



Information Integration Group, Inc.

# Share Point Document Management For MAS 90/200

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software

Master Developer

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## Installation Instructions and Cautions

**PLEASE NOTE: MAS 90** must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically.

Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

### Wait! Before You Install – Do You Use CUSTOM OFFICE?

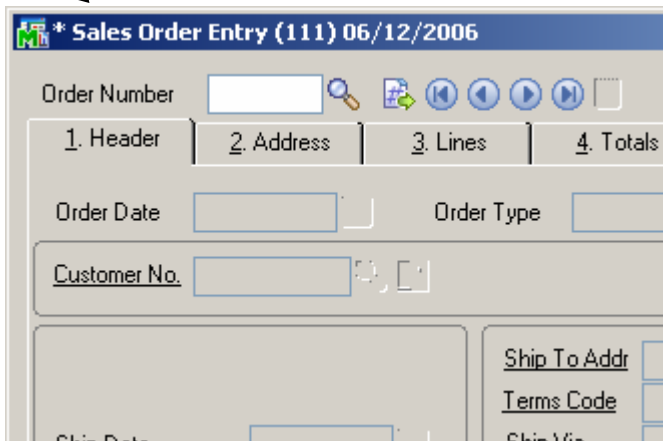
**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any MAS 90 screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update.

**Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



## Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the MAS 90.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement Name	4.20		AAAAAAAAAAAAAAAAAA	BBBBBB

Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

## ODBC Security

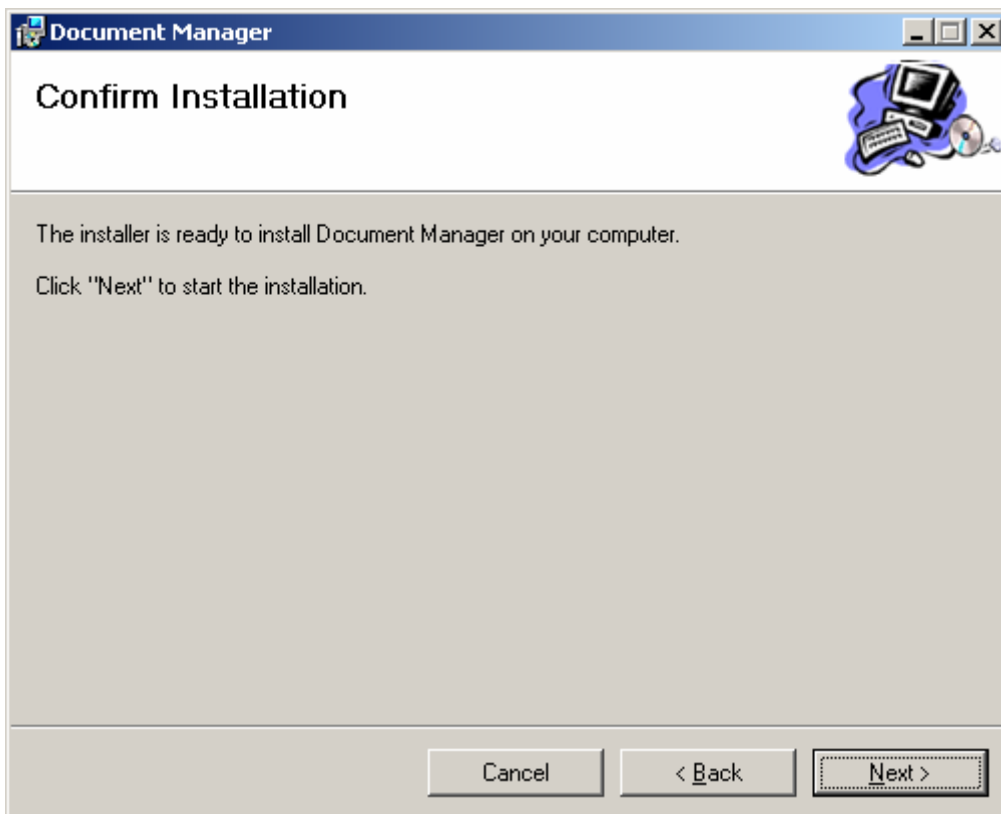
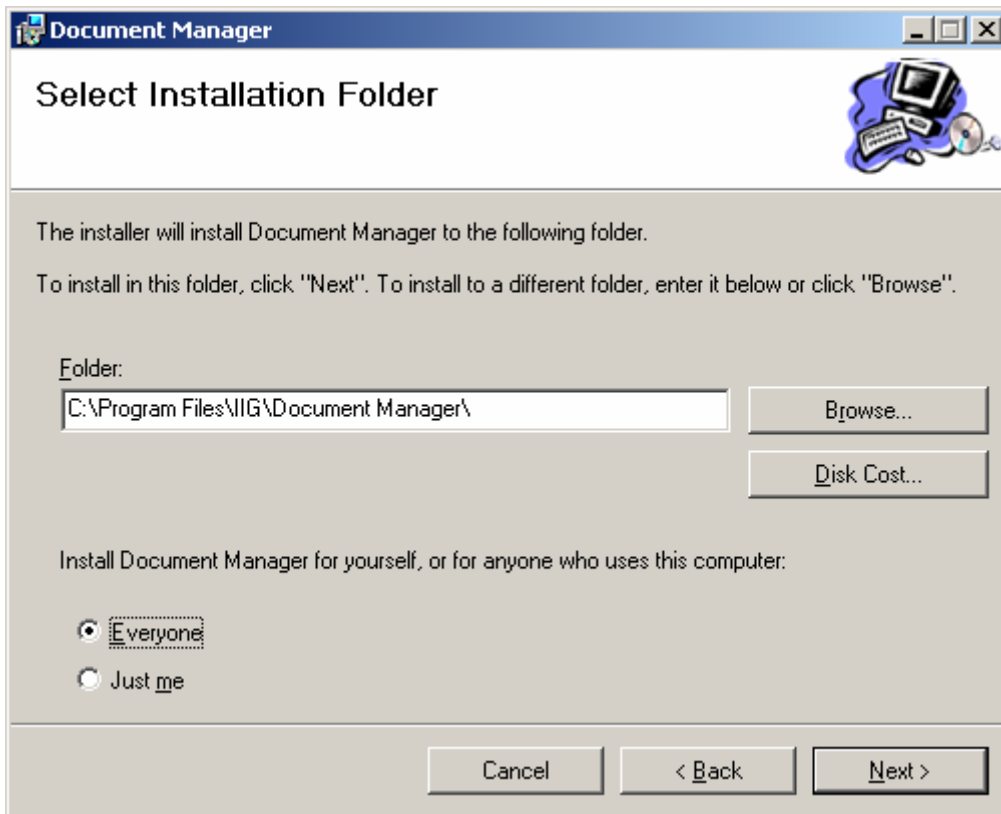
After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



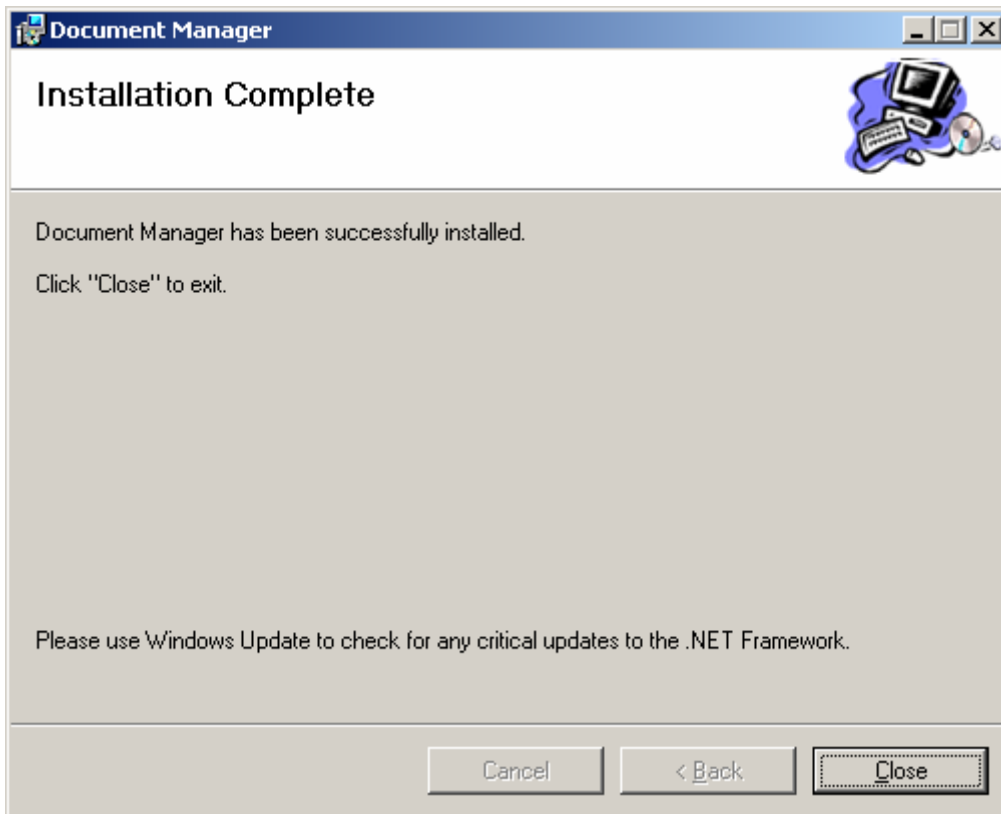
## Client Setup

The “Document Manager Setup.msi” file is present in the “DocumentManager\Client\” folder. After running it the following setup wizard will follow.

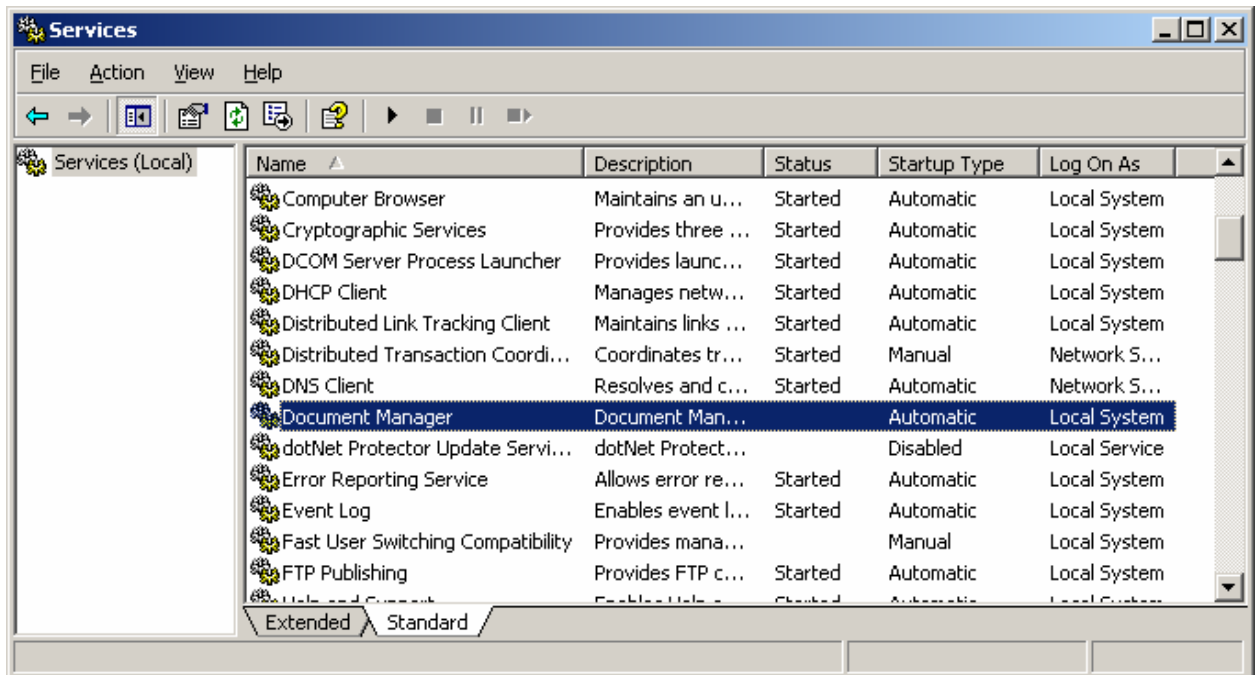




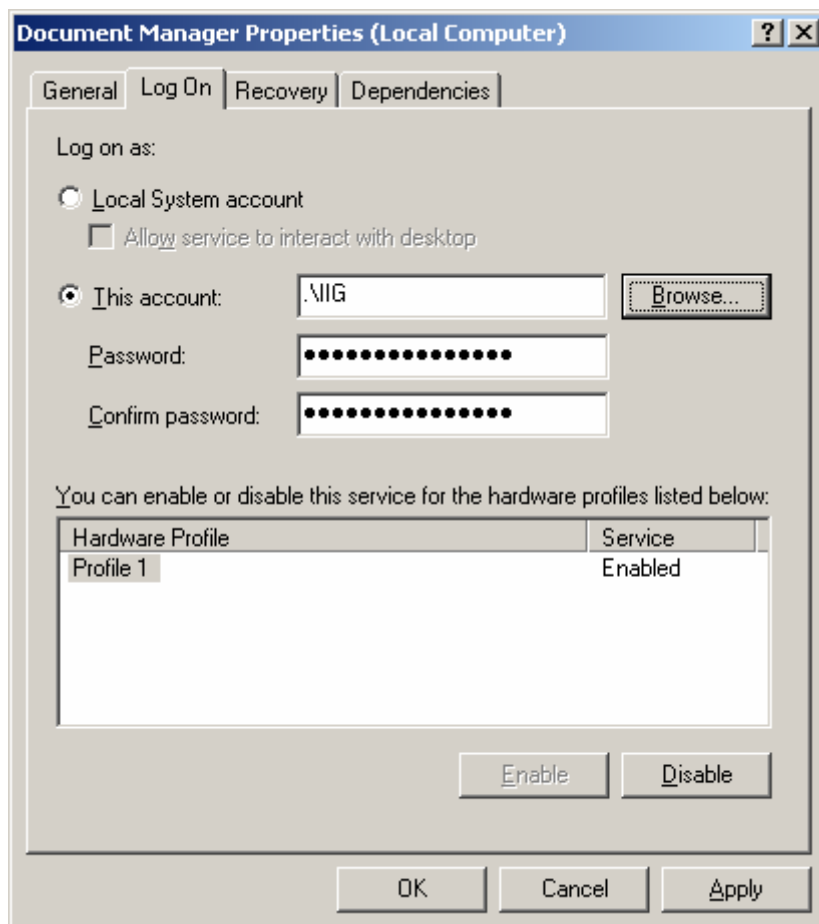




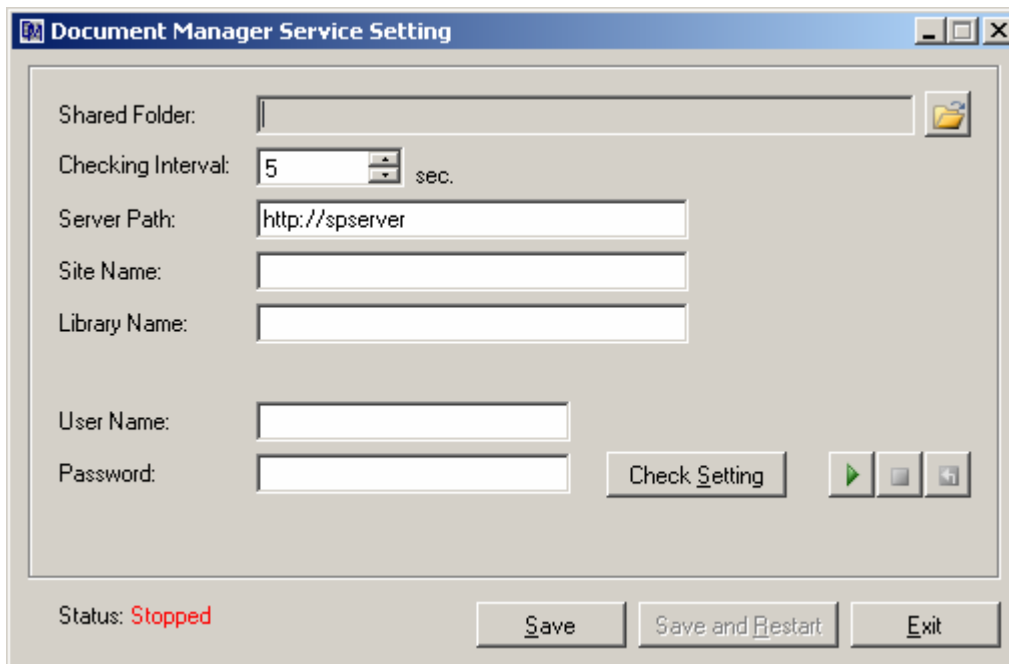
After the installation open **Services** from **Administrative Tools**.



Go to the **Document Manager Properties** -> **Log On** tab, choose the **This account** option and select a user with administrative rights.



For starting the program run **Document Manager Setting** from **Start -> Programs -> IIG -> Document Manager Setting** menu.



The screenshot shows the 'Document Manager Service Setting' dialog box. It contains the following fields and controls:

- Shared Folder:** An empty text box with a folder icon on the right.
- Checking Interval:** A spin box set to '5' with 'sec.' to its right.
- Server Path:** A text box containing 'http://spserver'.
- Site Name:** An empty text box.
- Library Name:** An empty text box.
- User Name:** An empty text box.
- Password:** An empty text box.
- Check Setting:** A button with a green play icon to its right.
- Status:** A label showing 'Stopped' in red text.
- Save:** A button.
- Save and Restart:** A button.
- Exit:** A button.

**Shared Folder** – The Shared Folder (for MAS90 and Share Point Document Manager) must be specified here.

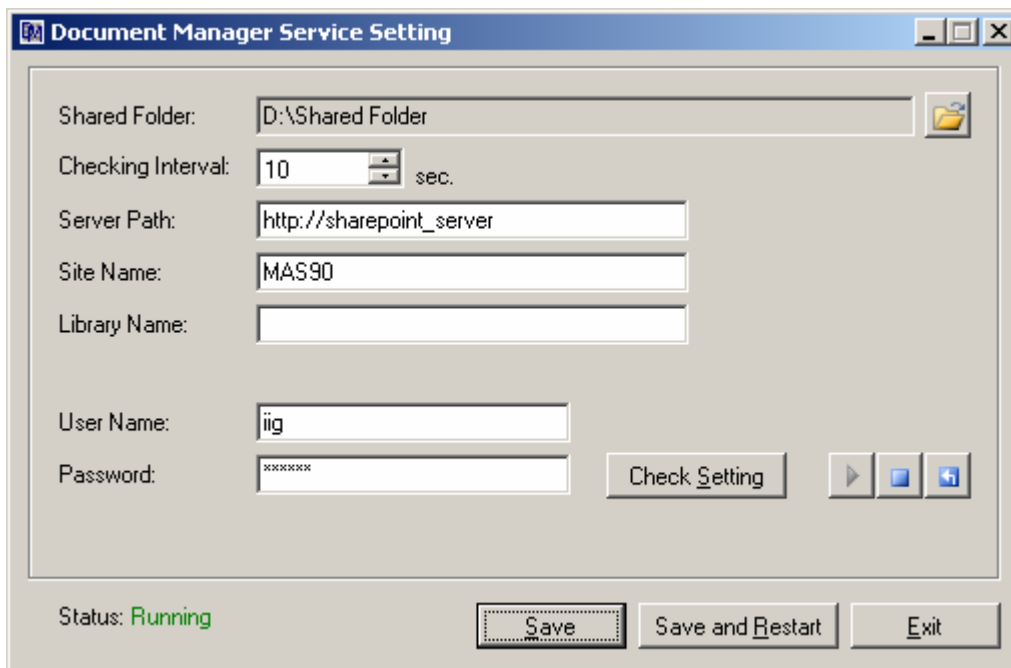
**Checking Interval** – Interval is set by seconds to check the Shared Folder.

**Server Path** – The server path is specified.

**Site Name** – The site name is specified.

**Library Name** – A default library name is specified.

**User Name, Password** – Such Username and Password must be specified which have rights for modifying access to the Share Point server.

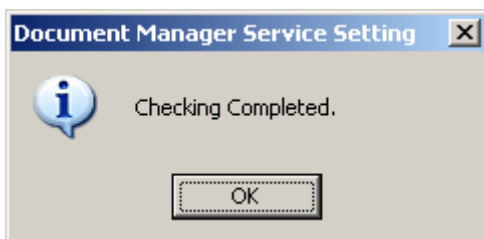


**Check Setting** – Press this button to verify the settings information on the screen.

If any setting does not match, an appropriate error message will be displayed. Here is an example:



If the whole specified data is correct, the following message will be displayed:



**Run, Stop, Restart Windows Service** – press the button to perform desired command.

**Save** – Press this button to save the settings. If the settings have been changed and saved, they can be acted only after the server is restarted. In order not to restart the server again, click the **Save and Restart** button.

## MAS90/200

### Share Point Document Management Options

The **Share Point Document Management Options** program has been added under the **Library Master Setup**. The needed settings must be done here by all means to enable the rest processing.

Temporary output folder must be specified in the **Choose Temporary Output Folder** field by all means. **Note that the path must be mentioned only through net when using MAS200. And in case of using MAS90, it's recommended to specify the path through net in order to avoid problems.**

In the **Share Point Library Name** fields specify the name of the library where documents must be uploaded into. The last three (A/R Checks, A/R Invoices, Customer PO) Library Names are just informative as no Printings are specified for them.

The path of the Share Point Library is specified in the **URL Address** field for each option by all means.

Choose Temporary Output Folder	
\\KarenYep\D_KarenYep\MAS\420\SDM\SDM_NEW\MAS90\TemporaryOutput	
Upload to Share Point	
Share Point Library Name	
Picking Sheet Printing <input checked="" type="checkbox"/>	Pick Tickets
URL Address	http://armens-vw/sdm/Pick%20Tickets/Forms/AllItems.aspx
A/P Check Printing <input checked="" type="checkbox"/>	AP Checks
URL Address	http://armens-vw/sdm/AP%20Checks/Forms/AllItems.aspx
Sales Invoice Printing <input checked="" type="checkbox"/>	Sales Invoices
URL Address	http://armens-vw/sdm/Sales%20Invoices/Forms/AllItems.aspx
Customer Statement Printing <input checked="" type="checkbox"/>	Customer Statements
URL Address	http://armens-vw/sdm/Customer%20Statements/Forms/AllItems.aspx
Purchase Order Printing <input checked="" type="checkbox"/>	Purchase Orders
URL Address	http://armens-vw/sdm/Purchase%20Orders/Forms/AllItems.aspx
A/R Checks <input type="checkbox"/>	A/R Checks
URL Address	http://armens-vw/sdm/AR%20Checks/Forms/AllItems.aspx
A/P Invoices <input type="checkbox"/>	A/P Invoices
URL Address	http://armens-vw/sdm/AP%20Invoices/Forms/AllItems.aspx
Customer PO <input type="checkbox"/>	Customer PO
URL Address	http://armens-vw/sdm/Customer%20PO/Forms/AllItems.aspx

The check boxes specified on this screen will be defaulted in the corresponding screens for the **Upload to Share Point** options.

*Note: This option must be specified for each Company separately.*

## Sales Order

### Picking Sheet Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Main** tab of **Picking Sheet Printing** screen.

If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Order and sent to upload to Share Point (after printing the Order). Note that the upload will not be done during previewing mode.

Press the **Share Point Documents** button to go to the **Pick Tickets** Library of Share Point server.

The screenshot shows a Microsoft Internet Explorer browser window displaying a SharePoint 'Pick Tickets' library. The browser address bar shows the URL: `http://armens-vw/sdm/Pick%20Tickets/Forms/AllItems.aspx`. The page title is 'Pick Tickets' and it displays a table of ticket records. The table has the following columns: Type, Order No, Order Date, Customer No, Salesperson No, Customer PO#, Bill-To Name, Ship-to Name, Comment, Confirm to, ItemNo. 1, ItemNo. 2, and ItemNo. 3. The table contains several rows of data, including tickets from AMERCON, BRESLIN, ATOZ, CUSTOM, ABF, and AVNET.

Type	Order No	Order Date	Customer No	Salesperson No	Customer PO#	Bill-To Name	Ship-to Name	Comment	Confirm to	ItemNo. 1	ItemNo. 2	ItemNo. 3
	0000149	5/23/2010	02-AMERCON	0400					Mike Thompson	GB-EQ380-10-MF	2480-8-50	25
	0000174	4/23/2008	02-AMERCON	0400		American Concrete Service	American Concrete Service		Mike Thompson			
	0000174	4/23/2008	02-AMERCON	0400		American Concrete Service	American Concrete Service		Mike Thompson			
	0000116	5/19/2010	01-BRESLIN	01-0100	90-1004	Breslin Parts Supply	Breslin Parts Supply		Winnie Spackman	1001-HON-H254LK	ARS-9301	D1
	0000104	4/20/2010	02-ATOZ	02-0400	VERBAL	A To Z Carpet Supply	A To Z Carpet Supply		Allen Ableson	GB-EQ380-5-MM	GB-EQ380-10-MF	66 24
	0000157	5/15/2010	02-CUSTOM	02-0300		Custom Craft Products	Custom Craft Products		Rex Anderson	6650-26-16-11		
	0000153	5/11/2010	01-ABF	01-0100	XX-890200	American Business Futures	American Business Futures		Artie Johnson	6657-24-20-12	8972	
	0000105	4/20/2010	01-AVNET	01-0200	TS0420	Avnet Processing Corp	Avnet Processing Corp		Tony Schultz	1001-HON-H252		
	0000115	5/18/2010	01-ABF	01-0100	VERBAL	American Business Futures	American Business Futures	Customer to confirm	Artie Johnson	D1400	D1700	

## S/O Invoice Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Main** tab of **S/O Invoice Printing** screen.

S/O Invoice Printing (ABC) 5/4/2008

Form Code: STANDARD  
Description: Preprinted Laser

Number of Copies: 1 Collated:  Multi-Part Form Enabled:  Multi Part...

1. Main | 2. Select

Sort Invoices By: Invoice Number

Invoice Type to Print: All  
Print Invoices Already Printed:  Print Comments: Partial

Line 1 Message:   
Line 2 Message:

Share Point  
Upload to Share Point:  Share Point Documents

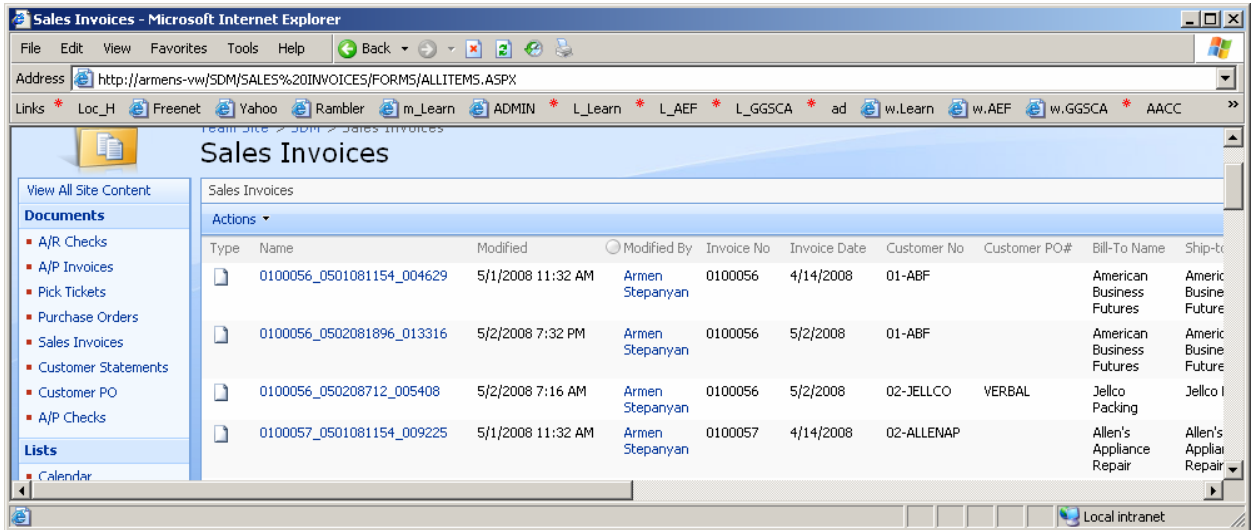
Share Point Documents, Alt+W

\\MIGSERVER\HP LaserJet 1022 Alignment Print Preview Setup ?

If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Invoice and sent to upload to Share Point (after printing the Invoice). Note that the upload will not be done during previewing mode.

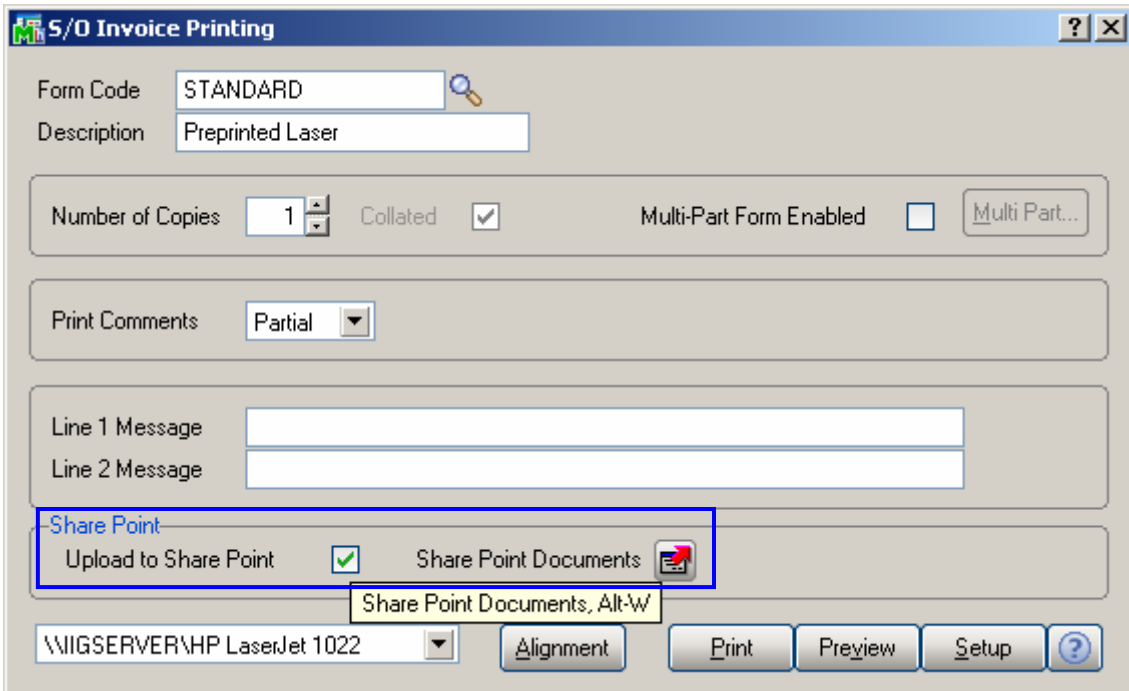


Press the **Share Point Documents** button to go to the **Sales Invoices** Library of Share Point server.



## S/O Invoice Data Entry Quick Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **S/O Invoice Printing** screen which is opened by clicking on the **Quick Print** button from **S/O Invoice Data Entry** screen.



If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which a separate PDF file will be created for current Invoice and sent to upload to Share Point (after printing the Invoice). Note that the upload will not be done during previewing mode.

## Sales Order Entry

The **Pick Tickets** button has been added to the **Sales Order Entry** header which leads to Share Point to see the documents of the Pick Tickets Library. **Pick Tickets** and **Customer PO** items are available in the popup menu, which lead to corresponding libraries in Share Point.

**Sales Order Entry (ABC) 5/4/2008**

Order Number: 0000174

Order Date: 5/4/2008

Order Type: Standard Order

Master/Repeating No.:

Customer No.: 01-ABF

American Business Futures

Cust PO:

Ship Date: 5/4/2008

Status: New

Reason:

Whse: 001 EAST WAREHOUSE

Sales Tax:

Schedule: WI

Wisconsin:

Ship To Addr: 2

Terms Code: 01

Net 30 Days

Ship Via: UPS BLUE

FOB:

Confirm To: John Quinn

E-mail: artie@abf.com

Fax No.:

Batch Fax:

Comment:

Salesperson: 0100 Jim Kentley

Split Comm.: No

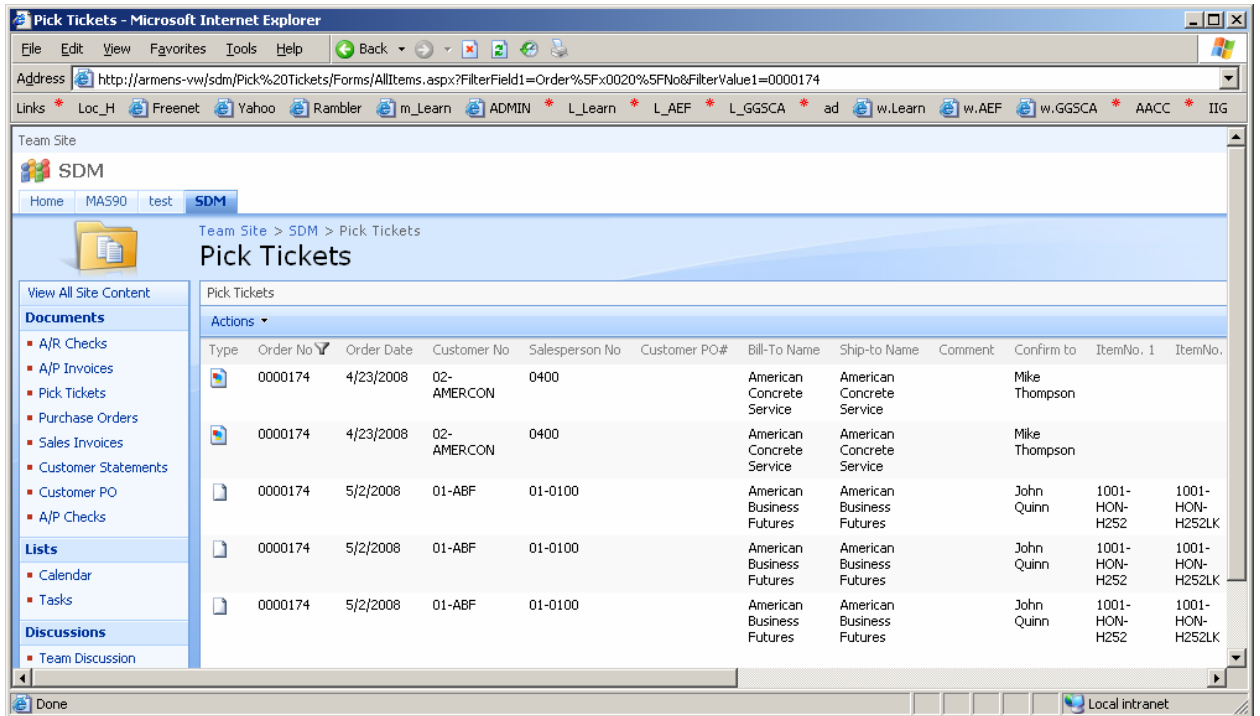
Split Comm...:

Print Order:

Print Pick Sheets:

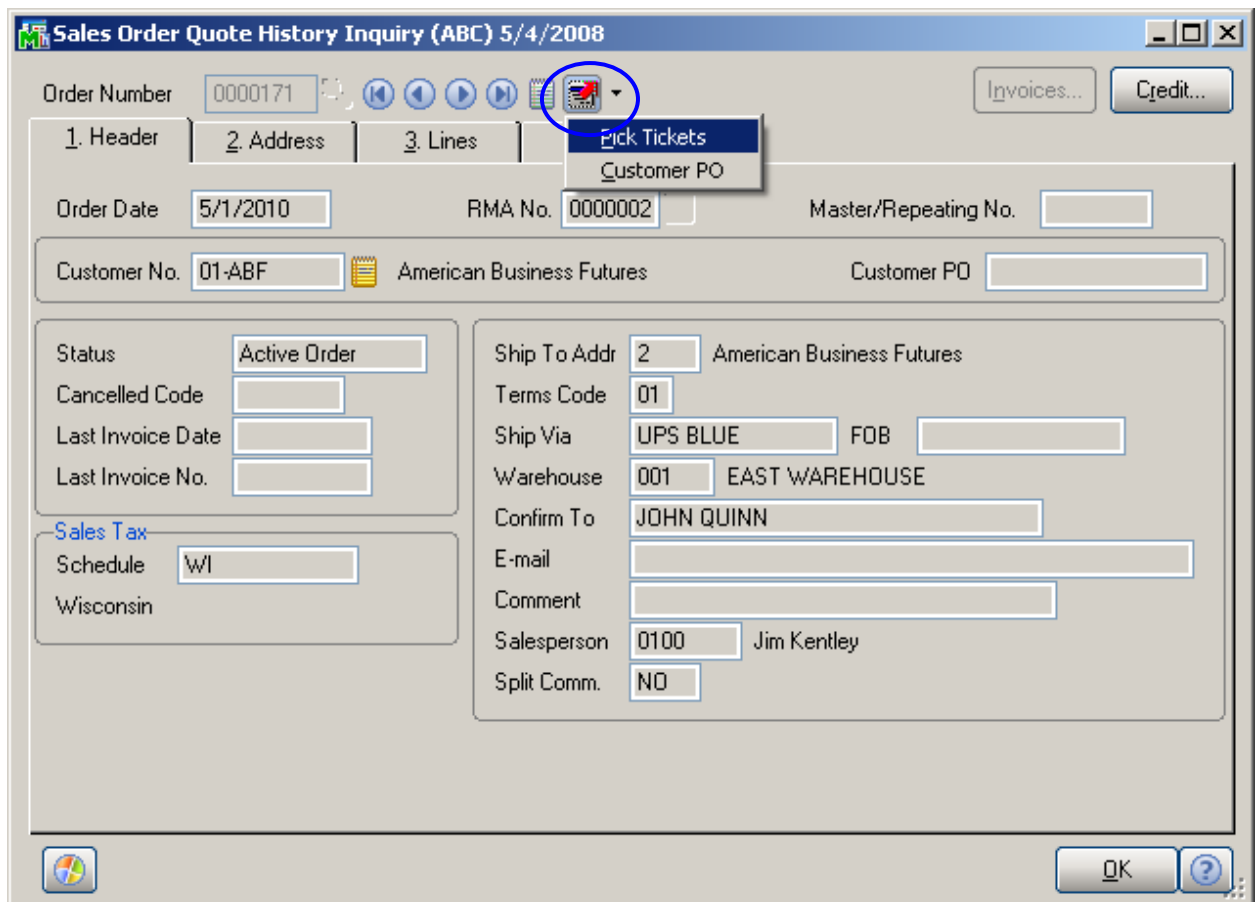
Quick Print... Recalc Price Accept Cancel Delete

If no Order is selected, all the documents will be listed in Share Point, otherwise, if an Order is selected then only the ones will be listed which are related with that Order.



### Sales Order Inquiry, Sales Order Quote/History Inquiry

Similar button as in **Sales Order Entry** has been added also in **Sales Order Inquiry** and **Sales Order/Quote History Inquiry**.



## Accounts Payable

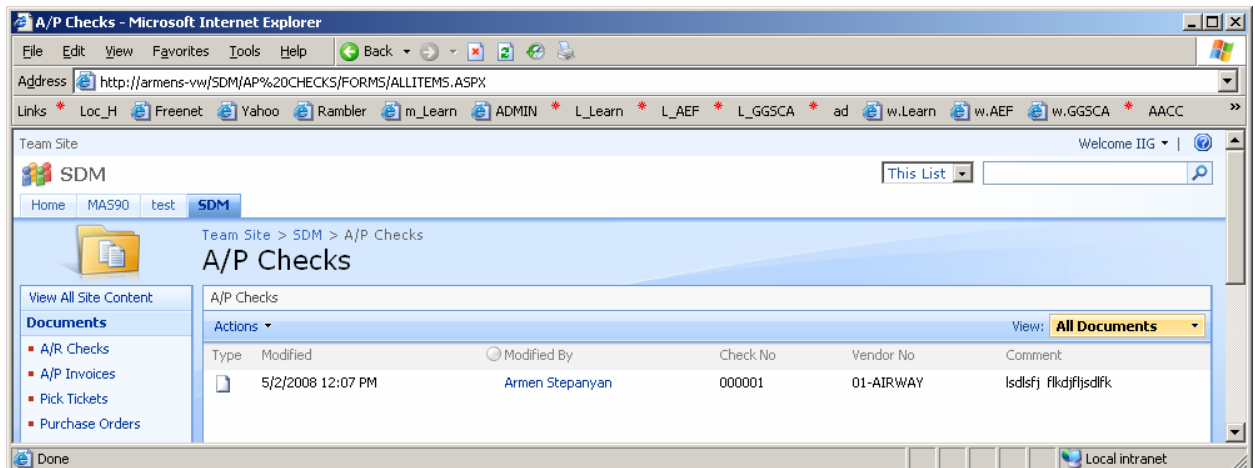
### A/P Check Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Main** tab of **A/P Check Printing** screen.

The screenshot shows the 'A/P Check Printing (ABC) 5/4/2008' window. The 'Main' tab is active. The 'Share Point' section is highlighted with a blue box, showing the 'Upload to Share Point' checkbox checked and the 'Share Point Documents' button. A tooltip for the button reads 'Share Point Documents, Alt+W'. The printer selection is set to '\\IIGSERVER\HP LaserJet 1022'.

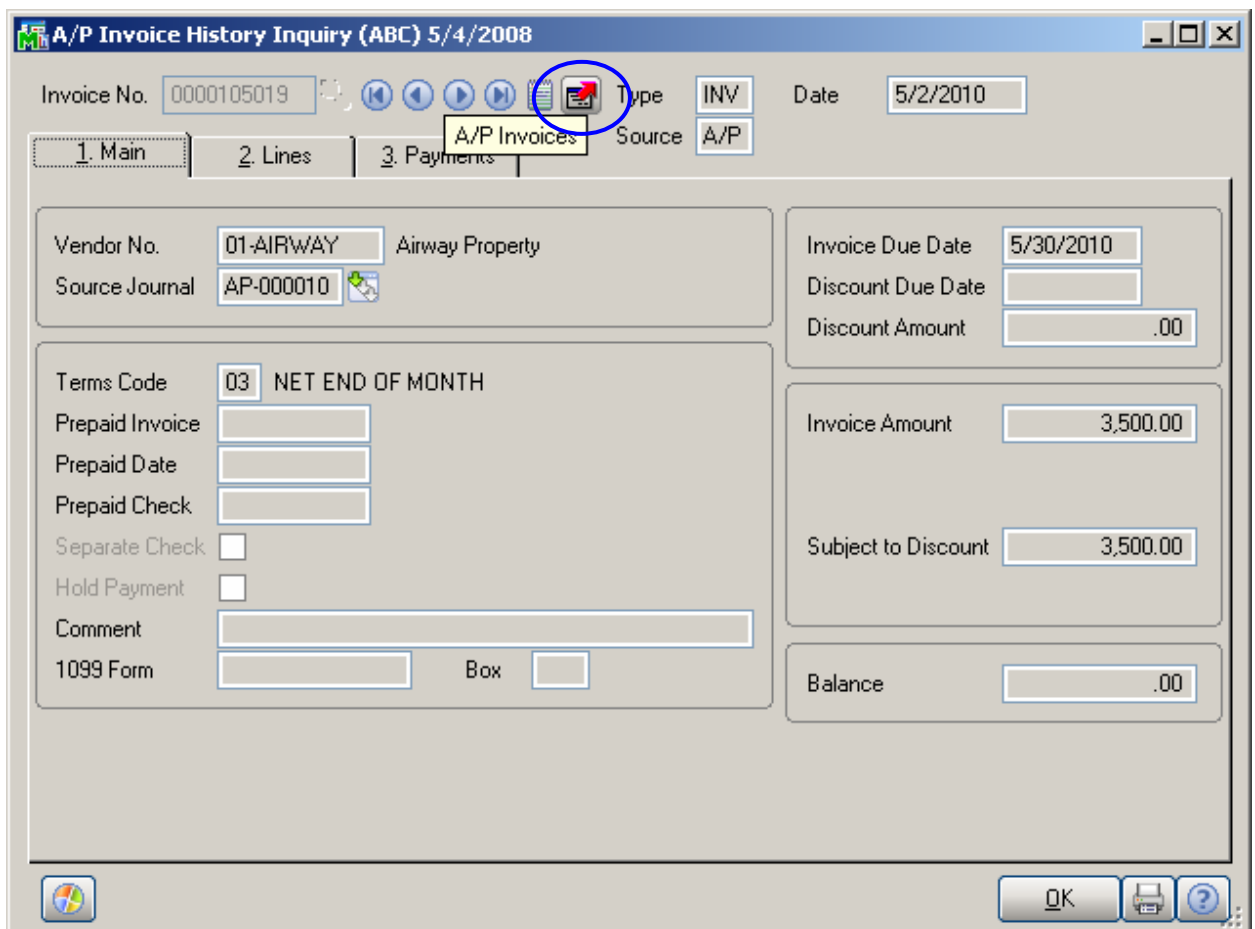
If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Check and sent to upload to Share Point (after printing the Check). Note that the upload will not be done during previewing mode.

Press the **Share Point Documents** button to go to the **A/P Checks** Library of Share Point server.



## A/P Invoice History Inquiry

The **A/P Invoices** button has been added to the **A/P Invoice History Inquiry** header which leads to Share Point where the **A/P Invoices** Library documents are displayed according to the selected Invoice No. and Vendor No.



Team Site

SDM

Home MAS90 test SDM

Team Site > SDM > A/P Invoices

A/P Invoices

View All Site Content

Documents

- A/R Checks
- A/P Invoices
- Pick Tickets
- Purchase Orders
- Sales Invoices
- Customer Statements
- Customer PO

A/P Invoices

Actions

Type	Vendor No.	Invoice No.	Invoice Date	Invoice Due Date	Comment	Approved	ItemNo. 1	ItemNo. 2	ItemNo. 3	ItemNo. 4	ItemNo. 5
Invoice No : 0000105019 (2)											
	01-AIRWAY	0000105019	5/2/2010	5/30/2010		Yes	555000300				
	01-AIRWAY	0000105019	5/2/2010	5/30/2010		No	555000300				

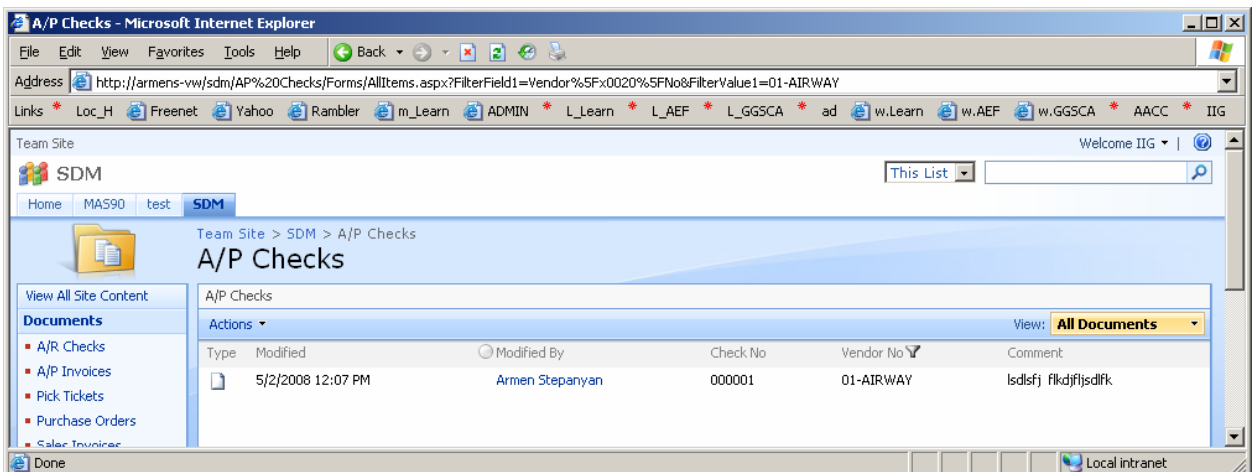
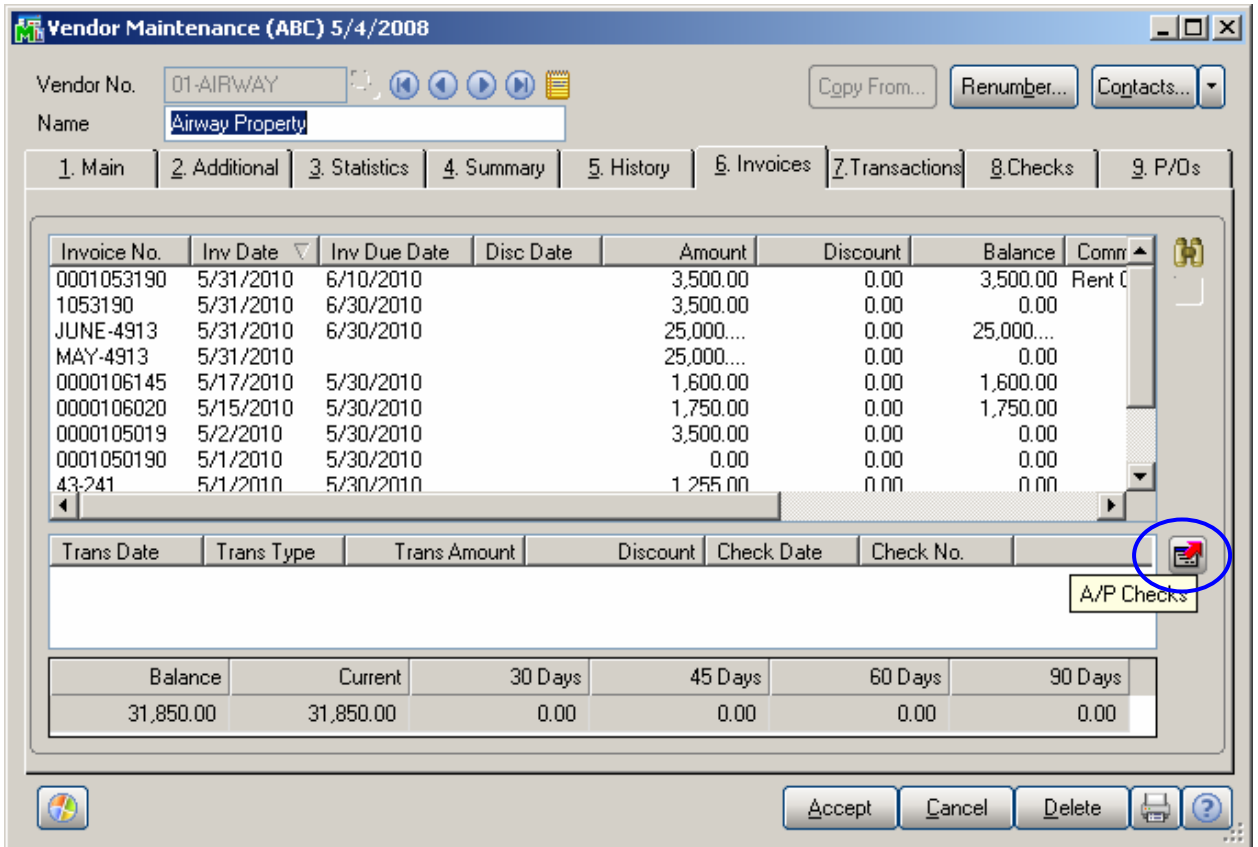
Done

Local intranet

If no Invoice No. is selected, then all the documents of the appropriate Library will be listed in Share Point.

**Vendor Maintenance, Vendor Inquiry**

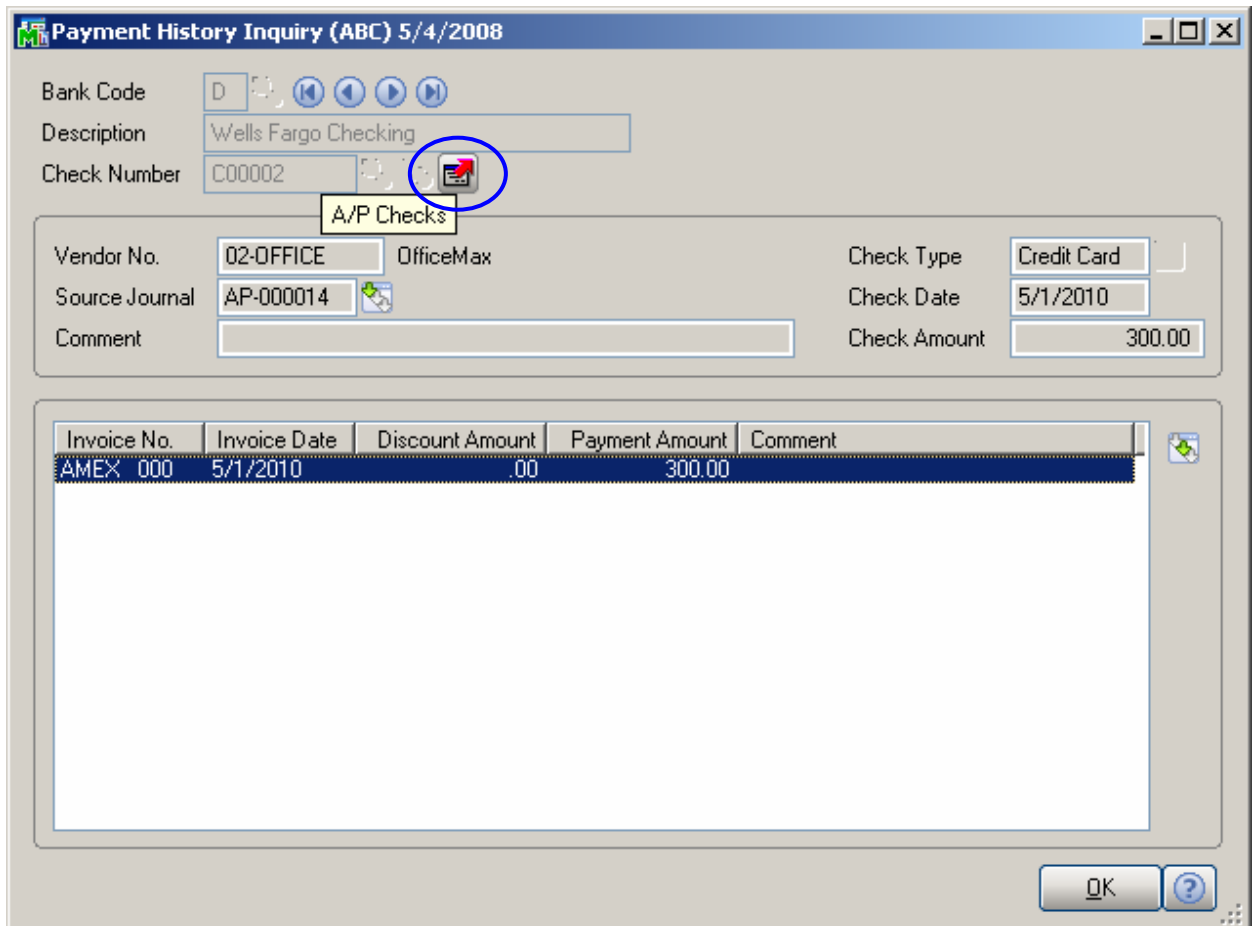
The **A/P Checks** button has been added to the **Invoices** tab of **Vendor Maintenance** and **Vendor Inquiry** which leads to Share Point where Library documents are displayed according to the selected Vendor No.



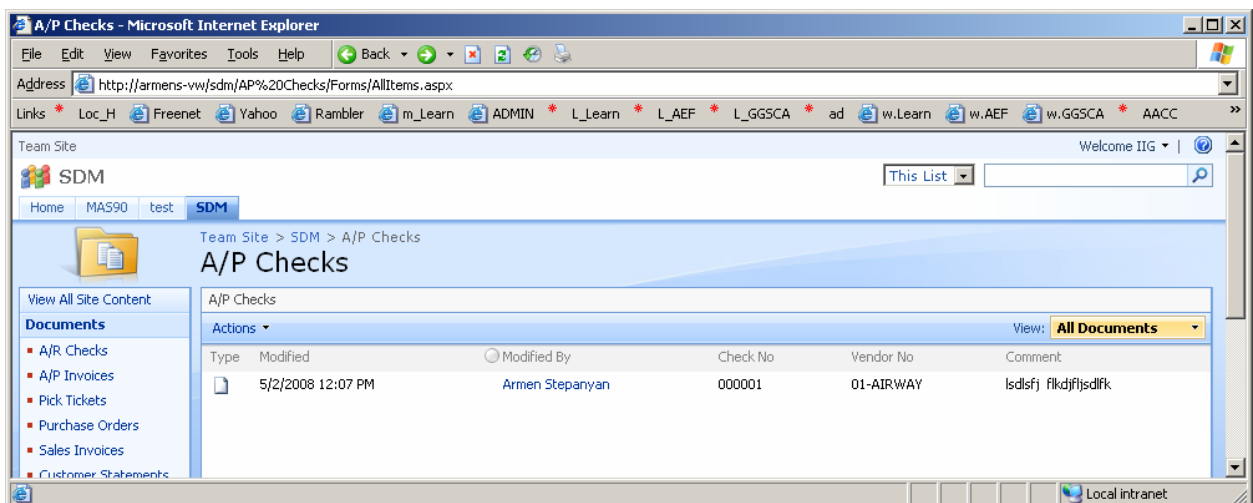


### Payment History Inquiry

The **A/P Checks** button has been added to the **Payment History Inquiry** screen which leads to Share Point where Library documents are displayed according to the selected Check Number and Vendor No.



If no Check Number is selected, then all the documents of the appropriate Library will be listed in Share Point.



## Purchase Order

### Purchase Order Printing

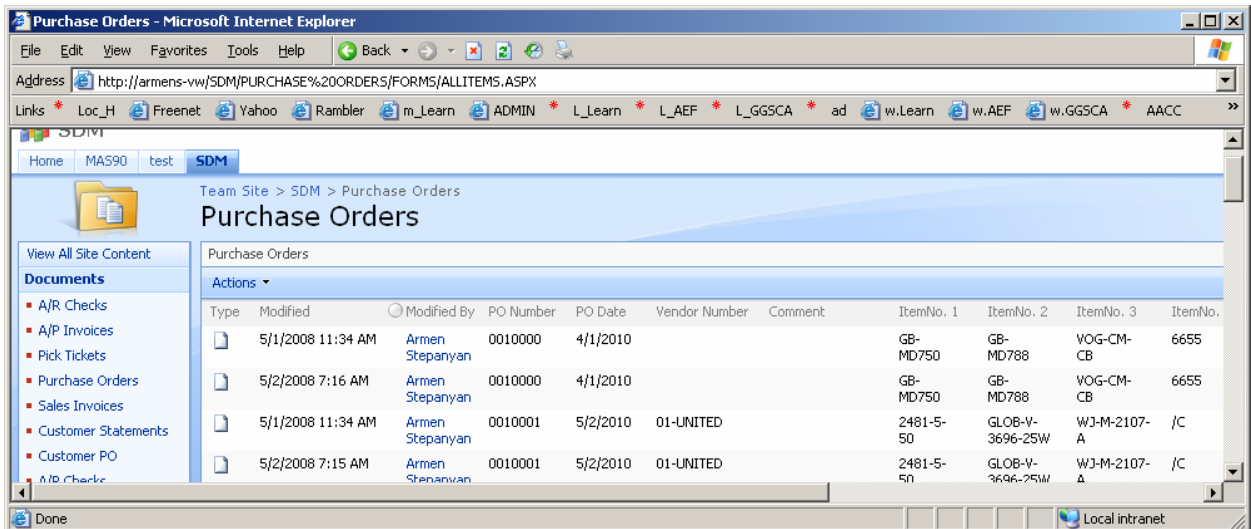
The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Main** tab of **Purchase Order Printing** screen.

The screenshot shows the 'Purchase Order Printing' dialog box. The 'Share Point' section is highlighted with a blue box. It contains the following elements:

- Order Type to Print:** All Orders
- Order Status to Print:** All Statuses
- Line 1 Message:** COPY OF THE PURCHASE ORDER MUST BE INCLUDED.....
- Line 2 Message:** WITH ALL SHIPMENTS.....
- Order Form Code:** 1 (with a search icon) and 122
- Copies:** 1
- Collated:**
- Order Number:**  (with a search icon) and a patterned field (with a search icon)
- Share Point:**  Upload to Share Point and Share Point Documents (with a tooltip: Share Point Documents, Alt+W)
- Buttons:** Adobe PDF, Print, Preview, Printer Setup...

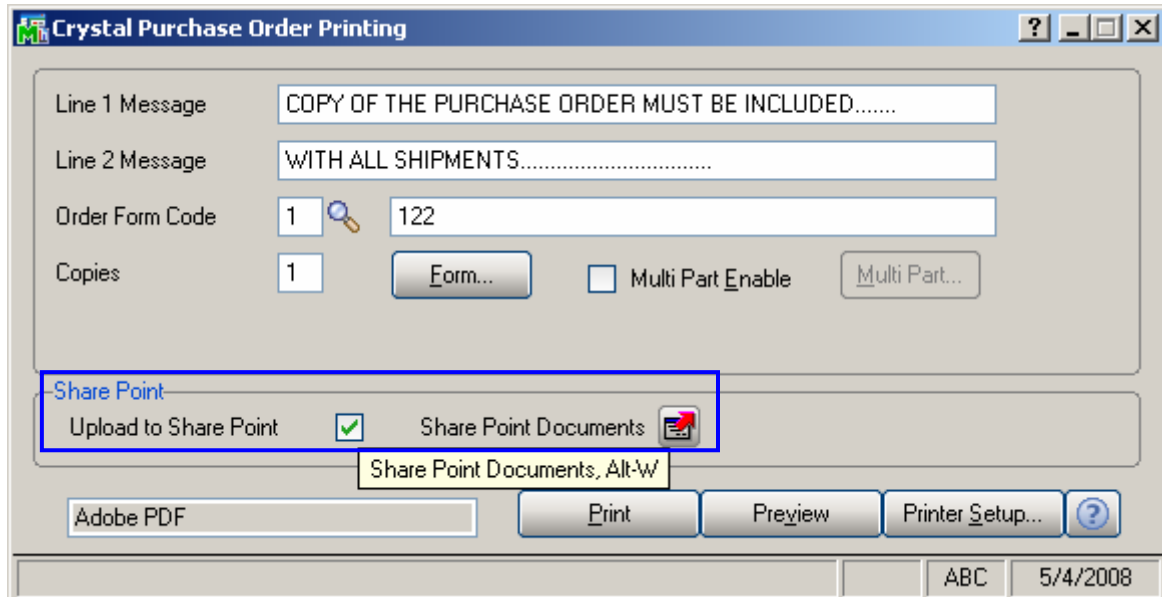
If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Order and sent to upload to Share Point (after printing the Order). Note that the upload will not be done during previewing mode.

Press the **Share Point Documents** button to go to the **Purchase Orders** Library of Share Point server.



## Purchase Order Entry Quick Printing

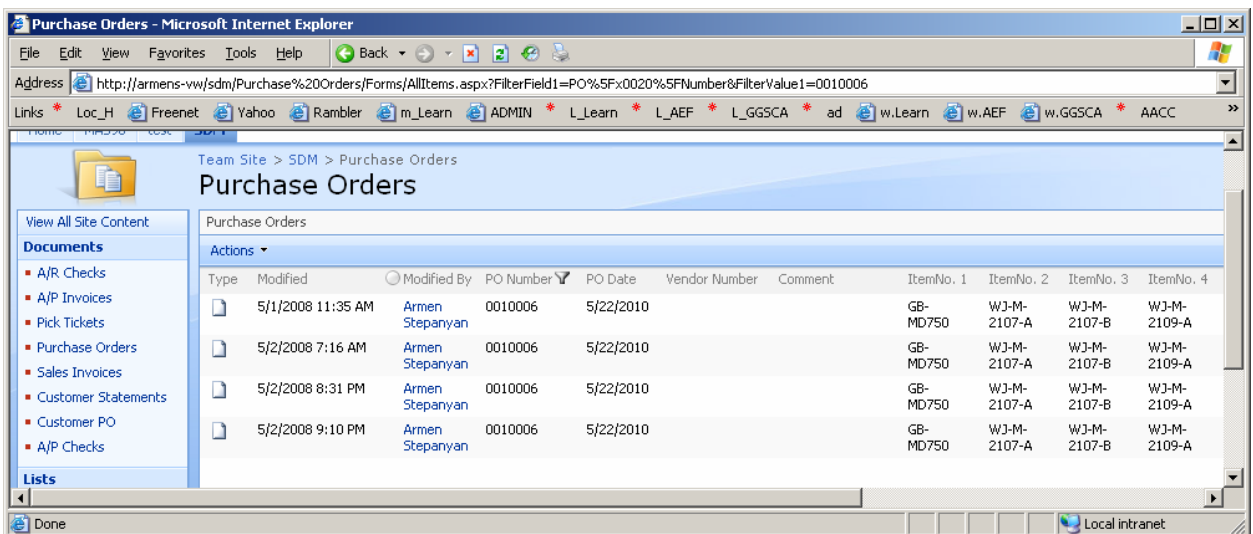
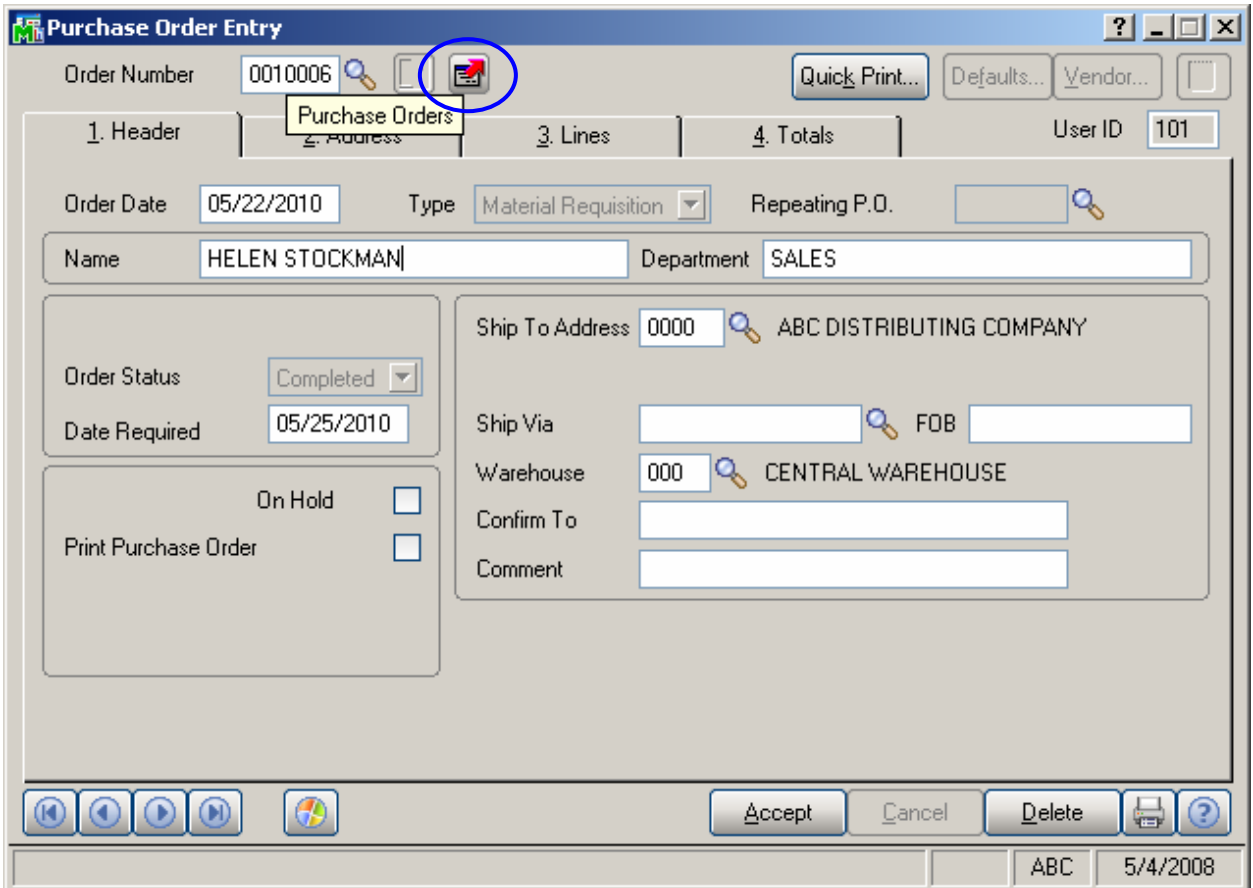
The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Crystal Purchase Order Printing** screen opened by clicking on the **Quick Print** button from **Purchase Order Entry** screen.



If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which a separate PDF file will be created for current Order and sent to upload to Share Point (after printing the Order). Note that the upload will not be done during previewing mode.

**Purchase Order Entry, Purchase Order Inquiry**

The **Purchase Orders** button has been added to the **Purchase Order Entry** and **Purchase Order Inquiry** screens which leads to Share Point where Library documents are displayed according to the selected Order Number.



If no Order Number is selected, then all the documents of the appropriate Library will be listed in Share Point.

## Account Receivable

### Statement Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Main** tab of **Statement Printing** screen.

Statement Printing (ABC) 5/4/2008

Form Code: STANDARD  
Description: Preprinted Laser

Number of Copies: 1  
Collated:   
Multi-Part Form Enabled:

1. Main | 2. Select

Sort Statements By: Customer Number

Age Invoices as Of: 5/4/2008  
Select Statements with Minimum Balance Of: .00  
Select Customers with Balance Past Aging Category: Current Category  
Produce Statements For: Print All Statements

Include  
Temporary Customers: Yes  
Zero Balance Customers:   
Credit Balances: No  
Zero Balance Invoices: Current Month Only

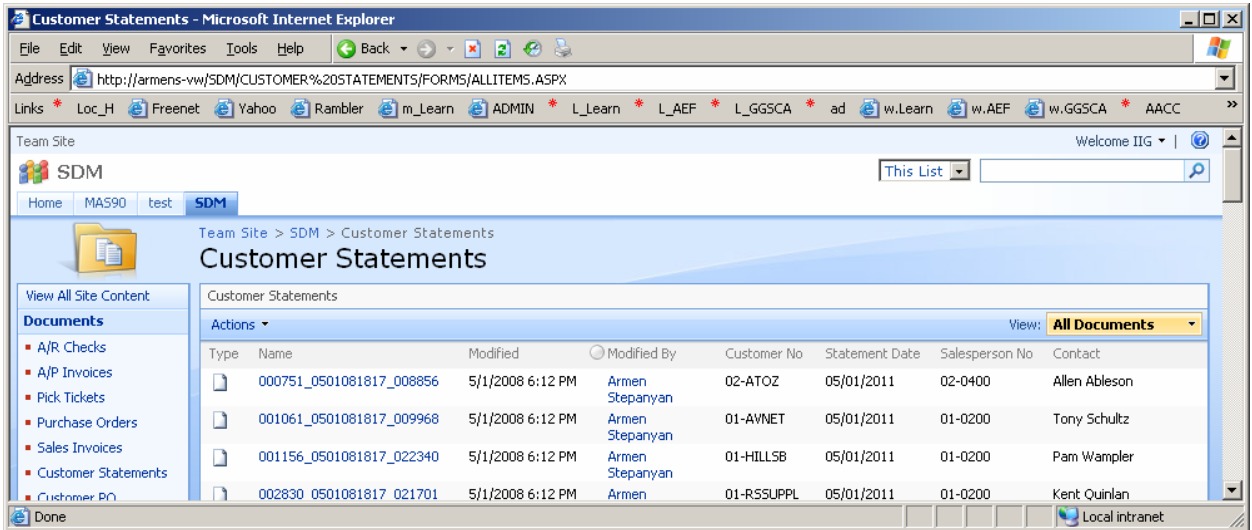
Share Point  
Upload to Share Point:   
Share Point Documents

Share Point Documents, Alt+W

Adobe PDF | Alignment | Print | Preview | Setup

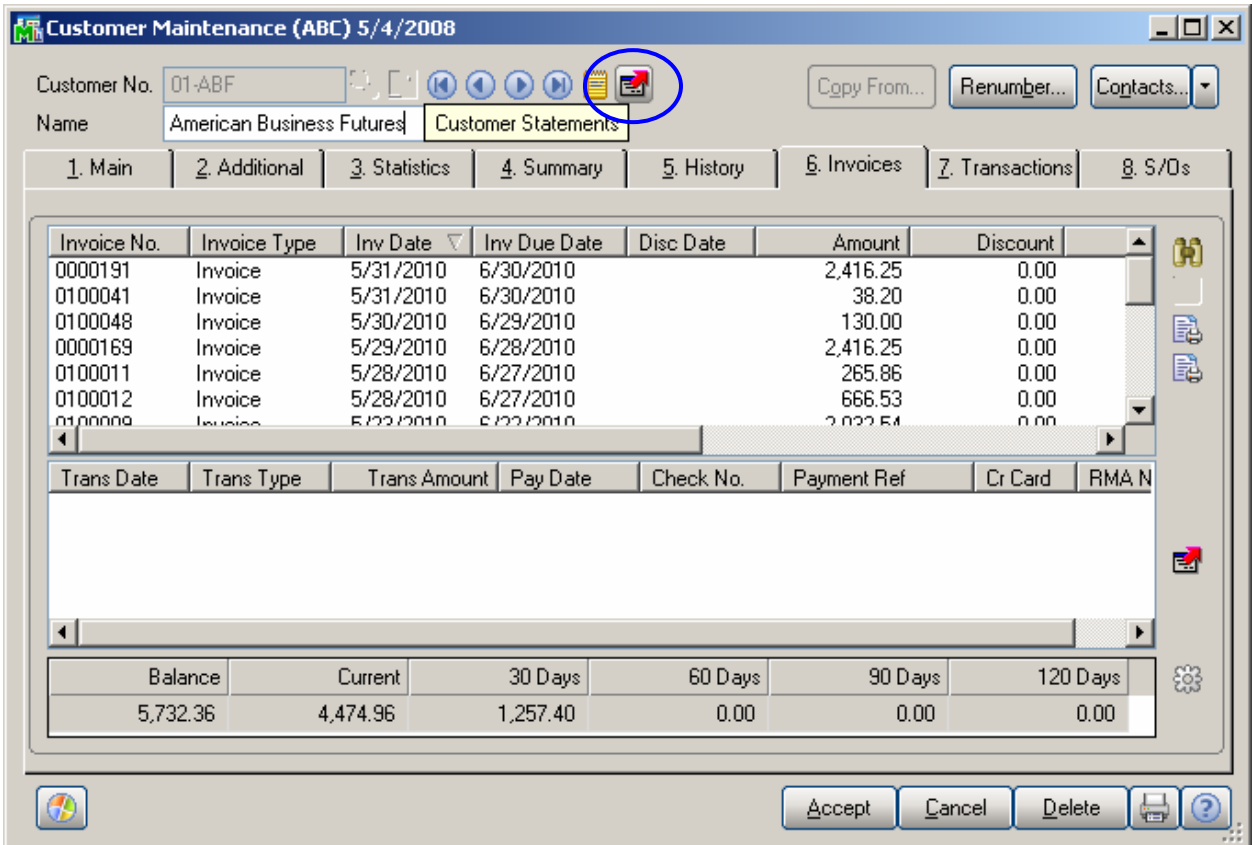
If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Customer and sent to upload to Share Point. Note that the upload will not be done during previewing mode.

Press the **Share Point Documents** button to go to the **Customer Statements** Library of Share Point server.



## Customer Maintenance, Customer Inquiry

The **Customer Statements** and **A/R Checks** buttons have been added to the **Customer Maintenance** and **Customer Inquiry** headers and **Invoices** tab correspondingly which lead to Share Point.



**Customer Statements** – When pressed, the documents of all the Customers will be listed in Share Point if a **Customer No** is not selected. Otherwise, if a **Customer No** is selected, only the documents of current Customer will be listed.

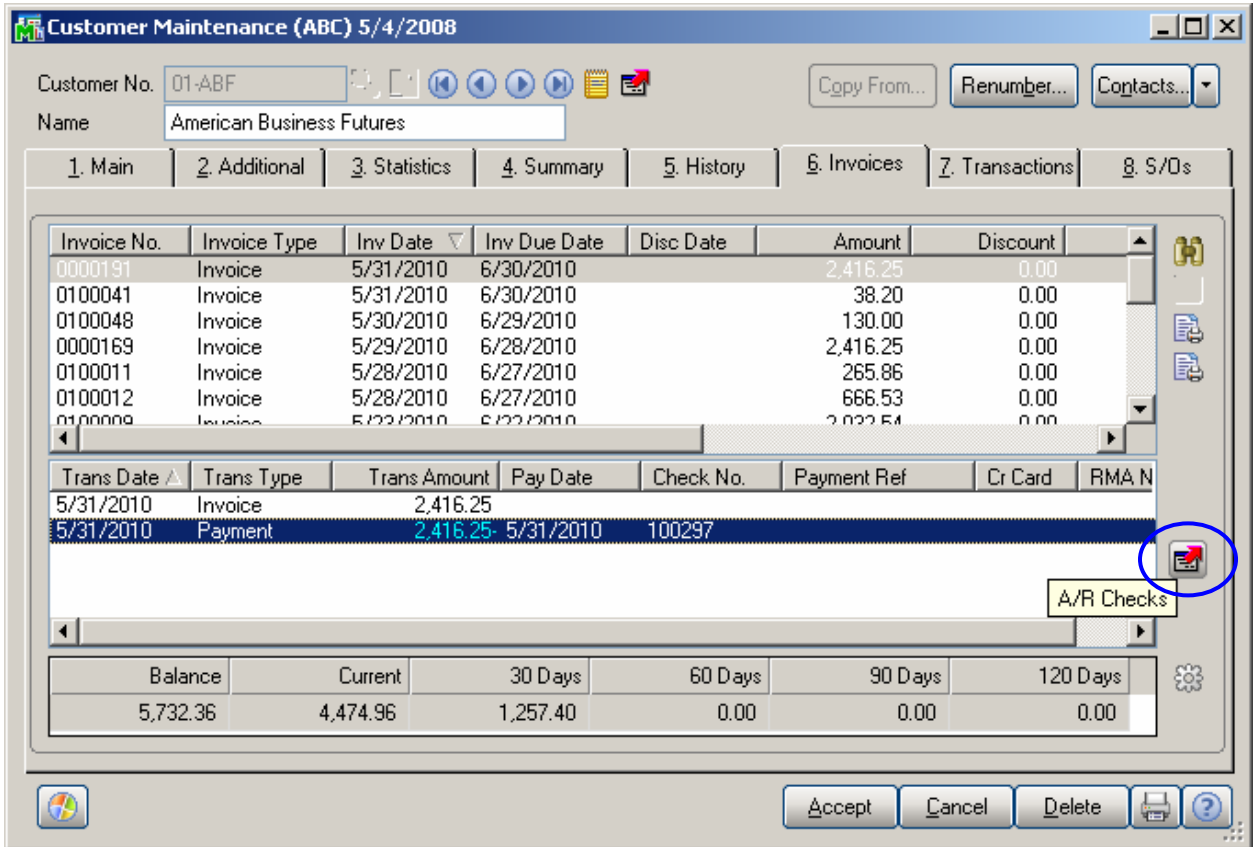
Customer Statements - Microsoft Internet Explorer

Address: http://armens-vw/sdm/Customer%20Statements/Forms/AllItems.aspx?FilterField1=Customer%5F%0020%5FNo&FilterValue1=01-ABF

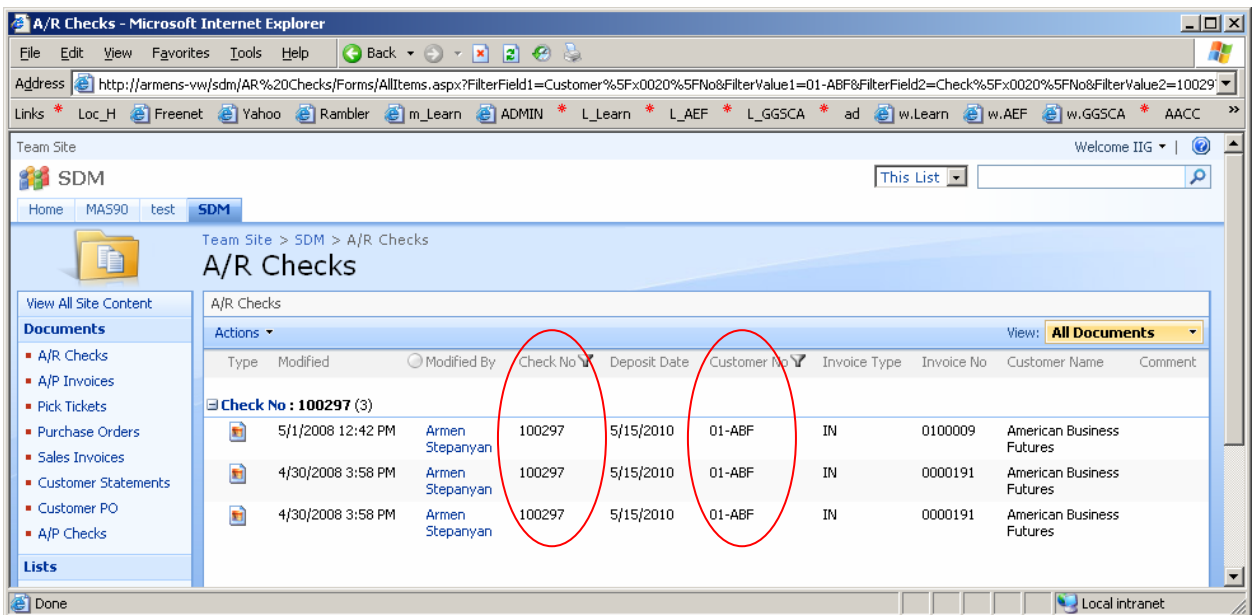
Team Site: SDM

Customer Statements

Type	Name	Modified	Modified By	Customer No	Statement Date	Salesperson No	Contact
	007886_050208733_014343	5/2/2008 7:20 AM	Armen Stepanyan	01-ABF	05/02/2011	01-0100	Artie Johnson
	012361_0502082166_000129	5/2/2008 9:39 PM	Armen Stepanyan	01-ABF	05/02/2010	01-0100	Artie Johnson
	013997_0502082183_011129	5/2/2008 9:50 PM	Armen Stepanyan	01-ABF	05/02/2010	01-0100	Artie Johnson
	015088_0502082188_029385	5/2/2008 9:53 PM	Armen Stepanyan	01-ABF	05/02/2010	01-0100	Artie Johnson
	015359_0502082192_003998	5/2/2008 9:55 PM	Armen Stepanyan	01-ABF	05/02/2010	01-0100	Artie Johnson
	016974_0501081817_003905	5/1/2008 6:12 PM	Armen Stepanyan	01-ABF	05/01/2011	01-0100	Artie Johnson



**A/R Checks** – When pressed, all the A/R Checks Library documents of current Customer will be listed in Share Point if no line is selected below. Otherwise, if a line with a **Check No** is selected, then only those documents will be listed which belong to current Customer No and Check No.





## Invoice History Inquiry

The **Sales Invoices** button has been added to the **A/R Invoice History Inquiry** header which leads to Share Point to see the documents of the Sales Invoices Library. **Sales Invoices, Pick Tickets, A/R Checks** and **Customer PO** items are available in the popup menu, which lead to corresponding Libraries in Share Point.

The screenshot displays the 'A/R Invoice History Inquiry (ABC) 5/4/2008' window. At the top, there are navigation buttons and a dropdown menu with a red arrow icon. The dropdown menu is open, showing four options: 'Sales Invoices', 'Pick Tickets', 'A/R Checks', and 'Customer PO'. The 'Customer PO' option is currently selected and highlighted in blue. Below the dropdown, the form contains several sections: '1. Main' and '2. Lines' tabs; a header section with fields for Invoice No. (0100033), Type (INV), Date (4/15/2010), Source (S/O), and Order No. (0000153); a customer information section with Customer No. (01-ABF), Ship To, and Source Journal; a shipping section with Terms Code (01 Net 30 Days), Ship Date (4/13/2010), Ship Via (UPS BLUE), Schedule (WI), FOB, Ship Zone (A), Weight (4), and Customer PO (XX-890200); a salesperson section with Salesperson (01-0100 Jim Kentley) and Confirm To (Artie Johnson); a comment and email section; a fax section with Fax and Batch Fax (checkbox); and a check section with Check No. (010255). On the right side, there is a summary table with the following values: Taxable (1,075.85), Nontaxable (.00), Freight (6.00), Sales Tax (52.72), Discount (21.52), Invoice Total (1,113.05), Deposit (500.00), Net Invoice (613.05), and Balance (613.05). At the bottom right, there are buttons for OK, Print, and Help.

**Sales Invoice** – If no Invoice is selected, all the documents will be listed in Share Point, otherwise, if an Invoice No is selected then only the documents will be listed which are related with that Invoice.

**Pick Tickets** – If no Order is selected, all the documents will be listed in Share Point, otherwise, if an Order No is selected then only the documents will be listed which are related with that Order.

**A/R Check** – If no Invoice is selected, all the documents will be listed in Share Point, otherwise only the documents will be listed which are related with current Customer No and Invoice No.

**Customer PO** – The same as **Pick Tickets**.