

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:

The screenshot shows the 'Masks for users @ archivista' page in the WebAdmin interface. On the left is a navigation menu with options like User, Templates, Administration, Masks for users, Fields and masks, Archive administration, Scanning, Barcodes, Form recognition, OCR definitions, and SQL definitions. The main area displays a table of existing masks.

>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 displays the Archivista web application. At the top, there is a navigation bar with a search bar and various icons. Below this is a table listing documents. The table has columns for Document, Pages, Date, Archive, and Download. The documents listed are 21803, 21801, 21597, 21595, and 21593, all dated 12/13/2018. The 'Archive' column shows a long alphanumeric string for each document. The 'Download' column provides links for PDF, IMG, and PIC formats.

Below the table, there are three tabs: 'View', 'Search', and 'Edit'. The 'View' tab is currently selected, showing a detailed view of document 21803. The view includes a 'Document' section with fields for 'Owner', 'BESR', and 'Note'. The 'Owner' field contains the document ID. The 'BESR' field contains a long alphanumeric string. The 'Note' field contains a detailed address and contact information for 'asga, Rosenbergstrasse 16 T +4171228 52 52 info@asga.ch'. The 'Edit' tab is also visible, showing a form for editing the document.

At the bottom of the interface, there is a status bar that reads: '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.