

# Zetadocs for Microsoft Dynamics NAV Upgrade Guide

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## Version history

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## 1. Introduction

The aim of this document is to guide you through the steps required to upgrade Zetadocs for Microsoft Dynamics NAV version 1.1 or 1.2 to version 2.0. The document provides a step by step guide as to how to install and configure Zetadocs for Microsoft Dynamics NAV version 2.0 on a system that has version 1.1 or 1.2 installed. It is recommended that you read the entire guide before starting with the upgrade.

### 1.1 Components

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

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

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

## 2. Upgrading

### 2.1 Zetadocs NAV Client

The Zetadocs NAV Client is installed in 3 separate parts:

- Zetadocs NAV Client
- Zetadocs API Runtime
- Zetadocs PDF

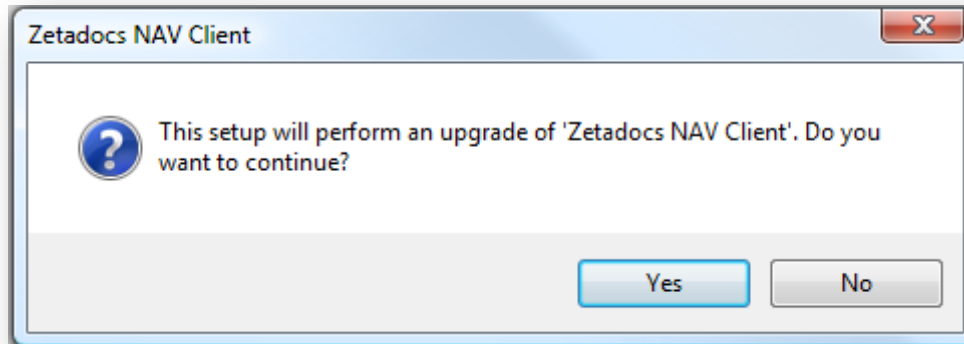
The Zetadocs NAV Client components are installed through Windows Installer and the upgrade can be performed by running the installer again for Zetadocs NAV version 2.0.

Actions:

1. From your Zetadocs for NAV CD, launch the installer.
2. Select Install **Zetadocs for NAV** → **Zetadocs for NAV Client**.



3. You will be asked if you want to perform an upgrade of Zetadocs NAV Client. Select **Yes**.



4. Follow the instructions of the installer and select **Yes** when asked to perform an upgrade of the Zetadocs NAV Client prerequisites (Zetadocs PDF and Zetadocs API Runtime).
5. Once the installation is finished, ensure that your license information is still valid for the version of Zetadocs that you are using. You can validate your license by using the Zetadocs PDF Configuration program.

## 2.2 Zetadocs SharePoint Extensions

For details on updating the Zetadocs SharePoint extensions click [here](#) or contact us at [support@equisys.com](mailto:support@equisys.com).

## 2.3 Zetadocs for NAV Objects

The NAV objects distributed with the Zetadocs for NAV solution can be separated in two separate categories:

- Objects created for Zetadocs only (Zetadocs for NAV Objects)
- Modifications made to existing objects in NAV (Zetadocs Interfaces)

### (i) Modifying Zetadocs Objects

Most of the objects configured for Zetadocs version 1.2 will already be configured for Zetadocs v2.0 once the new objects are imported, but we strongly recommend that the current configuration is backed up for security reasons. The following steps will tell you how to backup the Zetadocs for NAV objects before you upgrade.

Actions:

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

In order to import the updated Zetadocs for NAV tables some of the fields in the existing tables will need to be cleared. The Zetadocs for NAV 2.0 Upgrade Report has been provided to do this.

Actions:

1. Open the NAV Client and log on to the database.
2. Open the NAV **Object Designer**.
3. Import the **Zetadocs for NAV 2.0 Upgrade Report.fob** file.
4. From the object designer run the **Zetadocs for NAV 2.0 Upgrade report**.
5. The filters dialog will appear, just press **ok**, do not enter any filters.

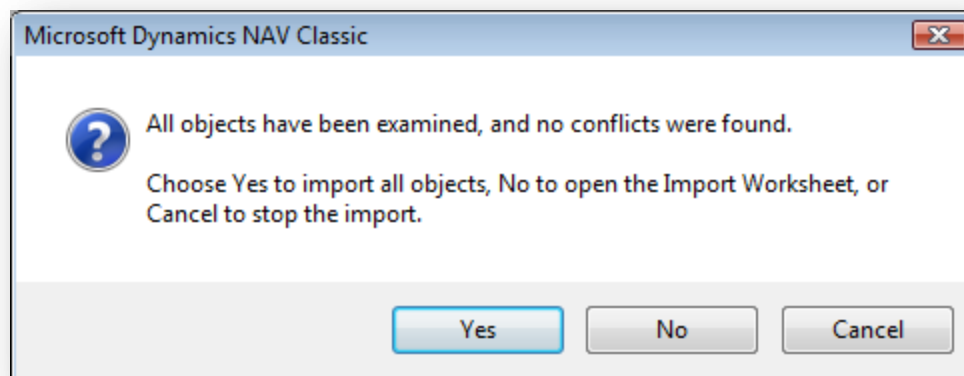
These actions must be repeated for each company in the database.

Note that all the reports that were created for Zetadocs version 1.2 will work with Zetadocs version 2.0 without any modifications. Therefore, there is no need to export them during the upgrade process.

You are now ready to import the Zetadocs for NAV 2.0 objects in your database. The instructions given here are for NAV 5.0. You must pick the file that's appropriate for the version of NAV you are using.

Actions:

1. From NAV, import the Zetadocs for NAV V2.00 Objects – NAV5.00.fob file. You will be prompted to open the Import Worksheet.



2. Once in the Import Worksheet, the actions suggested by NAV should be changed. Instead of merging the new tables in the existing ones, you must replace them. The figure below describes the actions that should be taken in the import sheet:  
Once the objects are imported. Return to the object designer, and import the **Zetadocs for NAV V2.0MenuSuite.fob** file.
3. Once again, you will be prompted to open the Import Worksheet.
4. In the Import Worksheet, select **Replace** for the only object available.
5. Import the **Zetadocs for NAV v2.0 Additions Report 9009959.fob** file. If there is a conflict importing that object, select the **Replace** option in the Import Worksheet.

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

### **(ii) Modifying Zetadocs Interfaces**

The interfaces have been changed between versions 1.1 and 2.0. Please refer to the Zetadocs for Microsoft Dynamics NAV Installation Guide (Appendix A) for instructions on how to modify existing NAV objects for Zetadocs version 2.0.

## 2.4 Reports

If upgrading from Zetadocs for NAV 1.1 all reports that have been modified for Zetadocs for NAV will require the following modifications to cater for the additional recipients feature:

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

To achieve this please refer to the Zetadocs for Microsoft Dynamics NAV Installation Guide.pdf distributed with Zetadocs for NAV 2.0 and follow the sections on inserting the code and text boxes into a report for the following sections. The code should replace your existing code in these triggers and you should replace the existing text boxes in the Zetadocs Embedded Commands Data Item section.

### Triggers

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

### Report Instructions

- Create Zetadocs Embedded Commands Data Item

## 3. Troubleshooting

The issues that might occur during an upgrade to Zetadocs for NAV version 2.0 are covered in the Zetadocs for Microsoft Dynamics NAV Installation Guide, in the Troubleshooting section of Appendix B.