Enhanced Integration REST Professional and fileSMART

REST Professional and fileSMART now deliver enhanced integration functionality to reduce time and improve productivity when searching for and filing documents. Features include:

- The ability to directly archive one-off and bulk mail merge documents from REST Professional to fileSMART, eliminating the need to file REST documents from the fileSMART pending queue
- The ability to initiate fileSMART searches from within REST Professional
- A utility that allows you to copy all documents previously saved in REST Professional Document Management to fileSMART
- The ability to publish documents from fileSMART to the Owner and Tenant Portals

Pre-requisites

You must be running REST Professional Version 10.5 and fileSMART Version 4.7 to use all of the integration features. Please [click here](#) for fileSMART Version 4.7 installation instructions.

Locate your REST Database Serial Number

Your REST database unique serial number is required to link your REST database to fileSMART. To locate your database serial number in REST:

1. Log in to REST Professional.
2. Click your **Client ID** from the menu.
3. Your Serial Number is displayed.

   ![REST Professional Serial Number](image)

4. Make a note of your serial number as it is required for field mapping in fileSMART.
   
   **Note:** If you have a separate Sales database you will need to follow the steps below again for that database.

Configuring fileSMART for Integration

Configuring fileSMART for Integration with REST requires an update of components and setting up the Integration Field Mapping.

Installing the Archive Wrapper

The Archive Wrapper will be installed automatically on each workstation where you log in to fileSMART archive.

**Note:** You may need to allow the program fileSMARTarchivewrapper.exe to run if you have windows User Account Control Activated.

Integration Field Mapping

Field mapping is only required if you have upgraded from fileSMART 4.5 and below, if you have always used version 4.6 or above, Field Mapping is set up as part of your initial installation.

Below are instructions on how to map fields for Property Management and separate Sales databases.
To map your REST Property Management fields to fileSMART:

1. Log in to fileSMART Archive.
2. Click File > Integration Field Mapping, the Integration Field Mapping screen is displayed.
3. Select REST Professional from the Integrate With drop down list.
4. Select MAIN from the Library drop down list, the purpose in selecting the Library is to access the Property Management and Sales Folders that belong to that Library.
5. Select PropertyManagement from the Folder drop down list, this will load the default Field Mapping for the fileSMART Property Management fields.
6. Enter your REST Property Management database serial number into the Serial No field.

7. Select the values below for each drop down list, to map your REST Property Management fields to the fileSMART fields.

8. Click Apply and Done.

If you have a separate REST Sales database you must also set the Sale field mappings in the Integration Field Mapping Screen.

1. Click File > Integration Field Mapping, the Integration Field Mapping screen is displayed.
2. Select Sales from the Folder drop down list
3. Enter your REST Sales database serial number into the Serial No field.

4. Select the values below for each drop down list, to map your REST Sales fields to the fileSMART fields.
Display fileSMART Documents on your Owner and Tenant Portals

The Enhanced Integration between REST Professional and fileSMART allows you to publish your fileSMART files to your Owner and Tenant Portals. This feature is only available if you have REST Professional v10.5 and fileSMART v4.7 and Enhanced Integration activated.

In order to determine which users will have access to the feature of publishing documents to portals, the fileSMART user permissions must be configured. Two new features have been added to Manage Users to facilitate this:

- **User Group Publisher**: a new User Group called Publisher provides the user with the ability publish fileSMART documents to Owner and Tenant Portals.
- **Bulk Edit files to Show on Portals**: a new User Permission option that allows users to perform bulk Document edits, that is, select more than one document at a time to Show on Portals.

### Setup users to Publish Documents

1. Click the **Manage Users** icon
2. Select the **Publisher** from the **User Group** drop-down list for the appropriate user
3. Click **OK**
4. Repeat these steps for any user that should have the ability to Publish Documents on the Portals

### Setup users to Bulk Edit

1. Click the **Manage User** icon
2. Click the **Manage** button for the user you wish to give Bulk Edit permissions
3. In **Folder Permissions** select the **Bulk edit** checkbox for the fileSMART folder that you would like to give this user access to Bulk Edit files
4. Click **Done**
5. Repeat these steps for any user that should have the ability to Bulk Edit in fileSMART
Create REST Portal fileSMART user

A new user must be created in fileSMART so that REST Professional can publish documents directly to the portal.

To create a REST Portal fileSMART user:

1. Click the Manage Users icon
2. Add a new user named RESTPortal
3. Select Publisher from the User Group drop-down list
4. Click Manage button from the Manager User column
5. Select the Archive and Search checkbox for the fileSMART folder
6. Click Done, then click OK

Please click here for the Owner and Tenant Portal Setup and Use Document to activate Documents on your Owner and Tenant Portals.

Configuring REST for Integration

To get started with fileSMART integration the feature must be activated in REST Professional by a user with the highest security level (Statistics/Company Details/Passwords & Above):

2. Select fileSMART from the drop down list.
3. Click Log into fileSMART, the fileSMART login screen displays. Login with your fileSMART administration account.
4. Click OK.
5. Select the fileSMART Library and Folders relevant for your database.
6. Click OK, to save your configuration.

When fileSMART has been saved as your Document Management System the yellow document management folder is updated to display the fileSMART folder on the REST toolbar and Owner, Tenant, Property, Creditor, Holiday Booking, Sale and Solicitor details screens.
Using Enhanced Integration REST Professional and fileSMART

For existing users of REST Professional Document Management, the REST workflow to save one-off and bulk mail merges to fileSMART is unchanged from the REST Document Management. There is one new step at the end of the REST process and you will need to review the information being archived to fileSMART.

Filing REST One-off Mail Merges
In REST, after completing a one-off mail merge and selecting Add to Document Management the fileSMART Integration screen is displayed:

1. Confirm the auto populated filing types are correct, select additional if required.
2. Select a Document type from the Doc Type drop down list.
3. Enter any specific notes you would like filed with the document in Notes.
4. Select the Show on Portal checkbox if you require this document to be published to the portal.
5. Click Archive.

Filing REST Bulk Mail Merges
In REST, after completing a Bulk Mail Merge and selecting Add to Document Management the fileSMART Integration screen is displayed:

1. Select a Document type from the Doc Type drop down list.
2. Enter any specific notes you would like filed with the document in Notes.
3. Select the Show on Portal checkbox if you require this document to be published to the portal.
4. Click Archive.

Bulk merges are filed against the Merge Type selected in REST Print Letters or Export Data.
Publishing Documents from fileSMART to Owner & Tenant Portal

In fileSMART, the Archive user interface has a new field called Show on Portals. Selecting Show on Portals against a document publishes that file on the REST Owner and / or Tenant Portals to be downloaded by your clients.

You can also select multiple files in fileSMART and publish them all to the portals. To perform a Bulk Edit of multiple documents to the portal:
1. In the found documents section highlight the document or documents you wish to Show on Portals
2. Click the Edit button the Edit Archived Documents Data screen displays
3. Select the Show on Portals checkbox, and check which Portals you would like the documents displayed on, Owners and or Tenants.
4. Click OK, the documents will be published to the appropriate Owner and or Tenant Portal

Searching for Documents
You can now access the FileSMART Archive search screen directly from your REST toolbar and Owner, Tenant, Property, Creditor, Holiday booking, Sale and Solicitor details screens. You will be prompted to login to fileSMART for the first search completed per session.

Exporting Historical REST Professional Documents to fileSMART

An export utility has been provided with REST version 10 that can export existing files from REST Document Management to fileSMART. The export will not delete the documents from REST Management Document. Files are copied across in their original format to fileSMART and filed against the respective file type from REST with the notation Document created prior to fileSMART.

Note: you will require a response code from Rockend Support to run this utility.

The time the export takes to run will vary depending on the volume and size of files that you have in your REST Professional Document Management System. We recommend that you run the export on your fileSMART server after hours, each document type can be exported separately if required.

To export your REST Document Management files to fileSMART:
1. Log in to your fileSMART server.
2. Go to C:\REST\ and locate the file ExportTofileSMART.exe.
3. Double click the file ExportTofileSMART.exe, the Export Historical Documents to fileSMART screen displays.
4. Check the **document types** to be exported into fileSMART.
5. Click **Go**. A **System Setup & Configuration Security Check** screen is displayed requesting a **response code** from Rockend.
6. Contact Rockend Support on 1300 365 788 and quote the **security number** displayed to obtain a response code for **Sensitive change in application**.
7. Enter the **Response Code** provided by Rockend and click **OK**, the number of documents to be exported is displayed.
8. Click **Yes** to process the export.
9. A fileSMART login screen is displayed. It is recommended that you log in as a fileSMART Admin user.
10. A notice is displayed to confirm the export has been completed.
Troubleshooting

- **The export utility was interrupted prior to completion.**
  If the export utility is interrupted prior to completion you can rerun the utility and it will continue where it left off exporting the files.

- **I get this message after the export has been completed.**

  Alpha folders in the REST Documents folder with no matching alphas in REST and fileSMART cannot be exported because there is no code to file it against in fileSMART. For example, the alphas may belong to records that have been deleted in REST. The log file will display the alpha types and alpha names.

- **I get this message after the export has been completed.**

  Documents that are saved in the REST Documents folder but not in an alpha folder cannot be exported to fileSMART. The log file will display the location of the documents and also the document name. If you move the documents into an alpha folder you will need to run the utility again to export the documents to fileSMART.

If you are experiencing difficulties with the setup or use of this new feature please contact Rockend Support via the Customer Lounge at www.rockend.com.au or 1300 657 700.