
›New	Name
›Edit	english
›Edit	mails
›Edit	deutsch all
›Edit	besr

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

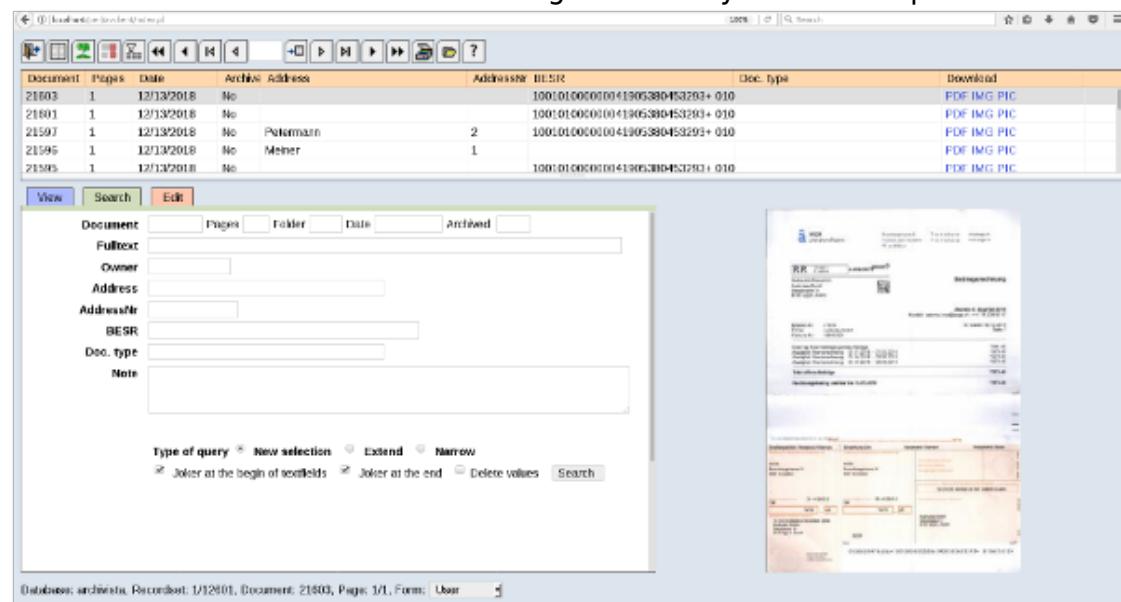
In addition to the name of the definition, the following entries must be entered. First the desired mask definition, these are the fields that are displayed. Secondly, it is important to determine which users can access the masks, whereby all users can select the mask if no entries exist. Thirdly, the 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 a software application window with a toolbar at the top. The main area is divided into two sections: a list of documents on the left and a detailed view on the right.

**Document List (Left):**

Document	Pages	Date	Archive	Download
21603	1	12/13/2018	BEZR	PDF IMG PIC
21601	1	12/13/2018	No	PDF IMG PIC
21597	1	12/13/2018	No	PDF IMG PIC
21595	1	12/13/2018	No	PDF IMG PIC
21593	1	12/13/2018	No	PDF IMG PIC

**Document View (Right):**

Document: 21603 Pages: 1 Folder: 258 Date: 12/13/2018 Archived: No

Owner: BEZR  
BEZR 10010100000041905380453290+ 010412652>

Note:

asga Rosenbergstrasse 16 T +4171228 52 52 info@asga.ch pGDSOnikaSSG Postfach, 9001 St.Gallen F +4171228 52 55 www.asga.ch PC 90-6683-0 PP

CH-9001 SG, Galien

pDF POST IP 4-PHOBRY  
veraudtchPostfach BOWA Beitragrechnung  
Archivista GmbH Steigstrasse 14 8132 Egg b. Zürich  
Aktenze. 4. Quartal 2018  
Kontakt: info@archivista.ch +41 71 228 52 97  
Mitglied-Nr. 41905 St. Gallen, 05.12.2018  
Firma: Archivista GmbH | Seite 1  
Postfach-Nr.: 38045429  
Übertrag total 80 träge gemäss Beilage  
Abschliess Rechnungsstellung

Database: archivista, Recordset: 1/27, Document: 21603, Page: 1/1, Form: beur

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.