

# DOCUMENT EXPORT

Arribatec.

Efficient, Secure, and Flexible  
Document Export for Unit4 ERP

## What is Arribatec Document Export?

Arribatec Document Export is designed to enable efficient, secure, and user-driven export of specific documents from the Unit4 ERP Document Archive. The solution is highly configurable, allowing end users or super users to define export criteria, select document types, and manage the export process directly from familiar browser templates within Unit4 ERP.

## How Does It Work?

### 1. Configuration:

- Set up system parameters (export method, web service URL, web service user).
- Configure Azure Blob Storage for secure file delivery.

### 2. Template Definition:

- Define browser templates specifying document types and indexes for export.
- Publish and test templates to ensure correct document selection.

### 3. Export Process:

- Run the browser template to select desired documents.
- Click "Export documents" to initiate export.
- Documents are compressed, uploaded to Azure, and a download link is provided.
- After download, files are automatically deleted from the cloud.

## Typical Use Cases

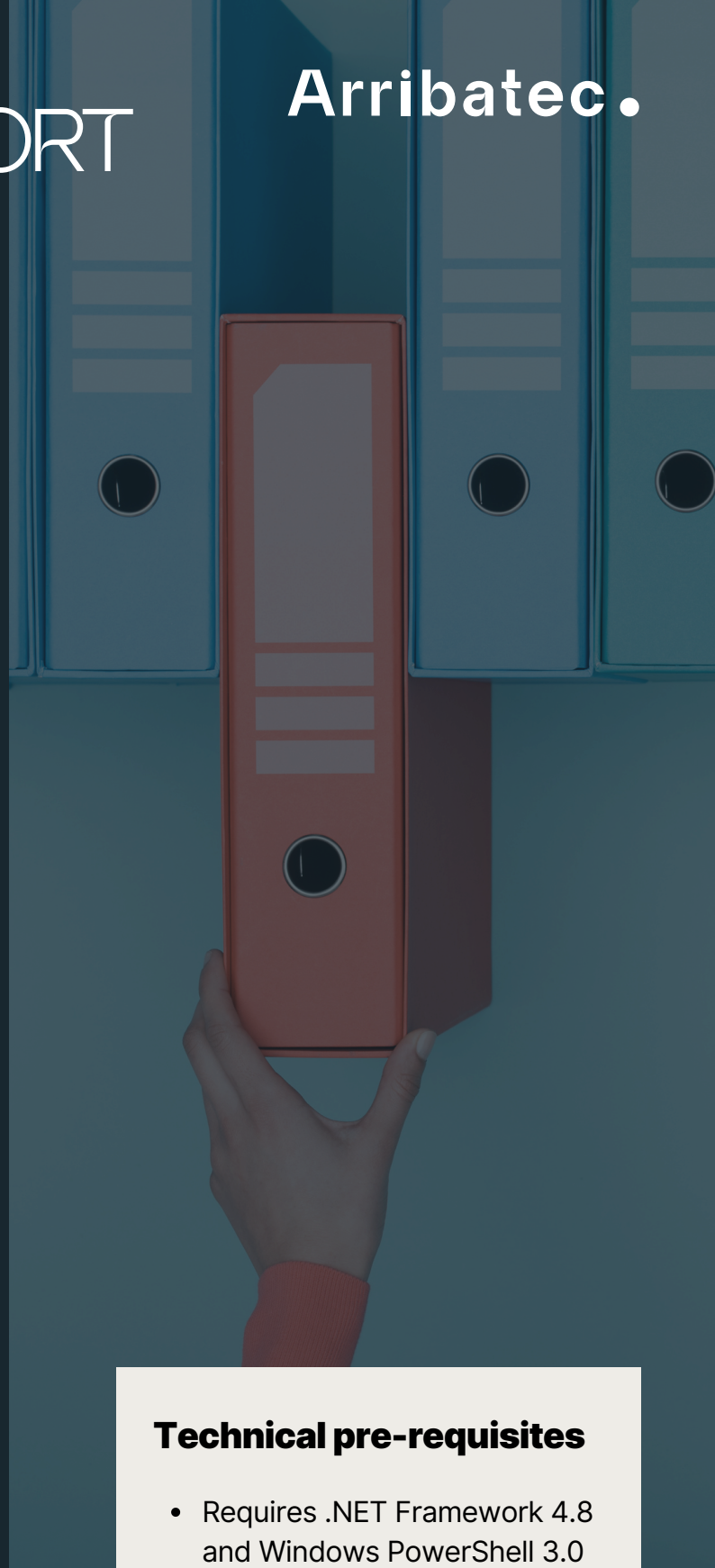
- Bulk export of project or client-related documents for audits, migrations, or compliance.
- Secure, temporary delivery of sensitive documents to users or external parties.
- Streamlining document retrieval for reporting or data portability needs.

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## Key Features

- **Flexible Export Criteria:** Users can define which documents to export using browser templates, specifying document types and indexes for precise selection.
- **Cloud-Based Delivery:** Exported documents are compressed into a ZIP file and securely delivered via Azure Blob Storage. Each customer has an isolated container, and files are automatically deleted from the cloud after download for enhanced security.
- **User-Configurable:** System parameters and web service accounts allow for easy setup and adjustment by administrators or super users. The solution supports both database and filesystem document types.
- **Seamless Integration:** Fully integrated with Unit4 ERP, leveraging the DocArchive web service endpoint for compatibility and reliability.
- **Clear Status Reporting:** The export process provides real-time feedback, including success and error reporting for each document, directly in the browser template.
- **Automated Cleanup:** After download, exported files are automatically deleted from the cloud container, ensuring data privacy and compliance.



## Technical pre-requisites

- Requires .NET Framework 4.8 and Windows PowerShell 3.0 or higher on the U4ERP server.
- Developed and tested for Unit4 ERP 7 and Unit4 ERP CR
- Installation and uninstallation are managed via PowerShell scripts, with clear steps for administrators

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