

Zetadocs Installation Guide



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Deployment Scenarios Overview

How you implement Zetadocs Delivery and Zetadocs Capture depends on the version of Microsoft Dynamics installed. For brevity, this guide will refer to Microsoft Dynamics 365 Business Central on-premises as BC and Microsoft Dynamics NAV versions as NAV plus their respective version e.g. NAV 2018.

Follow the actions below for the relevant Zetadocs edition:

Zetadocs Express

Version	Actions
NAV 2015 and later or BC	1. Follow the Express Installation steps only.
NAV 2013 R2 and earlier	1. Follow the Express Installation steps. 2. Then follow the steps How to Install Zetadocs Client on a Client PC on each PC.

Zetadocs Delivery Essentials

Version	Actions
NAV 2015 and later or BC	1. Follow the Express Installation steps. 2. Then follow the Delivery Essentials Configuration .
NAV 2013 R2 and earlier	1. Follow the Express Installation steps. 2. Then follow the Delivery Essentials Configuration . 3. Then the steps in Modifying NAV and BC Reports To Work With Zetadocs Client Delivery 4. Then follow the steps How to Install Zetadocs Client on a Client PC on each PC.

Zetadocs Capture Essentials

Version	Actions
NAV 2015 and later or BC	1. Follow the Express Installation steps. 2. Then follow the Capture Essentials Configuration .
NAV 2013 R2 and earlier	1. Follow the Express Installation steps. 2. Then follow the Capture Essentials Configuration .

- | | |
|--|--|
| | 3. Then follow the steps How to Install Zetadocs Client on a Client PC on each PC. |
|--|--|

Deployment Environments

You can deploy Zetadocs on the following deployment environments:

- On a Dynamics partner's test system.
- On premises at a customer site.
- On a server hosted for the customer.

On a Dynamics Partner's Test System

Note that if you are creating a test system for Zetadocs that contains multiple instances of NAV or BC, the Zetadocs Client will only be installed in the latest version.

To deploy Zetadocs on multiple versions, see technical note [ZTN4416](#), how to install Zetadocs Client Components for older versions of NAV on machines with multiple versions present.

On Premises at a Customer Site

It is recommended to implement a Zetadocs server only deployment on NAV 2015 and later or BC. However it is also possible to deploy a Zetadocs hybrid deployment with the Zetadocs Client installed on each client machine on NAV 2015 and later and BC to support features like fax delivery or local scanning.

To deploy a Zetadocs hybrid deployment, follow the steps described in [How to install Zetadocs Client on a client machine](#) and [How to modify Reports to work with Zetadocs Client Delivery](#) (if Zetadocs Delivery is required).

On Server Hosted for the Customer

Zetadocs supports private hosted NAV or BC deployments. You will be able to take advantage of all Zetadocs server only features without having to manage on premises servers. You can archive files using either SharePoint Server or SharePoint Online. The Zetadocs Archive is not supported in a hosted NAV or BC environment.¹

To deploy Zetadocs using ClickOnce, follow the steps described in [How to deploy Zetadocs using ClickOnce](#).

¹Zetadocs Archive is not supported in a hosted environment due to the fact that both the NAV/BC Clients and the NAV/BC Server require access to the Zetadocs Archive folder to function properly.



Express Installation

This section contains the common installation instructions for all Zetadocs editions. Complete these steps regardless of whether you are installing Zetadocs Express, Zetadocs Delivery, Zetadocs Capture or any of the advanced Plus editions.

Before You Start

Before you begin your installation, check the Equisys website for the latest [software updates, tools and advice](#) to ensure you have everything you need.

Overview of the Installation Steps to be Performed on the NAV or BC Server

The common installation process comprises these steps:

1. [Installing the Zetadocs Client and Zetadocs Help](#)
2. [Installing the Zetadocs Server Extensions](#)
3. [Setting up your Archive](#)
4. [Importing NAV and BC Objects and Interfaces](#)
5. [Importing the Configuration File](#)
6. [Licensing and Registration](#)
7. [System Testing](#)

1. Installing the Zetadocs Client and Zetadocs Help

Zetadocs Client must be installed on the NAV or BC server for licensing and shared components.

Steps for Installing Zetadocs Client Components

1. Extract and run the Zetadocs product download.
2. Locate the Zetadocs Client folder of your product download, and run the Setup-All.exe file.
3. Choose the installation language and click Install.
4. Follow the steps in the installation wizard, and review and accept the license agreement.
5. Select the Administrator install type when prompted. You will be asked to create the templates folder. Select a location and click Next to continue.
6. Complete the wizard to finish the install of the Zetadocs Client.

Installing Zetadocs Help

To install the Zetadocs Help:

Version	Action
NAV 2013 R2 and later	Follow the steps below.
NAV 2013 and earlier	Follow the steps Help files in the Appendix section, then carry onto the next section below.

Help Server

To integrate the Zetadocs help files with the Microsoft Dynamics Help Server, copy the Zetadocs help files into the main NAV Help file folder and update the table of contents file. This will enable your users to locate the help they need.

1. Locate your product download and select all of the files present from this folder:

\Documentation\Zetadocs Help

2. Copy the files to the NAV Help Server folder. The path is similar for each version of NAV. For example, for NAV 2017 systems, copy the files to:

C:\inetpub\wwwroot\DynamicsNAV100Help\Help\<languagecode>

This adds the help files into the Help Server, where they can be accessed by pressing F1 on a Zetadocs field.

3. Open the ToC_Additions.xml in file in a suitable text editor.
4. Copy the contents and paste them into the ToC.xml file near the bottom, and above the last </Node> tag.
5. Click Save.

The files will be added to the Table of Contents so the content can be easily browsed.

2. Installing the Zetadocs Server Extensions

The Zetadocs Server Extensions setup program installs all the Zetadocs server-side components for Zetadocs Delivery and Zetadocs Capture. These components add support for all NAV/BC clients, include the Web client and Universal app.

1. Locate the Zetadocs Server Extensions folder of your product download, and run the setup.exe file.
2. Follow the steps in the installation wizard to complete the installation.

For NAV 2015 or earlier you can skip steps 3 and 4 of this section and restart the NAV Server. If you are installing on NAV 2016 or later or on BC please follow the steps below.

3. A File explorer window will open by the end of the installation, please right-click the file RunMeAsAdmin.bat and select the option Run as Administrator.
4. A PowerShell script will prompt you to select the version you wish to install the Zetadocs Control Add-in into.

IMPORTANT: You must restart the NAV or BC server to complete the installation. If you encounter any problems using the Zetadocs Control Add-in install script, please refer to [manual installation instructions](#) in the Appendix section.

Note: If you are using a load balanced Server, the Zetadocs Server extensions must be installed in all server machines.

3. Setting up your Archive

Zetadocs provides two options for archiving your documents:

- [Archive to SharePoint](#) using the Zetadocs SharePoint Extensions.
- Use the [Zetadocs Archive](#). This allows you to archive files to a Network folder.

Archive to SharePoint

To archive documents to SharePoint, you need to add the Zetadocs SharePoint extensions to your SharePoint site. This enables Zetadocs to archive documents with metadata. Metadata allows Zetadocs to identify and associate documents in SharePoint with NAV or BC records as they pass through the sales and purchase processes. This enables users to access the relevant documents quickly and easily.

Prerequisites

Zetadocs supports SharePoint Online (a module of Office 365) and premise based SharePoint servers. For the latest technical information and details on the supported SharePoint versions, please see our [website](#).

SharePoint Online

Adding the Zetadocs SharePoint Online Extensions

1. Locate the Zetadocs SharePoint Extensions folder of your product download.
2. Open the SharePoint Online folder.
3. Right-click Zetadocs SharePoint Extensions.ps1 file and choose Run with PowerShell.
4. Follow the steps in the script:
 - a. Enter the URL for the site where the Zetadocs functionality is required (for instance <https://company.sharepoint.com/mysite/>)
 - b. Choose your SharePoint deployment: SharePoint Online or SharePoint Server
 - c. Enter an administrative user email and the password for this administrative user
5. The script will log out information, the text should be green and white. If there is any red text, please verify the error and take the required action to resolve if the error message is clear. If required, please contact Equisys to resolve any unclear errors.

SharePoint Server

Adding the Zetadocs SharePoint Server Extensions

1. Locate the Zetadocs SharePoint Extensions folder of your product download.
2. Open the SharePoint Server folder.
3. Run the sharepointonlinemanagementshell_5326-1200_x64_en-us.msi to install the SharePoint Online Management Shell.
4. Open the Sharepoint Online Management Shell as administrator.
5. From the shell browse to the Zetadocs SharePoint Extensions folder and run the Zetadocs SharePoint Extensions.ps1 file.
6. Follow the steps in the script:
 - a. Enter the URL for the site where the Zetadocs functionality is required (for instance `https://company.sharepoint.com/mysite/`)
 - b. Enter an administrative user email
 - c. Enter the password for the administrative user
7. The script will log out information, the text should be green and white. If there is any red text, please verify the error and take the required action to resolve if the error message is clear. If required, please contact Equisys to resolve any unclear errors.

Use the Zetadocs Archive

The Zetadocs Archive Service runs on a server machine on your network and handles the archiving of documents captured and sent using Zetadocs. The Zetadocs Archive Service uses a SQL database to store the metadata and act as an index for the archive.

Creating the Zetadocs Archive Folder

The archive requires a network folder. This folder is used to store captured documents, and you must provide users with the relevant permissions to access this folder.

1. Create a folder with the name "Zetadocs Archive".

The Zetadocs Archive Service searches for this exact name and it will not work with any other name.

2. Verify this location has sufficient disk space.

For more information, see the technical note on requirements - [ZTN4290](#).

3. View the folder's Properties. Select the Share tab and select Advanced Sharing.
4. Select the "Share this folder" checkbox, and add the share name "Zetadocs Archive".
5. Select the Permissions button, and add required users and groups.
 - All users of Zetadocs require Read permissions. Add these individually or create a Zetadocs group.
 - The Zetadocs Archive Service must have access to the folder. By default, it runs as Local System. The system account requires FULL permissions for it to function correctly.

6. Return to the Properties for the folder and select the Security tab.
7. Select the Edit... button. In the window which appears, select Add...
 - All users of Zetadocs require Read permissions. Add these individually or as a group.
 - The Zetadocs Archive Service must have access to the folder. By default, it runs as Local System. The system account requires FULL permissions for it to function correctly.

Installing the Zetadocs Archive Service

1. Locate the Zetadocs Archive Service folder of your product download and run the setup.exe file.

Note: The Zetadocs Archive Service installer may require you to reboot your server to complete this task.

The installer performs the following actions:

- Installs Microsoft SQL Server Express edition (or adds a new instance if already installed).
 - Creates the SQL database for indexing and metadata.
 - Installs the Zetadocs Archive Service.
2. Follow the steps in the installation wizard to complete the installation.

Connecting the Zetadocs Archive Service and Zetadocs Archive Folder When They are on Different Servers

If you have setup the Zetadocs Archive folder on a different server to the Zetadocs Archive Service, you must complete the steps below. These steps ensure the service can access the folder.

This is not required if they are on the same server machine.

1. Locate the Zetadocs Archive Service\Scripts folder of your product download and run the SetArchiveFolderLocation.cmd file.
2. In the window which appears, enter the server name where the Zetadocs Archive folder is located.
3. Ensure the Zetadocs Archive Service is running as is a domain user.

Ensuring Zetadocs Archive Service is Running as a Domain User

To ensure the user the Zetadocs Archive Service is running as a domain user, follow these steps:

1. Open Users and Groups (or the equivalent for the operating system you are using).
2. Select Users and then New User... from the Action menu.
3. Give the account a suitable user name, full name and description.
4. Enter a password for the account.

Note: Before clicking Create, verify the Password never expires checkbox is selected.

5. Go to your Zetadocs Archive folder and view its Properties. Select the Share tab and Select Advanced Sharing.
6. Select the Permissions button and add your newly created user account with FULL permissions.
7. Return to the Properties for the folder and select the Security tab.

8. Select the Edit... button. In the window that appears, select Add...
9. Add the users and groups you created earlier. This grants your users and the Zetadocs Archive Service access to the Zetadocs Archive folder.
10. Open the services list and locate the Zetadocs Archive Service. Stop the service before right-clicking and selecting Properties.
11. View the Log On tab and check the This account radio button. Click Browse... and select your recently created user account.
12. Enter the password details and click OK.
13. Restart the service running as the new user.

4. Import Zetadocs Objects

This section describes how to:

- Import the objects used by Zetadocs into NAV or BC.
- Modify some existing pages. [Zetadocs Page Modification Tool](#) is provided to automate this process.

Before you start - Creating a Test NAV or BC System

We recommend you perform the import of the Zetadocs objects and configuration data on a duplicate of your live database. This can then be exported and transferred onto the live system when you are confident that it is working correctly.

Prerequisites

Before you continue with your Zetadocs install you need to perform the following prerequisite actions:

Refreshing your NAV or BC license

To successfully install Zetadocs you need to add the Zetadocs module (9009970) your NAV or BC license. Log into PartnerSource to add the required module, then download an updated license.

Backing up the Existing Objects

Before beginning the Zetadocs installation you may wish to perform a backup of the existing objects to ensure you can undo any changes to your system if required.

Importing the Zetadocs Objects

1. Open the NAV Development Environment and the relevant database.
2. Change to a NAV or BC license suitable for importing objects
3. From the object designer, import the fob file by selecting File > Import.
4. Browse to your product download and navigate to the Zetadocs Server Components folder.
5. Choose the object file relevant to your NAV version or BC .

Version	Fob file to use
NAV 5.0 SP1	Zetadocs Objects - NAV5.00.fob
NAV 6.01 (2009 SP1)	Zetadocs Objects - NAV6.01.fob
NAV 6.10 (2009 R2)	Zetadocs Objects - NAV6.10.fob
NAV 7.00 (NAV2013)	Zetadocs Objects – NAV7.00.fob
NAV 7.10 (NAV2013 R2)	Zetadocs Objects – NAV7.10.fob
NAV 8.00 (NAV2015)	Zetadocs Objects – NAV8.00.fob
NAV 9.00 (NAV2016)	Zetadocs Objects – NAV9.00.fob
NAV 10.0 (NAV2017)	Zetadocs Objects – NAV10.0.fob
NAV 11.0 (NAV2018)	Zetadocs Objects – NAV11.0.fob
BC 13.0 (Business Central on-premises)	Zetadocs Objects – BC13.0.fob
BC 14.0 (Business Central on-premises)	Zetadocs Objects – BC14.0.fob

6. If there are no collisions with existing objects, continue importing the objects and ensure that there have been no compilation errors.

Modifying NAV and BC Pages Using the Zetadocs Page Modification Tool

The Zetadocs Page Modification tool makes the process of adding Zetadocs functionality to NAV or BC pages quicker and easier.

The tool is designed to work with most pages and will notify you if there are any issues. For example, if the pages have too many existing customizations. If you encounter any problems with the tool, follow the technical note [ZTN4275](#).

To modify the existing pages:

1. Download the latest [Zetadocs Page Modification Tool](#) from the Equisys website and extract it.
2. Open the Object Designer in the Dynamics NAV Development Environment.
3. Choose the All tab and click on the Table Filter.
4. Add this filter to select objects which typically need modifying:

Type	ID	Notes
Form Page	21 22 26 27 41 .. 44 49 .. 52 130 132 134 136 138 140 142 .. 147 438 440 448 450 507 509 6630 6640 6650 6652 6660 6662 9300 .. 9311	Forms are not compatible with NAV 7.0.

5. Apply the filter and review the list.
6. Select the required objects and go to File > Export.
7. Save the interfaces as:
 - an XML file (NAV 6.x), or
 - as a TXT file (NAV 7.x and later or BC)
8. Now open the Zetadocs Page Modifier tool from the extract location and click Load Items and select your NAV version or BC and your language.
9. Browse to the location of your exported Interfaces file and click Open. Wait while the tool loads your exported items.
10. The loaded pages will be displayed. Enable Send adds the Zetadocs Send button, required for Zetadocs server-side delivery and Zetadocs Express.
11. When Enable Send is checked, the type of page will be automatically populated if the tool recognizes that page.
12. Click Start
 - The tool will then prompt you to add the Rules button to the Customer and Vendor pages if included in the export.
 - The status column shows the conversion process. If an item cannot be modified, the reason will be listed in this column. If you encounter any problems with the tools, follow the instructions in [ZTN4275](#)
 - The updated export file name will be appended (Modified) and can be viewed by clicking View Output Directory.
13. Now use the Object Designer to re-import modified pages and forms and compile them (F11).

Note: On first use, the tool will create an AppSettings.xml file in the tool Directory to store the types specified. The tool will load these settings automatically on next run to save time specifying them again. The AppSettings.xml can be copied to another system if you wish to use the same types on that system.

Note2: The tool can remove the Zetadocs components when used in repair mode. This mode can be activated from the drop down menu.

5. Importing the Configuration File

You must import the Zetadocs standard configuration file, as it populates your system with the base settings Zetadocs requires.

Importing the Language Module

If you are intending to use a language other than English, you will need to import the relevant language module, using the steps below.

1. Complete this step, if required:

Version	Action
NAV 2013 R2 and later or BC	Carry out the additional steps in technical note ZTN4301 how to Import language modules from NAV 2013 R2 and later or BC before proceeding with the steps below.
NAV 2013 and earlier	No action needed. Follow the steps below.

2. In the object designer, select the All view.
3. Using a table, filter Version = EQ* to list all the Zetadocs objects.
4. Select all the highlighted objects and click Tools > Language module > Import.
5. Browse to the Zetadocs Server Components\Language Modules\ folder of your product download.
6. Import the language module for your region and your version.

Importing the Zetadocs Standard Configuration Data

This will import all data and default settings to all Zetadocs tables. This is a required step for each individual Company in the NAV or BC Database.

To import the Zetadocs Standard Configuration Data:

2. Open the Zetadocs General Settings page.
3. A message may appear informing that the Windows Client needs permissions to run the Zetadocs.ExternalUtilities.ZdAutomationFactory, select Always Allow.
4. Next, in the Actions Ribbon click Import Configuration Data.
5. Browse to the Zetadocs Server Components\Standard Configuration Data folder of your product download.
6. Select the relevant xml file for your language and version.
7. Click Import on the Home tab.
 - Two warning messages will appear. Select Yes to continue.

Archive Settings

1. If you are archiving documents using Zetadocs, you need to select your preferred method:

Archiving method	Description
Off	Zetadocs will not attempt to archive items.
SharePoint	Enable this method to use SharePoint Server or SharePoint Online(for NAV 2015 and earlier) to archive your documents to.
SharePoint Online	Enable this method to use SharePoint Online to archive your documents. This method uses the Zetadocs Authorization Service and is only available for NAV 2016 and later or BC.
Zetadocs Archive	This enables Zetadocs Archive Service address field. This needs to point to the Zetadocs Archive Service installed when setting up your archive.

2. Enter a Document Library. The default value is Zetadocs.

Note: If you are using the Zetadocs Archive Service or Zetadocs Express, you must use the default value Zetadocs.

3. Set the library Folder Name Structure.

Note: Zetadocs Express will always use daily folders

- This subdivides archived documents into subfolders in the SharePoint document library, based on information from the sent record. You have three levels to work with.

Choose the following options:

Item	Description
COMPANY	The recipient NAV or BC Customer name. e.g. Cronus Inc
DATE	The Date with a format specified by the Date Folder Naming property below. e.g. 03/30/2018.
DOCTYPE	The Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings. e.g. Sales Orders. Note: This is not the SharePoint content type.

- When using Date, you need to specify the Date Folder Naming. This specifies the date format e.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.
- Enter the name of the the service address:

Archiving method	Action required
If you are using SharePoint archiving	<p>Input the SharePoint site or site collection address as required. This is the bold section shown here:</p> <p>https://equisys.SharePoint.com/sites/MicrosoftDynamics/default.aspx.</p> <p>Note: You can click the button located at the end of the SharePoint Site field to verify it.</p>
If you are using the Zetadocs Archive	<p>Enter the server name on your network where the Zetadocs Archive Service has been installed into the Service Address field e.g.</p> <p>http://example-server/ZetadocsArchive</p> <p>Note: Ensure there are no spaces in the name.</p>

7. When you have added the service address, click the test button at the end of the field to verify it. This will open a browser window. If it is successful in connecting to the service, it will display a page titled ArchiveService Service with the confirmation message. You have created a service below it.

Zetadocs Authorization Service (NAV 2016 and later or BC with SharePoint Online)

The ZAS simplifies identity for Office365 users when using SharePoint Online. Each Azure Active Directory (Azure AD) user will follow a one-time Zetadocs Authorization Service app registration to enable this feature. Once enabled, Zetadocs stores an Azure AD token in the NAV or BC database and uses this to access SharePoint. App registration will also enable Office 365/Azure AD users that have multi-factor authentication (MFA) enabled to use the Zetadocs FactBox without being prompted for a code each time.

As Zetadocs is going to be storing Azure AD tokens in tables, it will require Data Encryption Management to be enabled before proceeding.

Zetadocs Delivery Settings

The Zetadocs Delivery Settings enable you to specify the delivery options applied to the Send Button for Zetadocs server-side delivery.

Version	Action
NAV 2015 and later or BC	Follow the steps below.

NAV 2013 R2 and earlier	No action needed. Skip to the next section.
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Open the Zetadocs Delivery Settings page and fill in the options of your SMTP details.

SMTP Settings

Zetadocs server-side delivery uses SMTP to send emails. The Zetadocs Delivery Settings page holds the SMTP configuration settings that the Zetadocs will use to send emails. Specify on premise SMTP, Exchange online secure mail settings, or other SMTP server.

Setting	Description
SMTP Server	The SMTP server that the Zetadocs will use to send emails.
SMTP Server Port	The port of the SMTP server specified above.
Secure Connection	This flag is used to specify if delivery will use a secure connection with the SMTP server.
From	The alias from each the email is sent.
User ID	The user ID for the SMTP server.
Password	The password of the above user for the SMTP server.

Importing the Zetadocs Permissions

Users in NAV or BC need to be granted permissions to access and edit fields. This also applies to the additional Zetadocs objects. You now need to add permissions to allow users access to the Zetadocs elements.

To grant permissions to access and edit fields you will need to import the Zetadocs Permission Sets and Permissions. Locate in the Zetadocs download folder the Zetadocs Permission Sets and Permissions - NAV7.xx-NAV10.0-BC14.0.RAPIDSTART file and import it.

Assigning Users Permissions

Users using Zetadocs components will need to be given permissions to access and edit fields. To do so you can assign the previously imported permission sets to Zetadocs users. There are 2 different permission sets for Zetadocs:

- ZETADOCS – grants access to the standard Zetadocs pages, forms and tables and allows you to use Zetadocs.
- ZETADOCS ADMIN – grants the user the ability to adjust the setup of the system in more fundamental ways and should be reserved to administrators only.

6. Licensing and Registration

All editions of Zetadocs must be licensed and registered in order to receive technical support

Entering your License Number

1. On the NAV or BC server, run the Zetadocs PDF Configuration.
2. Choose General and set the license location to Network Folder.
3. Select a Shared Network folder to save the license file. Ensure that the user that runs the NAV or BC server has access to this Network location.
4. Choose Licensing and Registration, and enter your Zetadocs license number. Click Register Online and follow the onscreen steps.
5. Following registration, you will be provided with a Registration code by email. Enter the code to continue.
6. Now use User Management to add the required users.
7. Now choose Save to save changes to the license file.

Version	Action
NAV 2015 and later or BC	Follow the steps below.
NAV 2013 R2 and earlier	No action needed. Skip to the next section.

8. Launch the NAV or BC Windows client and open Zetadocs General Settings.
9. Set the License Path to the network path used to save the license file.
10. Close the Zetadocs General Settings.

7. System Testing

To ensure that the features have been correctly configured we recommend that you run a number of simple tests of the Zetadocs functionality.

Note: Log into the Dynamics NAV Client with a Dynamics Full User license and a user role that has access to the modified sections within NAV or BC.

Authentication with SharePoint on Office 365

1. Open NAV or BC and proceed to one of the Zetadocs enabled pages e.g. Sales Order page.
2. The Zetadocs Documents FactBox will display a login box requesting their Office 365 username and password.
3. Add these and select OK to continue, this establishes the connection between Zetadocs and SharePoint.
4. These details will be stored locally in Windows Credential Manager meaning that the user will only be requested to provide them again should they be changed or a problem connecting occurs.
5. This should be repeated on all required user accounts.

Drag and Drop Testing

1. Open the Dynamics NAV Client and open a page with the Zetadocs Documents FactBox.
2. Locate a suitable test file and drag and drop this onto the Drag files here to upload area of the FactBox.
3. Ensure this appears in the Related Document List and is archived.

Version	Action
NAV 2016 and later or BC	Follow the steps below.
NAV 2015 and earlier	Follow the steps Save and Send Testing (NAV 2015 and earlier) , then carry onto How to install Zetadocs NAV Client on a client machine .

Drag and drop from Outlook Testing

Microsoft Outlook does not support the functions browsers use to interpret files during drag and drop events. It is therefore not possible to directly drag emails or attachments from Outlook onto the Documents FactBox. It requires a two-stage process:

1. Drag an email to the desktop and then from desktop onto the FactBox.
2. Ensure the email appears in the Related Document List and can be opened.
3. Delete the email on the desktop.

Note: There are 3rd party add-ons for Outlook that can be installed to avoid this two-step process for any browser based web applications. See [ZTN4477](#) for more information

Universal App Testing

On the Universal app, the Documents FactBox is optimized for touch. With screen real estate at a premium, file count is hidden and larger icons are presented for finger input. Drag files here to upload is only shown on clients where drag and drop is applicable e.g. Web Client.

1. Tap the upload button to add related documents from the device gallery to the record on display.
2. Touch the document in the list to view previously archived files.

Save and Send Testing (NAV 2016 and later or BC)

1. Open the Dynamics NAV Client and navigate to a Sales Quote record, or other supported record type.
2. Click the Send button in the Zetadocs group on the Actions Ribbon to open the request filter auto-populated with the selected record ID. Note: Record ranges to select batches are not available for Zetadocs Express, only with Zetadocs Essentials.
3. Click OK and then confirm the customer addressing information presented.
4. On selecting OK an SMTP email message will appear in the Zetadocs Outbox briefly and disappear when saved and sent successfully.
5. Check it was delivered as expected and that the document appears in the Documents FactBox.

Save and Send Testing (NAV 2015 and earlier)

1. Open the 32-bit Dynamics NAV Client and navigate to a Sales Quote record, or other supported record type.

2. Click the Save and Send button and then Select the Save and Send option.
3. On selecting OK an Outlook email message should open with an attachment and with customer addressing information already populated.

Note: On selecting Save and Send for the first time you will be presented with up to four warnings such as:

- Server has requested to run Scriptcontrol object
- Server has requested to run OApplication class
- Server has requested to run OSendMail class
- Server has requested to run BSTRConverter class

These are to be expected and you should simply select Always Allow in each instance, they will not appear again on this machine.

4. Check it was delivered as expected and that the document appears in the Documents FactBox..

Now that you have made the necessary modifications to NAV or BC and tested the setup, you can install the Zetadocs Client on the client PCs. To do this simply log onto client machine in question with an account with admin rights and follow the instructions in the Appendix - [How to Install Zetadocs Client on a Client PC](#). This will add all of the necessary components onto the client PC to enable it to utilize the Zetadocs functionality. Its recommended that you perform the tests above to confirm that Zetadocs is operating as expected on each client PC.

Next Step

This completes the installation and testing of Zetadocs Express. If you are not installing Zetadocs Delivery Essentials or Zetadocs Capture Essentials your setup is now complete.

If you have installed the software on a test setup, go to the next section [migrating to a live environment](#).



Delivery Essentials Configuration

This chapter covers how to modify the Zetadocs Delivery configuration to fulfill your specific requirements.

Please ensure you have carried out the steps in the [Express Installation](#), as its components are required to support Zetadocs Delivery. Systems that are not implementing Zetadocs Delivery Essentials can skip this section.

About Zetadocs server-side delivery

For Dynamics NAV 2015 and later or BC, Zetadocs provides the option of a server-side deployment that significantly simplifies the implementation as there are no Report modifications required and no software is installed on the client PCs. Zetadocs server-side delivery is the recommended installation method on these newer systems. For instructions on how to migrate to server-side delivery, please refer to [How to migrate to Zetadocs server-side delivery](#).

About Zetadocs Client Delivery

For all Dynamics NAV versions and BC it is also possible to deploy Zetadocs in a hybrid deployment with the Zetadocs Client installed on each client machine to support Zetadocs Delivery features like fax delivery and electronic signatures.

To deploy a Zetadocs hybrid deployment, follow the steps described in [How to install Zetadocs Client on a client PC](#) and [How to modify Reports to work with Zetadocs Client Delivery](#).

How to modify the Zetadocs Delivery configuration:

Version	Action
NAV 2015 and later or BC	Follow each section below.
NAV 2013 R2 and earlier	Follow each section below unless specified to ignore.

1. Updating the Zetadocs Report Settings to Match your Reports

The Zetadocs Standard Configuration data points to the default report objects. You now need to adjust this to match your Report ID's.

Note: To enable NA Customer Statement reports please see Appendix on [How to add support for NA Customer Statements\(10072\)](#) after completing the steps below.

Zetadocs Report Settings table

The Zetadocs Report Settings table allows you to record information about the rules that apply to these reports. It covers the rules used to send reports as well as how to archive the report.

General

Field	Description
Report ID	The unique value given to identify each report.
Report Name	This field is populated when Report ID is selected. It contains the Name that matches the Report ID
Comments	Allows you to add additional information to the record.
Document Set No.	Corresponds to the key field of the Zetadocs System Rule table linking the report to rules for its distribution.
Document Set Name	Contains the name of the rule that is being applied to the report. It is determined via the Document Set No. selection
Default Batch Name	The default name to be given to the batch that will appear in the Zetadocs Client.

Report Mappings (Zetadocs server-side delivery only)

Field	Description
Report Table ID	Specifies what is the ID of the main table of the report.
Report Table Filter	Refers to the Where clause of the DataItemTableView on the main DataItem of the report. (e.g.: Document Type=CONST(Quote))
Report DataItem Name	Refers to the name of the main DataItem

Table Mapping

Setting	Description
Company Type Code	Links the Zetadocs Report Settings table with the Zetadocs Company Type table. The type allows us to add additional ways to locate recipient details. Examples of this would be CUST, VEND.
Company No. Field No.	Identifies the company associated with the report.
Contact No. Field No.	Directs the NAV or BC to look for the Contact No. in the relevant table in the Field No. specified. For

Setting	Description
	example if the report covered a particular Vendor then the value in this field would identify the location of the Contact No. in the vendor table.
Record No. Field No.	Directs the NAV or BC to look for the Record no. in the relevant table in the Field specified. For example if the value was 5 the the system would look in field 5 for the Record No.

Options

Setting	Description
Show Delivery Dialog	Determines whether or not to display the delivery dialog for overriding send information at runtime.
Show Batch Delivery Dialog	Determines whether or not to display the batch delivery dialog for overriding send information at runtime.
Preview in Zetadocs Client	Determines whether or not to preview on the Zetadocs Client before sending information.
Test Mode	Activates the default test mode settings. Note: This setting is only supported with Zetadocs Client Delivery.
Report Pre-Processing	If the report is based on more than one Report DataItem, please check this option.

To modify or add report settings open the Zetadocs Report Settings page and follow the steps below:

1. Select a report and use the Document Set Name as your guide to the respective report setting.
2. Select the Report ID field and choose your modified report from the Object list.
3. Repeat the process for any remaining reports as required.

Note: A report can only be associated with one Zetadocs Document Set, but many reports can be associated with one Zetadocs Document Set.

Setting NAV or BC to run the correct reports

Set NAV or BC to run the modified reports instead of the original ones by adjusting Report Selections.

Note: You do not need to perform this step if you have modified your reports and kept the default Report IDs.

In this example, we will set the modified Order Confirmation report. Repeat this process for each new report being used.

To run the modified reports:

Version	Action
NAV 2013 and later or BC	Search for Report Selections Sales and select the Order report from the drop down.
NAV 2009	<ol style="list-style-type: none">1. Open the Dynamics NAV Client2. Select Administration > Sales & Marketing > Report Selections and choose the Order report.3. Click into the Report ID field and select the arrow to open the Objects list.4. Select the new object from the list, in this case 9009962 ZD-Order Confirmation.5. Repeat as required for the other reports.

2. Job Queues

Note: These settings are only applicable on NAV 2015 and NAV 2016, for Zetadocs server-side delivery.

About Zetadocs Delivery Queue and Zetadocs Batch Delivery Job Queues

Zetadocs Delivery Queue and Zetadocs Batch Delivery Job Queues are created during the Zetadocs configuration settings import. These two queues ensure that the individual reports that need to be sent urgently don't get held up by large batches.

Any running batches in the Zetadocs Batch Delivery Queues, or individual emails being sent by the Zetadocs Delivery Queue, can be viewed using the Zetadocs Delivery Outbox for the submitting NAV user.

About Job Queue Category Lists

Zetadocs also provides one Job Queue Category List for each Job. It creates two categories: one for individually sent documents and another for batches containing multiple documents.

Job Queue and Job Queue Category Lists are created automatically by Zetadocs when you open the Zetadocs General setting page.

Checking the Job Queues are Running

1. Check the “Job Queues” page and ensure that the ZETADOCS_1 and ZETADOCS_2 job queues have been created and are running.
2. To start a job queue, check the box in the start column.

How the Batches are Processed

All the batches are processed in the background on the server.

Note: Job Queue and Job Queue Category Lists are shared for all users in the same NAV database.

- When a user attempts to submit a job (by clicking on the Zetadocs Send button), Zetadocs checks that the Job Queue Entries are running. This is to prevent unexpected delays after submitting batches for delivery.
- When a job is submitted, Zetadocs creates a new entry in the Job Queue Entries.
- This entry is queued in the Zetadocs Queue, and NAV schedules it for processing.

About the Entry

The entry contains the necessary information for Zetadocs to deliver the batch. When a batch is processed successfully, the entry will be deleted from the database.

If there is an Error in a Batch

If the batch has one or more errors, it will remain in the Job Queue Entries. You can open the Zetadocs Delivery Outbox page if you need further information on the error.

Retry a Failed Batch

Click the Retry button in the Zetadocs group on the Home tab to retry failed batches from the Zetadocs Delivery Outbox. The status of the job will change to Processing and the job will be resubmitted.

Zetadocs Queues are Run as the Administrative User

By default, both Zetadocs Queues run as the administrative user who imported the Zetadocs configuration settings file. This account can be modified in the Job Queues list. By default the queues run within the default NAV service (NST) that runs the NAV server.

Running Queues on a Shared or Dedicated NAV Application

The Zetadocs Queues are designed to be run either within the default NAV service instance (NST) or a NAV application server (NAS). See [ZTN4474](#) Running Zetadocs server-side delivery on a NAS.

More Information

For more information on Job Queues, see the Microsoft Dynamics NAV help file.

3. Scheduled Tasks (NAV 2017 and later or BC)

Note: This section is only applicable on NAV 2017 and later or BC, for Zetadocs server-side delivery.

About Job Queue Category Lists

Zetadocs provides one Job Queue Category List for each Scheduled Task. It creates two categories: one for single delivery documents and another for batches containing multiple documents.

Zetadocs Delivery Category and Zetadocs Batch Delivery Category are created during the Zetadocs configuration settings import. These two categories ensure that the individual reports that need to be sent urgently don't get held up by large batches.

Any running batches with the Zetadocs Batch Delivery category, or individual emails being sent with the Zetadocs Delivery category, can be viewed using the Zetadocs Delivery Outbox for the submitting NAV or BC user.

How the Batches are Processed

All the batches are processed in the background on the server.

- When a user attempts to submit a job (by clicking on the Zetadocs Send button), Zetadocs checks that the Job Queue categories are created. This is to prevent unexpected delays after submitting batches for delivery.
- When a job is submitted, Zetadocs creates a new entry in the Job Queue Entries.
- This entry is queued as a Scheduled Task, and NAV or BC schedules it for processing.

About the Job Queue Entries

The Job Queue Entry contains the necessary information for Zetadocs to deliver the batch. When a batch is processed successfully, the entry will be deleted from the database.

If there is an Error in a Batch

If the batch has one or more errors, it will remain in the Job Queue Entries. You can open the Zetadocs Delivery Outbox page if you need further information on the error or if you want to see individual information for a record in a batch.

Note that all records in a batch are processed independently, which means that if one record fails the batch will continue to try and deliver the rest of the remaining records.

Retry a Failed Batch

Click the Retry button in the Zetadocs group on the Home tab to retry failed batches from the Zetadocs Delivery Outbox. The status of the job will change to Processing and the job will be resubmitted.

Running Tasks on a Shared or Dedicated NAV or BC Application

The Zetadocs server-side delivery is designed to be run either within the default NAV or BC service instance (NST) or a NAV or BC application server (NAS). See [ZTN4474](#) Running Zetadocs server-side delivery on a NAS.

More Information

For more information on Job Queues, see the Microsoft Dynamics help file.

4. Document Templates

Note: These settings are applicable on all NAV and BC versions.

The final area of system settings we need to configure are the [Template settings](#).

Before looking into the settings, we recommend you first familiarize yourself with templates and what they can offer your system.

About Templates

Zetadocs has a number of preconfigured document templates included within it to make setting up a system quicker and easier. These templates contain Zetadocs stationery overlays, attachment documents, and a message body. These have been constructed to provide a starting point from which to build and customize your system.

For information on constructing your own templates or adjusting the Zetadocs Templates, open the Zetadocs Client and view the help files.

Note: If you are installing in a language other than English, you should first check the templates folder of your product download. It contains a folder with sample templates specific to your language.

Document Template Features

Attachments

The document template can include an attachment to allow you to include your own company specific documents. For example, terms and conditions etc. This is in addition to the copy of the document being sent.

Note: Attachments must be in PDF format if using Zetadocs server-side delivery, in a server only or hybrid installation.

Stationery

A single stationery file can be used to add the company's branding to all documents being sent out. This means you would only be required to update this stationery once for it to apply to all document templates.

If using Zetadocs server-side delivery, in a server only or hybrid installation, the stationery file specified in the template will be ignored. To add corporate branding, you should instead:

- Use NAV or BC Word Report layouts, or
- Modify the NAV or BC Report RDLC layout directly.

See the NAV or BC help topic "About Report Layouts" for more information.

Message Body Text

The message body text contains a default message that forms the email message body and subject when the document is sent using Zetadocs. This can be used with dynamics fields to populate information from NAV or BC automatically into the email. This reduces the time required to process business documents.

Sample Templates

To speed the setup of your system, we have provided a set of generic templates that can be used to quickly get you up and running.

Attachments

No default attachments are included with the sample templates.

Stationery

The sample templates all point to the same stationery file. This means that by updating this one file to match your companies existing documentation, all documents sent by the system will be branded.

Message Body Text

A default email message is provided for the main document types, with dynamic fields automatically populating it with key data. These are shown in red in this example:

Subject: Order Confirmation for order number: **300381** for **Equisys Ltd**

Message Body:

FAO: **John Smith**

Dear Customer,

I'm pleased to attach your order confirmation, reference number **300381**.

Kind regards,

Sales Team

.

5. Template Settings

Note: These settings are applicable on all NAV and BC versions.

Zetadocs has a number of preconfigured document templates included within it to make setting up a system quicker and easier. Zetadocs will already have created entries for commonly used sales and purchase reports.

It is usually simpler to modify these to match your requirements than to create new ones. These can be modified in the Zetadocs Client.

Location of the Templates

The English language versions of the templates will have been copied to the Shared Network Folder you created during the client installation.

If you are installing your system in another language, follow the steps below to replace these with the translated templates:

1. Browse to your product download and select Zetadocs Server Components\Sample Templates\.
2. Select the language required.
3. Copy the templates to the Shared Network folder you created during the client installation for the templates.
The default location is:

\\<machine name>\Zetadocs Templates

Accessing the Template Settings

To access the Template Settings:

Version	Action
NAV 2013 and later or BC	Open the Windows Client and in the Navigation Pane select Departments > Administration > Application Setup > Zetadocs Setup > Zetadocs Template List.
NAV 2009	Open the RTC or Classic client and navigate to Administration > Application Setup > Zetadocs Setup > Advanced Settings > Zetadocs Templates.

Changing the Template a Report Uses

You might want to change the template a report uses. For example: When you have a special offer, you might want to send out Sales Orders for a period with special attachment and message.

To create additional templates in the Zetadocs client and assign them:

1. Press the New button in the UI, or press the Edit button to edit an existing report. If you require further help on this info, please visit the help in the Zetadocs Client Help.
2. Fill in the following fields in the form:

Option	Description
Template ID	The ID specific to this particular template.
Path	Contains the path to the folder which stores your templates.
Name	Contains the filename of the template to be used.
Description	A description of the template, to help you identify it.

Next Step

This completes the setup of the standard delivery settings which apply across all documents. At this point, your system should be setup to send out your business documents with the correct stationery, attachments and a email personalized by dynamic fields.

The next level of customization allows you to specify how each type of document is handled and how specific customers or vendors have their document delivered.

The next section will introduce [delivery rules](#).

6. Introducing Delivery Rules

Note: These settings are applicable on all NAV and BC versions.

When printing a Zetadocs enabled report, Zetadocs analyses each record in turn against the Delivery Rules. These include details such as the recipient, delivery method (Email, Fax, Hard Copy), Archiving settings and the template to apply.

Zetadocs rules come in four levels. The rules are applied in ascending order when printing a document to Zetadocs.

The rule levels are:

Level	Description
1. The Default Rule	A basic rule that can be used by any Zetadocs enabled report.
2. Per Document Set	Specific settings for Zetadocs enabled documents by type.
3. Per Company	Specific settings for Zetadocs enabled documents by company.
4. Per Company, Per Document Set	Specific settings applied to specific document types when sent to a specific company.

7. Testing Delivery Essentials

To test Zetadocs Delivery:

Note: Log into the Dynamics NAV Client with a Dynamics Full User license and a user role that has access to the modified sections within NAV or BC.

Version	Action
NAV 2015 and later or BC	Follow Zetadocs Server-side Delivery testing.
NAV 2013 R2 and earlier	Follow Zetadocs Client Delivery Testing after first completing How to modify Reports to work with Zetadocs Client Delivery in the Appendix.

Zetadocs Server-side Delivery Testing

1. Open the Order Processing section or search for Sales Orders in the Dynamics NAV Client.
2. Select or create a suitable order record.
3. Click the Send button in the Zetadocs section on the Actions Ribbon. This will attempt to send the currently selected record by populating the No. filter in the filter page. The filter will be applied to the NAV or BC records. If only one record remains, then the single delivery dialog window will be shown. Otherwise, the Zetadocs Batch delivery will open. **Note:** Emails will be sent to the corresponding addresses, please ensure that the email address is correct before going to the next step. The test mode is only supported with Zetadocs Client Delivery.
4. On selecting OK an SMTP email message will appear in the Zetadocs Outbox briefly and disappear when sent successfully.
5. Verify they are delivered as expected and archived (if archiving has been configured).

Zetadocs Client Delivery Testing

Activating Test Mode

When testing Zetadocs, you can activate test mode to:

- Stop the report being sent to the Zetadocs Client Delivery.
- Allow you to test the system without sending documents to customers.

Open the Zetadocs Report Settings page

1. Select the report you wish to put into test mode, and locate the Test mode checkbox.
2. Ensure this is checked for each report you are testing,

Note: You will need to undo these steps when testing is complete.

Batch Send

1. Open the Order Processing section or search for Sales Orders in the Dynamics NAV Client.
2. Select a suitable range of records.
3. Select Print > Order Confirmation. A print dialog will appear. Select Print.
4. The Zetadocs Batch Delivery card may appear depending on your system settings. This will contain all of the delivery details according to your current rule setup.
5. Select OK to send the reports.
6. Verify they are delivered as expected and archived (if this has been configured).

Next Step

Important: Remember to deactivate the Test mode when testing is complete.

This completes the installation and testing of Zetadocs Delivery Essentials. If you are not installing Zetadocs Capture Essentials, your setup is now complete.

If you have installed the software on a test setup, go to the next section [migrating to a live environment](#).



Capture Essentials Configuration

In this section, we will install the Zetadocs Server responsible for document conversion with Zetadocs Document Queues and go through its configuration options.

Please ensure you have carried out the steps in the [Express Installation](#), as many of its components are required to support Zetadocs Capture. Systems that are not implementing Zetadocs Capture Essentials can skip this section.

Version	Action
NAV 2015 and later or BC	Follow each section below.
NAV 2013 R2 and earlier	Follow each section below unless specified to ignore.

The Capture configuration process comprises these steps:

1. [Installing the Zetadocs Server](#)
2. [Configuring Document Queue Options](#)
3. [Configuring Capture Settings](#)

1. Installing the Zetadocs Server

The Zetadocs Server monitors network folders setup for document queues and converts documents added to that folder to PDF/A format before placing them in the document queue.

To install the Zetadocs Server:

Note: Zetadocs Server requires Microsoft .NET Framework 4.6 to be installed first.

1. Download the latest version of the Zetadocs Server from the [Software Updates page](#), and run the setup.exe file.
2. Click Next and choose a destination folder for the installation and then Next.
3. You will be asked to choose whether you want to include OCR support.

Note: OCR support requires additional Zetadocs Capture Plus licensing, the Zetadocs OCR Engine and have a separate Zetadocs OCR Engine license number.

- Choose the relevant option for your install and complete installing the Zetadocs Server:
 - I have a Zetadocs OCR Engine license number and would like OCR support.
 - I do not have an Zetadocs OCR Engine license number.

4. If you would like OCR support, follow the steps relevant to your situation:

Situation	Action
If you do not have an Zetadocs OCR Engine license and don't need OCR support.	Go to Configuring Document Queue Options and follow the steps described in that section.
If you have an Zetadocs OCR Engine license and you would like OCR support.	Follow the instructions "installing OCR Support" (described below) .

Installing OCR Support

OCR support is provided using a third party solution provided by ABBYY. The Zetadocs OCR Engine installer is responsible for installing the ABBYY OCR libraries and licensing services used by the Zetadocs Server for processing barcodes and creating searchable PDF files.

To install OCR or barcode support:

1. Download the latest version of the Zetadocs OCR Engine from the [Software Updates page](#).
2. Extract and run the Zetadocs OCR Engine download.
3. Choose a destination folder for the installation and then Extract.
4. On completion a setup program will automatically run and complete your installation.

Licensing the Zetadocs OCR Engine

Note: This step requires the Zetadocs OCR Engine license sent with your Zetadocs Capture Plus license certificate.

If you are installing the Zetadocs Server on an Microsoft Azure Virtual Machine (VM) then follow the steps in Zetadocs OCR Engine Cloud Licensing below, otherwise follow Zetadocs OCR Engine Licensing.

Zetadocs OCR Engine Licensing (non-virtualized servers)

When the ABBYY License Manager opens automatically:

1. Click the Activate license... to starts the License Activation Wizard
2. Enter your Zetadocs OCR Engine license number and activate your license.

Activation Methods

Method	Description
Via the Internet	Activation is carried out automatically and takes only a few seconds. An Internet connection is required for this type of activation.
By e-mail	The user needs to send an e-mail message generated by the program and containing information required for activation. To ensure a quick reply from the mail robot, do not alter the information in the message body or Subject field.

3. Now configure the Zetadocs Server by following [Configuring Document Queue Options](#).

Zetadocs OCR Engine Cloud Licensing (Azure VMs only)

1. Ensure you have received your Zetadocs OCR Engine Cloud Licensing files before continuing:

Files	Description
password.txt	Zetadocs OCR Engine password file.
SWERxxx.ABBYY.ActivationToken	Zetadocs OCR Engine activation token, where xxx will be replaced with your unique Cloud license key.

2. Close the ABBYY License Manager when it opens automatically at the end of the installation. Do not enter the Cloud license number as this type of license cannot be activated with the License Manager.
Note: The ABBYY License Manager is still used to track page volume usage.
3. Rename the file extension of the SWERxxx.ABBYY.ActivationToken file from ABBYY.ActivationToken to ABBYY.Cloud.ActivationToken.
4. Copy your password file and the Activation token files into the Document Converter folder in the Zetadocs Server installation path, for example C:\Program Files (x86)\Zetadocs Server\Document Converter.
5. Now configure the Zetadocs Server by following [Configuring Document Queue Options](#).

2. Configuring Document Queue Options

Zetadocs comes with two Document Queues setup a standard, a Sales and a Purchase Document Queue, with other custom queues available with Zetadocs Capture Plus.

To configure the Zetadocs Server to communicate with the document queues, these first need to be configured.

Note: When outputting files into the Batchsplit folder, make sure these are not streamed into the folder as Zetadocs Server will pick the file before its complete and it might deplete the Zetadocs OCR Engine license count.

Creating the Document Queue Folders

Each document queue requires a network folder. This folder is used to place captured documents for processing and conversion, and you must provide users with the relevant permissions to access this folder. For optimal use of the software, you should ensure that no process is locking or regularly accessing the files.

1. Create the required folders

- e.g. Sales Document Queue
- e.g. Purchase Document Queue

Note: Each folder name must be unique and must not start with the same work.

2. View its Properties and ensure the Share this Folder checkbox is checked.
3. Select the Permissions button and assign the necessary permissions:

Permission	Description
USERS	Share permissions with a minimum of Change and Read Permissions. Full Permissions are recommended.
SERVICE	The Zetadocs Document Converter Service must have access to the queue folders. To do this, add FULL Permissions to the SYSTEM user (or as whatever network user the service is running).

4. Make sure that the files will be dropped into the folder as entire files.
5. For better performance, please consider adding the folder path to the white list of any file management process (i.e. anti-virus, synchronization software...).

Document Queue Settings in NAV and BC

The Zetadocs Document Queue card will have been populated by the configuration file imported earlier with default values.

Open the Zetadocs Document Queue List page and select the Queue you wish to adjust. It will contain the following fields:

Field	Description
No.	The document Queue ID. You do not need to modify this.
Name	The name of the Document Queue. Edit as required.
Path	The location of the document queue folder you created in the previous step. Enter in the format \\example-server\Sales Document Queue\.
Archive Documents	Checking this option means all processed documents will be archived.
Archive Original	Checking this option means Zetadocs will archive the original document rather than the version converted to PDF. The conversion will still take place, ensuring that any OCR or barcode recognition is still performed.
Delete After Archive	Checking this option means documents will be deleted from the document queue after being successfully archived.
Show Delete Confirmation	Checking this option determines whether a user is to be asked to confirm deletion of documents.
Auto Link Documents	Note: This is not supported with Capture Essentials. Checking this option enables Auto Link functionality. This determines whether the document queue will call the GetAutoLink function in the Zetadocs-Send Customize codeunit. This option must be checked if you are intending to use OCR or barcode matching.
Check Out on View	Checking this option means that when documents are viewed in the document queue they are also checked out.

The list at the bottom of the Document Queue card shows the menu items available to the user, when they click the Archive button from the Zetadocs Document Queue form.

Adding Document Queues to the MenuSuite

To enable users to quickly access your document queues you can add them to your menuSuite. To do this simply follow the simple steps below.

1. Open the object designer in the Dynamics NAV Development Environment.
2. Select the Zetadocs menusuite and click design.
3. Locate the area in the Navigation pane where you wish to add the item to the menusuite.
4. Right-click on the area and select Create item.
5. Select the object type of Page.
6. Select the Zetadocs Document Queue Page (ID: 9010000)
7. Select the Department as Lists
8. Click OK when satisfied and close the design pane.
9. Save and compile the Zetadocs menusuite.
10. Restart your Dynamics NAV Client.

Adding Document Queues to the Menusuite Navigation pane

1. Open the Dynamics NAV Client.
2. Click the down arrow located on the top left corner of the page ribbon and select Customize Navigation pane.
3. On the left pane, select Departments option.
4. On the right pane, locate the Zetadocs Document Queue option.
5. Click the Copy To option and select the Home option.
6. Accept the dialog that shows up.
7. Once the Dynamics NAV Client is restarted you should be able to see the Zetadocs Document Queue in the Navigation Pane.

The Zetadocs Server Configuration File

The Zetadocs Server settings are modified using a Config.xml file, this is located in the Zetadocs Server installation location.

This is usually C:\Program Files (x86)\Zetadocs Server\Document Converter.

You can open this file in a text editing program such as Notepad.exe.

The Config.xml file contains settings which govern how documents are captured and added to document queues. It consists of instructions for each document queue configured and more general options for capturing documents.

We will go through those options relevant to an Essentials install in the order they appear. Users can leave the default values unchanged for any options not described as Essentials.

Example

In the example below:

- There is a Sales and a Purchase Document Queue each inside its own `<DocsQ>` `</DocsQ>` tags.
- The general Zetadocs Server settings are below that. These Server settings apply to all queues.

In this section, we will go through the document queue specific options identifying what the options do and providing suggestions for recommended defaults. Please go through each in turn to ensure your system is configured properly.

```
<?xml version="1.0" encoding="utf-8"?>
<Config xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">

  <docsQueue>
    <DocsQ Description="Sales Document Queue" Location="//User specified queue
location\Sales Document Queue\">
      <EnablePDFTextExtractionToFile>false</EnablePDFTextExtractionToFile>
      <BatchScanSplitType>Barcode</BatchScanSplitType>
      <BatchScanPageInterval>1</BatchScanPageInterval>
      <BatchScanBarcodePrefix></BatchScanBarcodePrefix>
      <BatchScanBarcodeDeleteSplitPage>false</BatchScanBarcodeDeleteSplitPage>
      <FilenamePrefix></FilenamePrefix>
    </DocsQ>

    <DocsQ Description="Purchase Document Queue" Location="//User specified queue
location\Purchase Document Queue\">
      <EnablePDFTextExtractionToFile>false</EnablePDFTextExtractionToFile>
      <BatchScanSplitType>Off</BatchScanSplitType>
      <BatchScanPageInterval>1</BatchScanPageInterval>
      <BatchScanBarcodePrefix></BatchScanBarcodePrefix>
      <BatchScanBarcodeDeleteSplitPage>false</BatchScanBarcodeDeleteSplitPage>
      <FilenamePrefix></FilenamePrefix>
    </DocsQ>

  </docsQueue>

  <PDFQuality>Better</PDFQuality>
  <EnableAbbyy>true</EnableAbbyy>
  <StellentTimeOut>10</StellentTimeOut>
  <StellentBypassPDF>true</StellentBypassPDF>
  <LogLevel>Error</LogLevel>
  <LogToFile>true</LogToFile>
  <LogToEventLog>false</LogToEventLog>
  <EnableBarcodeDetection>true</EnableBarcodeDetection>
</Config>
```

The Zetadocs Server Config.xml file is Case Sensitive

WARNING: When setting the various options, please ensure that you copy the exact casing shown here. Failing to do so may prevent the server from working as intended.

Specifying Document Queue Locations in the Zetadocs Server

- Items added into the Document Queue folders will be processed and converted to PDF/A format.
- Document Queue folders should be folders on the local machine where the Zetadocs Server is installed.
- The folder should then be shared on the network for Document Queue users to access.

Sample Code

```
<DocsQ Description="Sales Document Queue" Location="//User specified queue location\Sales Document Queue\">
```

Options

Element	Description
Description	Enter the name of the queue as specified in NAV or BC earlier , it is already set to the default value.
Location	Enter the Path to this queue as specified in NAV or BC earlier on the Zetadocs Document Queue card.

PDF Text Extraction

- This option allows you to set the Zetadocs Server to extract text which can then be used by several Capture and Delivery Plus elements.
- Essentials users can leave this set to the default value of false.

Sample Code

```
<EnablePDFTextExtractionToFile>>false</EnablePDFTextExtractionToFile>
```

Options

Option	Description
true	Causes the Zetadocs Server to attempt to extract text from documents, activating this option will slow down the Zetadocs Server operation.
false	This option stops the Zetadocs Server extracting text from documents.

Batch Scanning Settings

- Each document queue can be configured to use only one type of splitting method when processing batches of documents.
- Select from the options below depending on how you wish to split batches, if at all.

Sample Code:

```
<BatchScanSplitType>Off</BatchScanSplitType>
```

Options

Option	Description
Off	The default, the Zetadocs Server doesn't process any batches present in the Batch Split folder of your document queue treating them as a single document.
Barcode	Note: This is not supported with Capture Essentials. The Zetadocs Server splits the batches on every page that contains a barcode.
BarcodeValue	Note: This is not supported with Capture Essentials. The Zetadocs Server splits the batches every time the barcode being read has a different value to the previous barcode read.
PageInterval	Zetadocs Server splits the batches using an interval defined by the BatchScanPageInterval parameter, e.g. every 3 pages see below for details.

Configuring the Page Interval

This value determines the page interval number to be used when processing a document using the PageInterval splitting method described above.

Sample Code

```
<BatchScanPageInterval>1</BatchScanPageInterval>
```

Options

- The page interval can be any positive whole number value (integer) e.g. 1,2,5,10,20 etc. The batch will then be split into documents each that number of pages.
- For those not using page interval splitting, we recommend adding the value 1, as this will be ignored unless the BatchScanSplitType has been set to PageInterval.

File Name Prefix

- It is often useful to be able to identify which Document Queue a document originated from following the conversion and queue processing.
- The file name prefix settings allows you to prefix all files processed by a queue. For example, a prefix setting of "SDQ_" in the Sales Document Queue would result in a document "Sample.doc" becoming "SDQ_Sample.pdf" after conversion to PDF.

Sample Code

```
<FilenamePrefix></FilenamePrefix>
```

Options

- The default is no prefix.
- To set a prefix put the appropriate prefix in the setting for the desired queue.
- We recommend that the prefix value be less than 10 characters and the following characters are not allowed:

% & * : < > ? / { | } ~ " '

Next Step

That completes the Zetadocs Server settings for a document queue, this process should be repeated for all subsequent queues before continuing on to the [general capture options](#).

3. Configuring Capture Settings

The general capture options for the Zetadocs Server are located at the bottom of the [Config.xml file](#) and contain the options listed below. These are applied to all captured documents regardless of the document queue settings.

Adjusting the PDF Quality

The quality of the PDFs the Zetadocs Server produces during conversion can be adjusted to meet your requirements of file size, quality and conversion speed.

Sample Code

```
<PDFQuality>Better</PDFQuality>
```

Options

Option	Description
Better	Use this option when PDF quality is important, e.g. when using OCR.
Smaller	Use this option when storage space is at a premium and high resolution is not required.

StellentTimeOut Option

Stellent is a component that helps with PDF conversion. This setting determines the duration Zetadocs will wait before assuming it has a problem and aborting the conversion.

Sample Code

```
<StellentTimeOut>10</StellentTimeOut>
```

Options

We recommend that this setting is left at its current default of 10.

StellentBypassPDF Option

This option causes the Zetadocs Server to bypass PDF files added to the conversion folder rather than convert them again. They are instead simply copied to the converted folder, which can result in the Server operating more quickly on a given batch of documents.

Note: The PDF files may not be in the specific PDF/A format generated by the Server.

Sample Code

```
<StellentBypassPDF>true</StellentBypassPDF>
```

Options

Option	Description
true	The recommended default as PDF files will no longer be converted which can increase the speed at which the Zetadocs Server can process a batch of documents.
false	Sends all documents for conversion including those already in PDF format.

Adjusting the Logging Level

The logging level options can normally be left set to error, with the other options only used in troubleshooting and support cases.

Sample Code

```
<LogLevel>Error</LogLevel>
```

Options

Message type	Description
Error	Use this setting for general operation.
Warning	Use this for trouble shooting issues.
Debug	Should be used for a controlled period of time to trouble shoot issues.

Specifying the Log Location

The Zetadocs Server log can be set to save to a file and/or the event log. This is done using the two options `<LogToFile>` and `<LogToEventLog>`. Using these options is possible to set Zetadocs to log to either a file or the event log or neither.

The Zetadocs Server log file is written to:

C:\Windows\Temp\Zetadocs\ZdDocumentConverter.log

Sample Code

```
<LogToFile>true</LogToFile>

<LogToEventLog>>false</LogToEventLog>
```

The above code would result in the log being kept in Zetadocs Server log file.

Options

Each of the can be set to either true or false, we recommend that you have one or the other forms of logging active at all times.

Option	Description
true	Logs event at the level specified above to the log file or event log.
false	Stops the Zetadocs server logging events into the log file.

Restarting the Zetadocs Server

Save the updated Config.xml file when you have finished making your changes. To implement the changes you have made, you need to restart the Zetadocs Server.

To restart the Zetadocs Server:

1. Go to Start > Run. Then enter Services.msc.
2. Scroll to Zetadocs Document Converter.
3. Right click on Zetadocs Document Converter, and select Restart.

4. Testing Capture Essentials

To test Zetadocs Capture:

Note: Log into the Dynamics NAV Client with a Dynamics Full User license and a user role that has access to the modified sections within NAV or BC.

Version	Action
NAV 2015 and later or BC	Follow the steps below
NAV 2013 R2 and earlier	No additional actions, follow the same steps below.

Zetadocs Server Extensions install the Zetadocs Control add-in to support all clients without any further installation on each client PC. This means the same Zetadocs Documents FactBox is now available on all NAV/BC clients, include the Web client and Universal app.

Zetadocs Document Queue Testing

The Sales and Purchase Document Queues have the capacity to generate a number of different documents within NAV or BC. These are predetermined, and you should do a test for each that you intend to implement in the system.

Creating a Document using the Sales and Purchase Document Queues

1. Open Dynamics NAV Client and open the Zetadocs Sales Document Queue.
2. Ensure the queue is populated with a selection of sample or test documents.
3. Select one of the items from the queue.
4. Select Create and then the type of document you wish to test. In this case, we'll look at a Quote.
5. This will display the Sales Quote window. Fill in the form as usual and when finished.
6. Close the Sales Quote window.
 - o The Zetadocs Status Message is displayed advising you that a copy of your document that you have just processed from the Zetadocs Document Queue, has been saved in the archive. It will also give you the archive location.
7. You will be asked whether you want to delete the document from the document queue. If you no longer require the document to be in the Document Queue, you can delete it. You can always go back to the archive location where the document was saved to view it.
8. Repeat this process for the other Sales items and the Purchase queue as required.
9. Open your archive and ensure the documents have been archived as expected.

Test Shared Location Updating

1. Create an email with an attachment and save it as a .msg file into the Zetadocs Document Queue's shared folder location.
2. Select the Queue > Refresh menu button and ensure that the saved email.msg file is now in the Document Queue converted into PDF format.
3. Select the entry in the Zetadocs Document Queue and click Item > View. Verify the item is viewable in PDF format
4. Select the entry in the Zetadocs Document Queue and click Item > View Original. Verify the item is viewable in its original format.

Check Delete

1. Select an entry in the Zetadocs Document Queue and click Item > Delete.
2. Verify the document is removed from the Queue and also that it successfully deletes the file from the Zetadocs Document Queue network folder location.

Next Step

This completes the installation and testing of Zetadocs Delivery and Capture Essentials. If you are not installing any Advanced features, your setup is now complete.

If you have installed the software on a test setup, go to the next section [migrating to a live environment](#).



Appendix

[Migrating to the live database](#)

[How to install Zetadocs Client on a client PC](#)

[How to install Zetadocs Client using ClickOnce](#)

[How to manually install the Zetadocs Control Add-in for NAV2016 and later or BC](#)

[How to Modify reports to work with Zetadocs Client Delivery](#)

[How to add support for NA Customer Statements \(10072\) with Zetadocs server-side delivery](#)

[Additional Archiving information](#)

[Creating SharePoint Document Libraries for Zetadocs](#)

[Zetadocs Updates and Uninstall](#)

Migrating to the Live Database

To migrate your setup to your live system, you need to:

1. Export the Configuration.
2. Export any Modified Forms, Pages, Tables and Reports.
3. Import Zetadocs to the Live NAV or BC System:
 - a. Import the Zetadocs Objects.
 - b. Import any Modified Forms, Tables or Reports.
 - c. Import the xml file with your configuration.

Exporting the Configuration

The Zetadocs Configuration Export form will export all of the configuration data specific to Zetadocs. If you have modified data in other tables, this will not be exported.

1. From the Navigation pane select the Administration option.
2. From the options that appear, select Application Setup and then Zetadocs Setup.
3. Select the Zetadocs Configuration Export option.
4. In the window that appears select a suitable name and location for your configuration export and click Export.

Exporting Modified Forms, Pages, Tables and Reports.

1. Open the Object Designer (Tools > Object Designer).
2. Click on All button in the designer menu.
3. Select All objects (CTRL + A) or alternatively select those objects you wish to export.

4. Export the Objects (File > Export) to a suitable file e.g. Zetadocs Export.fob file.
5. Keep the Zetadocs Export.fob in a safe place.

Importing Zetadocs to the Live NAV or BC System

When moving to the live system, instead of importing the config.xml file and pages/tables/forms.fob files straight from the Zetadocs product download, you select the files you created during the exports above.

To import:

1. [Import the Zetadocs Objects fob file created from you test system](#)
2. [Install the Page interfaces and forms as required](#)
3. [Import the xml file with your configuration from the test system](#)
4. [Copy across your Zetadocs Templates](#)

When you have imported the configuration, you should perform a brief series of tests like those conducted earlier to ensure that the migration has been successful.

How to Install Zetadocs Client on a Client PC

Installation Steps to be Performed on Each Client Machine

Note: This should only be completed after the [Express Installation](#).

The following steps are only required on each client machine if you require Zetadocs Client functionality:

1. [Installing the Zetadocs Client](#)
2. Zetadocs Client Licensing
3. Installing the Zetadocs Help files.
4. Testing the Zetadocs Solution. See:
 - [Testing Zetadocs Express](#)
 - [Testing Delivery Essentials](#)
 - [Testing Capture Essentials](#)

Zetadocs Client Licensing

1. Start the Zetadocs Client.
2. Go to Tools> Options> Licensing and enter the path to the network folder containing the Zetadocs license.
3. Restart the client if necessary, you can confirm that you are successful if the splash screen shows the Automation tag beside the number of users.
4. Please refer to the Zetadocs Client Help for further information on configuring the Zetadocs Client.

Zetadocs Help files (NAV 2013 and earlier)

Windows Client/Role Tailored Client

The Zetadocs help files need to be copied to the NAV help folder on each machine. The file names should use the first unused post-fix letter between a and j (e.g. change to addin_b.chm and addin_b.hh if addin_a.chm exists).

The destination of these files is determined by the install language e.g. substitute the en-GB subfolder shown in the examples below for the language pertinent to the install e.g. en-US for US systems.

There are 2 files to copy:

- .chm file, and
- .hh file

These are available from your product download in the folder:

\Zetadocs Client\ Help

Copy the .CHM files to the following location:

Version	Location
NAV 2013	Program Files (x86)\Microsoft Dynamics NAV\70\RoleTailored Client\en-GB
NAV 6.0	Program Files (x86)\Microsoft Dynamics NAV\60\RoleTailored Client\en-GB

Copy the .hh file to the following location:

Version	Location
NAV 2013	Program Files\Microsoft Dynamics NAV\70\Service\ENG
NAV 6.0	Program Files (x86)\Microsoft Dynamics NAV\60\Service\ENG

You may need to restart the NAV Server to get the help files to appear.

1. Go to Start > Run, type services.msc, and then press ENTER.
2. Under Services, right-click the NAV Server, and then click Restart.

Development Environment/Classic Client

The Zetadocs help files need to be copied to the NAV help folder on each machine. The file names should use the first unused post-fix letter between a and j (e.g. change to addin_b.chm and addin_b.hh if addin_a.chm exists). The destination of these files is determined by the install language e.g. substitute the en-GB subfolder shown in the examples below for the language pertinent to the install e.g. en-US for US systems

There are 2 files to copy:

- .chm file, and
- .hh file

These are available from your product download in the folder:

\\Zetadocs Client\\Help\\

Copy the file to the following location:

Version	Location
NAV 2013	Program Files\\Microsoft Dynamics NAV\\70\\Service\\ENG
NAV 6.0	Program Files\\Microsoft Dynamics NAV\\60\\Classic\\ENG

You may need to restart the NAV Server to get the help files to appear.

- Go to Start > Run, type services.msc, and then press ENTER.
- Under Services, right-click the NAV Server, and then click Restart.

How to Deploy Zetadocs Client using ClickOnce

To deploy Zetadocs Client with 32-bit Windows Client, you need to follow the steps below:

Version	Action
NAV 2016 and later or BC	No actions required. Zetadocs Server Extensions install the Zetadocs Control add-in to support all clients including the Dynamics NAV clients (32 and 64-bit) without any further installation on each client PC.
NAV 2013 R2 and NAV 2015	Follow the steps below.
NAV 2013 and earlier	No actions required. ClickOnce feature not available.

- Step 1: Installing Zetadocs.
- Step 2: Update the Deployment manifest.

Step 1: Installing Zetadocs

1. After installing Zetadocs in the NAV or BC Server, copy the Zetadocs Capture Add-in Folder to the NAV or BC deployment location.

The Zetadocs Capture Add-in Folder is typically located in the NAV or BC Add-ins folder:

C:\Program Files (x86)\Microsoft Dynamics NAV\xx\RoleTailored Client\Add-ins
C:\Program Files (x86)\Microsoft Dynamics 365 Business Central\xx\RoleTailored Client\Add-ins

The NAV or BC deployment location is:

C:\inetpub\<CLICKONCEDEPLOYMENT>\Deployment\ApplicationFiles

(Replace <CLICKONCEDEPLOYMENT> with the name of your NAV or BC deployment.)

2. Go to the assemblies folder by opening Run and enter:

C:\Windows\assembly\GAC_MSIL

3. Find the folder Microsoft.SharePoint.Client.
4. Copy the Microsoft.SharePoint.Client.dll found inside the Microsoft.SharePoint.Client folder to the NAV or BC deployment location. This is typically:

C:\inetpub\<CLICKONCEDEPLOYMENT>\Deployment\ApplicationFiles

5. In the assemblies folder, find the folder Microsoft.SharePoint.Client.Runtime and copy the Microsoft.SharePoint.Client.Runtime.dll to the NAV or BC deployment location.
6. In the assemblies folder, find the Microsoft.SharePoint.Client.Runtime.Resources folder and copy the Microsoft.SharePoint.Client.Runtime.Resources.DLL found inside to the NAV or BC deployment location.

Additional steps for NAV 2016 and later or BC:

1. Remote desktop to the NAV or BC server.
2. Backup your deployment folder (e.g. C:\inetpub\<CLICKONCEDEPLOYMENT>) to a different location.
3. Navigate to the location of your NAV or BC deployment. For example:

C:\inetpub\<CLICKONCEDEPLOYMENT>\Deployment\ApplicationFiles

4. Delete the following files:

- Microsoft.Dynamics.Nav.Client.exe
- Microsoft.Dynamics.Nav.Client.exe.config

5. Navigate to your Dynamics NAV or BC RTC installation folder typically in C:\Program Files (x86)\Microsoft Dynamics NAV\xx\RoleTailored Client and copy the following files:

- Microsoft.Dynamics.Nav.Client.x86.exe
- Microsoft.Dynamics.Nav.Client.x86.config

6. Paste the files into the folder:

C:\inetpub\<CLICKONCEDEPLOYMENT>\Deployment\ApplicationFiles

7. Rename the file Microsoft.Dynamics.Nav.Client.x86.exe to Microsoft.Dynamics.Nav.Client.exe

8. Rename the file Microsoft.Dynamics.Nav.Client.x86.exe.config to Microsoft.Dynamics.Nav.Client.exe.config

Step 2: Update the Deployment Manifest

Before starting the following steps make sure you have the following tools on the NAV or BC Server:

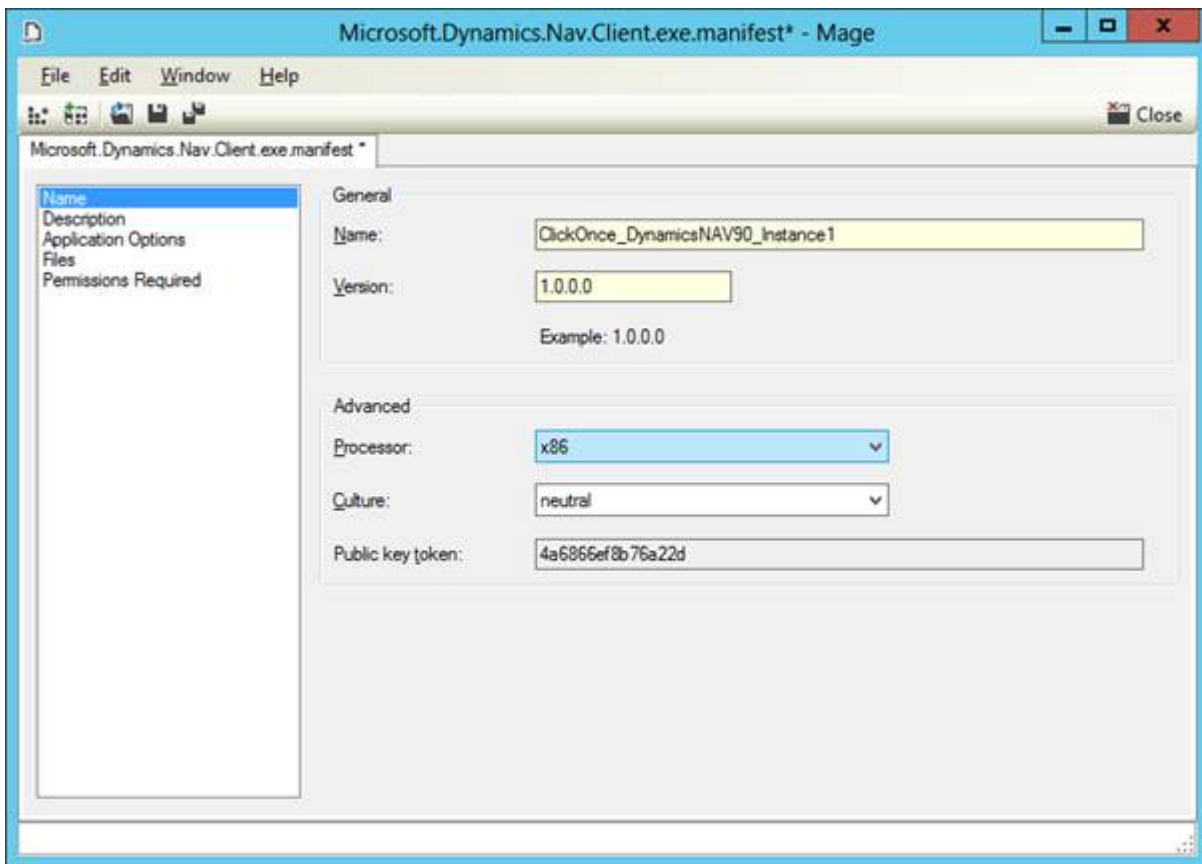
- mageUI.exe
- mage.exe (This is part of the default ClickOnce scripts provided by Microsoft)

Follow the steps below to update the deployment manifest:

1. Start by opening mageUI.exe.
2. Go to File -> Open and select the file Microsoft.Dynamics.Nav.Client.exe.manifest:

C:
\inetpub\
<CLICKONCEDEPLOYMENT>\Deployment\ApplicationFiles\Microsoft.Dynamics.Nav.Client.exe.manifest

3. Go to the Name tab and in the Advanced section change the Processor to x86:



4. Go to the Files tab and click Populate.
5. Save the manifest and if a warning shows select 'Yes' to continue.
6. A prompt to sign the manifest should appear. Select a certificate file and click OK to sign the manifest and close the dialog.

Note: More information on how to obtain a certificate can be found in [Using Certificates to Secure a Remote Client Connection](#).

7. Close mageUI.exe.
8. Open the manifest file with Notepad or similar.
9. Find the line

```
<assemblyIdentity name="Tracker.PDF-XChange.25" version="1.0.0.0" processorArchitecture="X86" type="win32" />
```

10. Replace "X86" with "x86".
11. Save the file and close Notepad.
12. Open the Command Prompt as an Administrator and change directory to your ClickOnce deployment Application Files folder:

```
C:\inetpub\<CLICKONCEDEPLOYMENT>\Deployment\ApplicationFiles\
```

13. Run the following command (replace certFile.pfx with your certificate and password with its password):

```
mage.exe -Sign Microsoft.Dynamics.Nav.Client.exe.manifest -CertFile certFile.pfx -Password password
```

14. Open mageUI.exe again and open the application file:

```
"C:\inetpub\<CLICKONCEDEPLOYMENT>\Deployment\Microsoft.Dynamics.Nav.Client.application"
```

15. Go to the Name tab and in the advanced section change the Processor to x86.

16. Go to the Application Reference tab and click the Select Manifest button and select the manifest file changed previously.

17. Save and Sign the application file.

Testing

To test the deployment:

1. Go to the URL of the deployment and open a page that has been modified to have the Zetadocs FactBox.
2. Verify the FactBox can open without errors and test that a document can be saved using the FactBox.

How to manually install the Zetadocs Control Add-in

This section will explain how to manually install the Zetadocs Control Add-in for NAV 2016 and later or BC.

1. Open the Dynamics NAV Client
2. Search for the "Control Add-ins" page
3. Add a new Addin entry by clicking on the button "New"
4. Enter the following information:
 - a. Add-in Name: Zetadocs.ControlAddins.Web
 - b. Public Key Token: e139abe62dd951e0
 - c. Category: JavaScriptComponent
5. Select the created line
6. Click on "Import" and browse for the Zip file Zetadocs.ControlAddins.Web.zip provided
7. Close the client.

How to Modify Reports to work with Zetadocs Client Delivery

Zetadocs Report Modification Tool for Zetadocs Client Delivery

Note: These sections are only required for Zetadocs Client Delivery.

Zetadocs requires existing NAV and BC reports to be modified to add the Zetadocs reference that the Zetadocs PDF printer interprets as the start of the next document in a batch. To make this process quicker and easier, we have provided the Zetadocs Report Modifier tool.

Prerequisites

- The Tool is not guaranteed to work for all NAV and BC reports. If you encounter any problems with the tools, follow the technical note to modify the reports - [ZTN4448](#) - provided on the website. We also provide manual instructions on how to modify remittance advice reports - [ZTN4375](#) - and Word layout reports for NAV 2015 - [ZTN4376](#).
- The tool does not perform all the changes required for Windows Client reports. To modify Windows Client reports, we recommend running the reports through the tool and then performing the additional edits detailed below.

Using the Report Tool

1. Download the latest [Report Modification Tool](#) from the Equisys website and extract it.
2. Open the Object Designer and select the reports you wish to add Zetadocs functionality.
3. Export the reports as a text file.
4. Run the Tool and click Load Reports.
5. Select the version of NAV or BC.
6. Browse to your exported reports and click Start. The Conversion Options window will appear.
7. Modify the new report ID range as required.
 - This specifies the starting ID that the Report Modification Tool will use for the first modified report. Subsequent reports will use values incremented from this base value.
8. Modify the report name prefix, as required.
 - This specifies a 0 to 3 character prefix that all reports will have appended to their names. This ensures the reports have a unique name. Leaving the prefix blank will allow the existing report name to be used. However, you may get name collisions if you have chosen to use new report IDs as well.
9. You may be asked to delete the existing output directory. We recommend you back up this directory before proceeding.
10. If a report cannot be modified, the reason will be listed. For successful conversions, the new report ID and report name are given.
11. The modified reports are now available in the folder containing the original reports, in an Output subfolder.
12. Re-import the reports and deal with any merge and conflict messages that appear.

RDLC Layout Modifications

If you are using the RDLC reports, you need to perform these additional steps to ensure the Zetadocs reference is visible to the Zetadocs PDF printer.

There are two different methods to do this, depending on how it has been designed and the version of NAV or BC in question:

- Modifying the Header and Body section
- Modifying the Body section only

Most can use the header and body section modifications, but some reports (for example, the remittance advice journal) require the [body only modifications](#).

NAV and BC Modifying the Header and Body Section

The Order confirmation report is an example where the page header section is used to display header information on each page for the record.

To add the Zetadocs reference:

13. Locate the report and click View > Layout. This will open the report designer.

14. Add a new text box in the top left of the body section, ensuring it does not overlap any existing controls.

- Existing text boxes have a parent listbox called list1. In this situation, ensure that this new textbox has the same.

15. Adjust the properties as follows:

- Name: Zetadocs_Reference_tb.
- Value: =Fields!Zetadocs_Reference.Value.
- Visibility Hidden: TRUE.
- Color: Red.

16. Open the Document Outline – Report window (Visual Studio > View > Other Windows > Document Outline).

17. Locate the Zetadocs_Reference_tb textbox.

18. Click the Bring to front button.

19. Add a new text box to the top left of the page header section of the report.

- Ensure the textbox does not overlap any existing controls.
- Ensure the whole 15 digit ZD Reference will fit in the text box on one line.

20. Adjust the properties as follows:

- Font size: 6 (4 being the minimum)
- Color: White
- Value: =ReportItems!Zetadocs_Reference_tb.Value.

21. Close and save the report.

Version Code

When you have saved the report, add **EQ9.0** to the Version List column in the Object Designer.

NAV 2009 Modifying the Body Section Only

The remittance advice journal report is an example of a report that does not have a page header section. In this situation, follow the instructions below to add the Zetadocs reference. Additional help for remittance advice reports can be found online in the [knowledgebase](#).

To add the Zetadocs reference:

22. Click View > Layout to open the report designer for Dynamics NAV Client reports.
23. Add a new text box into the top left of the header section.
 - Ensure the textbox does not overlap any existing controls.
24. Usually existing text boxes have a parent listbox called list1. In this situation, ensure this new textbox has the same.
25. Adjust the properties as follows:
 - Font size: 6 (4 being the minimum)
 - Color: White
 - Value: =Fields!Zetadocs_Reference.Value.
26. Close and save the report.

Version Code

When you have saved the report, add **EQ9.0** to the Version List column in the Object Designer.

How to add support for NA Customer Statements (10072)

This section explains how to add support for the North American Customer Statement Report(10072) or reports based on 10072. These reports require an extra filter not required by the standard Customer Statement reports (116 or 1316).

Note: The following steps are only required for Zetadocs server-side delivery functionality.

To add support for report 10072 follow these instructions:

1. Open the NAV or BC Development Environment and go to table 9009965 - Zetadocs Report Settings and click 'Run'.
2. Add a new entry for the required report (e.g. 10072).
3. Populate the fields as below:

Report ID	10072
Report Name	Statement
Document Set No.	ZD00012
Document Set Name	Statements
Archive Document Type	
Company Type Code	CUST
Company No. Field No.	1
Contact No. Field No.	5049
Default Batch Name	
Show Delivery Dialog	true
Show Batch Delivery Dialog	true
Preview in Zetadocs Client	true
Test Mode	False
Record No. Field No.	1
Comments	
Report Table ID	18
Report Table Filter	
Report DataItem Name	Customer
Consolidate E-Mails Limit	0
Consolidate E-Mails	false
Enable Additional Filter	true
Additional Filter	

4. Click 'OK' to close the window.
5. Test by sending a Customer Statement and verify that no error is shown.

Additional Archiving Information

SharePoint

SharePoint ListView Thresholds

Microsoft SharePoint currently has a maximum limit for the number of items in a Library. Items can be documents or folders. When planning your Archive file plan, you should take into account this limitation by splitting items into multiple lists so that no list exceeds 5,000 items. You'll be unable to view the list items beyond the limit of 5,000 items.

Zetadocs Essentials allows you to configure your archive folder structure by changing the archive options in the General settings page.

In order to help you create a more customizable file plan, you can use Zetadocs Capture Plus. This will allow you to archive different documents to different places depending on a custom logic, giving you more control over your stored files and file plan.

Custom File Plan

The Zetadocs-Capture Customize Codeunit contains an example in the PreArchive function to create a custom folder structure. The example shows how to create a folder structure based on a root folder name, the transaction type, and then the name of the customer or vendor.

This example can be uncommented to get something working immediately and then extended to meet your need. More information on how to use the Zetadocs SDK can be found in the Zetadocs SDK guide.

The Zetadocs SharePoint Content Type and its Columns

Zetadocs includes a SharePoint solution package (.wsp) to bundle Zetadocs features. You can find it in your product download under the Zetadocs SharePoint Extensions folder. This package contains a Zetadocs Content Type which is required for Zetadocs to archive documents into your SharePoint Document Library.

The Zetadocs Content Type contains different SharePoint columns depending on the version of the Zetadocs SharePoint Extensions installed in your SharePoint site.

Note: There may be columns hidden that are not displayed in the Microsoft SharePoint user interface.

The following table shows the name of the column, the hidden property, its data type and the supported version:

Variable name	Hidden column	Data type	Supported version
ZetadocsBcc	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsCc	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsDateReceived	No	DateTime	Available for version 4.2 of Zetadocs or later
ZetadocsDateSent	No	DateTime	Available for version 4.2 of Zetadocs or later
ZetadocsEmail	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsFax	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsFrom	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsCompanyNo	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsRecordNo	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsRecordType	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsOrganization	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsPrinter	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsRecipientName	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsArchiveID	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsDocumentType	No	Text	Available for version 4.2 of Zetadocs or later
ZetadocsRecordLink	Yes	Text	Available for version 5.0 of Zetadocs or later
ZetadocsRecordLinkType	Yes	Text	Available for version 5.0 of Zetadocs or later

If you intend to move documents archived using Zetadocs in your Microsoft SharePoint from a Document Library to another, you must copy all the Zetadocs columns. This must include the hidden columns.

Adding the Zetadocs SharePoint Extensions

The Zetadocs SharePoint Extensions create a document library called Zetadocs by default and enables it for operation with Zetadocs. To install the Zetadocs Server Extensions to your SharePoint, you need to:

1. Locate the Zetadocs SharePoint Extensions folder of your product download.
2. Run the `sharepointonlinemanagementshell_5326-1200_x64_en-us.msi` to install the SharePoint Online Management Shell.
3. Open the Sharepoint Online Management Shell as administrator.
4. From the shell browse to the Zetadocs SharePoint Extensions folder and type `.\SharePoint Extensions.ps1` to run the Zetadocs SharePoint Extensions.ps1 file.
5. Follow the steps in the script:
 - a. Enter the URL for the site where the Zetadocs functionality is required (for instance `https://company.sharepoint.com/mysite/`)
 - b. Enter an administrative user email
 - c. Enter the password for the administrative user
6. The script will log out information, the text should be green and white. If there is any red text, please verify the error and take the required action to resolve if the error message is clear. If required, please contact Equisys to resolve any unclear errors.

Creating Document Libraries for Zetadocs

The Zetadocs SharePoint Extensions create a document library called Zetadocs by default and enables it for operation with Zetadocs. Should you wish to create a different document library then you will need to follow the steps below to ensure you get the full range of Zetadocs functionality.

NOTE: You must activate the Zetadocs site features prior to performing these settings on the site where you want the new document library.

1. Create a new document library on the site.
2. Open the Document Library settings > Advanced Settings.
3. Set Allow management of content types option to Yes.
4. Return to the Document Library settings and select Add existing content type and then Zetadocs in the Content Types section.

Should you wish to enable the basic approval workflow feature then you will need to perform these additional steps:

1. From your new Document Library ribbon browse to the library Workflow Settings.
2. Click on Add a workflow ensuring the These workflows are configured to run on items of this type option is set to All.
3. From the workflow list select the Approval - SharePoint 2010 option.
4. You must name the workflow Zetadocs.
5. Complete the workflow creation and to complete the setup you must upload a document to the document library and run the Zetadocs workflow on it.

The screenshot shows the 'Add a workflow' dialog in SharePoint 2010. The left sidebar shows the 'Libraries' section with 'Zetadocs' selected. The main area is divided into sections for configuring the workflow:

- Content Type:** 'Run on items of this type:' is set to 'All'.
- Workflow:** 'Select a workflow template:' shows 'Approval - SharePoint 2010' selected. The description states: 'Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.'
- Name:** 'Type a unique name for this workflow:' is set to 'Zetadocs'.
- Task List:** 'Select a task list:' is set to 'Tasks'. Description: 'Use the Tasks list to keep track of work that you or your team needs to complete.'
- History List:** 'Select a history list:' is set to 'Approval History'. Description: 'Use the Approval History list to keep track of any reviews or approvals that have been performed on documents by you or your team.'
- Start Options:** 'Specify how this workflow can be started.'
 - ☒ Allow this workflow to be manually started by an authenticated user with Edit Item permissions.
 - ☐ Require Manage Lists Permissions to start the workflow.
 - ☐ Start this workflow to approve publishing a major version of an item.
 - ☐ Start this workflow when a new item is created.
 - ☐ Start this workflow when an item is changed.

At the bottom right are 'Next' and 'Cancel' buttons.

Updating Zetadocs

FOB Independent Updates

All Zetadocs updates and update rollups allow for the Zetadocs Client and Zetadocs Server Extensions to be updated independently of the Zetadocs objects. This will bring an easier update process for customers, as they can update Zetadocs without having to require their Dynamics partner to access the Dynamics NAV development environment.

For detailed instructions on how to update your Zetadocs, see the [Equisys updates page](#).

Enabling ForceSearchByRecordLink option

If you are updating from 5.0 or 5.4 to 9.0 of Zetadocs and you previously had Zetadocs version 4.x installed, you need to complete these steps:

1. Open Dynamics NAV development environment and then the Object Designer.
2. Locate and run the Zetadocs System Settings table (ID:9009959).
3. Add a new record called ForceSearchByRecordLink, check the bool field and close the table.
4. This will instruct Zetadocs to search your archive for items archived using the RecordLink method.
5. Create Index in SharePoint (for SharePoint users):
 - Zetadocs SharePoint Extensions does not create an index for the Zetadocs Archive ID automatically.
 - We recommend you to create it manually to improve the performance of your system. To create it, follow the instructions in technical note [ZTN4398](#), related document search fails in SharePoint when any document library contains more than 5000 documents.

Enabling Zetadocs Capture Plus for Zetadocs Document Factbox

When updating Zetadocs from versions 7.1 or earlier the Zetadocs Document Factbox will not call the PreArchive function in the Zetadocs Capture Codeunit by default.

To enable this feature:

1. Open the Dynamics NAV development environment and run the table 9009959 Zetadocs System Settings.
2. Add a new entry FactboxSDKEnabled.
3. Set the Bool value to true(ticked).
4. Close the page.

You should now be able to use the Zetadocs Capture Customize codeunit for the documents archived using the factbox.

Uninstalling Zetadocs

Please follow the instructions on the technical note [ZTN4272](#), on how to uninstall your Zetadocs.

Further Resources

To keep this guide as simple as possible, we have focused on the standard installation requirements.

See [Latest Advice and Resources](#) to access the latest technotes, updates and tools to support your installation.

We recommend you view this page to ensure you are working with the most up to date software and advice. It also provides general advice and specific advice for special install scenarios, such as Upgrades, Group Policy and Remote Desktop Services installations.