



DocXtender

Quick Start Install Guide

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Version

Date	Author	Version	Change
August 1, 2019	T. Plett	1.0	Initial Version

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1 Application Description

Users often need to attach files to various records.

DocXtender is a tool to extend the capabilities of Microsoft Dynamics 365 Business Central by adding Drag and Drop support and automatic storage and linking of the dropped file.



Note: *A valid Microsoft Dynamics 365 Business Central User License is required.*

2 Installation

2.1 Install

After choosing "Free Trial" in AppSource, the DocXtender extension will be installed in Microsoft Dynamics 365 Business Central.

- Register the software:
 - a. Navigate to 'Extension Management'
 - b. Configure the 'IWorks Common' extension.
 - c. Enable 'Allow HttpClient Requests'

...SION SETTINGS | WORK DATE: 4/8/2019

IWorks Common

Group

App ID ba1776ba-1198-4b4c-a61e-c46... Publisher Insight Works

Name IWorks Common Allow HttpClient Requ...

- d. Navigate to 'Insight Works Registration' and then choose 'Actions', and 'Request Registration Update'.

Insight Works Registration

Actions

General Show more

License ID {1e73ff97-1dcf-4550-b035-6d2... Contact Name

Global Message Contact E-Mail

Event Message Registration status retrieved. Contact Phone

Default Device User

Details

Insight Works Extensions

NAME	STATUS	EXPIRY DATE	STATUS UPDATED	ALLOWED DEVICES	ALLOWED USERS	ALLOWED COM
DocXtender	Not Registe...	8/14/2019	7/30/2019	1	0	*CRONUS*

- e. After you have been registered, choose 'Actions', and 'Retrieve Registration'.

2.2 Uninstall

DocXtender can be uninstalled from the Extension Management page in Business Central.

1. Select the DocXtender extension
2. Select "Manage"
3. Select "Uninstall"
4. Select the IWorks Common extension
5. Select "Manage"
6. Select "Uninstall"



Note: *The IWorks Common extension is a library used by all Insight Works products. It should only be uninstalled when there are no remaining Insight Works' extensions.*

3 Configuration

The following sections describe the various configuration tasks required to set up DocXtender.

3.1 User Configuration

The DocXtender Permission Set will provide access to features for individual users. This can be set in the Permissions section of the 'Users' page.

- For an administrator to set up the DocXtender Setup table, apply permission 'DOCX-SETUP'
- For a user, apply permission 'DOCX-USER' to use DocXtender

3.2 DocXtender Setup

If you want to configure DocXtender manually, navigate to the DocXtender Setup page. From there, you can define and adjust settings as required.

To start the DocXtender Setup, search for "DocXtender Setup" in the Search Bar.

DocXtender Setup	
Drop Behavior	Confirmation ▼
Duplicate Behavior	Rename Prompt ▼

For 'Drop Behaviour' choose if you want a confirmation prompt when a file is dropped on a record or if you want it to be silent.

For 'Duplicate Behaviour' choose what you want to happen when 2 files of the same name are added to the same card.