**USING THE DOCUMENT ARCHIVE MENU**

The Document Archive menu consists of the Manage Documents function.

The Document Archiving functionality provides users the ability to archive generated documents to the database and to search and retrieve them.

When printing documents from history, you have the option to retrieve archived copies instead of re-rendering from data in history tables. Transactions entered starting in build 16316 will include archived copies, but when they do not exist for transactions entered before this build, documents will be re-rendered using history data.

You can manage archived documents using the SM Manage Document Delivery function or the SM Manage Documents function.

**Set-Up Information**

In order to utilize the Document Archiving functionality, you must set the System Manager Business Rule to Enable Document Archiving to Yes. If you set the rule to No, the Archive settings in the application's Business Rules will have no effect.

Each application in which Document Archiving is available has an Archive section in its Business Rules:

- Set the Use Archive Business Rule to Yes to archive documents, and allow you to reprint prior printed versions of that document. This also activates the Search Document feature, in the Activity window.
- For the Archive Watermark rule, enter the watermark text you would like to appear on the reprinted documents. This is only applicable if Use Archive is set to Yes.

In other words, if Use Archive is set to No, after users print an Invoice, Order, or Check Stub, they will not have the capability to reprint prior printed versions of documents, and the Search Document feature, in the Activity window, will be unavailable. There are still functions that allow users to reprint a document using data from the history files.

If the document was printed online or using batching with the document archiving feature enabled, the Business Rule Archive Watermark text will print. If the document was printed before build 16316, or if the Use Archive option is set to No, the Watermark Text for Reprinted Orders/Invoices will print.

**Application Archive Business Rules screen**

If Use Archive is set to No, after printing an Invoice, Order, or Check Stub, or POS Receipt, users will not have the capability to reprint prior printed versions of documents and the Search Document feature, in the Activity window, will not be available. There are functions that allow users to reprint a document using data from the history files. You must set the Use Archive Business Rule to Yes in order to reprint prior printed versions of that document.

The following applications include an option to define if you would like to use document archiving and the Archive Watermark feature.

- Accounts Payable
If the Business Rule to Use Archive is set to Yes, each time a user prints Check or Voucher, a transaction activity record is saved. To view activity records, users can select the Activity or Search Document button on the toolbar to look for activity records based on specific information. Users can then reprint an activity record that includes the Archive Watermark text entered in Business Rules for that application.

If you use document delivery, that process also uses the same print functionality and treats the document as if it was being printed.

If you have a customized invoice, the system takes a snapshot of the invoice at the time of printing and stores it as an activity record. So if you change something (i.e. company name), when reprinting a prior activity record, the system will use the original company name.

This functionality exists in the following application functions:

- AP, Transactions, Transactions, Print Check
- PA, Payday Work, Print Checks
• PA, Payday Work, Print Vouchers
Notice when reviewing the PA Print Checks Activity Log, you are able to reprint a Check Stub for each Employee.

**Printing Invoices, Checks, and Vouchers using Batching**

The same functionality available in Transactions is also available when printing by batches in the following application functions:

- AP, Pay Invoices, Print Checks
- AP, Pay Invoices, Print Vouchers

**Interactive Views**

After a transaction is posted, users can reprint Orders, Check Stubs, and Invoices from history. The Print function displays all Document No records for that transaction and users can select which one they would like to reprint.

This functionality is available in the following views:
PA, Check History View, Print Check Stub

![Image of PA Check History View]

![Image of Print Check From History]

- Check Stub
- Voucher Stub

Drag a column header here to group by that column.

<table>
<thead>
<tr>
<th>Post Run</th>
<th>Check Number</th>
<th>Check Date</th>
<th>Employee ID</th>
<th>Employee Name</th>
<th>Department ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>201603201353186</td>
<td>20180320</td>
<td>3/20/2018</td>
<td>Salary</td>
<td>Salary, Timothy T</td>
<td>Owners</td>
</tr>
<tr>
<td>20180322004932</td>
<td>20180322</td>
<td>2/21/2018</td>
<td>YorkNathan</td>
<td>York, Nathan</td>
<td>Office</td>
</tr>
<tr>
<td>20180322004332</td>
<td>20180322</td>
<td>2/21/2018</td>
<td>BILLYB</td>
<td>Bee, Billy V</td>
<td>Techs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Earnings</th>
<th>Deductions</th>
<th>Employer Costs</th>
<th>Withholdings</th>
<th>Employer Tax</th>
<th>Leave</th>
<th>Department ID</th>
<th>Code</th>
<th>Description</th>
<th>PayGroup</th>
</tr>
</thead>
<tbody>
<tr>
<td>REG</td>
<td>Regular</td>
<td>Techs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>REG</td>
<td>Regular</td>
<td>Techs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OT</td>
<td>Overtime</td>
<td>Techs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>REG</td>
<td>Regular</td>
<td>Techs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If the document was printed online or using batching with the new document archiving feature enabled, the Business Rule Archive Watermark text will print. If the document was printed before build 16316, or if the Use Archive option is set to No, the Watermark Text for Reprinted Orders/Invoices will print.
MANAGE DOCUMENTS

The SM Manage Documents function allows you to manage archived documents, including reprinting, purging, and exporting archived documents. You can also manage archived documents using the SM Manage Document Delivery function.

- You must select to use document archiving in the Business Rules function, as well as set the Archive business rules for each application in which you want to use document archiving.

Follow these steps to work with Manage Documents:
1. Select Manage Documents from the Document Archive menu.

Manage Documents Menu
2. The **Manage Documents** screen appears.

**Manage Documents Screen**

3. Use the **Data Filter** to select the range of filtering options or leave the filter blank to include all available data. Click **Apply Filter** to populate the grid with documents.

4. To Print documents:
   - Click the **Document** button in the Document column for the selected Document. The system will use your computer's default PDF viewer to open the document.
   - You have the option to print the document via the PDF viewer.
5. To Export documents:
   - Select the Document(s) you want to export by marking the check box in the Select column. Use the **Select All** button to select all the documents, or the **Unselect All** button to clear all the check boxes.
• Click the Export Documents button to export the selected documents. A browse window will appear.

Manage Documents - Export Document Browse Screen

Navigate to the location in which you want to save the document(s), then click OK. The document(s) will be saved as .PDF files in the location you specified. A notification window will appear when the export is complete.

6. To Purge documents:
   • Click the Purge button. The Purge Document window will appear.

Manage Documents - Purge Document Screen

• You have the Option to remove documents or remove document duplicates. Select an option from the drop-down list.
  
  • Remove Documents will delete the documents Prior To the selected date.
  
  • Remove Duplicates will delete duplicates of the document; only the latest version of the document will be retained.
  
  • If you selected to Remove Documents, enter a date in the Prior To field. Documents that were generated before that date will be purged.
• Select the type(s) of documents you want to purge by marking the check box next to the Form ID column. To select all types of documents, click the All button. Click the None button to clear all the check boxes.

• Select a command button:

**Command Buttons**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Execute</td>
<td>Purge the selected documents.</td>
</tr>
<tr>
<td>Activity</td>
<td>View the Activity Log for processing.</td>
</tr>
<tr>
<td>Reset</td>
<td>Set all fields to their default values.</td>
</tr>
</tbody>
</table>

• A notification window will appear when the purge is complete.

The Activity Log dialog box appears when you click Activity. The Activity Log dialog box tracks all post activity for administrative purposes. The system assigns each post a run ID.

**Activity Log Dialog Box**

<table>
<thead>
<tr>
<th>Name</th>
<th>Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Run</td>
<td>The system assigned post run ID.</td>
</tr>
<tr>
<td>Run Time</td>
<td>The date and time the purge was made.</td>
</tr>
<tr>
<td>Description</td>
<td>The purge description.</td>
</tr>
</tbody>
</table>
User ID
The user who performed the purge.

Comments
The comments, if applicable, entered in the Comments field.

Print Log
Not available for this function.

7. Select a command button:

Command Buttons

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export Documents</td>
<td>Export the selected documents as a .pdf to a specific folder.</td>
</tr>
<tr>
<td>Activity</td>
<td>Not available for this function.</td>
</tr>
<tr>
<td>Reset</td>
<td>Set all fields to their default values.</td>
</tr>
<tr>
<td>Select All</td>
<td>Select all listed documents.</td>
</tr>
<tr>
<td>Unselect All</td>
<td>Clear all check boxes.</td>
</tr>
<tr>
<td>Purge</td>
<td>Open the Purge Document window.</td>
</tr>
</tbody>
</table>
Archive Document Example

Below is an example of what the Print Online Invoice for an Accounts Receivable Transaction will look like with the Document Archiving activated.

**Print Online Invoices Dialog Box**

1. The **Print Invoice** screen appears when you select **Print** and **Invoice** on the Transactions screen.
2. If you use multi-currency, select the **Print All in Base** currency check box, to print the invoice or credit memo in your company’s base currency; otherwise, clear the box to print the invoice in the customer’s currency. If you do not use multi-currency, this option is not available.
3. To **Print Additional Descriptions** on the invoice, select the check box; otherwise, clear it.
4. To print the **Federal Tax Id** for the current company at the bottom of the invoice, select the check box; otherwise, clear it.
5. The **Invoice Date** automatically appears.

   If you enter an invoice number on the Transactions screen, that invoice number is printed on the invoice and the next available invoice number is ignored and not effected.

6. Select a **Message** for the invoice.
7. Select a command button:

**Command Buttons**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reset</td>
<td>Set all fields to their defaults.</td>
</tr>
</tbody>
</table>
Preview
Preview the report on your monitor.

Output
Output the report as a .pdf file and save it.

Print
Print the report.

Activity
Display the Activity Log to view printing activity.

Search Document
Open the Archived documents search dialog box.
(Button only available when you select Yes to Use Archive in the Business Rules.)

Activity Log
Use the Activity Log to view printing activity for administrative purposes.

<table>
<thead>
<tr>
<th>Name</th>
<th>Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Run</td>
<td>The system assigned post run ID.</td>
</tr>
<tr>
<td>Run Time</td>
<td>The date and time the printing was done.</td>
</tr>
<tr>
<td>Description</td>
<td>The printing description.</td>
</tr>
<tr>
<td>User ID</td>
<td>The user who performed the print.</td>
</tr>
<tr>
<td>Comments</td>
<td>The comments, if applicable, entered in the Comments field.</td>
</tr>
<tr>
<td>Print Log</td>
<td>Not available for this function.</td>
</tr>
</tbody>
</table>

- Click the Plus (+) button next to the Post Run to view the Invoice(s) printed for the selected printing.
- Click the Document button to preview the Invoice printed for the selected Document No.

NOTE: These options are only available if you selected Yes to Use Archive in the Business Rules function.

Activity Log Screen
Search Document

Use the Search Document button to view archived Invoices. This button is only available if you selected Yes to the Use Archive Business Rule (page 3-7).

Select the range of Filter Criteria to include in the View. Leave the filter criteria blank to include all records. Click Apply Filter to populate the grid below.

<table>
<thead>
<tr>
<th>Name</th>
<th>Displays</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Number</td>
<td>The Invoice number printed.</td>
</tr>
<tr>
<td>Run Time</td>
<td>The date and time the printing was done.</td>
</tr>
<tr>
<td>Description</td>
<td>The printing description.</td>
</tr>
<tr>
<td>Reference</td>
<td>The Customer ID for which the invoice was printed.</td>
</tr>
<tr>
<td>Form ID</td>
<td>The type of form printed.</td>
</tr>
<tr>
<td>User ID</td>
<td>The user who performed the print.</td>
</tr>
</tbody>
</table>
Host ID

The workstation name used to print the invoice.

Comments

The comments, if applicable, entered in the Comments field.

Document

Preview the original invoice printed.

Search Document Screen