



V1  
Document  
Management

Invoice Automation for Infor SunSystems

Release Notes

8<sup>th</sup> August 2018

# Document Introduction

This document provides high level details of Invoice Automation for Infor SunSystems Master Connector.

For more details on a typical solution implemented in conjunction with the Master Connector, please consult the supporting documentation:

## **Invoice Automation for Infor SunSystems - Solution Guide**

You are encouraged to bookmark the Portal which is regularly updated with information about the release:

<http://support.wearev1.com/software/Sun/>

# What's in this Release?

## General

- ▶ Taking advantage of V1's latest DM4.5 core release:
  - ▶ V1 SmartDeposit
    - ▶ Online browser based interface allowing the AdHoc deposit of documents indexed against a SunSystems transaction or attachment.
  - ▶ V1 SmartRetrieve
    - ▶ Online browser based interface allowing the retrieval of archived documents. Searches can be saved per user per document
    - V1 SmartRetrieve can be accessed either as a non-Sun user (externally via the V1 Smart Portal) or directly within Sun using a dedicated button
    - ▶ Documents are linked so viewing a document means you can quickly see what documents it relates to and for which Supplier or Customer.
  - ▶ V1 SmartMail
    - ▶ Our latest technology enables an unlimited number of mailboxes to be configured to receive for archiving or their attachments extracted for OCR and import into the DbCapture system, then on to the SunSystems database.
  - ▶ V1 SmartRetentions
    - ▶ Fulfilling your GDPR obligations, our retention module allows the controlled removal of documents that may contain personal data using specific rules per document type.
    - ▶ In conjunction with V1 SmartRetrieve, **Full Text Search** can be added to give even more accuracy with finding your data.

# Master Connector

## ► What is a Master Connector?

For context, there are 3 types of integration provided by the V1 Integrations team.

### 1. Bespoke

This is a purely one off integration developed by the PS engineer specifically for the customer.

### 2. PS Owned

Usually originating as a bespoke, a collection of files familiar and functional to the PS team that if applied to different customer sites, work in the same way.

### 3. Standard

A packaged end to end solution provided by the V1 DM Integrations team. All files pre-written, a portal containing all documentation, outward facing downloadable content and documentation.

How these are installed varies.

- **iManager**
  - Installs the core software, but no integration components.
  
- **Connector**
  - A dedicated .NET UI that applies Standard integration files over the top of an iManager core software install, the end result is a functional integration.
  
- **Master Connector**
  - A hybrid. It does all the jobs iManager does in a cleaner fashion including:
    - Creating required databases
    - Testing database credentials
    - Installs components based on licenses provided rather than tick boxes
    - Auto configures the SmartSuite
    - Auto configures SmartMail with examples
      - Post Install
        - Allows FTS to be applied
        - Allows a PS Engineers *own files* to be applied to the core installation the Master Connector has installed. Whether from a bespoke or PS Owned source.

As the SunSystem integration has well established partner, V1 PS and pre-sale versions, using the Master Connector means the installation is done quickly, consistently and minimizing issues.