



DocXtender

Quick Start User Guide

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April 29, 2020	C. Peters	1.1	Clarity on Permissions requirements
June 16, 2020	C.Peters	2.0	<ul style="list-style-type: none"><li>• Reformat</li><li>• Include Overview</li><li>• Add instructions for SharePoint</li><li>• Add additional setup information</li></ul>

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# 1 Overview

DocXtender from Insight Works is a free utility that enables users to attach documents to any page in Dynamics 365 Business Central with a simple drag and drop. DocXtender works with any page in Dynamics 365 Business Central that supports attachments. With DocXtender you'll easily associate customer Pos to order; invoices to Pos; quality documents to receipts; or any other file to pages in Business Central.

- Save significant time by not having to search for files. Files are stored with your Business Central record so you, and others, always know where they are.
- Don't lose another document. By attaching your documents to Business Central pages they are available when you need them.
- Fire and floods can't destroy your digital documents like they can paper
- Reduce your carbon footprint by eliminating the need to manage paper documents.

## 2 Initial Configuration

Some simple configuration is required for the use of DocXtender

### 2.1 Permission Sets

Users will require some permissions to use this extension. These can be added on the User Card or included in a User Group set of permissions.

- For an administrator to configure DocXtender apply permission set 'DOCX-SETUP'.
- For a user to attach files apply permission set 'DOCX-USER'.
- All users require the 'IWX COMMON' permission set.

### 2.2 DocXtender Setup

To configure DocXtender navigate to "DocXtender Setup."

- **File Storage Behavior:** Determines where you would like your files to be stored.
  - Document Attachments: Use this option if you would like your documents to be stored internally in Dynamics 365 Business Central's Document Attachments. This option does not support the Replace Automatically Duplicate Behavior option.
- **Drop Behavior:** Determines whether the user should be notified after a document has been attached or uploaded.
  - Silent: The user will not be notified that a document has been attached or uploaded.
  - Confirmation: The user will be notified that a document has been attached or uploaded.
- **Duplicate Behavior:**
  - Prevent: Duplicate files will not be attached or uploaded.
  - Rename Automatically: Duplicate files will be renamed and then attached or uploaded.
  - 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.
  - Replace: The existing file will be overwritten with the new file. This is not supported for Document Attachment storage.
- **SharePoint Host:** This is your own SharePoint host. The format for the host is typically "yourcompanyname.sharepoint.com."
- **SharePoint Site:** This is optional, but recommended. It is the name of the Site where you would like documents to be uploaded to. Example result: yourcompanyname.sharepoint.com/sites/MySite/
- **SharePoint Folder:** This is optional, but recommended. It is the name of the parent folder where you would like documents to be uploaded to. Example result: yourcompanyname.sharepoint.com/sites/MySite/MyFolder/

## 3 DocXtender Use

DocXtender can be used with Dynamics 365 Business Central Document Attachments or with SharePoint. See [DocXtender Setup](#) for how to configure for either option.

### 3.1 Document Attachments

1. Open a card that includes the Document Attachments factbox.
2. Drag and drop any file on to the DocXtender symbol.
3. Depending on the Drop Behavior option you may get a confirmation asking if you want to view the file that was copied.
4. To view the file again you can drill down on the Document Attachment factbox to see a list of documents.

### 3.2 SharePoint

1. Open a card that includes the Document Attachments factbox.
2. Drag and drop any file on to the DocXtender symbol.
3. Depending on the Drop Behavior option you may get a notification that the file was uploaded.
4. To view the file again you can drill down on the Record Links factbox to see a list of record links. You may also navigate to your SharePoint location configured in the DocXtender setup page.

qui officia deserunt mollit anim id est laborum.

## 4 Having Issues?

Known issues with simple solutions will be tracked here. Please try these solutions before contacting support

### 4.1 Method "Initialize" was not found in the control add-in

This error indicates the user is missing some permissions.

On their User card you can add the 'DOCX-USER' permission set to make this error go away.