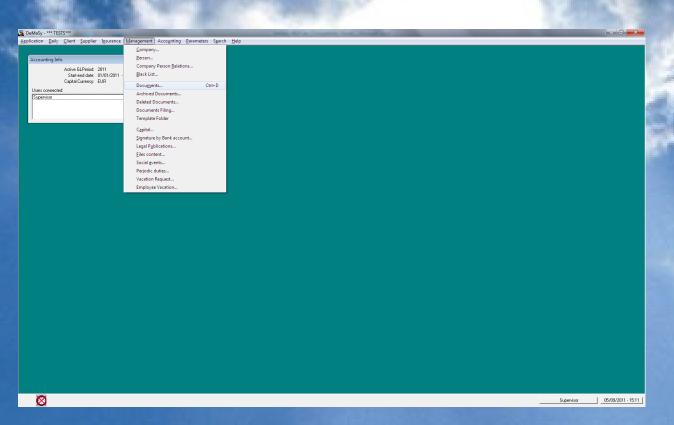
# Silicon DNA DeMaSy ERP software

### **MODULE ELECTRONIC DOCUMENT MANAGEMENT**



The application is designed to allow an electronic management of documents.

All documents (MS Office, Open Office, PDF, images ...) can be added to contacts (company, persons, employees, jobs).

All documents are stored under native format in a file server directory which only the application can access. The application calls original programs to create the documents

In order to make the module operational the options have to be reviewed and completed



#### DeMaSy OPTIONS Documents

le Path

Path of documents location on file server ex : Y:\DeMaSyTest\TEST\DOCUMENTS\

path for archived documents

Template folder ex : Y:\TEMPLATE\

No: means that when inserting a document the original document remains

Yes: means that when inserting a document into the application the original is moved

The application allows users to attach pdf scanned copies of client/suppliers invoices or accounting entries supporting documents to the application invoices or accounting entry. This creates a link between the invoice or accounting entry and the documents which enables to recover supporting documents in on click

Client - Physical name length

Supplier - Document directory

Supplier - Physical name leng

GLMovement - Default docum

Folder path for scanned Client invoice to be attached to the application Invoice

Relevant Length of scanned documents name for client invoice number identification

Folder path for scanned Client invoice to be attached to the application Invoice

Relevant Length of scanned documents name for Supplier invoice number identification

Folder path for scanned supporting accounting document to be attached to the application accounting entry



#### DOCUMENTS SCREEN

Here below is the main document screen.

It can be called with F10 Key from any other screen or by clicking DOCUMENT button placed on other screens (example: company or person screen).

Document - (Show mode)		
Documents Detail		1
Real Solutions S.A.		
		Add
Modèle rappels client 3 niveaux Hello n'oublie pas qu'on a un stagiaire universitaire au mois d'août et que tu peux lui déléquer des travaux au nivaux informatiques	25/07/2011 00000643 25/07/2011 Supervisor 25/07/2011 00000642 26/07/2011 Supervisor	Edt
Modele negote di cienti 3 niveau: → teloti - nodelle pas qu'ori a un stagiare universitaire au mois d'acôt et que tu peux lui dééguer des travaux au niveaux informatiques ⊕ UETRE SDNA.doc ₩ 2 MEMO	19/07/2011 00000635 20/07/2011 Supervisor	Delete
R TEMP	26/07/2011 00000646 11/08/2011 Supervisor	Copy  Copy to clipboard
Demande chargement imputation paiement     Sociation (sociation paiement)     Sociation (sociation (sociation))     Sociation (sociation))	25/07/2011 00000641 26/07/2011 Supervisor 25/07/2011 00000640 25/07/2011 Supervisor	Copy to clipboard External Copy Copy To
		Paste (from Clipboard)
		View Dog
		<u>Rig</u> hts
		Mail
		Egt

This SCREEN displays the existing folders and documents for a specific company or person.

The NUMBER is a automatic unique number identifying the document. Documents can be found using their number in the combo box next to to company/person name.

A combo box list the SORT CRITERIA

Sort by name Sort by creation date Sort by Modified date Sort by Reference date

The check box HIDE FOLDER allows displaying all the document of a company/person without the folders.

The first date is a system date tracking the document CREATION DATE The second date is the REFERENCE DATE specified by the user



#### **Button COPY**

- Clicking on the copy button creates a copy the existing document. Before creation the user can access, completed or modify the copied document information.
- The ARROW on the right side of the COPY BUTTON proposes several copy options:
  - COPY TO CLIPBOARD: copy a document to PC Clipboard and allows the user to paste the document in the PC or server directory or to another application
    - **EXTERNAL COPY**: allows the user to copy a document from another company/person into the documents of the selected company/person.

Once this button is clicked the user has to select another company/person and select the document in the target company/person to copy it into the documents of the company/person where the command has been initiated.

**COPY TO** : allows the user to copy the selected document from a company/person to one or several other company persons (or to selected client type)

Select Client Type and Company	/ Person		
Client type:			
Company / Person:	, 	 	
		<u>о</u> к	Cancel

**Button PASTE (FROM OUTLOOK):** allows the user to create a document from outlook. Edit/copy on a mail (or several mails) in outlook and click this button will create the mail(s) as documents in DeMaSy. The name of the document will be the subject of the mail (but can be changed).

**Button PASTE (FROM CLIPBOARD):** allows the user to create a document from a file directory. Edit/copy on an external document and click on the button will create a new document in the application. The name of the document will be the external file name (but can be changed).

**Button VIEW DOC**: Allows the user to view the document. The application will open the associated application (word, pdf ...) and display the document.

**MAIL MERGE:** There is little CHECK BOX inside the VIEW button which is used to open the document and merge all fields which are in the document.

Merge fields consists of the name of SQL query executed on the database to extract the information.

The convention is that all merge fields are encapsulated between "<<" and ">>".

Standard merge queries exist (see list below on next page).

If a user knows the database structure it possible to add queries that the user has prepared (see Application Utilities).



# DeMaSy ERP software

seQuery Merge Get Document Number>>         Date of creation of document           seQuery Merge Get Document Number>>         Document number           seQuery Merge Get CompPers Name>>         NAME of the company/person to which the document is attached           seQuery Merge Get CompPers name>>         COUNTRY of mailing address of the company/person           seQuery Merge Get CompPerson LegalCounty>>         COUNTRY of mailing address of the company/person           seQuery Merge Get Dox Number>>         JOB NUMBER to which the document is attached           seQuery Merge Get CompPers Tak>>         JUB NUMBER to which the document is attached           seQuery Merge Get ComPers Tak>>         USER NAME editing of the company/person           seQuery Merge Get Login Name>>         PHONE number of the company/person           seQuery Merge Get Login Name>>         Database name in which the document has been created           seQuery Merge Get Login Address>         Database name in which the document has been created           seQuery Merge Get Legal Address>         Legal address of the company/person           seQuery Merge Get Legal Address>         Legal address of the legal address           seQuery Merge Get Legal Address>         Legal address of the company/person           seQuery Merge Get Legal Address>         STREET NAME AND NBR of the legal address           seQuery Merge Get Legal Address>         COUNTRY of legal address	ES			
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MANAGE YOUR BUSINESS WITH ONLY ONE SOFTWARE

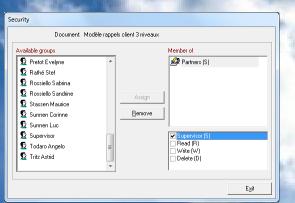
## System queries

< <login.name>&gt;</login.name>	NAME OF THE USERS logged
< <client.filenumber>&gt;</client.filenumber>	CLIENT NUMBER
<comppers.name>&gt;</comppers.name>	COMPANY/PERSON NAME
< <comppers.telephone1>&gt;</comppers.telephone1>	TEL of the company/person
< <comppers.fax>&gt;</comppers.fax>	FAX of the company/person
< <companyperson.rel=destinataire des="" factures.name="">&gt;</companyperson.rel=destinataire>	PERSON NAME AND FIRST NAME based on the system relation « Invoice contact»
CompanyPerson.Rel=Destinataire des factures.Title>>	PERSON TITLE based on the system relation « Invoice contact»
< <companyperson.rel=destinataire des="" factures.firstname="">&gt;</companyperson.rel=destinataire>	PERSON FIRST NAME based on the system relation « Invoice contact»
< <companyperson.rel=destinataire des="" factures.lastname="">&gt;</companyperson.rel=destinataire>	PERSON LAST NAME based on the system relation « Invoice contact»
< <comppers.mailhousenum>&gt;</comppers.mailhousenum>	STREET NUMBER AND NAME based on the system relation « Invoice contact»
< <comppers.mailstreet>&gt;</comppers.mailstreet>	STREET of the person based on the system relation « Invoice contact»
< <comppers.mailpostalcode>&gt;</comppers.mailpostalcode>	POSTAL CODE of the person based on the system relation « Invoice contact»
< <comppers.maillocality>&gt;</comppers.maillocality>	LOCALITY of the person based on the system relation « Invoice contact»
< <comppers.mailcountry.name>&gt;</comppers.mailcountry.name>	COUNTRY NAME of the mail address
< <comppers.legalcountry.name>&gt;</comppers.legalcountry.name>	COUNTRY NAME of the legal address
< <bankaccount.number>&gt;</bankaccount.number>	BANK ACCOUNTS OF THE COMPANY/PERSON
< <job.number>&gt;</job.number>	JOB NUMBER
< <licence.name>&gt;</licence.name>	DATABASE NAME
< <company.name>&gt;</company.name>	COMPANY NAME
<pre></pre>	PERSON NAME

# silicon.dna@sdna.lu



Button **RIGHTS**: allows the user the define access rights to a particular document or folder.



Document rights (supervisor rights / Read / Write / Delete ) can be assigned to a single user or to group of users. The group of users are the same than the group of rights defined for the application security (see rights section).

To assign the rights the user has to select a user or group of users on the left side and click on ASSIGN or REMOVE button.

Button MAIL: Allows the users to create an empty outlook email with the selected document as attachment. The name of the attachment will be the document number followed by the document name. The mail will be created in the draft folder of outlook.

When the user clicks on the MAIL button, a screen allows him to select a company/person and one or several email address (if email addresses exist in the data sheet of the company/person selected).

Search Email Address	
Company / Person:	
Real Solutions S.A.	
Email Addresses:	
thierry.drot@skynet.be	
	Send Cancel
	Lancel

DD : A a new document from a directory of the server or pc.

ME: Name of the document

Silicon DNA

(F2 while cursor is in the field where user can select the external file name will copy the external file name to the name field)

FERENCE DATE: By default the date of the day

DOCUMENT TYPE: User defined Parameter (Go button allows to access the parameters screen)

STATUS: Auto-incrementative combo box allowing user to create status for documents.

**DESCRIPTION:** Free description of the document

**CREATION AND LAST UPDATE**: inaccessible system fields storing the creation date of the document and the last update as well as the author of the last modification.

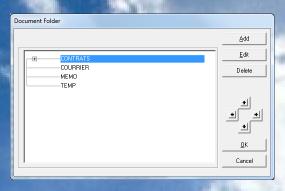
ORMAT TYPE: Native format (word, excel, pdf ...) or Simple text (notepad type of document)

Documents Detail		
Name: Arendt Facturation	Folder:	
Reference date: 01/09/2011	E CONTRATS	
Document type:	COURRIER	
Status:		
Description		
Creation and last update:		
Number:		
Format Type: Native format		
Company/Person: Real Solutions S.A.		
Document Template:		
Document type:		
Intel A	C:\Temp\Arendt Facturation xis	
LOG MSOCache	106 2011 DMS type de plans comptables.pdf	
PerfLogs	2011 02 14 query sql pour reperer les comptes non traduits txt	
Program Files Program Files (x86)	2011 08 31 alter domus INNVOABFHLDG.ZIP	
ProgramData	2011 09 01 OAK TREE PILGRIM ZIP     With Arendt Facturation xis	
	DeMaSy - Manuel Comptabilité pdf	
Project.VBNET Recovery	DeMaSy HELP.doc	
- swsetup =	1) DeMaSy mises a jourxis 역) DeMaSy Options xis	
- System Volume Information	Formule VP Bilan Hide 0.bt	
E- Temp ABAX	MPORT GLAccount excel file xis	
Arendt	SIWIS pdf	
BAT	Logiciel de previsions Documentation_HannaH_6.9.pdf	
Blacklist	PCN 2011_CA_PLANCOMPTA_LINK_10_DOC_EN_V002.fieldist	
	PCN Centrale des bilans PCN et ETATS FINANCIERS xis	
DMS	PCN COMPTES ANNUELS - 2011_CA_BILAN_LINK_10_DOC_EN_V002/ieldist	
e-ANNUAL ACCOUNT	₩]RPT 1480 Blacklist conditions sur pourcentage.doc ₩ <sup>1</sup> test ADM_U.doc	
GALLO	Steet ADM U.RPT	
- KYC	Thumbs.db	
lois MALTA	₽ TIM_D2.RPT	
	₩)~SMaSy HELP.doc	
OAKTREE	- Witcode ranp	
SOGECORE Systemat		
Temp		
TRANSFER	]	
		<u>O</u> K Cancel

At the bottom of the screen user can use the explorer the browse the local or network resources. On the upper right side of the screen are the existing folders where the document can be inserted.



The GO ICON on the right of the FOLDER allows users to create new folder(s) and organize the hierarchy.



#### GO ICON - DOCUMENT TYPE

Allows the user to create new types of documents or modify existing ones.

Document Type - (Show mode)		
Name:	Add	
TEST	Edit	
	Delete	
	Cancel	
	Exit	

I user clicks on the arrow on the right side of the ADD Button it splits in three sub-menus:

- Document : add a document
- Folder: add a folder based on existing templates

Template for company/person