Zetadocs for Microsoft Dynamics NAV
Upgrade Guide

Version history
Version: 1.2 25/07/2008

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1.   Introduction

The aim of this document is to guide you through the steps required to upgrade Zetadocs for Microsoft Dynamics NAV version 1.1 to version 1.2. The document provides a step by step guide as to how to install and configure Zetadocs for Microsoft Dynamics NAV version 1.2 on a system that has version 1.1 installed. It is recommended that you read the entire guide before starting with the upgrade.

1.1 Components

The different components of the Zetadocs for NAV solution need to be upgraded differently depending on their nature. They are:

- Zetadocs NAV Client
- Zetadocs SharePoint Extensions
- Zetadocs for NAV Objects

The following sections of this document will give instructions on how to perform the upgrade for these different components.

2.   Upgrading

2.1 Zetadocs NAV Client

The Zetadocs NAV Client is installed in 3 separate parts:

- Zetadocs NAV Client
- Zetadocs API Runtime
- Zetadocs PDF

The Zetadocs NAV Client components are installed through Windows Installer and the upgrade can be performed by running the installer again for Zetadocs NAV version 1.2.

Actions:
1. From your Zetadocs for NAV CD, launch the installer.
2. Select Install Zetadocs for NAV -> Zetadocs for NAV Client.
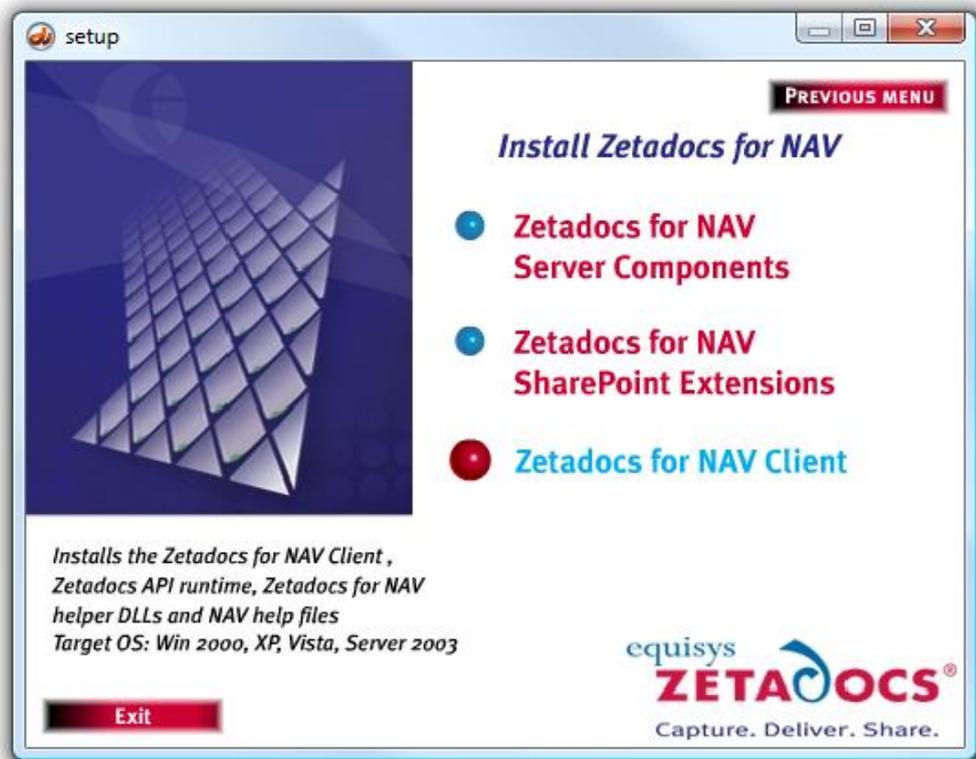
3. You will be asked if you want to perform an upgrade of Zetadocs NAV Client. Select Yes.
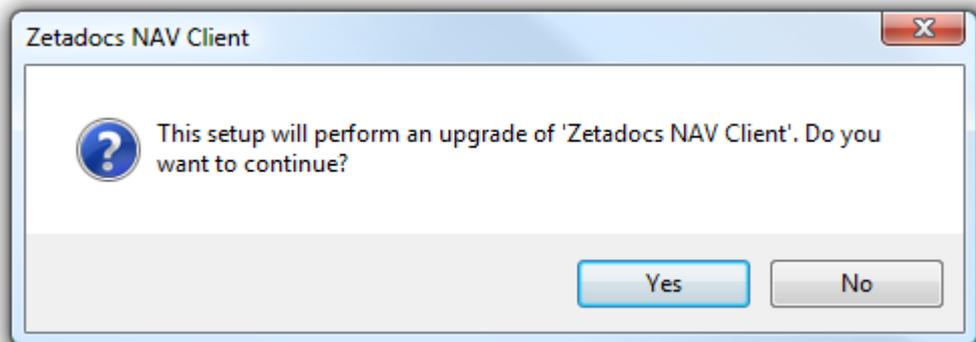
4. Follow the instructions of the installer and select Yes when asked to perform an upgrade of the Zetadocs NAV Client prerequisites (Zetadocs PDF and Zetadocs API Runtime).

5. Once the installation is finished, ensure that your license information is still valid for the version of Zetadocs that you are using. You can validate your license by using the Zetadocs PDF Configuration program.

2.2 Zetadocs SharePoint Extensions

To upgrade the SharePoint extensions, you must be able to log on the server which has MOSS or WSS installed with administrator privileges, for both Windows and SharePoint.

Actions:

1. Log on to the server using an account that has administrator privileges.
2. Open Add/Remove programs.
3. Locate "Zetadocs SharePoint Extensions" in the list of installed programs and select Remove.
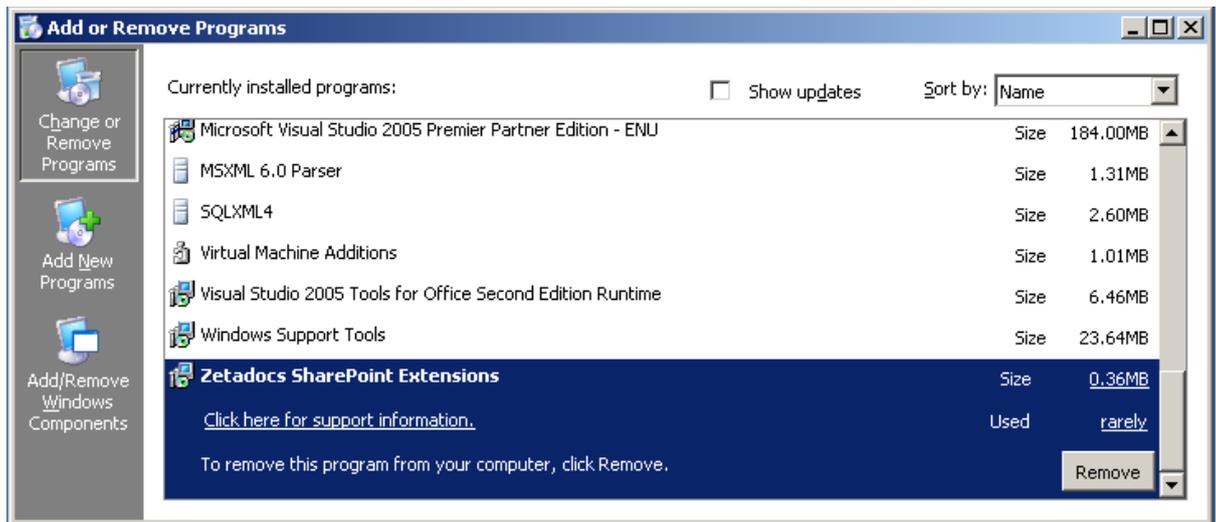
4. Open the SharePoint Central Administration program.
5. In the Operations tab, select Solution Management in the Global Configuration section.
6. Ensure that the Zetadocs SharePoint Extensions have been removed.
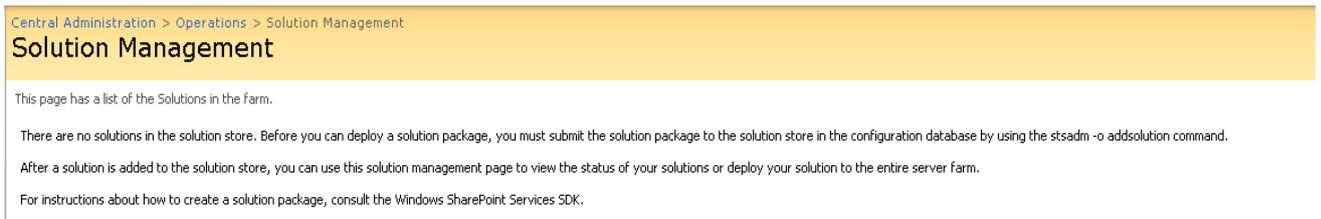
7. The Zetadocs SharePoint Extensions have now been removed from the SharePoint Server.

It is important to note that while the solutions have been removed from the server, the columns created by Zetadocs will still exist on your SharePoint site. These columns should not be deleted as they will be used by Zetadocs v1.2 once the upgraded version of the SharePoint Extensions is deployed.

You are now ready to install the upgraded version of the Zetadocs SharePoint Extensions.

Actions:
1. On the SharePoint server, start the Zetadocs for NAV installer.
2. In the Install Zetadocs for NAV section, select Zetadocs for NAV SharePoint Extensions.
3. Follow the instructions from the installer. The options offered during the installation are explained in details in the Zetadocs for Microsoft Dynamics NAV Installation Guide section 3.2

2.3 Zetadocs for NAV Objects

The NAV objects distributed with the Zetadocs for NAV solution can be separated in two separate categories:
- Objects created for Zetadocs only (Zetadocs for NAV Objects)
- Modifications made to existing objects in NAV (Zetadocs Interfaces)

(i) Modifying Zetadocs Objects

Most of the objects configured for Zetadocs version 1.1 will already be configured for Zetadocs v1.2 once the new objects are imported, but we strongly recommend that the current configuration is backed up for security reasons. The following steps will tell you how to backup the Zetadocs for NAV objects before you upgrade.

Actions:
1. Open the NAV Client and log on to the database.
2. Navigate to the Zetadocs Administration section (Administration Tab -> Application Setup -> Zetadocs Setup).
3. Run the Zetadocs Report Settings form.
4. Press Ctrl + A to select all records, then press CTRL + E to export the records to an Excel file for backup. Save the Excel file as a backup of your reports configuration. Alternatively you can export to Notepad or WordPad should Excel not be available.
5. Repeat steps 3 and 4 for the Zetadocs Company Types form, the Zetadocs System Rules form, the Zetadocs Customer Rules form, the Zetadocs Vendor Rules form, the Zetadocs Templates form and the Zetadocs Document Sets form in that order. Note that you will not be able to delete the default document set.

Note that all the reports that were created for Zetadocs version 1.1 will work with Zetadocs version 1.2 without any modifications. Therefore, there is no need to export them during the upgrade process.

You are now ready to import the Zetadocs for NAV 1.2 objects in your database. The instructions given here are for NAV 5.0. You must pick the file that's appropriate for the version of NAV you are using.

Actions:

1. From NAV, import the Zetadocs for NAV V1.02 Objects – NAV5.00.fob file. You will be prompted to open the Import Worksheet.
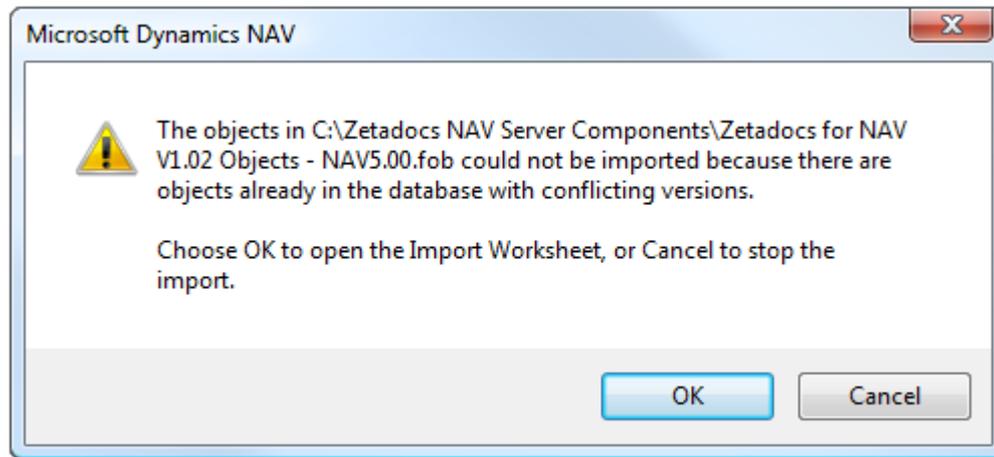
2. Once in the Import Worksheet, the actions suggested by NAV should be changed. Instead of merging the new tables in the existing ones, you must replace them. The figure below describes the actions that should be taken in the import sheet:

Type	No.	Name	Action
Table	9009959	Zetadocs System Settings	Replace
Table	9009960	Zetadocs Template	Replace
Table	9009961	Zetadocs Document Queue Item	Replace
Table	9009962	Zetadocs Sales Doc. Queue	Replace
Table	9009963	Zetadocs System Rule	Replace
Table	9009964	Zetadocs Customer Rule	Replace
Table	9009965	Zetadocs Report Settings	Replace
Table	9009966	Zetadocs Document Set	Replace
Table	9009968	Zetadocs Send Result	Replace
Table	9009970	Zetadocs No. Series	Replace
Table	9009971	Zetadocs Vendor Rule	Replace
Table	9009973	Zetadocs Company Type	Replace
Table	9009974	Zetadocs Company Rule	Replace
Table	9009975	Zetadocs Send Settings	Replace
Table	9009976	Zetadocs Sys. Rule Recip. Line	Create
Table	9009977	Zetadocs Cus. Rule Recip. Line	Create
Table	9009978	Zetadocs Ven. Rule Recip. Line	Create
Table	9009979	Zetadocs Company Rul Rcp. Line	Create

Table	9009982	Zetadocs Purch. Doc. Queue	Create
Form	9009959	Zetadocs System Settings	Replace
Form	9009960	Zetadocs Template Card	Replace
Form	9009961	Zetadocs Template List	Replace
Type	**No.**	**Name**	**Action**
Form	9009962	Zetadocs Sales Document Queue	Replace
Form	9009963	Zetadocs System Rule Card	Replace
Form	9009964	Zetadocs Customer Rule Subform	Replace
Form	9009965	Zetadocs Report Settings	Replace
Form	9009966	Zetadocs Delivery	Replace
Form	9009967	Zetadocs Batch Delivery	Replace
Form	9009968	Zetadocs Batch Errors	Replace
Form	9009969	Zetadocs Document Sets	Replace
Form	9009970	Zetadocs System Rule List	Replace
Form	9009971	Zetadocs Customer Rule Card	Replace
Form	9009972	Zetadocs Customer Rule List	Replace
Form	9009973	Zetadocs No. Series	Replace
Form	9009974	Zetadocs Sales Doc Queue Setup	Replace
Form	9009975	Zetadocs Printer Reminder	Replace
Form	9009976	Zetadocs Vendor Rule Subform	Replace
Form	9009977	Zetadocs Vendor Rule Card	Replace
Form	9009978	Zetadocs Vendor Rule List	Replace
Form	9009980	Zetadocs Company Type List	Replace
Form	9009981	Zetadocs Data Import	Create
Form	9009982	Zetadocs Purch. Document Queue	Create
Form	9009983	Zetadocs Purch Doc Queue Setup	Create
Form	9009985	Zetadocs About Box	Create
Form	9009986	Zetadocs Sys. Rul Rcp. Subform	Create
Form	9009987	Zetadocs Cus. Rul Rcp. Subform	Create
Form	9009988	Zetadocs Ven. Rul Rcp. Subform	Create
XMLPort	9099959	Zetadocs Xml Port	Replace
Codeunit	9009959	Zetadocs-Utilities	Replace
Codeunit	9009960	Zetadocs-Send Results Gen	Replace
Codeunit	9009961	Zetadocs-Embedded Commands Gen	Replace
Codeunit	9009962	Zetadocs-Customize	Replace
Codeunit	9009963	Zetadocs-Integration	Replace

3. Once the objects are imported. Return to the object designer, and import the Zetadocs for NAV V1.02 Menusuite.fob file.
4. Once again, you will be prompted to open the Import Worksheet.
5. In the Import Worksheet, select Replace for the only object available.
6. Import the Zetadocs for NAV v1.02 Additions Report 9009959.fob file. If there is a conflict importing that object, select the Replace option in the Import Worksheet.

Once all the Zetadocs for NAV objects have been imported, ensure that the existing configuration has been kept intact by going through the forms of the Zetadocs application setup. Recover configuration from the backup excel spreadsheet if needed.

(ii) Modifying Zetadocs Interfaces
There are no required changes to the Zetadocs for NAV Interfaces between 1.1 and 1.2. If you have already applied the changes to existing objects as part of your 1.1 installation then no further action is required.

If the objects in your database have not been modified, please refer to the Zetadocs for Microsoft Dynamics NAV Installation Guide (Appendix A) for instructions on how to modify existing NAV objects for Zetadocs version 1.2.

2.4   Reports
Zetadocs for NAV 1.2 has a new feature which allows additional recipients. This feature requires a modification of the code in reports modified for Zetadocs for NAV. These modifications are:

1. Adding two more text box controls to the Zetadocs Embedded Commands page section
2. Adding code to retrieve the additional recipient and custom embedded commands to the new text boxes.
3. Adding clean up code to ensure future compatibility with NAV 5.0 SP1 or later

To achieve this please refer to the Zetadocs for Microsoft Dynamics NAV Installation Guide.pdf distributed with Zetadocs for NAV 1.2 and follow the sections on inserting the code and text boxes into a report for the following sections. The code should replace your existing code in these triggers and you should replace the existing text boxes in the Zetadocs Embedded Commands Data Item section.

Triggers
- Report – OnPreReport
- Report – OnPostReport
- Zetadocs Embedded Commands – OnAfterGetRecord

Report Instructions
- Create Zetadocs Embedded Commands Data Item

3.   Troubleshooting
The issues that might occur during an upgrade to Zetadocs for NAV version 1.2 are covered in the Zetadocs for Microsoft Dynamics NAV Installation Guide, in the Troubleshooting section of Appendix B.