# AddonSoftware by Barista
# Printing & Document Management
# Standard MASI Setup for Client Implementation

## Introduction

In order to provide assurance to clients regarding the printing and filing of their audit trail reports (generally, the registers), the following setup is implemented.

## Staff Employees

This setup is based on the assumption that "Staff" will be printing all the registers, and that the client would prefer that all the registers be saved automatically in PDF form for safety. By saving them automatically, they can be more assured that the file will actually be saved. If a manual "save" were required, some reports might not be saved.

The automatic save feature in DocOut saves to a file path that is specified in the Document Group record that is associated with the operator, not the report. So in order that the registers are saved together in the same directory, the same Document Group must be assigned to all the "staff" level operators that might be printing a register.

Therefore, all "staff" level personnel are assigned the BASIC Document Group. That Document Group provides for the operator to print reports to a system printer, and to automatically save it in PDF form to the specified Registers folder. They have no other options for any DocOut report they run.

Please note that all registers, regardless of the module, will be archived in the same "register" folder. Once there, they can be filtered together for access and retrieval.

## Management Employees

Management employees need the options to print reports, export them to Microsoft Excel, save them as PDF and email them, or simply to preview them on the screen and then delete them.

In order to provide for these options, the ADMIN Document Group is assigned to them. It enables all the options provided by DocOut for any report run by Management.

NOTE: If management runs a register, it will NOT be automatically saved in the archive, because the ADMIN Document Group does not provide for that, and it cannot provide for that in addition to the other options.

Therefore, Management has choices: it can go ahead and run the register, preview it, print it, or whatever, but Management should not allow the system to "update" the master files after the register has been printed, because if the update is not posted, the register will still be there for Staff to run it again. When "Staff" runs the register again, in order to update the files, the register will then be saved automatically.

The other option is that when Management runs the register, they "save as" the register into the proper file before they run the update.

So either Management will need to remember not to run the update, or they will need to remember to "save-as" the report in the proper place.

## Non DocOut Reports

Some forms and other non-DocOut reports save automatically whenever they are run, whether they are printed on paper or not. These include OP Invoices, AR Invoices, OP Picking Lists, SF Picking Lists, and Customers Statements. And they can be run by anyone, and still get properly archived.

All other non-DocOut reports (12 more) output to preview and can be printed or saved at the operator's choosing. Again, anyone can run them.

For MASI clients, we will make program customizations that provide for the OP Invoices and AR Invoices, at a minimum, to archive automatically in a folder of their own.

## Summary

We want to make sure the critical audit trail reports are automatically saved in specified and completely predictable folders for future access and retrieval. These critical reports are all the system registers plus the company's invoices.

Any other reports or forms the client wants to archive should be discovered during implementation and set up for automatic archiving.