

SmartRetrieve for Microsoft NAV

What is it used for?

The SmartRetrieve web interface is used to view any and all archived images supported by the standard solution.

Using a 'wildcard' search across all companies for any value, search for particular values in a Document Type or construct and save specific searches to see a summary of activity for a given period.

How do I use it from within Microsoft NAV?

- Login to Microsoft NAV
- Go to the Purchase Order Page (this is an example, any supported Page can be used)
- Open a Purchase Order
- In the V1 Document Management Action bar, click View Document
- Login using your V1 DbLogin credentials (if you click 'remember me' you won't need to keep logging on, your credentials will be remembered)
- Any images archived against this document in this company will be displayed.
- When selected, click the information icon to see more detailed information
- Zoom in and out by clicking the + or – icons
- Open it as a full screen view by clicking Open externally
- Add or view any annotations associated with the image displayed

How do I use it from outside Microsoft NAV?

- Open your web-browser of choice
- Navigate to the V1 Smart Portal by going to <http://NAVSERVER:5002> (replace NAVSERVER with the actual web-address of your server)
- Login using your V1 DbLogin credentials (if you click 'remember me' you won't need to keep logging on, your credentials will be remembered)
- Click on the SmartRetrieve icon
- In the top most cell, enter a wildcard search to find any value in any document type across all companies

OR

- Select a Document Type from the drop down
- Construct your own custom search selecting the Field, Condition and Value.
- If you wish to narrow your search, click Add Line and add more search criteria.
- When satisfied, click Show Results to see your images matching the criteria.
- If this is a search you will perform a lot, click 'Save search', give it a name and save it. The same criteria will then be available for you the next time you log in by simply clicking the button.