



Document Archive

1.0.0.0

IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

USER SCENARIO DOCUMENTATION

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Change Log

Version number	Date	Description
V1.0.0.0	01-02-2021	Initial released version

Introduction

A paperless office (or paper-free office) is a work environment in which the use of paper is eliminated or greatly reduced. This is done by converting documents and other papers into digital form, a process known as digitization.

Are you ready to digitize your processes and move to a paperless office with just a few clicks?

Then start now with *Document Archive*!

Document Archive provides the storage of attachments on master data like customers, vendors & items, but also on your purchase and sales documents. Of course these attachments are transferred to posted documents as well.

This with an easy drag-and-drop method to prevent unnecessary actions like saving on your desktop before storing it in Microsoft Dynamics 365 Business Central.

With the additional features of document categories and permission by document category you are in complete control of how the attachments are organized and who can access & modify them.

Document Archive stores the data in an online environment (like SharePoint). This ensures that you access your attachments at any time and at any place!

See a list of the full features below.

Features & Benefits

- ✓ Easy storage with drag-and-drop functionality
- ✓ Drag-and-Drop directly from Microsoft Outlook
- ✓ Available on more than 95 pages for master data like customers, vendors & items, documents and posted documents of purchase & sales and more!
- ✓ Use document categories to organizing your attachments
- ✓ Set up permissions per document category and user group
- ✓ Online storage options like SharePoint
- ✓ Set up easily with a wizard for a quick start

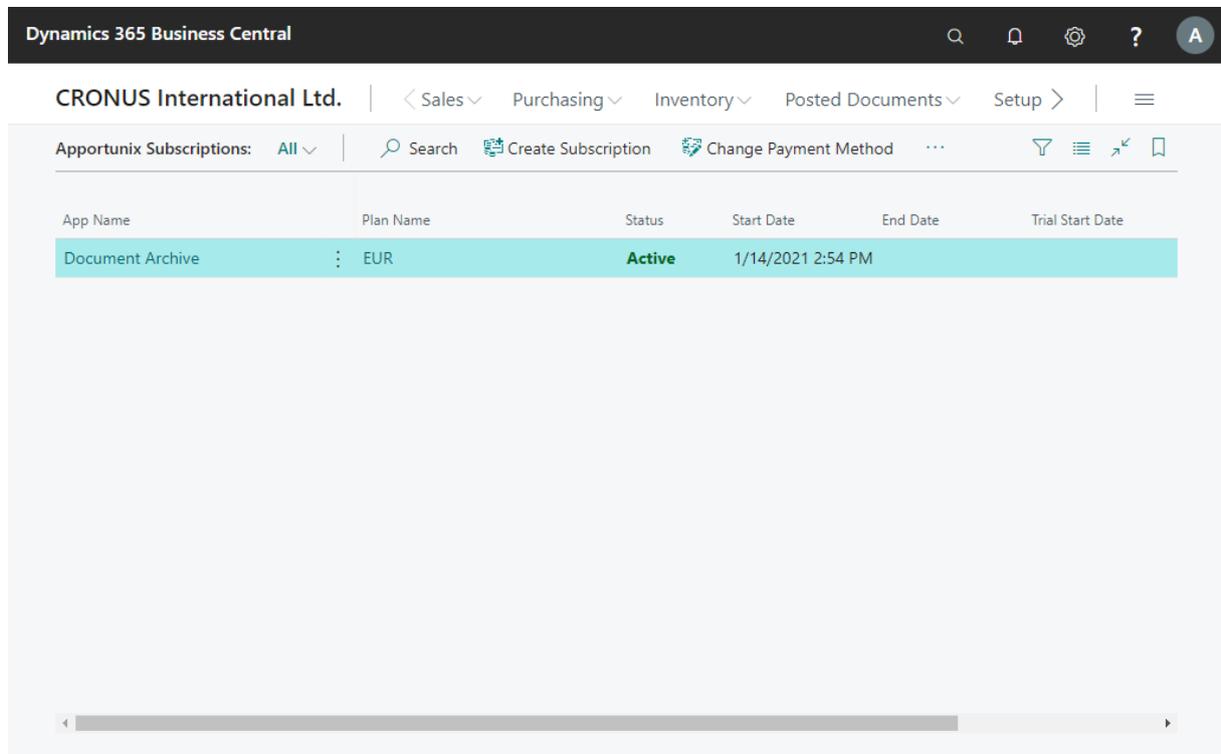
This app supports both the Essential and Premium editions of Microsoft Dynamics 365 Business Central.

Free to Try

This extension can be used for free, without limitations in one or more of your Dynamics 365 Business Central *Sandbox* environments. When you use the features that would require a subscription for use in one of your *Production* environments, a notification will be displayed that informs you that you are using such a feature.

To use all the features of the extension in a *Production* environment you can start a free trial subscription that will automatically change to a paid subscription after the trial ends. You can cancel your subscription at any time you like and will be able to use the features of the app until the current invoicing period ends.

To manage your subscriptions, you can use the *Apportunix Subscriptions* page. On this page you can start or cancel subscriptions for Apportunix apps and view or update the payment methods that are used for your subscriptions.



The screenshot displays the 'Apportunix Subscriptions' page in Dynamics 365 Business Central. The page header includes the company name 'CRONUS International Ltd.' and navigation menus for Sales, Purchasing, Inventory, Posted Documents, and Setup. The main content area shows a table of subscriptions with the following data:

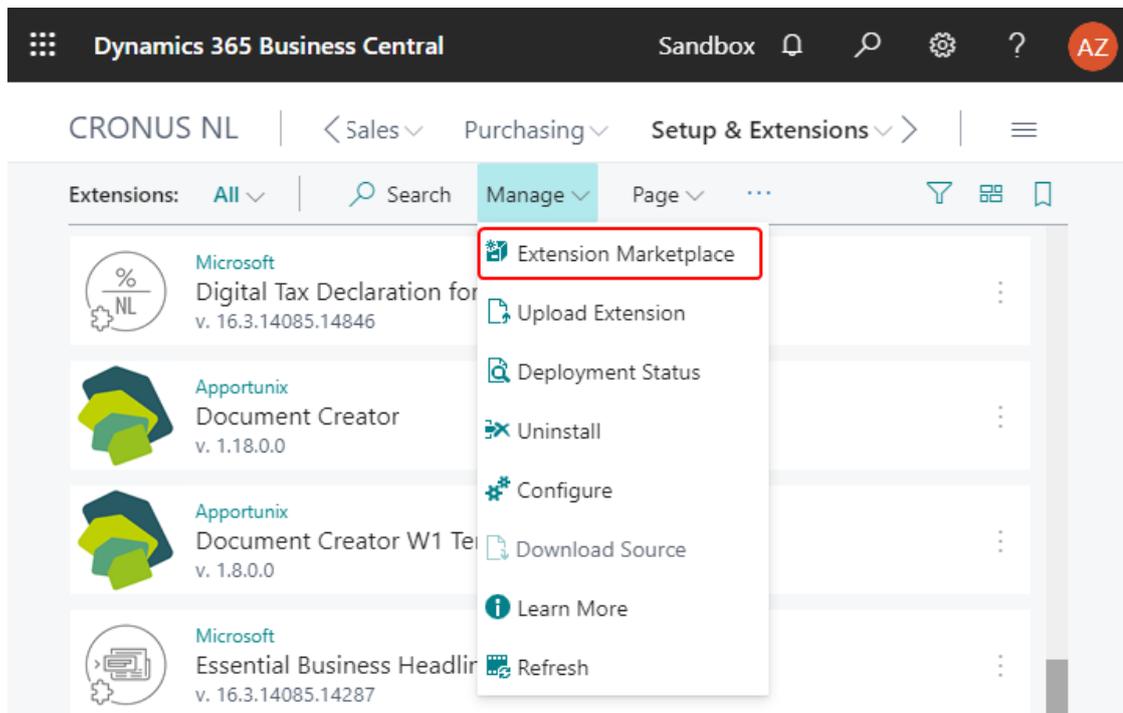
App Name	Plan Name	Status	Start Date	End Date	Trial Start Date
Document Archive	EUR	Active	1/14/2021 2:54 PM		

Please note that your payments are handled safely, in a PCI-compliant manner, in cooperation with our payment provider [Stripe](#). For more information, please feel free to contact us by visiting the [Contact](#) page on our website.

Installation

The *Document Archive* extension can be installed from the Extension Marketplace (AppSource). To install the extension, please follow the following steps:

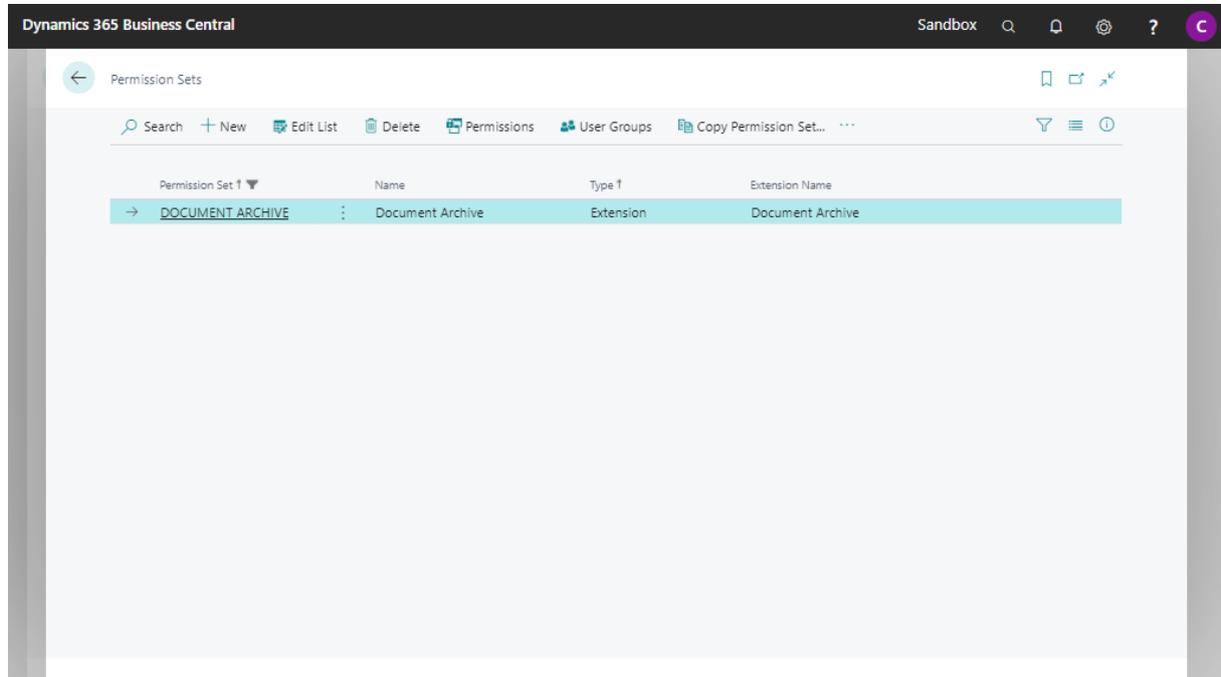
1. In Microsoft Dynamics 365 Business Central, go to **Setup & Extensions > Extensions**
2. Open the Extension Marketplace (AppSource) via: **Manage > Extension Marketplace**



3. Search for and select "*Document Archive*" (By Apportunix)
4. Please take note of the End-User License Agreement and Privacy Statement
5. Choose **FREE TRIAL**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.

Permissions Configuration

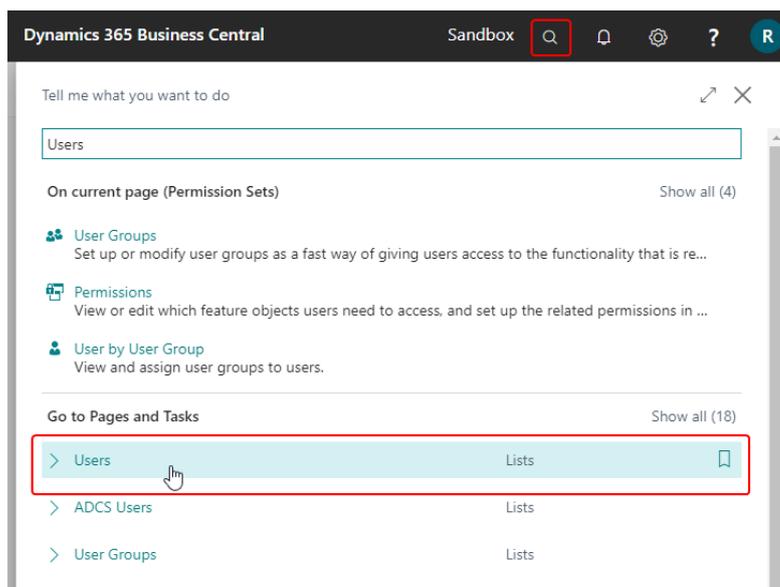
After the *Document Archive* extension has been installed, a permission set for the extension will have been added to your Business Central environment.



This permission set should be assigned to relevant users or user groups.

To assign the permission set to users:

1. Select the magnifying glass icon (*Tell Me*) on the top right corner of Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.



2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** FactBox.

3. Choose the **Edit** action to open the **User Card** page.
4. On the **User Permission Sets** FastTab, on a new line, fill in the Permission Set field with the permission set for the Document Mail Queue extension.

For more information, please refer to Dynamics 365 Business Central documentation - [Managing Users and Permissions](#)

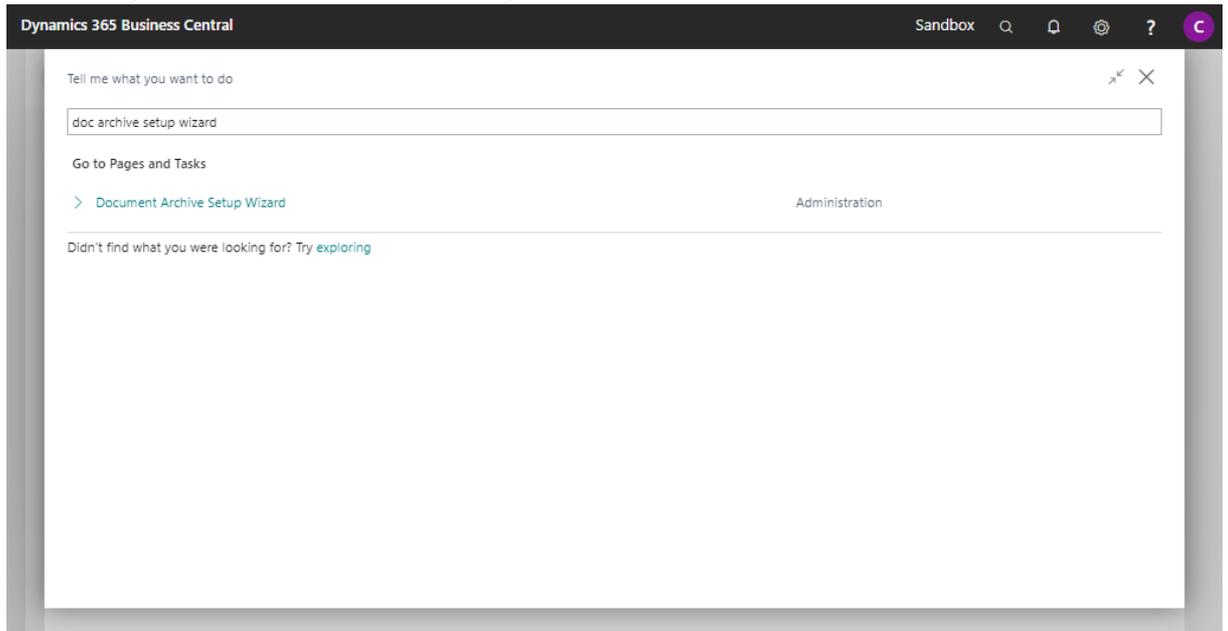
Setup & Usage

This chapter provides details about how to set up and use the functionality of this extension and will present several examples and scenarios to demonstrate the functionalities. A basic understanding of how to work with Microsoft Dynamics 365 Business Central is presumed.

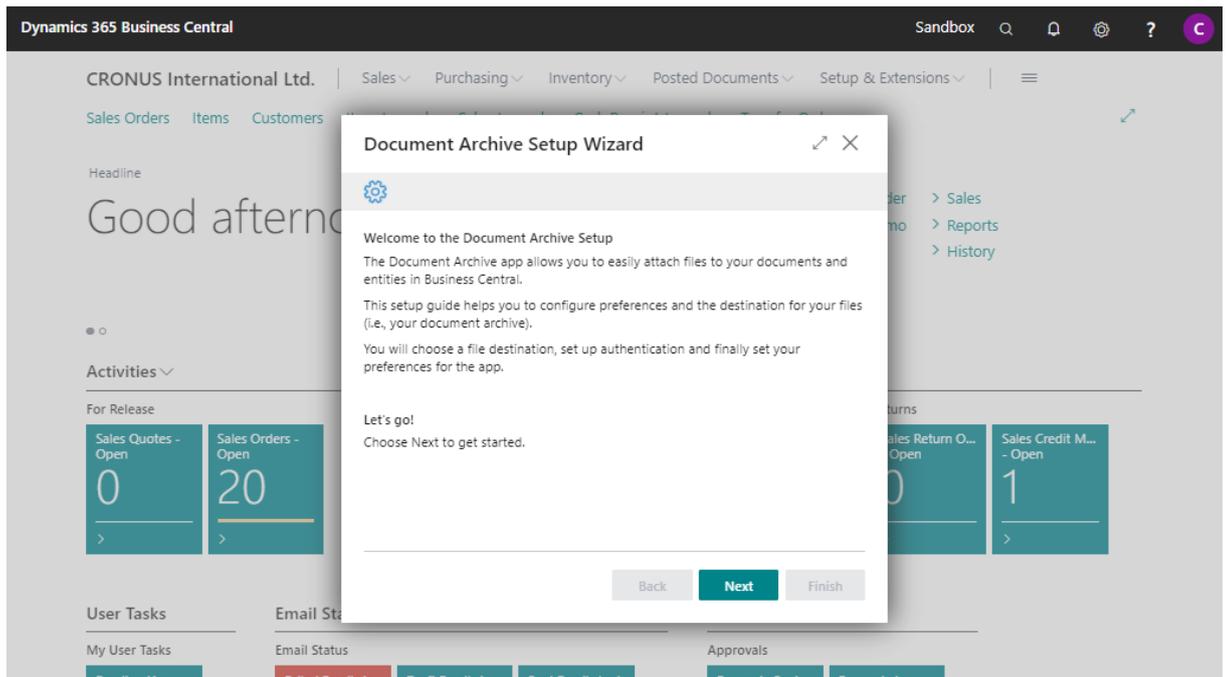
Document Archive Setup Wizard

Document Archive has an integrated setup wizard to assist you with the initial configuration of the app. It is recommended to use the setup wizard.

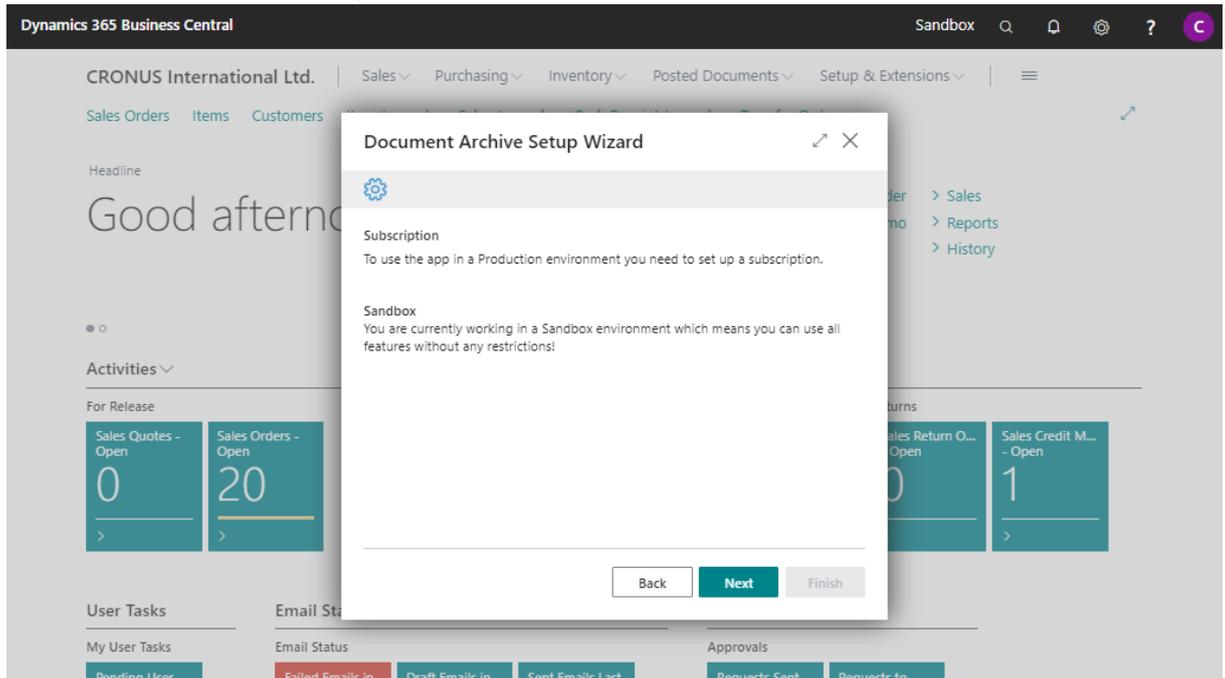
1. Find and open the *Document Archive Setup Wizard* in *Tell Me*



2. Read the introduction and click on *Next*

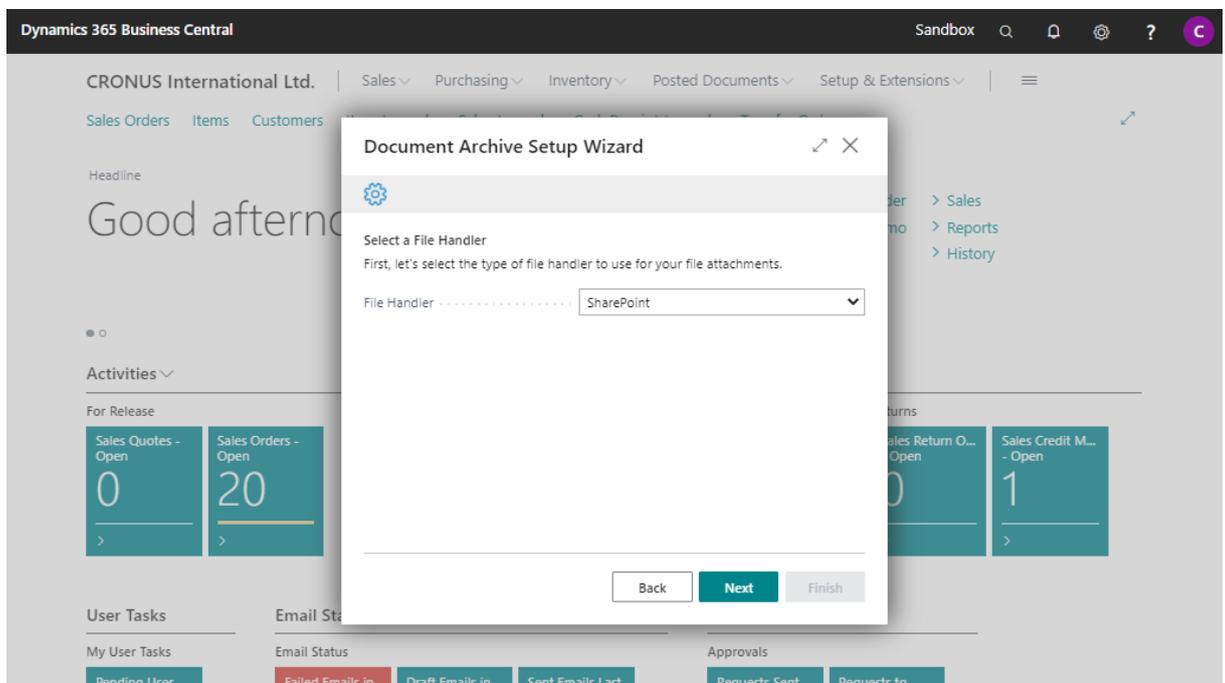


3. Read the notes of the subscription and click on *Next*



4. Choose your preferred *File handler* and click on *Next*

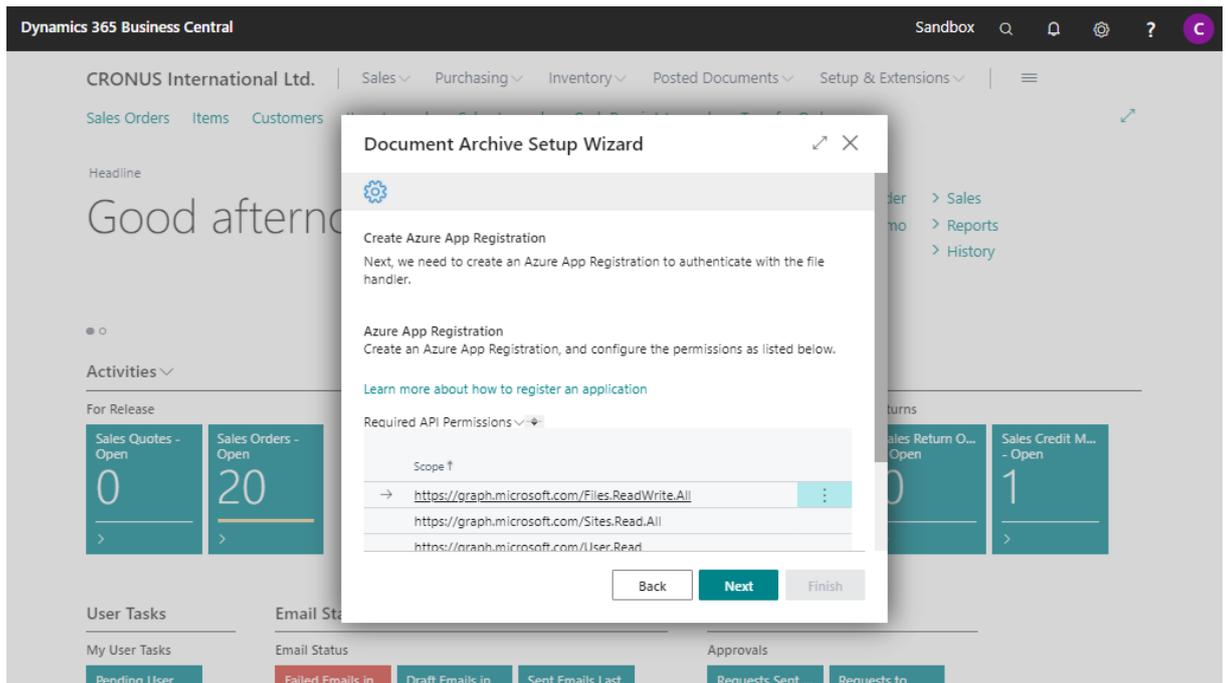
Note: currently it is only possible to store documents in SharePoint. More options will come available in new versions



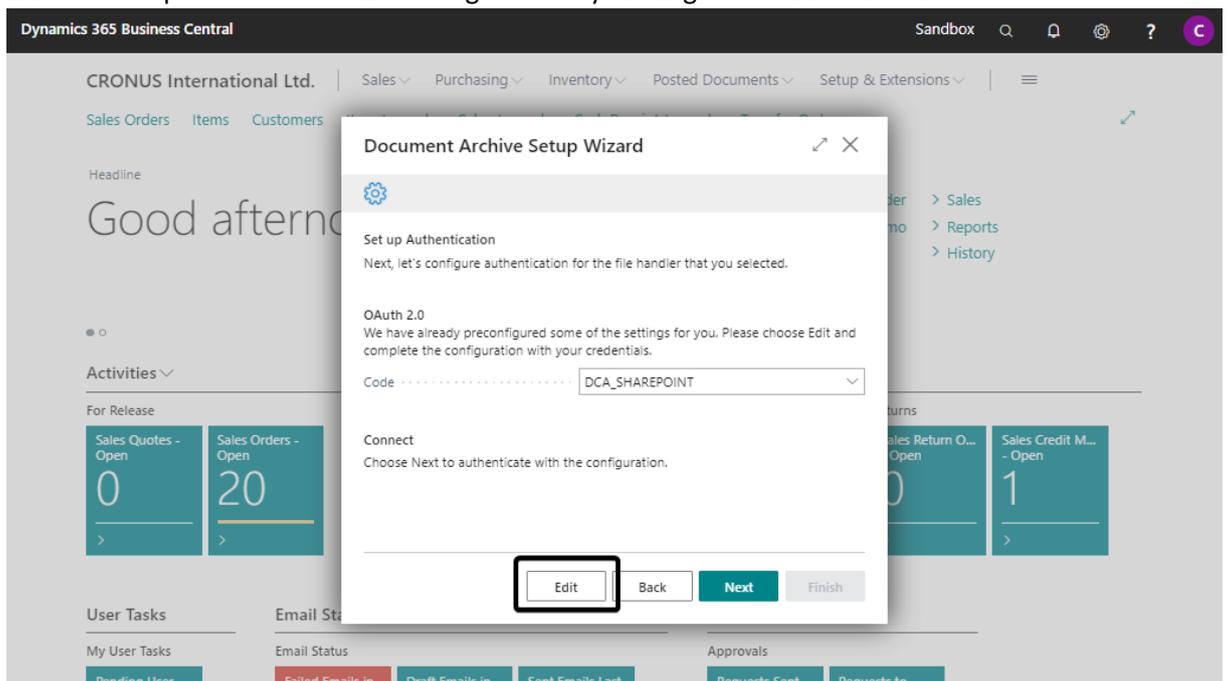
5. Create an *Azure App Registration* and click on *Next*.

During the Azure App Registration, please set up the required API Permissions as listed in the wizard.

To assist you with the *Azure App Registration*, please use the following documentation from Microsoft: [Quickstart: Register an app in the Microsoft identity platform | Microsoft Docs](#).

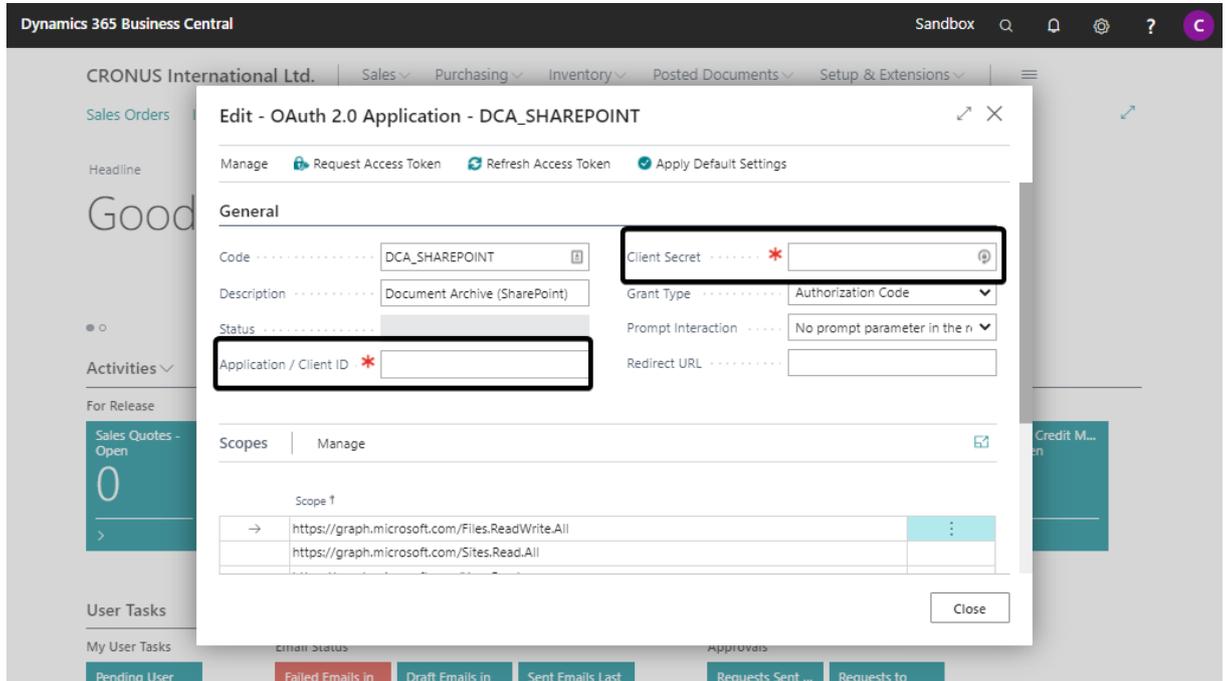


6. Edit and complete the OAuth 2.0 configuration by clicking on the *Edit* button.

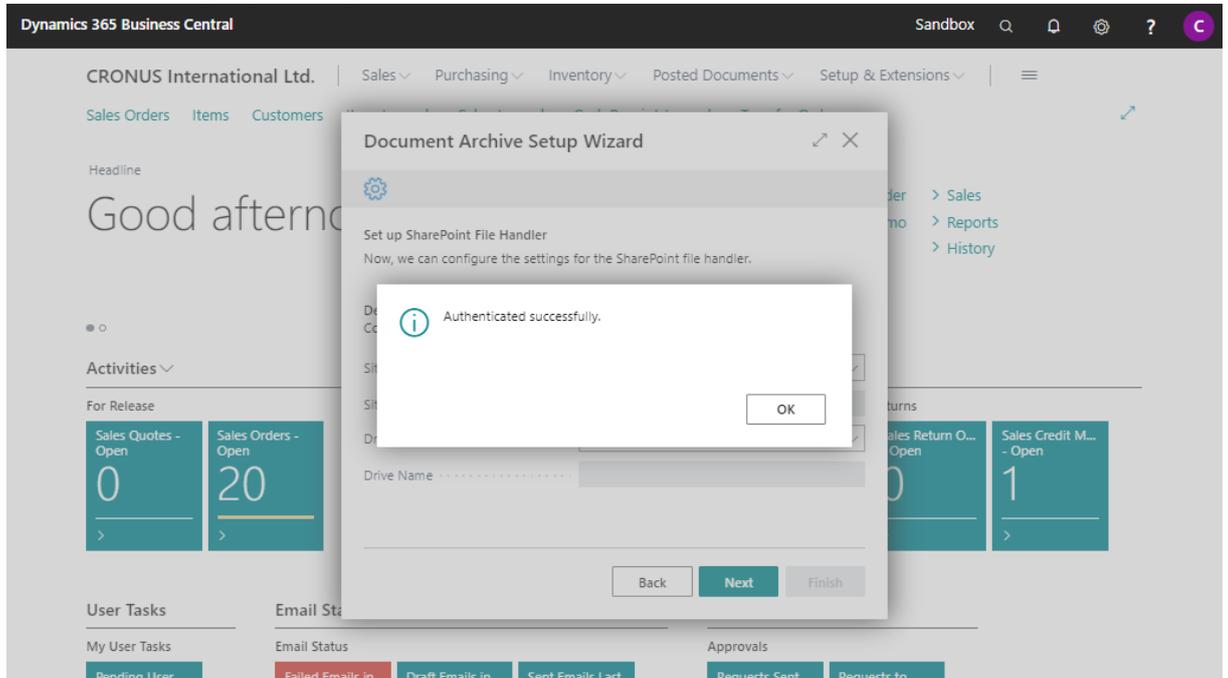


7. Perform the following steps in the next page and click on *Next*:
- The fields *Code* and *Description* are filled in with a default value, but can be changed manually.
 - Fill in the *Application / Client ID* and the *Client Secret* which are provided during the *Azure App Registration* of step 5.
 - Grant Type* is set up with *Authorization Code* as default and as preferred grant type. Can be changed manually to your preferences.

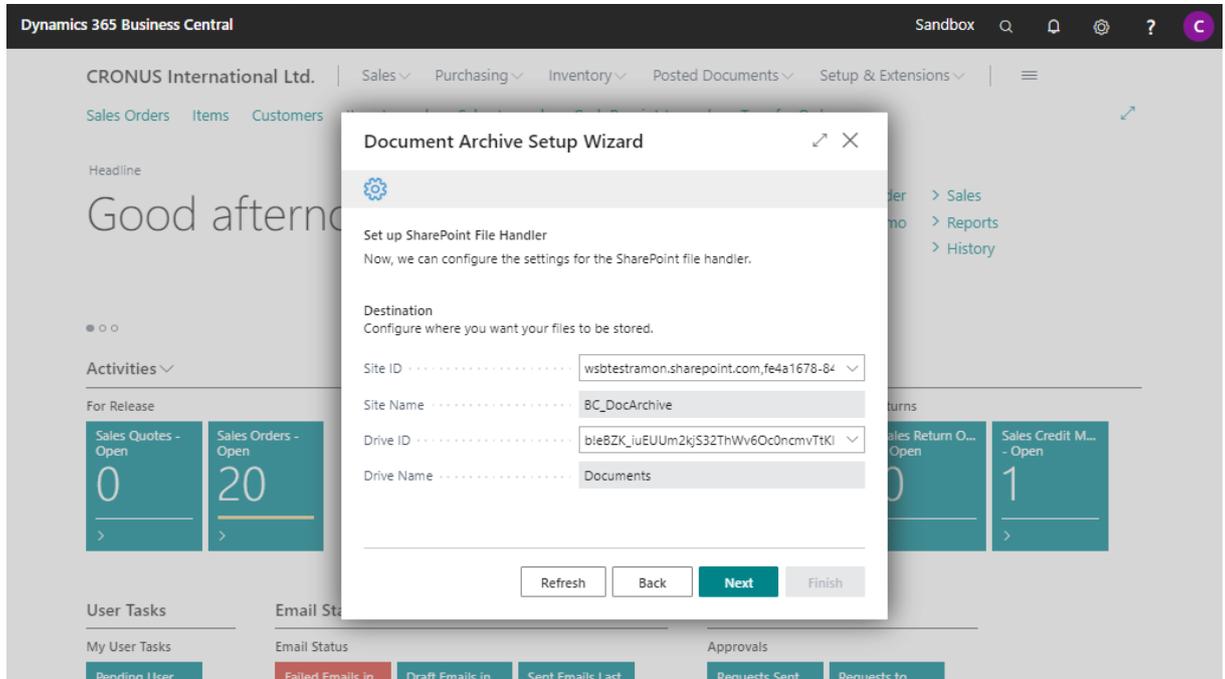
- d. *Authorization URL* and *Access Token URL* are filled in based on your working environment (i.e., for your current AAD tenant), but can be changed if necessary.
- e. Close the *OAuth 2.0 Application* page with *Close*.



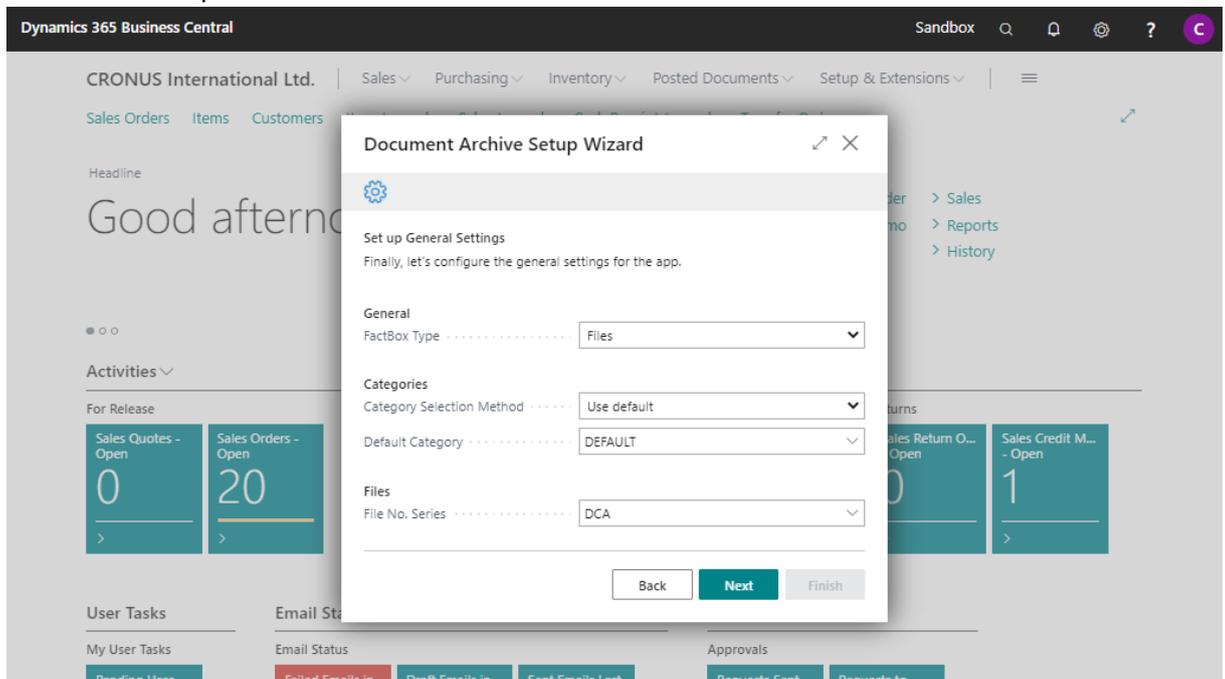
- 8. After clicking on *Next*, *Document Archive* will validate the connection and credentials set up and will provide a message when the authentication is successful. Please fix the *OAuth 2.0 Application* if there is an error given by checking the error message. Close the message by clicking on *OK*



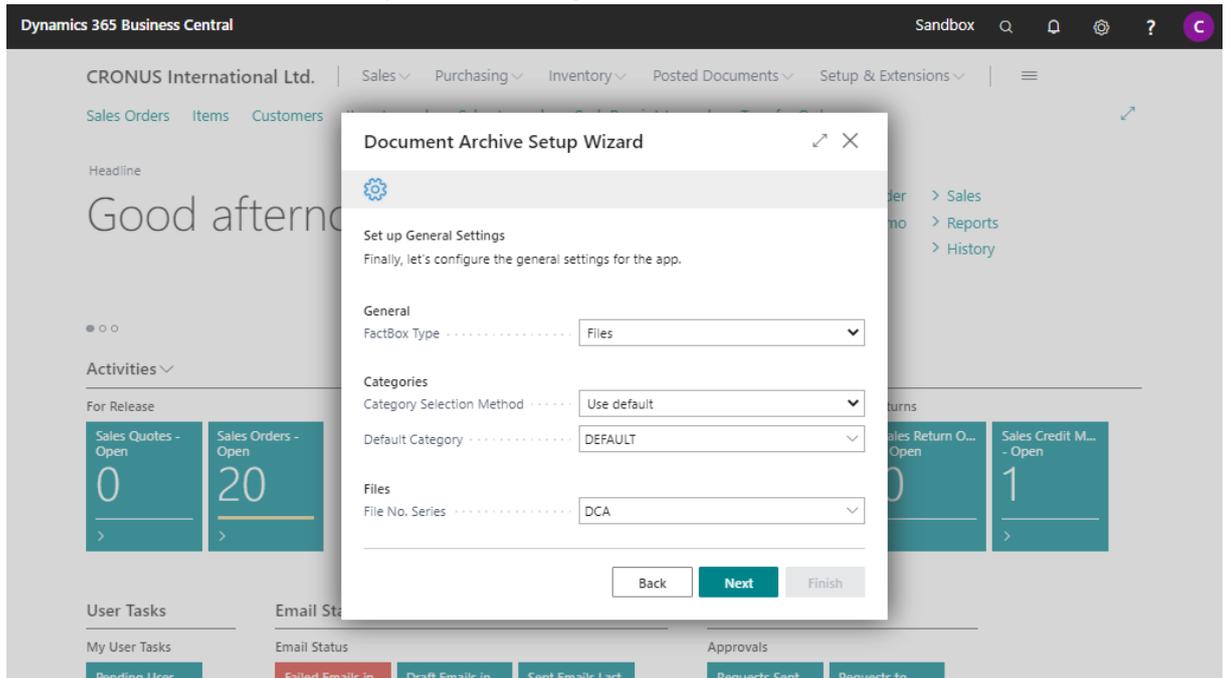
9. Fill in the *Site ID* and *Drive ID* of the preferred SharePoint page. The options available are linked to your Office environment. If you create a new site and drive during this setup, you can refresh the available sites and drives by clicking the *Refresh* button



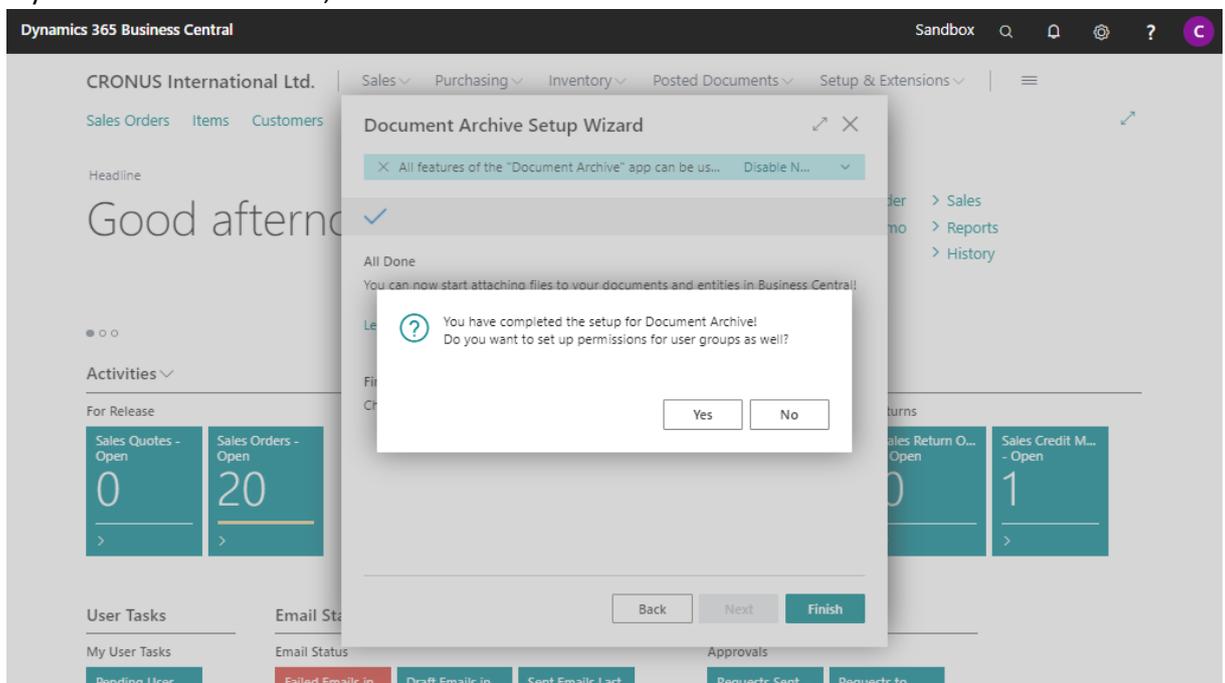
10. Check the following default setup and change if preferred. Details of the following setup will be listed further on in the manual. Click on *Next* to proceed with the wizard.



11. Click on Finish to finish the setup and start using *Document Archive*.



12. If you want to set up additional permissions for user groups you can access this page directly by clicking on Yes in the following message. If you want to this later on, click on No.



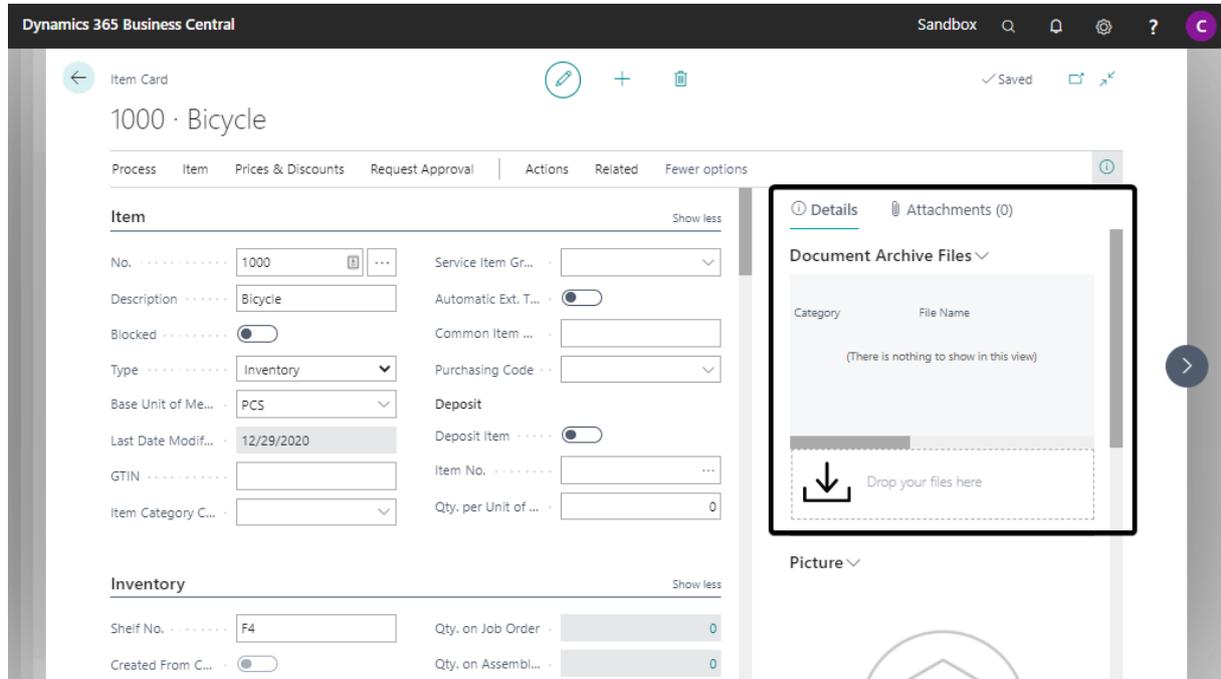
Document Archive is now configured and can be used.

More details about the setup can be found in the chapter **Error! Reference source not found..**

Usage

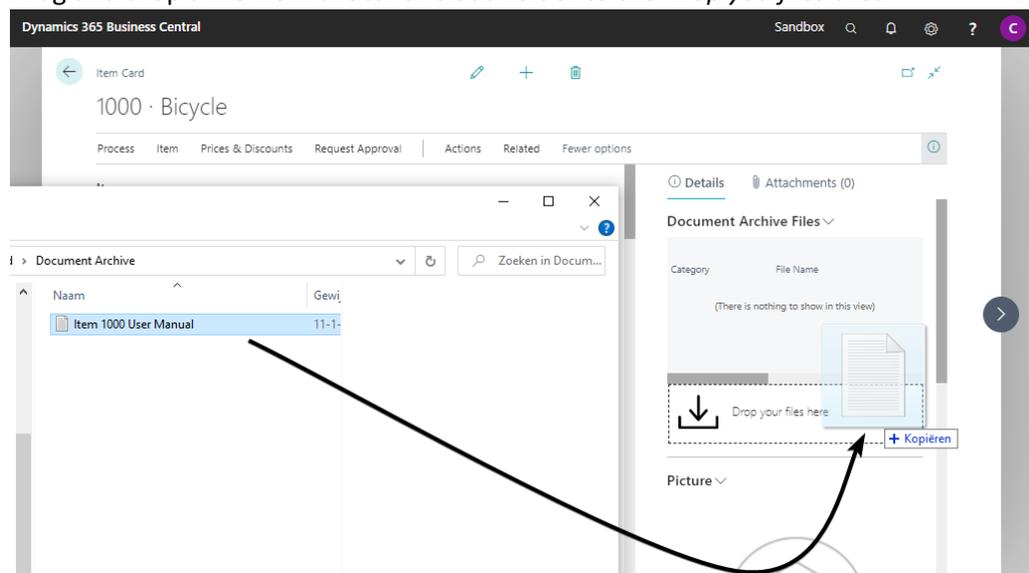
Document Archive Files Factbox

The *Document Archive Files* factbox can be found on the page views of your master data and documents. A complete list of where the factbox is available can be found in the Document Archive Pages section of this manual.

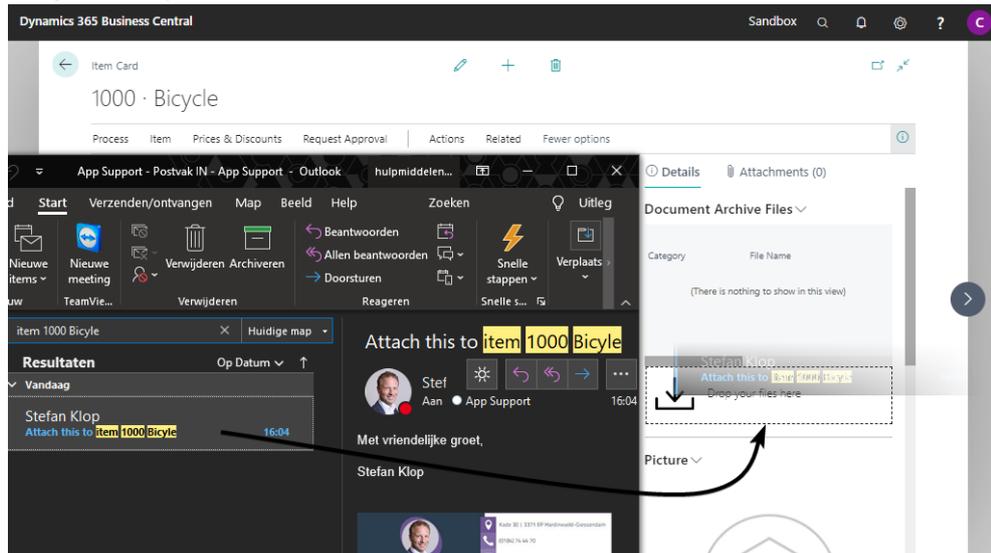


How to store an attachment

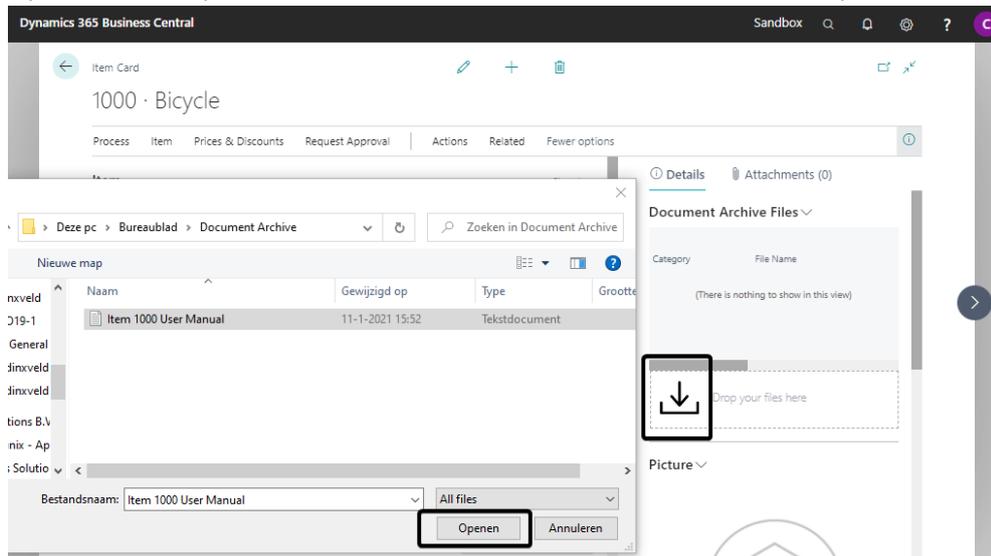
1. Open the page of a preferred entity. In this example: Item 1000 Bicycle
2. Use one of the following options to attach a document to the entity
 - I. Drag and drop a file from a local or cloud folder to the *Drop you files* area



II. Drag and drop a e-mail from Microsoft Outlook

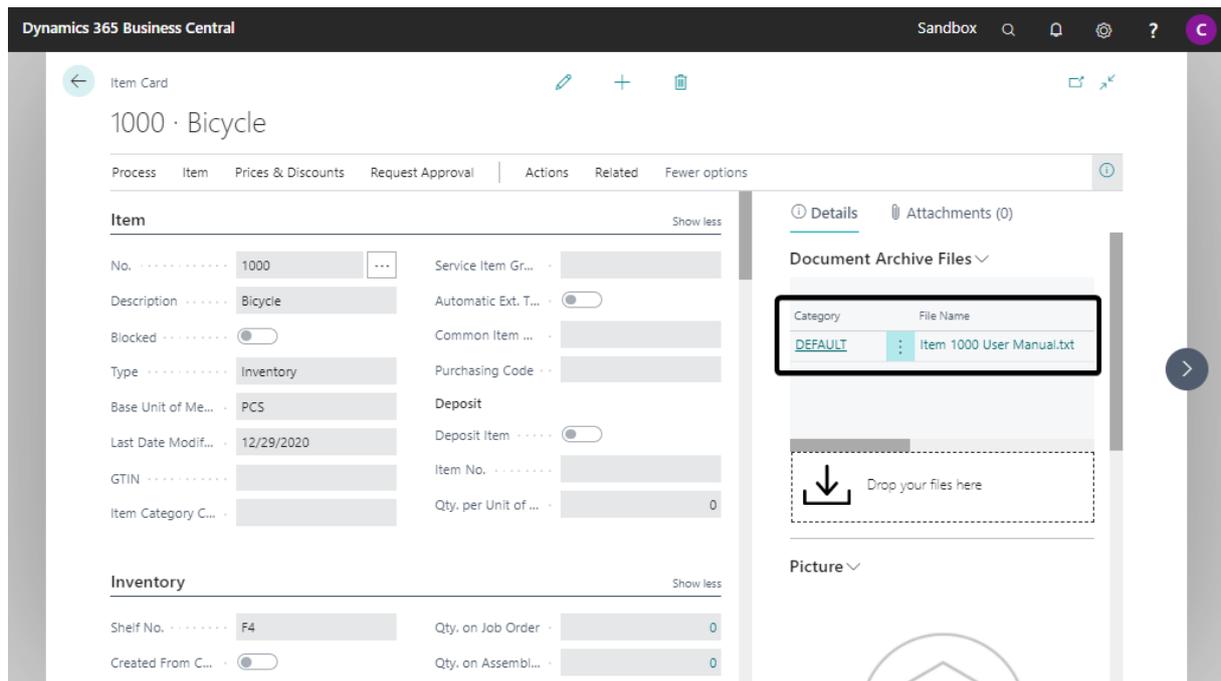


III. Open the File Explorer, locate and select the document and click on *Open*



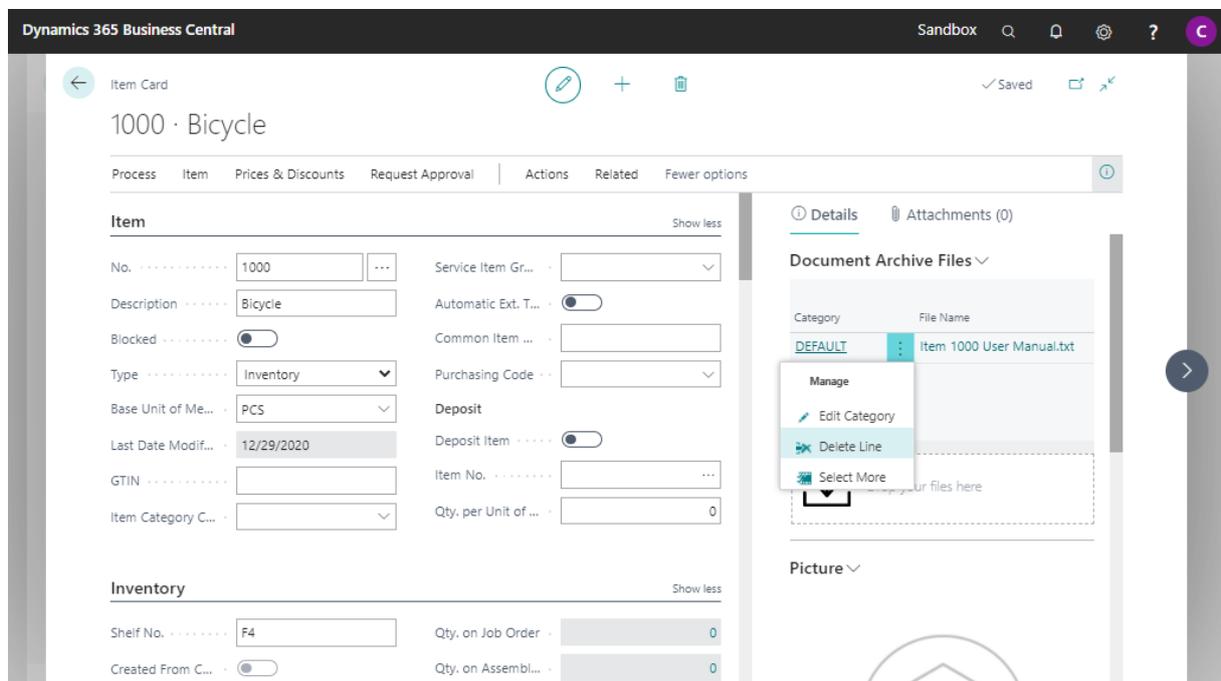
3. The document is now attached to the entity with the following data

- I. Category The category of the document
 Now setup with *Default* due to the configuration in the Document Archive Setup (Wizard)
- II. File name The file name and extension of the document
- III. Created Date/Time Date/time when the document was stored
 Only for drag-and-drop of an e-mail from Microsoft Outlook:
- IV. Message From Sender Name of the e-mail
- V. Message Date/Time Sender Date/Time of the e-mail



How to delete a Document Archive File

1. Click on *Show more options* (three dots) of the file to delete
2. Click on *Delete Line*



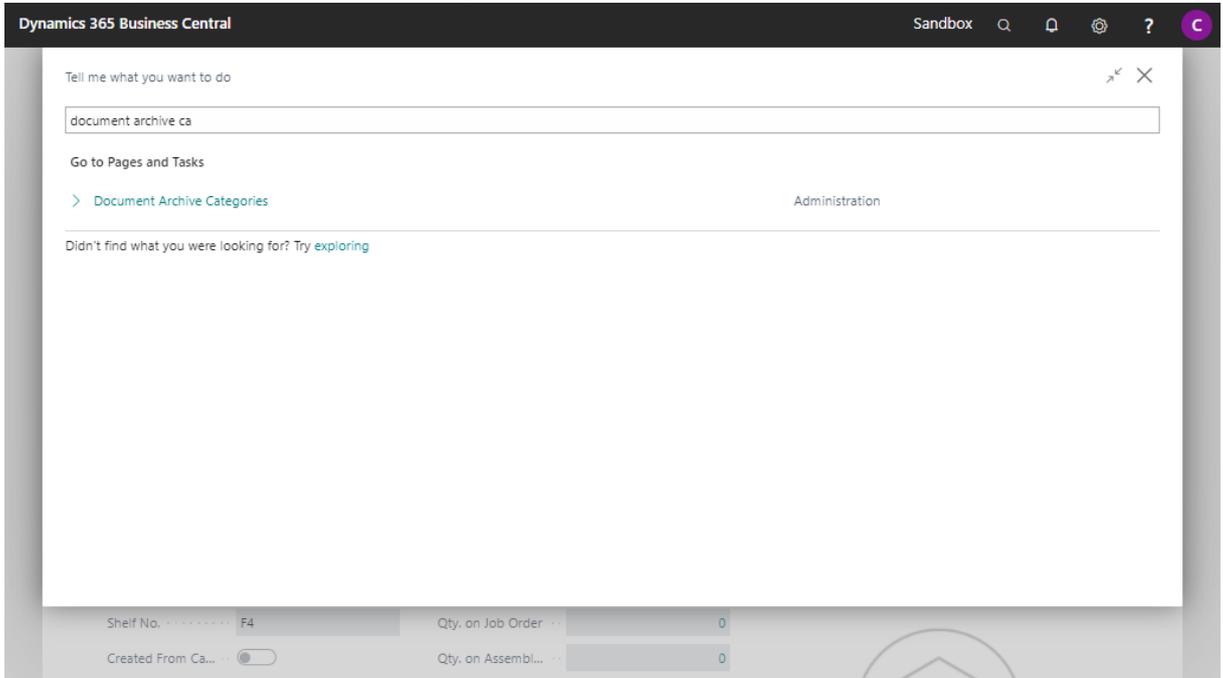
After deleting the *Document Archive File* the file in the storage will also be deleted

Document Archive Categories

Categories can be used to organize your attachments. The document archive categories can be set up in the *Document Archive Categories* page.

Setup Document Archive Categories

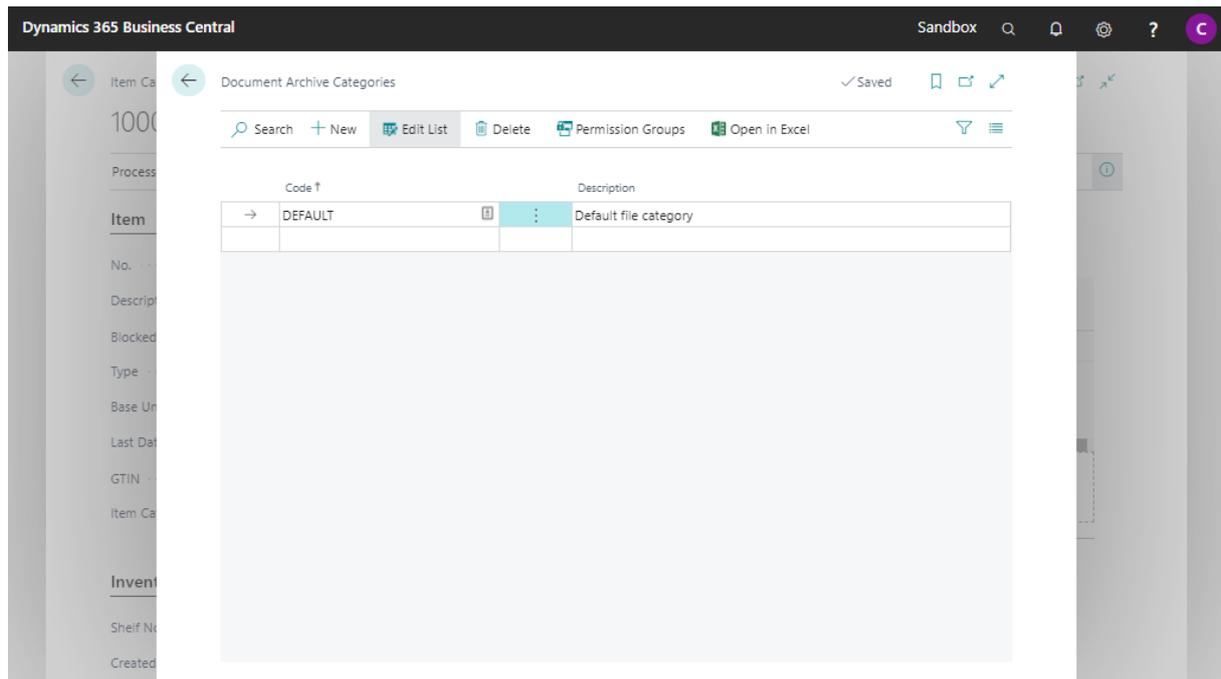
1. Find and open *Document Archive Categories* in *Tell Me*



2. Create new categories or edit/delete existing categories in this page.

Each category has the following mandatory fields

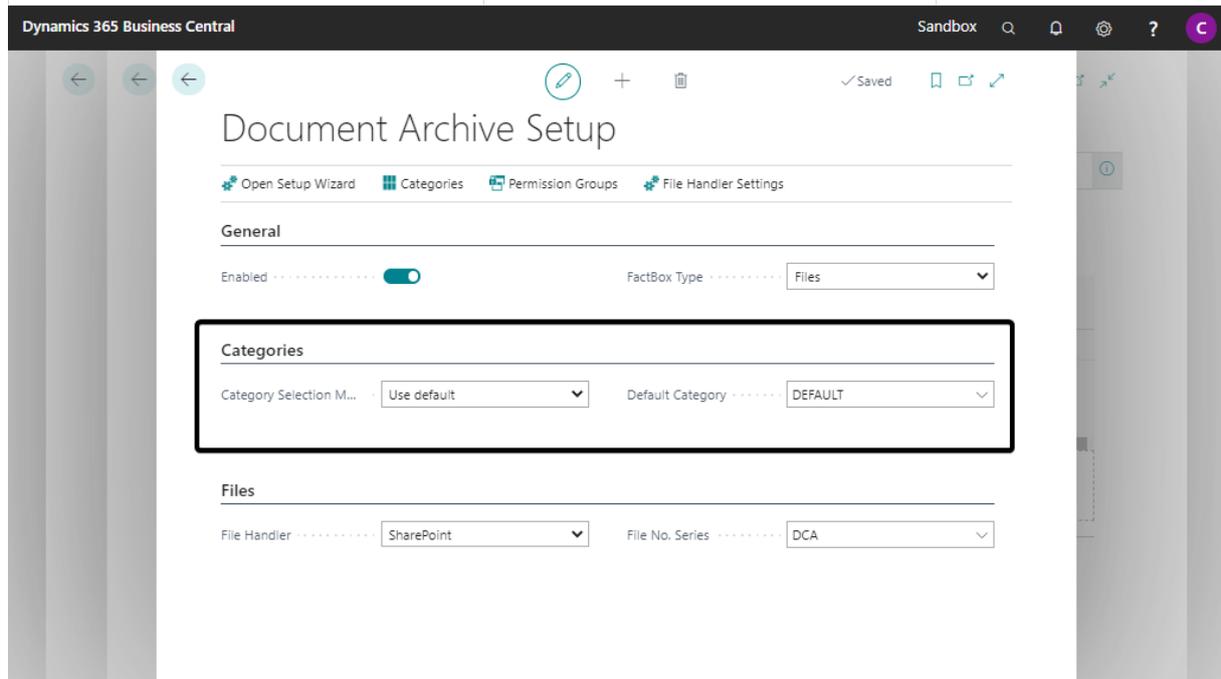
- a. Code The code of the *Category*
- b. Description The description of the *Category*



Initial Document Archive Category

The initial category of an attachment is determined by the setup in the *Document Archive Setup*. The available options are found in the Categories section and provides the following options based on the Category Selection Method.

Category Selection Method	Initial Category	Note
Use selected category	Based on the selected category when attaching the document	Only available for FactBox Type = Categories
Select on file upload	Select preferred category after attaching the document	
Use default	The Default Category of the Document Archive Setup	Default Category is mandatory to set up in the Document Archive Setup

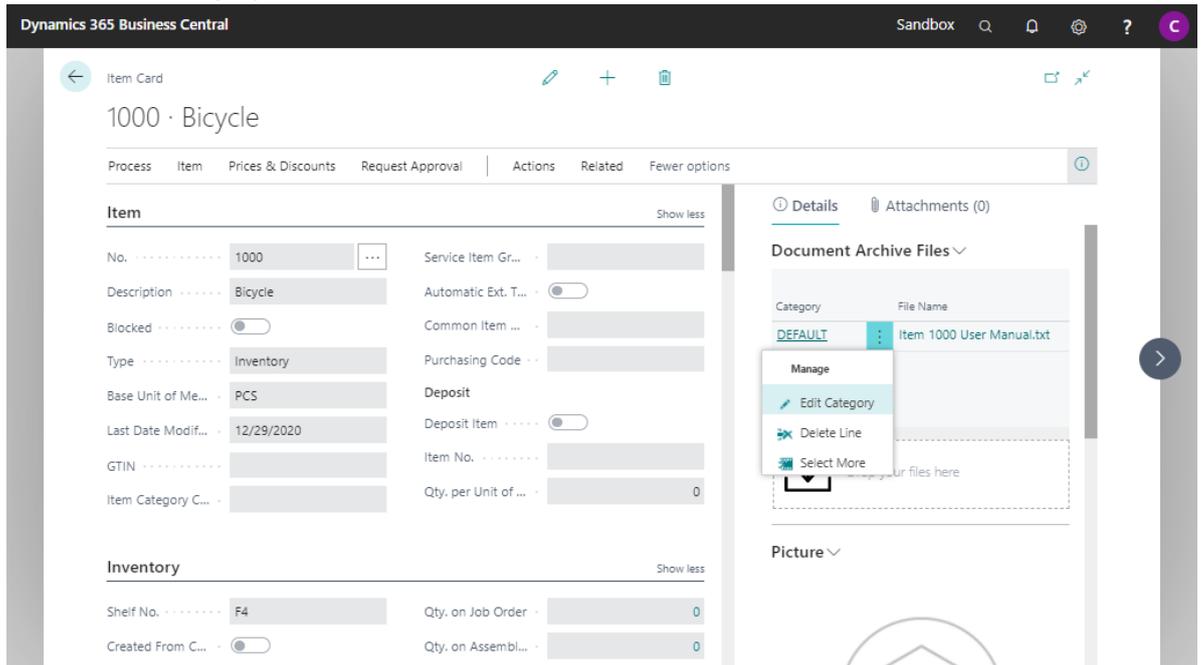


Change Document Archive Category

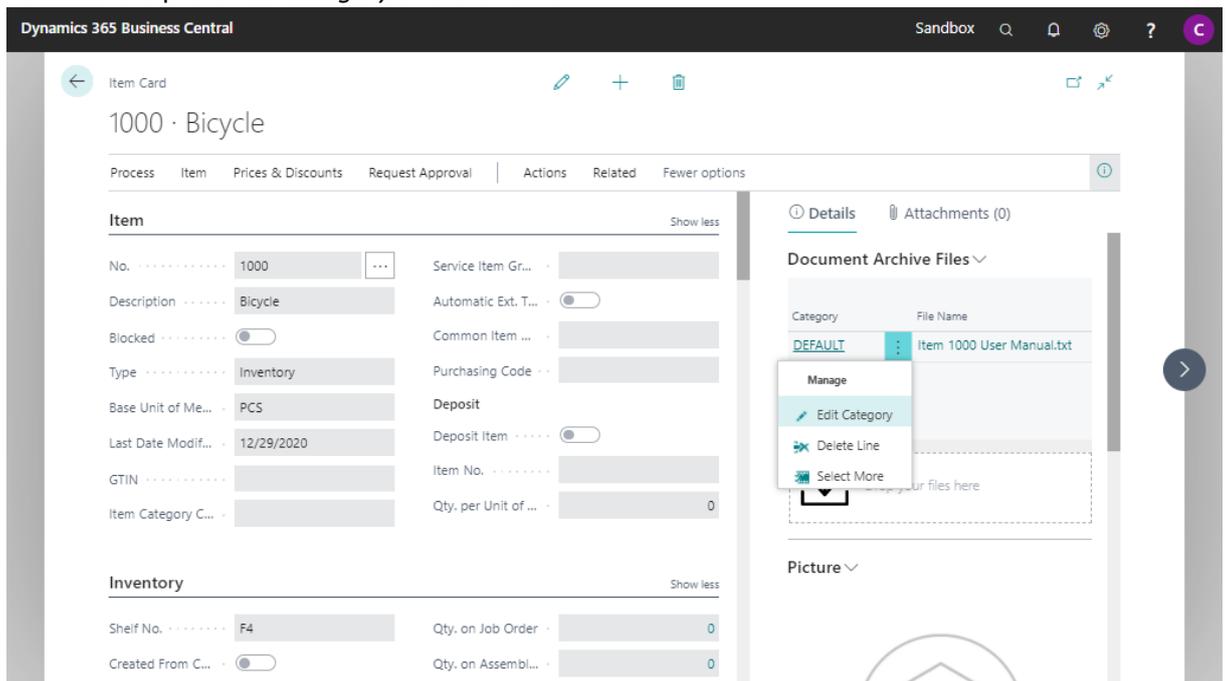
To change category of an attachment:

1. Click on *Show more options* (three dots) of the file to change.

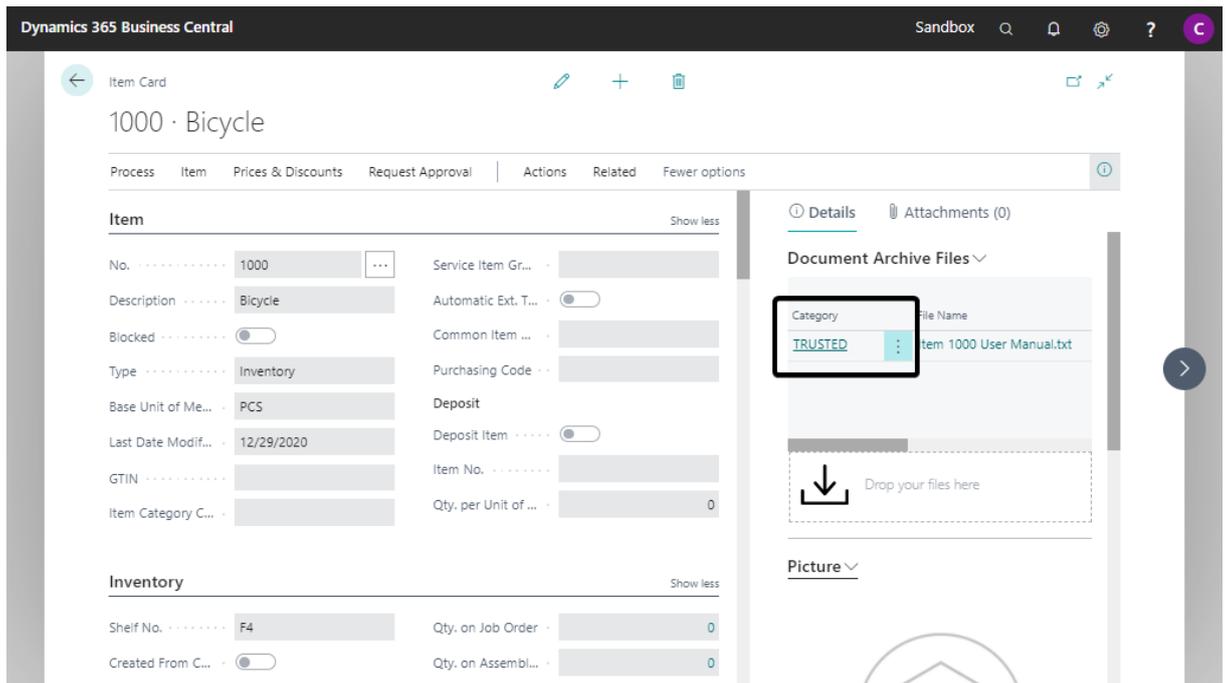
2. Click on *Edit Category*.



3. Selected the preferred *Category* and click on OK.



4. The category is now changed.



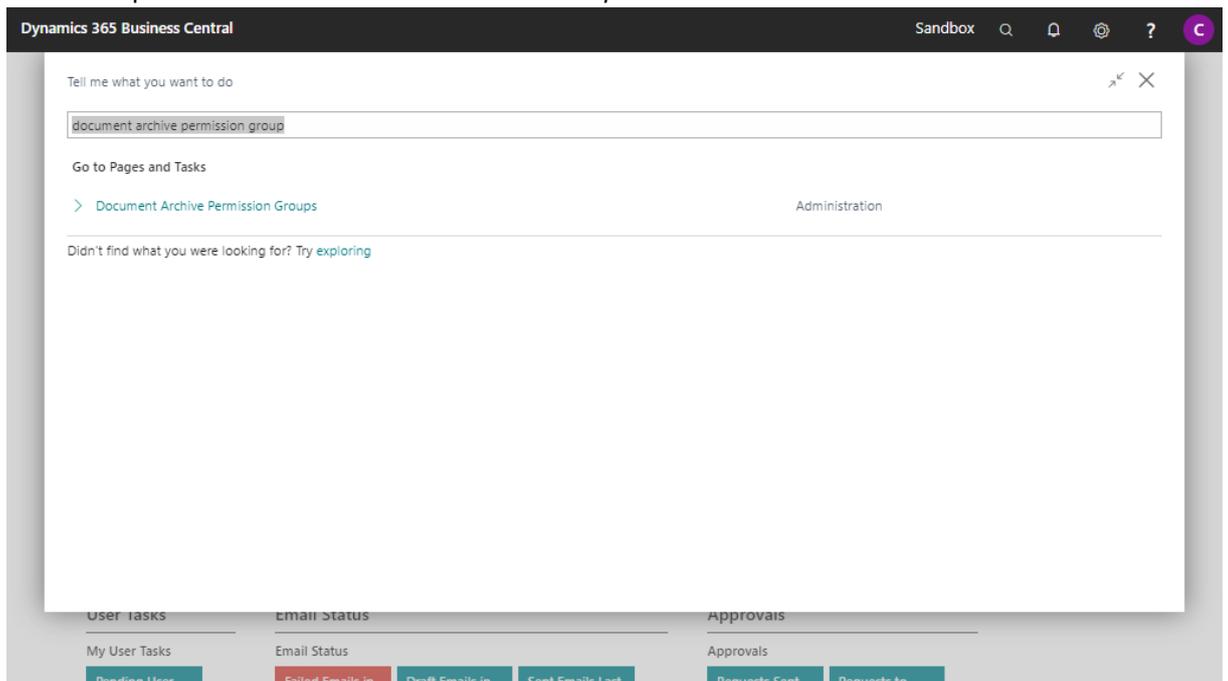
Notes

- The visibility of the available categories is based on the setup of the permissions of the category
- The visibility and accessibility of the file can change after assigning a new category due the permission of the category

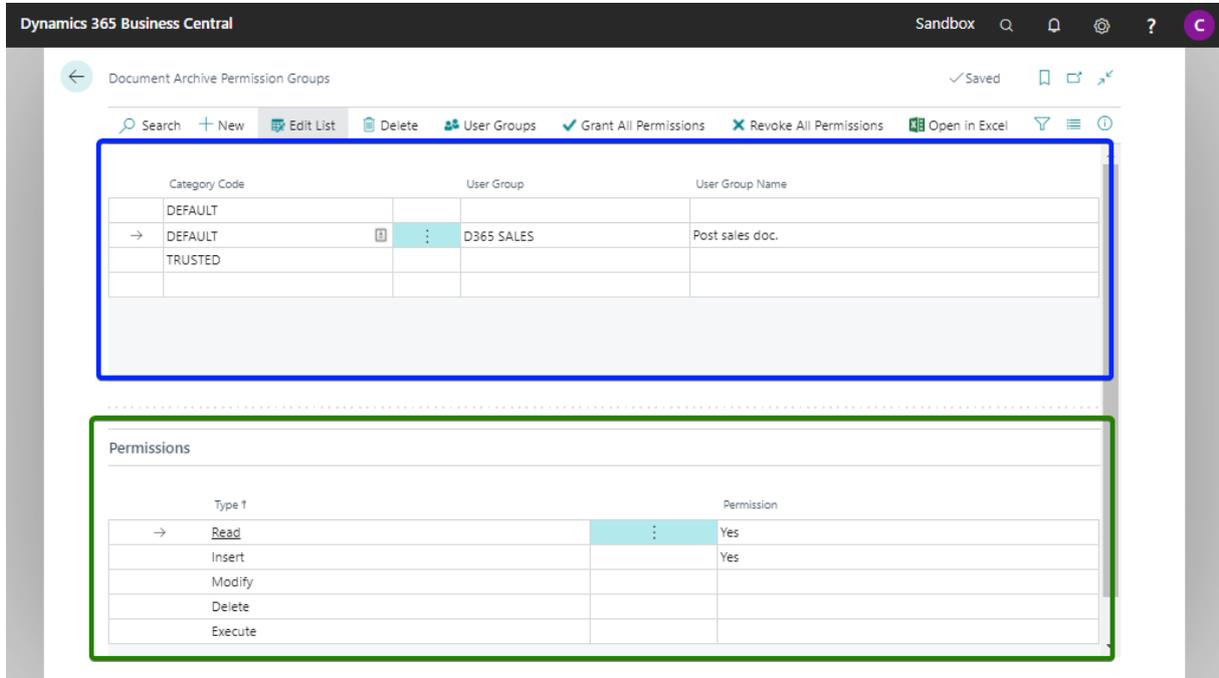
Document Archive Permission Groups

With the *Document Archive Permission Groups* you can set up the permissions per *User Group* for each *Document Archive Category*.

1. Find and open *Document Archive Permission Groups* in *Tell Me*.

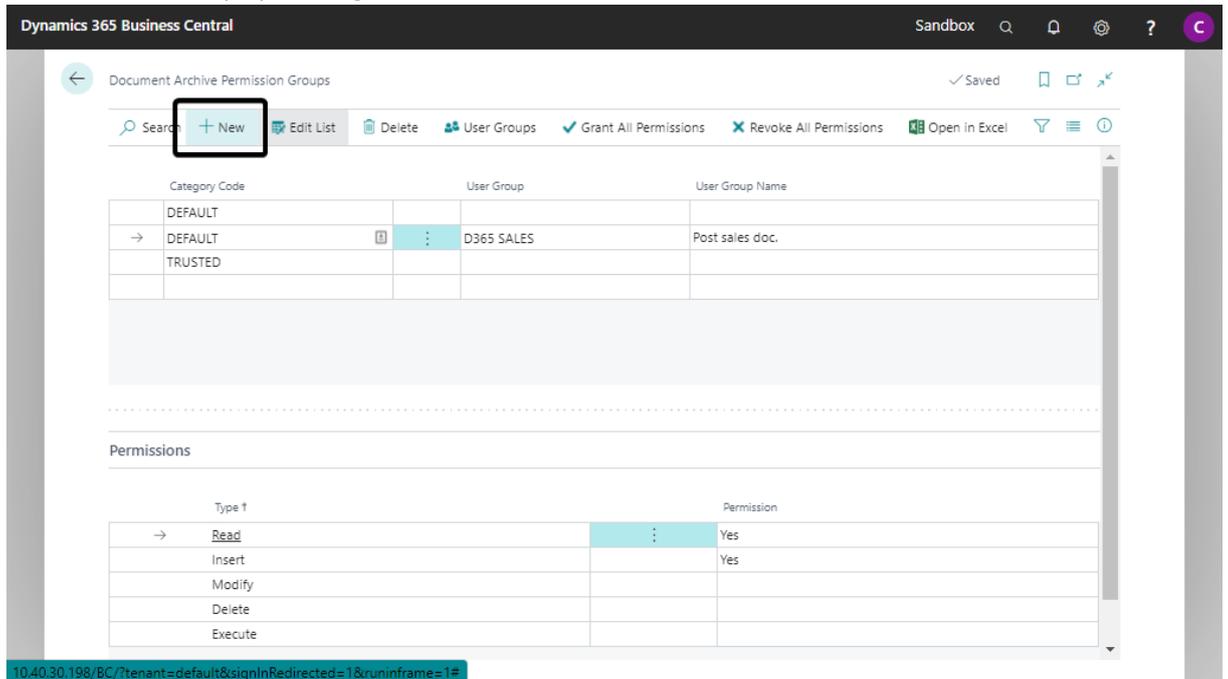


2. In the *Document Archive Permissions Groups* page you can see the existing permissions by *Document Category* and *User Group*.
 - a. Top section (blue) Configured *Category / User Group* combinations
 - b. Bottom section (green) Permissions for the selected *Category / User Group* Combination

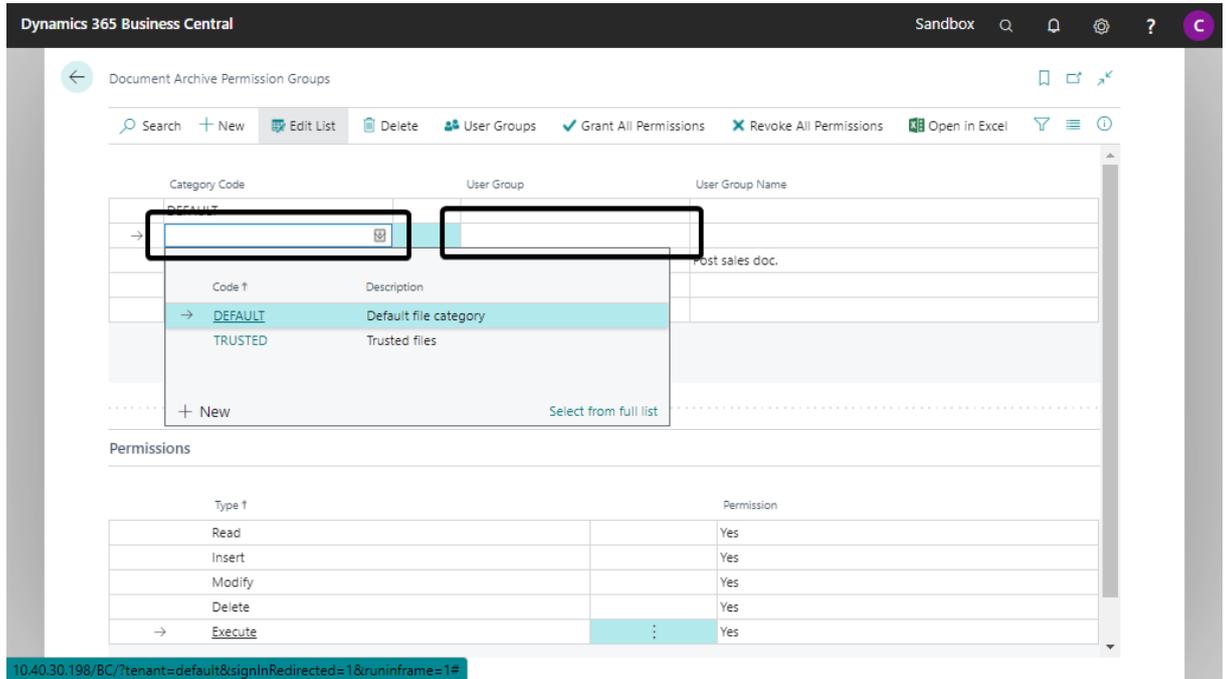


Top set up a new Document Archive Permission Group

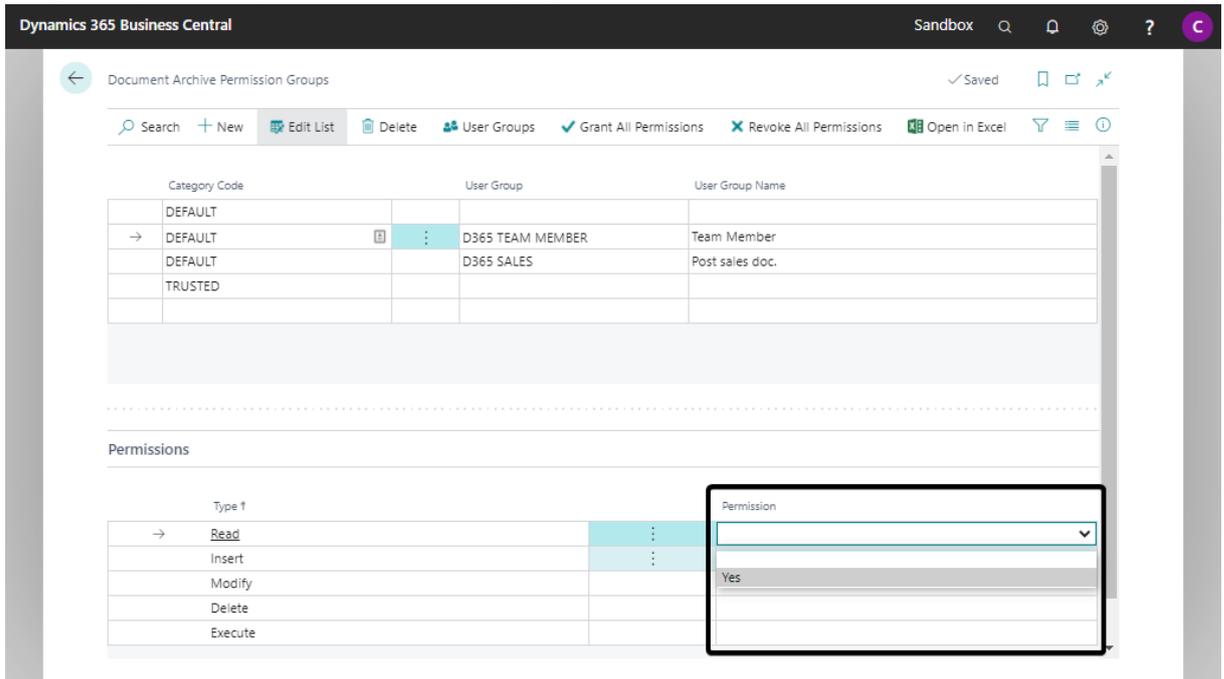
3. Create a new entry by clicking on *New* in the ribbon.



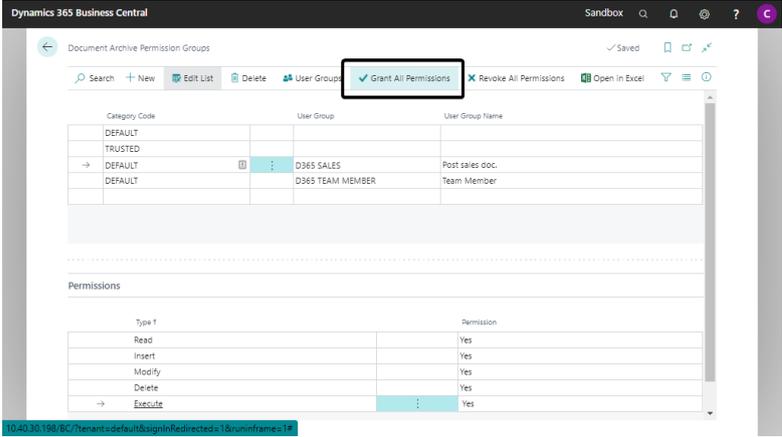
- Fill in the Category code and the User Group combination for which you want to set up the permissions.



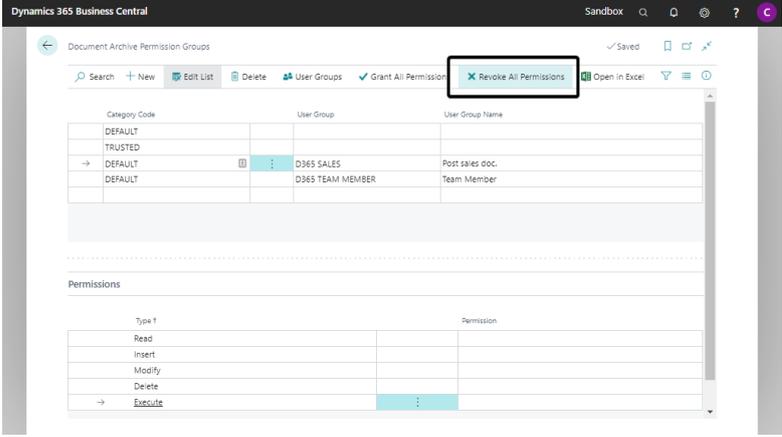
- Assign the preferred permission in the subpage.



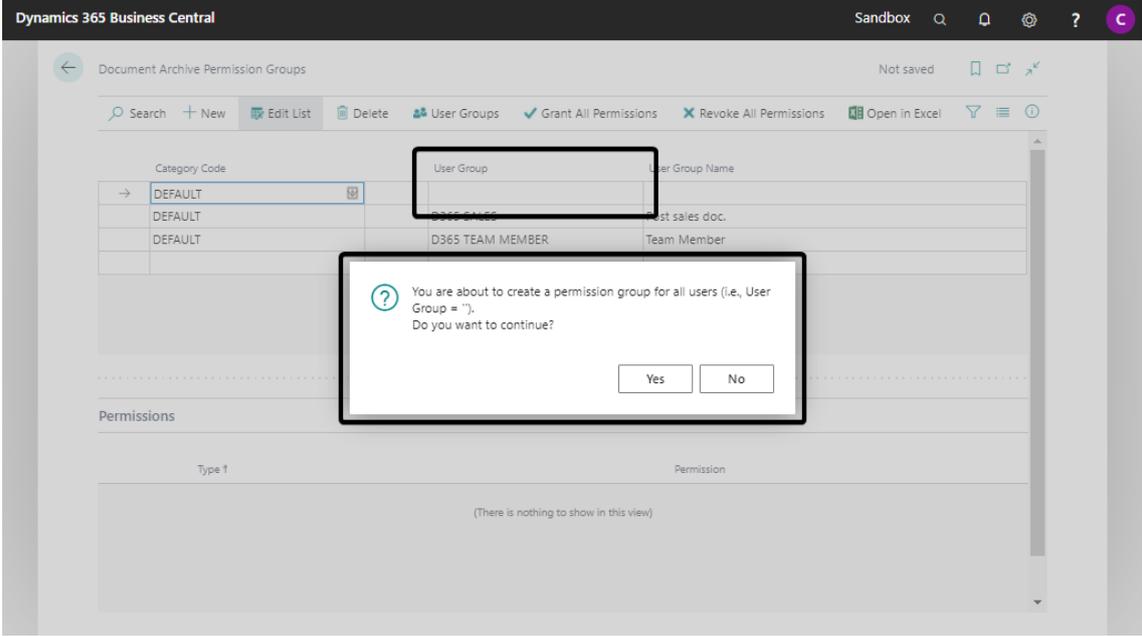
You can grant all permissions for a *Document Archive Permission Group* with the action Grant All Permissions.



You can revoke all permissions for a *Document Archive Permission Group* with the action *Revoke All Permissions*.



Note: The permissions of a *Document Archive Permissions Group* with no *User Group* assigned, will be applicable for all users. You are warned with a message when you set up this configuration.

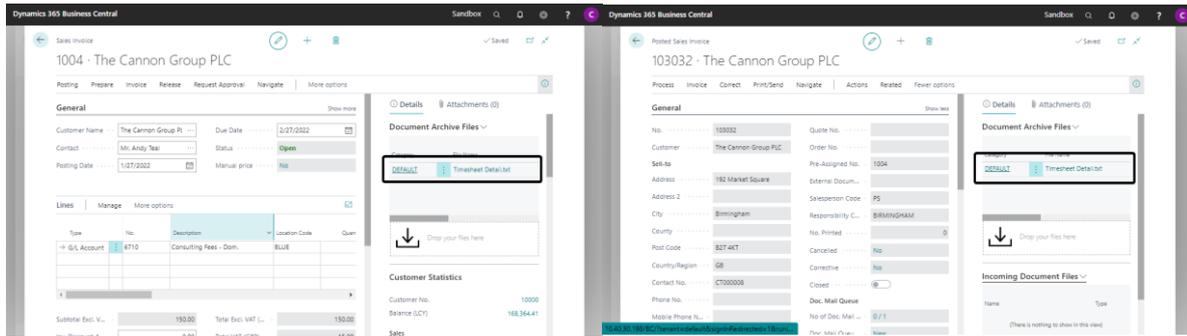


Miscellaneous

Document Archive with Posted Documents

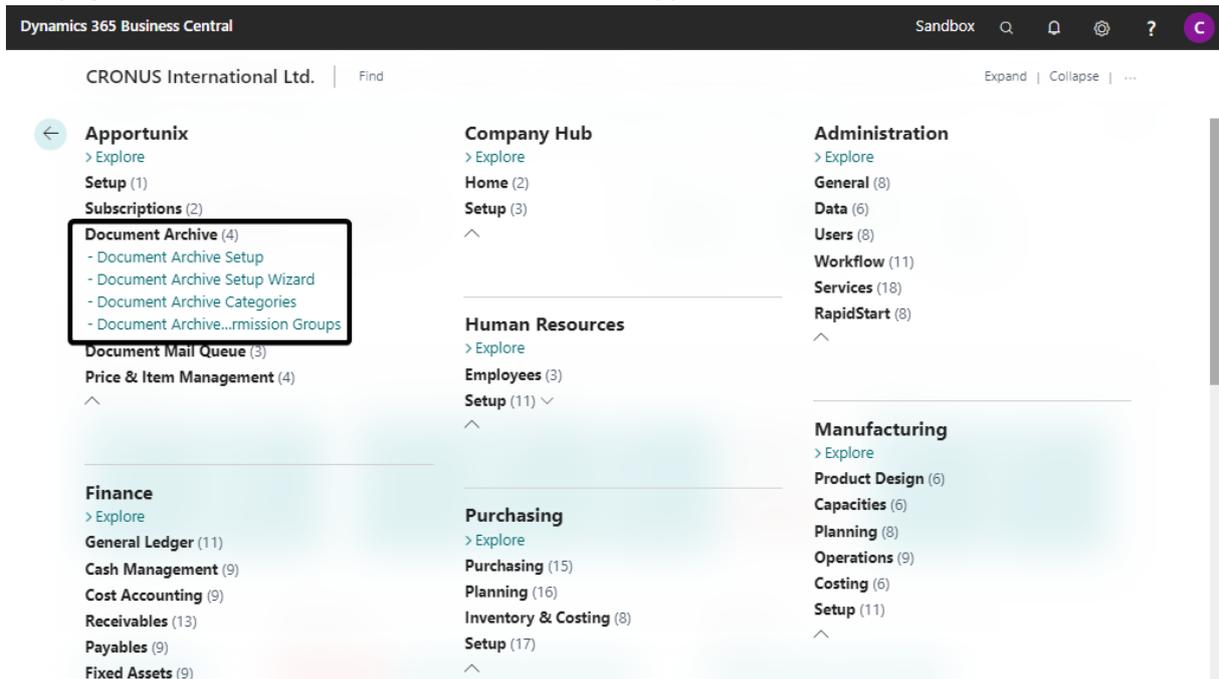
The *Document Archive Files* will be automatically transferred from a document to the posted document during posting.

The picture below shows an example of a *Document Archive File* being transferred when a *Sales Invoice* is posted.



Document Archive Role Center Entries

The pages for *Document Archive* can be found in the *Apportunix* role center.



Document Archive Pages

Document Archive is available on the following pages:

Page		
Customer Card	Sales Order Archive	Blanket Purchase Orders
Customer List	Sales Quote Archive	Purchase Return Order List
Vendor Card	Purchase Quote Archive	Service Quotes
Vendor List	Purchase Order Archive	Service Orders
Item Card	Warehouse Receipt	Service Invoices
Sales Quote	Service Order	Service Credit Memos
Sales Order	Service Invoice	Service Contracts
Sales Invoice	Service Credit Memo	Service Contract Quotes
Sales Credit Memo	Service Quote	Purchase Quote Archives
Purchase Quote	Posted Service Credit Memos	Purchase Order Archives
Purchase Order	Posted Service Credit Memo	Sales Quote Archives
Purchase Invoice	Posted Service Shipments	Sales Order Archives
Purchase Credit Memo	Posted Service Shipment	Planned Production Order
Resource Card	Posted Service Invoices	Firm Planned Prod. Order
Job Card	Posted Service Invoice	Released Production Order
Job List	Service Item Card	Simulated Production Order
Posted Sales Shipment	Service Item List	Assembly Orders
Posted Sales Invoice	Service Contract	Item List
Posted Sales Credit Memo	Service Contract Quote	Sales Invoice List
Posted Purchase Receipt	Sales Return Order Archive	Sales Credit Memos
Posted Purchase Invoice	Sales Return Order	Sales Quotes
Posted Purchase Credit Memo	Purchase Return Order	Production Order List
Posted Sales Shipments	Purchase Return Order Archive	Resource List
Posted Sales Invoices	Posted Return Shipment	
Posted Sales Credit Memos	Posted Return Shipments	
Posted Purchase Receipts	Posted Return Receipt	
Posted Purchase Invoices	Posted Return Receipts	
Posted Purchase Credit Memos	Posted Whse. Receipt	
Blanket Sales Order	Warehouse Shipment	
Blanket Purchase Order	Posted Whse. Shipment	
Assembly Order	Posted Whse. Shipment List	
Contact Card	Blanket Sales Orders	
Contact List	Sales Return Order List	
Opportunity List	Sales Order List	
Opportunity Card	Purchase Quotes	