



SmartRetrieve - EDM for Sage X3

What is it used for?

SmartRetrieve is used to view all files either archived via SmartDeposit against transactions / their attachments and those Purchase Invoices / Sales orders created by PIA and SOA.


How do I use it?

Navigate to <http://YOURSERVER:5002> and login to the portal (replace YOURSERVER with the actual url of your V1 installation)

Login and once authenticated, click the on the icon for SmartRetrieve.

- To do a wildcard search
 - Enter text in the top most bar to search all field data across all tables in the EDM database
- To do a specific search
 - From the first dropdown, select the EDM table to search on
 - From the second dropdown, select the field / (s) you wish to search on in that table then enter text in the cell to the right based on your criteria
 - Click Add Line to add more fields making your search more narrow and producing fewer results if the table contains many entries
- To save a search
 - If you have a search you do often, it's a good idea to save it. This can then be clicked on and ran without having to keep building it.
 - Once you have decided on a Table and added some meaningful criteria, click the Save Search button
 - Give it a meaningful name
 - Click Save
 - Refresh the page
 - You should then see your search on the left hand side which when clicked on, will be ran.

Once you have your results and want to view an image:

- Click the tick box to the left of the result you want to display
- Click the  against the entry to get detailed information about it
- Others icons on the top of the image include orientation options, to open externally (open just the image in a new tab), to view any annotations present on the entry and to add an annotation against the entry

Links

- When viewing a document and the 'Select Link' is available, click the dropdown to choose which linking document to go to applicable to the document your viewing, then click the link icon.

What else is new for EDM for Sage X3?

- Browser based interface using the latest technology
- ALL document types listed in the Smart Retrieve ui can now be used to view images to your EDM for Sage X3 transactions.
- All tables prefixed with the same 3 character object code than EDM for Sage X3 making them easier to identify and use

