



DocXtender

Quick Start Install Guide

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Version

Date	Author	Version	Change
August 1, 2019	T. Plett	1.0	Initial Version
April 29, 2020	Insight Works	1.1	Reflect registration changes
June 16, 2020	Insight Works	2.0	Include steps for the SharePoint feature

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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.

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

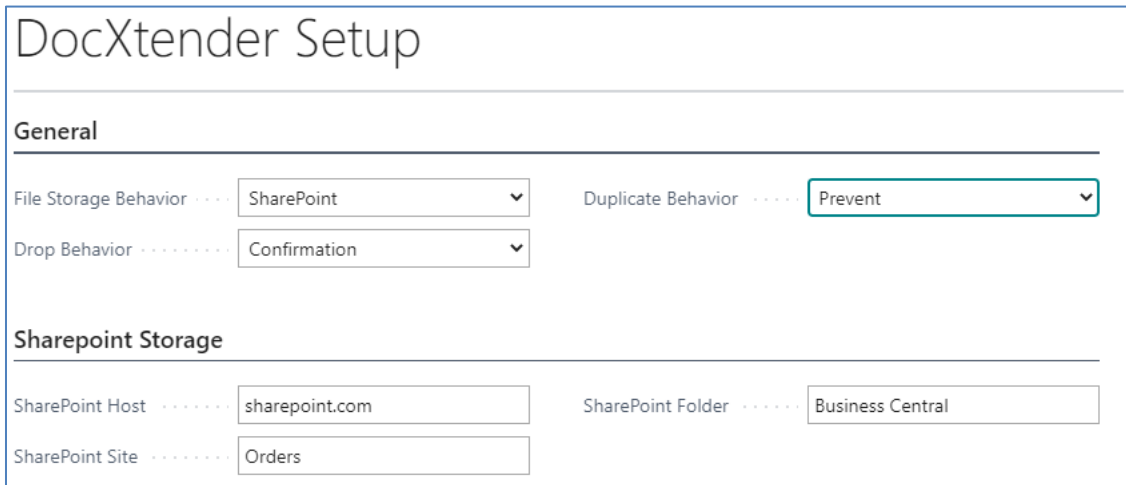
The DocXtender Permission Set will provide access to features for individual users. This can be set in the Permissions section of the 'Users' page.

- For an administrator to set up the DocXtender Setup table, apply permission set 'DOCX-SETUP'.
- For a user, apply permission set 'DOCX-USER' to use DocXtender.
- All users require the 'IWX COMMON' permission set.

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

General

File Storage Behavior SharePoint

Duplicate Behavior Prevent

Drop Behavior Confirmation

Sharepoint Storage

SharePoint Host sharepoint.com

SharePoint Folder Business Central

SharePoint Site Orders

1. **File Storage Behavior:** Determines where you would like your files to be stored.
 - a. *Document Attachments:* Use this if you would like your documents to be stored internally in Dynamics 365 Business Central's Document Attachment. This option does not support the Replace Automatically Duplicate Behavior setting.
 - b. *SharePoint:* Use this if you would like your documents to be stored externally in your own SharePoint. You must set the SharePoint Storage values if you choose this option. This option does not support the Rename Prompt Duplicate Behavior setting.
2. **Drop Behavior:** Determines whether the user should be notified after a document has been attached or uploaded.

- a. *Silent*: The user will not be notified that a document has been attached or uploaded.
 - b. *Confirmation*: The user will be notified that a document has been attached or uploaded.
3. **Duplicate Behavior**: Determines how DocXtender should handle detected duplicate files.
 - a. *Prevent*: Duplicate files will not be attached or uploaded.
 - b. *Rename Automatically*: Duplicate files will be renamed and then attached or uploaded.
 - c. *Rename Prompt*: The user will be prompted about whether they would like to rename. If accepted duplicate files will be renamed and then attached. This is not supported for SharePoint storage.
 - d. *Replace*: The existing file will be overwritten with the new file. This is not supported for Document Attachment storage.
4. **SharePoint Host**: This is your own SharePoint host. The format for the host is typically "yourcompanyname.sharepoint.com".
5. **SharePoint Site**: This is optional, but recommended. It is the name of the Site where you would like documents to be uploaded to.
6. **SharePoint Folder**: This is optional, but recommended. It is the name of the parent folder where you would like documents to be uploaded to.