Zetadocs for Microsoft Dynamics NAV Installation Guide

Version history

Version: 5.5 International
Published: 23rd July 2013

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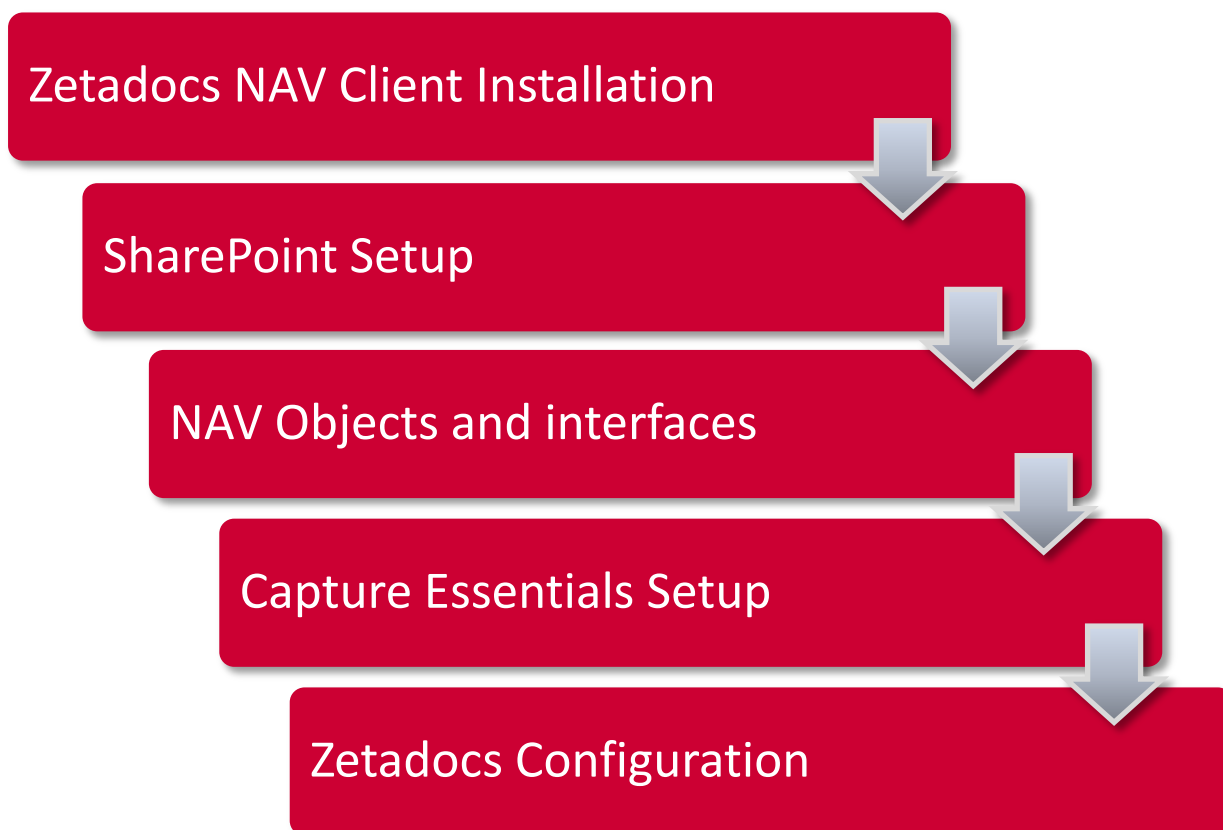Tel +1 (770) 772 7201
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1. Installation Overview

The document contains a brief set of instructions on how to install Zetadocs for NAV. Due to the highly flexible nature of what can be achieved with Zetadocs and NAV the remainder of the guide covers specific modifications you can implement to achieve your customer requirements.

Essentials Setup   Pages 5--25

By carrying out the five steps below you will have created a working Capture and Delivery Essentials system. After that it is a matter of simply adding any additional Zetadocs features required and tuning the configuration settings to match your requirements.

Zetadocs NAV Client Installation

SharePoint Setup

NAV Objects and interfaces

Capture Essentials Setup

Zetadocs Configuration

Advanced Configuration   Pages 26--56

This section of the guide contains the steps required to fully customize the delivery and capture of documents from NAV and the installation of advanced features.

Capture Plus Setup   Pages 57--86

This section covers the setup of the Capture Plus features.

Delivery Plus Setup   Pages 87--103

The reference guide provides details on the use of the SDK and what is possible. It is usually only helpful for those performing Delivery Plus installations.

Appendices   Pages 104--146

The appendices contain advice on how to troubleshoot your system as well as details on how to perform installations which do not follow the standard pattern, such as upgrades and Terminal Services installs.

Table of Contents   Pages 147--150

1.1   Identifying the Required Installation Elements

Zetadocs can aid your document handling in a variety of ways depending on the modules you are installing. Several of these modules share core components of Zetadocs with others and as such those installing Capture Essentials will be installing several components from throughout this guide. To aid you in locating those chapters relevant to your install simply look for the coloured indicators next to the chapter headings.

Delivery Essentials Chapters

Capture Essentials Chapters

Capture Plus Chapters

Delivery Plus Chapters

1.2   Installation steps to be performed on the server or servers

1. Installing the Zetadocs for NAV Client

   - Installation and configuration of the Zetadocs for NAV client, including licensing and registration, enabling users and setting up shared folders.

2. Installing the Zetadocs SharePoint Extensions (Optional)

   - Creation of the Zetadocs Archive Document library and installation of the required Zetadocs components.

3. Importing the Objects and Interfaces

   - Installation of the Zetadocs for NAV granules within Microsoft Dynamics NAV. Using the NAV Object Designer to configure the required pages, forms, tables and codeunits.

4. Zetadocs for NAV Configuration

   - Importing the standard configuration data.

   - Adjusting standard data to fit in your requirements.

5. Installing Zetadocs Capture Essentials/Plus (Plus requires additional licence)

   - Essentials: Installs the drag and drop document capture feature and the Zetadocs Server which converts documents placed in the document queue folders into pdf format.

   - Plus: Configuration of Capture Plus features as required such as OCR and Custom document queues.

1.3   Installation steps to be performed on each client machine

6. Installing the Zetadocs for NAV Client

   - Installation and licensing of the Zetadocs for NAV client.

7. Testing the Zetadocs for NAV Solution

   - Verify the functionality end to end and gain customer acceptance.

Note: Those intending to install using Group Policy should first perform the server setup as usual before viewing the instructions in section 28 Installing Zetadocs for NAV using Group Policy to roll the system out across the subsequent client machines.

Essentials Setup

This section of the guide covers the setup of the Zetadocs Essentials features which make up the core components of Zetadocs for NAV. These components are largely common across Delivery and Capture Essentials with any required deviations for each type of install clearly labelled.

Chapters

Zetadocs NAV Client

Zetadocs SharePoint Extensions

NAV Objects and Interfaces

Zetadocs Configuration

Capture Essentials Setup

2. Zetadocs NAV Client

Contents

2.1 Installing Zetadocs for NAV Client
Zetadocs for NAV needs to be installed onto the server as well as any intended client machines.

Platform Specific Steps: Please see the additional information available via the links below if you are installing on these platforms.
Terminal Services
Group Policy

- Extract your product download, the Zetadocs setup program will autorun, choose relevant install option:
    - o Zetadocs Delivery
    - o Zetadocs Capture
    - o Zetadocs Delivery and Capture
- Select **Zetadocs NAV Client** option to begin the install.
- Select the installation language and click **Install.** Follow the wizard to accept the software license agreement and complete the installation.
- Note the wizard will prompt you to select the Install Type,
    - o Typical - For additional client users.
    - o Administrator - All components including the licensing and configuration application.
    - o Custom - Allows you to specify the install locations for Delivery and Capture components.
- Note: If you selected the Administrator install type you will be asked to create a shared folder for sample Delivery Templates.
- Select a suitable folder location and select **Next** to continue. This will create and share the templates folder on the network.
- Complete the wizard to finish the install of the Zetadocs for NAV Client.

2.2 Install Zetadocs for NAV Help Files
The Zetadocs for NAV help files need to be copied to the Microsoft Dynamics NAV help folder on each machine and given names that will not clash with other help files. You should change the file names to 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). Note that the post-fix on both file names must match.

Role Tailored Client
The Zetadocs for NAV help files need to be copied to the Microsoft Dynamics NAV RTC help folders and given names that will not clash with other help files as explained above. There are 2 files to copy a .chm file and accompanying .hh file:

- addin_a.chm

This should be copied from your product download from the folder corresponding to your version of NAV:
\Zetadocs NAV Client\NAV Help\NAV 5 and 6
\Zetadocs NAV Client\NAV Help\NAV 2013
For NAV 6.0 systems copy to:
Program Files (x86)\Microsoft Dynamics NAV\60\RoleTailored Client\ en-GB
Substitute en-GB for the language pertinent to the install e.g. en-US for US systems.
For NAV 2013 systems copy to:
Program Files (x86)\Microsoft Dynamics NAV\70\RoleTailored Client\en-GB
Substitute en-GB for the language pertinent to the install e.g. en-US for US systems.

- addin_a.hh

This should be copied from your product download from the folder corresponding to your version of NAV:
> ***\Zetadocs NAV Client\NAV Help\NAV 5 and 6***
> ***\Zetadocs NAV Client\NAV Help\NAV 2013***

For NAV 6.0 systems copy to:
> ***Program Files (x86)\Microsoft Dynamics NAV\60\Service\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

To the following locations, for NAV 2013:
> ***Program Files\Microsoft Dynamics NAV\70\Service\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

Development Environment/Classic Client

The files should be copied from your product download from the folder corresponding to your version of NAV:
> ***\Zetadocs NAV Client\NAV Help\NAV 5 and 6***
> ***\Zetadocs NAV Client\NAV Help\NAV 2013***

For NAV 5.0 systems copy to:
> ***Program Files\Microsoft Dynamics NAV\CSIDE Client\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

For NAV 6.0 systems copy to:
> ***Program Files\Microsoft Dynamics NAV\60\Classic\ENG***
> Substitute ENG for the language pertinent to the install e.g. ENU for US systems.

To the following locations, for NAV 2013:
> ***Program Files\Microsoft Dynamics NAV\70\Service\ENG***

Alternatively it can be copied to the equivalent installation folder of Microsoft Dynamics NAV on the machine.

You may need to restart the Microsoft Dynamics NAV server to get the help files to appear as expected.
- To do this got to Start and then click Run, in the Open box, type services.msc, and then press ENTER.
- Under Services, right-click **Microsoft Dynamics NAV Server**, and then click **Restart**.

2.3   Configuring Zetadocs Licensing

Before you can start using Zetadocs you must license and register it, enable users and setup file sharing folders for storage of company accessories (templates, stationery and attachments).

Zetadocs Client Licensing and Setup
- Launch the Zetadocs PDF Configuration.
- Choose the license location (General Tab).
  - Active Directory (requires that user has access rights to write to AD)
  - Shared Network Folder
- Enter your Zetadocs license number and company name and register online.
- Enter your registration key on receiving the registration success email.
- Add the required users.
- Set up a shared network folder for the NAV Templates in the location specified earlier in the install.
- Leave Network Archiving off as you will configure archiving settings in NAV later in the install.

Zetadocs Client
- Start the client.
- If using Active Directory licensing, Zetadocs should locate the license automatically, otherwise, go to Tools→ Options\Licensing and enter the path to the network folder containing the Zetadocs license.
- 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.

Please refer to the Zetadocs Client Help for further information on configuring the Zetadocs Client.

Click here for more details on Zetadocs for NAV licencing.

3. **Zetadocs SharePoint Extensions**

Contents

3.1 **Prerequisites**

The Zetadocs SharePoint Extensions will only install successfully on a machine that is running the following versions of SharePoint.

- Microsoft SharePoint Foundation 2010/2013
- Microsoft SharePoint 2010/2013
- Microsoft SharePoint Online

Before beginning the installation of the Zetadocs SharePoint Extensions you require the following prerequisites.

- Suitable SharePoint Site or Site Collection created for your archive
- The Workflows feature under the Site Collection Features in SharePoint needs to be activated if you intend to support Approval Workflows.
- For more information on working with SharePoint please see these resources from Microsoft.

3.2 **Adding the Zetadocs SharePoint Extensions**

We need to add the Zetadocs content type to our Site and configure our Document Library to use it.

- Log into SharePoint as a Site Collection Administrator
- For SharePoint 2013 systems: Note: Select the Cog dropdown menu and choose Site Settings before selecting Solutions in the Web Designer Galleries section.
- For SharePoint 2010 systems: On the Site Actions menu, click Site Settings.
- For all version now click **Solutions,** and on the ribbon select **Solutions** and then **Upload Solution.**
- Browse to the **Zetadocs SharePoint Extensions** folder of your product download and select the **Zetadocs SharePoint Extensions.wsp** file.
- Upload it and then, click on **Activate**.
- Return to the Site Settings and select Manage Site Features
- Scroll down the list and activate the Zetadocs elements in the following order:
  - o Zetadocs Content Type
  - o Zetadocs Document Library
  - o Zetadocs Workflow (**Note:** Do not activate this item if using Office 365 Small Business or SharePoint Foundation)

3.3 **Zetadocs Workflows**

Note: Not available on Office 365 Small Business packages and SharePoint Foundation

If you have enabled Zetadocs Workflows you must now upload a document to your document library and start a workflow to complete the Zetadocs workflow setup.

- Go to your **Zetadocs** document library and select the **Add document** option.
- Upload a document, select it and select **Workflows** and then start the **Zetadocs Workflow**.
- Once it has been started you can either cancel or complete the approval process for the document.

To assign a specific icon for your pdf files in SharePoint see the section 31 of this guide.

3.4 **Installing the Adobe PDF IFilter on a 64-bit system**

For 64-bit systems please refer to the following advice:

http://www.adobe.com/support/downloads/detail.jsp?ftpID=4025

4. NAV Objects and Interfaces

This section details how to import the objects and interfaces used by Zetadocs.

Contents

4.1   Pre-requisites

- Zetadocs for NAV Client must be installed on the system where you intend to import the NAV objects.
- You have a NAV licence which allows the importation of NAV objects
- Your NAV user login has sufficient permissions to insert data into all required tables (We recommend that you are using the NAV Administrator / SUPER user.
- The Windows Script Control ActiveX control needs to be installed.

We recommend that you perform the importation of the NAV objects and configuration data on a duplicate of your live database. Once happy with this setup it can be exported as an xml file which will enable you to transfer the setup onto the live system.

Terminology

Zetadocs for NAV Objects
- This is how we define the NAV objects that we add to the database and are all within our object range 9009959 - 9001018.

Zetadocs for NAV Interfaces
- This is how we define the existing NAV objects which we modify to integrate Zetadocs for NAV with an existing database. This is done using our interface modification tool which automates the changes and makes the process significantly simpler.

4.2   Creating a test NAV system (optional)

If you are not intending to setup your system in a test environment then continue from section 4.4 below and skip section 27 on exporting and reimporting the configuration.

Creating a copy of your NAV database

- Open the NAV client and open the database in question.
- Select Tools→Backup.
- Save a copy of your NAV database in a safe location.
- Select **File→Database→New** and create a new duplicate system.
- Next select **Tools→Restore** and select the backup database you just created.

You are now ready to begin importing the Zetadocs for NAV objects and Standard Configuration.

4.3   Backing up the existing NAV Objects

In order to be able to uninstall Zetadocs for NAV software it is necessary to backup the NAV objects before installing the Zetadocs for NAV objects. Please perform the following tasks:

- Open the Object Designer (Tools→Object Designer).
- Click on All button in the designer menu.
- Select All objects and export them File→Export.
- Export objects to a Backup of Objects before Zetadocs for NAV5.0.fob file.
- Keep the Backup of Objects before Zetadocs for NAV5.0.fob in a safe place.

4.4   Importing the Zetadocs for NAV Objects

IMPORTANT: *Before you import the Zetadocs for NAV objects, you must ensure that you have installed the Zetadocs for NAV Client as a local administrator on the machine from which you intend to import the Zetadocs for NAV objects into your NAV database.*

- Open the NAV Development Environment (Classic Client) and open the relevant database.
- Open the **object designer** and import the relevant fob file by selecting **File→Import.**
- Browse to your download and navigate to *Zetadocs NAV Server Components* folder
- Choose the object file relevant to your NAV version e.g. for a NAV 2013 system \Zetadocs NAV Server Components\Zetadocs for NAV Objects – NAV7.00.fob

NAV Version	Fob file to use
NAV 5.00	*Zetadocs for NAV Objects – NAV5.00.fob*
NAV 6.01 (2009 SP1)	*Zetadocs for NAV Objects - NAV6.01.fob*
NAV 6.10 (2009 R2)	*Zetadocs for NAV Objects - NAV6.10.fob*
NAV 7.00 (NAV2013)	*Zetadocs for NAV Objects – NAV7.00.fob*

- Assuming there are no collisions with existing objects continue importing objects and ensure that there have been no compilation errors. If you have object collisions or compilation errors refer to the troubleshooting section at the end of this document.

Note: If upgrading from the Zetadocs for NAV – Express Edition then there will be some collisions, you will be presented with the NAV Import Worksheet. Please accept the default actions and click OK to continue with the import.

4.5   Zetadocs Interface Modification Tool

The Zetadocs Interface Modifier tool updates the NAV v5.x, v6.x and 7.0 objects to facilitate Zetadocs functionality and is recommended for most scenarios. To facilitate the setup of demo systems and new installs, a set of NAV 6.0 R2 and 7.00 objects have been provided. If your system has unmodified interface objects (Forms, Pages), as supplied by NAV, you can simply import the supplied fob files.

- **Role Tailored Client Sample Pages Import**
- **Classic Client Sample Forms Import**

Alternatively you can perform the modifications manually by following the steps available here:

- **Modifying NAV Pages Manually**
- **Modifying NAV Forms Manually**

Using the Zetadocs Interface Modifier Tool

We are continuing to develop the Zetadocs Interface Modification tool with lessons learned from ongoing system installations, please see our installation notes page for access to the latest version of the tool and any other updates relevant to your installation.

- Download the Zetadocs Interface Modifier Tool and extract it.
- Open the NAV Development Environment/Classic Client and connect to/open the NAV database.
- Selecting the items for modification by selecting each page and form requiring modification from the list.

Should you wish to modify the standard recommended set, of SOP and POP pages and forms, Please note Forms are not compatible with NAV 7.0 or Zetadocs Express and as such you should exclude Form from the filter.

- o Choose the All tab when viewing the Object Designer
- o Click on the Table Filter and add these filters:
  - ▪ Type - Form|Page
  - ▪ ID - 21|26|41..44|49..52|130|132|134|136|138|140|507|509|663|664|665|666
- o Apply the filter and click OK.
- Click on File→Export. Save the pages or forms as an XML file (NAV 6.x) or as a TXT file (NAV 5.x and NAV 7.0) Note: This requires an NAV Developer license.
- In the tool, click on the Load Items option and choose your NAV version and language.
- Browse to the folder containing the interfaces export, any valid pages and forms will be loaded into the table display.
- Invalid items are reported in a message dialog after the load operation has completed.

- Click Start, if there are Customer or Vendor Card pages, the tool will prompt you to decide whether to include the Rules action to those pages. Select Yes or No accordingly.
- A status column in the items list shows the status of the conversion process. If an item cannot be modified, the reason will be listed in this column.
- The modified items are now available in the folder containing the original pages or forms file, in an XML or TXT file depending on the NAV version, with the same name as the original followed by the suffix '(modified)'.

Importing the Modified Pages and Forms

- Reimport the pages and forms into NAV and deal with any merge and conflict messages that may appear.
- Compile the modified items by selecting them and pressing F11.

4.6 Zetadocs Report Modification Tool

Like the Zetadocs Interface Modifier Tool we are continuing to develop the Report tool with lessons learned from ongoing system installations. Please see our installation notes page for access to the latest version of the tool and any other updates relevant to your installation. Sample reports are provided for NAV 7 and NAV 6 W1 systems and can be imported by following the steps in section 22.5.

Alternatively you can perform the modifications manually by following the steps available here:
Manually Modifying your Existing Reports

In order to be able to uninstall the Zetadocs for NAV software it is necessary to backup any NAV reports you are editing before installing the Zetadocs for NAV objects. Alternatively, reports can be duplicated and saved with new report ID's before adding the Zetadocs for NAV changes. Either way it is important to add the Version List **EQ5.0** after saving the completed report.

The following should be taken into consideration when using this tool:

- The Report Modification Tool is currently only compatible with NAV 5.x, 6.x and 7.0 Classic Clients or Development environments.
- The tool does not perform all the changes required for Role Tailored Client reports, to adjust Role Tailored Client reports we recommend running the reports through the tool and then performing the additional edits detailed below.
- An appropriate NAV license is required for exporting and importing the reports.
- The Tool is not guaranteed to work for all NAV reports.

Using the Zetadocs NAV Report Modification Tool

- Open the **Object Designer** and select the Report view.
- Select each required report and export it as a text file to a new folder.
- Run the **ZdNAVReportTool.exe**, the Zetadocs NAV Report Modification Tool will open.
- Click on **Load Reports** and select the version of NAV.
- Browse to your exported reports folder.
- Valid reports will be loaded into the table display, with any invalid reports highlighted.
- Click **Start** and the Conversion Options window will appear.
- Modify the new report ID range if 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.
- Modify the report name prefix, if 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.
- A dialog may pop up asking to delete the existing output directory if there already is one. You may wish to back up this directory before proceeding.
- If a report cannot be modified, the reason will be listed. For successful conversions, the new report ID and report name are given.
- The modified reports are now available in the folder containing the original reports, in an **Output** subfolder.
- Reimport the reports into NAV and deal with any merge and conflict messages that may appear.

- Should you be modifying Role Tailored Client Reports you now need to perform the steps below, if you are not using the RTC reports please continue from section 4.9.

4.7 Role Tailored Client specific layout modifications for NAV 2013 (v7)

Following are the instructions for modifying the layout of the report for use with the role tailored client.

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. When this is the case, follow the instructions below to add the Zetadocs reference.

- Click **View → Layout** to open the report designer for the Role Tailored Client reports.
- Add a new text box to the body section of the report. Note: Ensure the textbox does not overlap any existing controls and put the text box at the top left of the section. If this is difficult you may need to move existing text boxes and controls down a small bit. In general, existing text boxes have a parent listbox called list1. If this is the case then ensure that this new textbox has the same.
- Change the Name property to Zetadocs_Reference_tb.
- Change the Value property to =Fields!Zetadocs_Reference.Value.
- Change the **Visibility → Hidden** property to **TRUE**.
- Change the **Color** property to **Red**.
- Open the Document Outline – Report window (Visual Studio → View → Other Windows → Document Outline). Locate and cut (ctrl+x) the Zetadocs_Reference_tb texbox.
- Right click on the **list1_Contents** node from the document outline Report and select paste before clicking the **Bring to front** button.
- Next, add a new text box to the top left of the page header section of the report. **Note**: Ensure the textbox does not overlap any existing controls and that the whole 15 digit ZD Reference will fit in the text box on one line.
- Change the **Font size** and **Color** properties to values that you are happy with. Our recommended size is 6 (4 being the minimum) and color is white, so that this information is not visible in the sent document.
- Change the Value property to =ReportItems!Zetadocs_Reference_tb.Value.
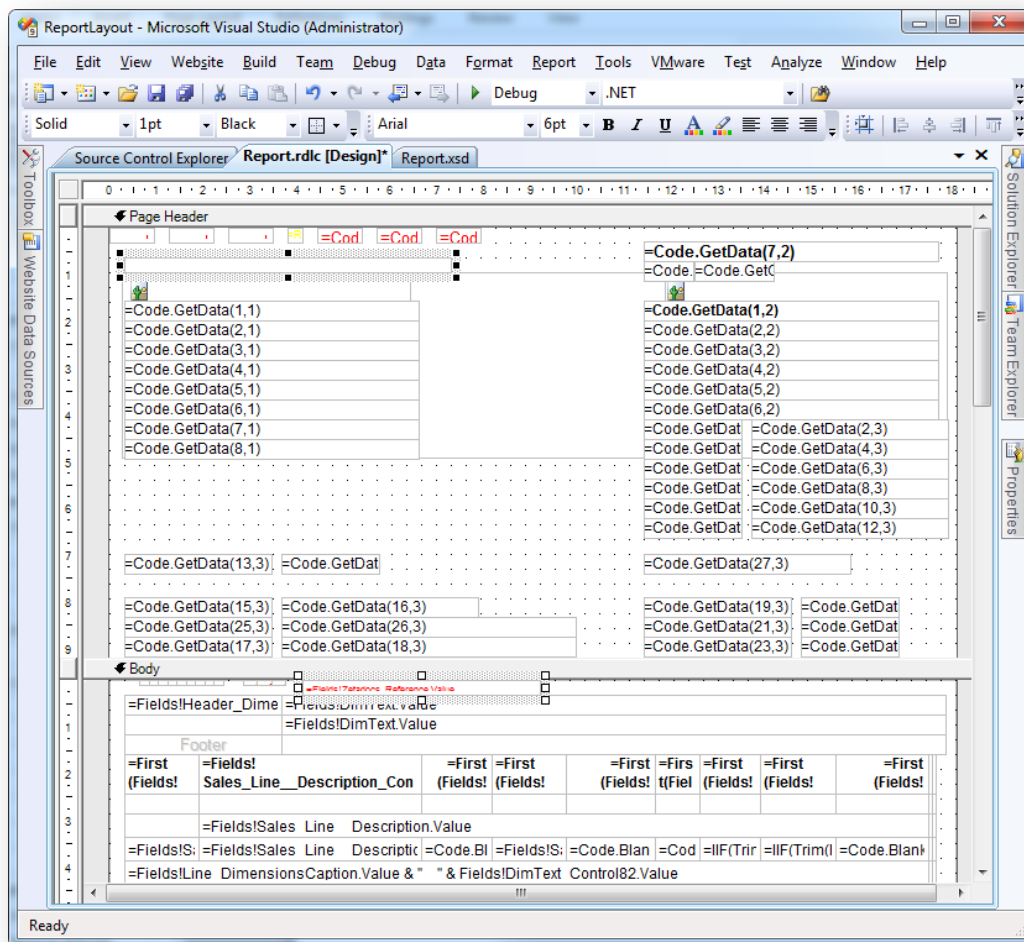- Close and **save** the report.

Version Code

Once you have saved the report add **EQ5.0** to the Version List column in the Object Designer. Adding this value is essential to ensure easy identification of reports modified for Zetadocs for NAV, in particular, for uninstalling Zetadocs for NAV at a later point.

4.8 Role Tailored Client specific layout modifications for NAV 6

Following are the instructions for modifying the layout of the report for use with the role tailored client. If your version of NAV does not have the role tailored client, skip this step.
There are two different methods that can be followed to add the Zetadocs reference to the role tailored client report depending on how it has been designed.

Body Section Only

The remittance advice journal report is an example of a report that does not have a page header section. When this is the case, follow the instructions below to add the Zetadocs reference.

- Click **View → Layout** to open the report designer for Role Tailored Client reports.
- Open the tool box and drag a new text box into the section of the report where the header data is displayed. **Note**: Ensure the textbox does not overlap any existing controls and put the text box at the top left of the section. If this is difficult you may need to mode existing text boxes and controls down a small bit. In general, existing text boxes have a parent listbox called list1. If this is the case then ensure that this new textbox has the same.
- Change the Value property to =Fields!Zetadocs_Reference.Value.
- Change the **Font size** and **Color** properties to values that you are happy with. Our recommended size is 6 and color is white so that this text is not visible sent document.
- Close and **save** the report.

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. When this is the case, follow the instructions below to add the Zetadocs reference.

- Click **View →Layout** to open the report designer for the Role Tailored Client reports.
- Add a new text box to the body section of the report. Note: Ensure the textbox does not overlap any existing controls and put the text box at the top left of the section. If this is difficult you may need to mode existing text boxes and controls down a small bit. In general, existing text boxes have a parent listbox called list1. If this is the case then ensure that this new textbox has the same.
- Change the Name property to Zetadocs_Reference_tb.
- Change the Value property to =Fields!Zetadocs_Reference.Value.
- Change the **Visibility →Hidden** property to **TRUE**.
- Change the **Color** property to **Red**.
- Change the **Size** property to 6.
- Next, add a new text box to the top left of the page header section of the report. **Note**: Ensure the textbox does not overlap any existing controls.
- Change the **Font size** and **Color** properties to values that you are happy with. Our recommended size is 6 and color is white so that this information is not visible sent document.
- Change the Value property to =ReportItems!Zetadocs_Reference_tb.Value.
- Close and **save** the report.

Figure 1 - Example of a modified Header and Body ReportLayout with both Zetadocs textboxes highlighted in position.

Version Code

Once you have saved the report add **EQ5.0** to the Version List column in the Object Designer. Adding this value is essential to ensure easy identification of reports modified for Zetadocs for NAV, in particular, for uninstalling Zetadocs for NAV at a later point.

4.9 Zetadocs Sample Templates

Note: This step is only required on systems using Zetadocs Delivery.

Zetadocs comes with a number of sample templates which contain stationery and an email body with embedded commands, which source information from NAV on send. It is usually simpler to modify these to match your requirements than to create new ones. 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 simply follow the steps below to replace these with the relevant templates.

- Browse to your product download then Zetadocs NAV Server Components\Sample Templates\.
- Select the language required and 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

4.10 Importing the Language Module

Note: This section should only be performed on systems using a language other than English.

- In the **object designer** select the **All** view. Then using a table filter *Version = EQ** get the list to show all the Zetadocs objects and select them.
- **IMPORTANT:** Ensure all the objects are selected (highlighted) before continuing. Otherwise the language module may not apply correctly.
- Navigate to Tools→Language module→Import.
- Browse to your product download then to Zetadocs NAV Server Components\Language Modules\.
- Import the relevant language module for your region and version of NAV e.g. for a Dutch NAV 2013 system this would be the **Zetadocs for NAV Language Module – NAV7.00NL.flm**.

5. Zetadocs Configuration

Contents:

The configuration steps are different in NAV 7.0 (NAV 2013) compared to the previous version as several of the options and settings have been moved, please use the steps specific to your version of NAV.

5.1 Importing the Zetadocs Standard Configuration Data on NAV 2013

- Open the Role Tailored client and in the Navigation Pane select **Departments → Administration→Application Setup→Zetadocs Setup → Zetadocs General Settings**.
- You may be presented with a screen informing you that the RoleTailored client needs permission to run the Zetadocs.ExternalUtilities.ZdAutomationFactory, select **Always Allow** and then OK.
- Next import the Zetadocs configuration by selecting **Actions** and then **Import Configuration Data**.
- On the import dialog, provide a path to the templates should you be using a location other than the default.
- Select the XML file path field and import the relevant xml file, e.g. for English it would be \Zetadocs NAV Server Components\Standard Configuration Data\Zetadocs for NAV Configuration – English.xml and select Open.
- Next select **Import** on the Home tab to perform the import. You will be asked to confirm that you wish to import the data as it will overwrite any existing data in these tables.
- If you are using SharePoint archiving review the **Archiving section** and ensure the **Archiving Enabled** Checkbox has been selected before inputting your SharePoint site or site collection address as required. This is the **bold** section shown here:
  https://equisys.SharePoint.com/sites/MicrosoftDynamics/default.aspx.
Note: Please do not include the specific library reference which appears at the end with its .aspx file type. You can click the button located at the end of the SharePoint Site field to verify it.
- Next enter your Archive Library, the default value is Zetadocs. To select an alternative library name please follow the steps detailed in section 22.8 to ensure your SharePoint site is suitably configured.
- Set the **Folder Name Structure**, this subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. You have three levels to work with and each can contain the following options
  - **COMPANY** – The recipient NAV *Customer* name
  - **DATE** – The Date with a format specified by the Date Folder Naming property below
  - **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings.
- If you are using **Date** in the folder structure you now need to specify the **Date Folder Naming**. This allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.
Further advice on file plan settings is available here.

5.2 Updating the Zetadocs Report Settings to match your Reports
On importing the Zetadocs Standard Configuration data you will have populated the Zetadocs Report Settings. This data points at some blank report objects, you now need to adjust this to match your report id's. As such if you are not using them or you have modified some or all of the existing NAV reports you now need to adjust the Zetadocs Report Settings accordingly to point at the correct reports.

- Open the Role Tailored client and in the Navigation Pane select **Departments →
  Administration→Application Setup→Zetadocs Setup → Zetadocs Report Settings**.
- Select the report you wish to modify the settings for. Use the Document Set Name as your guide to
  the respective report setting.
- Select the **Report ID** field and choose your modified report from the Object list.
- Repeat the process for any remaining reports as required.

Properties:
- A report can only be associated with one Zetadocs Document Set.
- Many reports can be associated with one Zetadocs Document Set.

5.3   Setting NAV to run the correct reports

Now that you have completed the report settings modifications to point at your report numbers, we need to
set NAV to run the correct reports. The steps below will take you through adjusting the Report Selections in
NAV.

Setting NAV to run the new report

If you are intending to use a sample or modified report with a different ID you will need to set NAV to run
that report instead of the existing report. In this example we will set NAV to run the sample Order
Confirmation report, this process should be repeated for each new report being used.

- Search for **Report Selections Sales** in the NAV 2013 Windows Client and open it.
- Select the Order report from the drop down.
- Click into the **Report ID** field and select the arrow to open the **Objects list**.
- Select the **new object** from the list, in this case 9009962 ZD-Order Confirmation.
- Repeat as required for the other reports.

5.4   Setting up User Permissions

To give the system users access to the features of Zetadocs they need to have their permissions setup with
NAV. Zetadocs comes with a RAPIDSTART file which contain the settings for two Zetadocs roles.

ZETADOCS - grants access to the standard Zetadocs forms and tables and allows you to use Zetadocs
for NAV.
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.

- Search for **Configuration Packages** and open the Configuration Packages page.
- Select Import Package... from the Process group on the Home tab and select the Zetadocs for NAV
  Permission Sets and Permissions – NAV 7.00.RAPIDSTART file from your product download.
- In the Process group, click on **Apply Package** to complete import of the settings.

Setting up Users

To assign a role to a user simply:
- In the NAV Windows Client type **User Setup** in the search bar and navigate to that page.
- Select the NAV user to enable for Zetadocs and choose **Edit** from the **Home** tab.
- In the **User Permission Sets** fast tab, select an empty row and add the required permission set.
- Click OK when finished and the user is now set up to use Zetadocs.

This user or group will now be added to the list shown in the Windows Logins window for this role.

5.5   Importing the Zetadocs Standard Configuration Data for NAV 5 and 6

- Right click on the Navigation Pane and select **Refresh** or close and then open NAV to update the
  menusuite with the changes imported earlier.
- Select Administration→Application Setup→Zetadocs Setup.
- Run the Zetadocs General Settings Form.
- Select Functions→Import Configuration Data, browse to *Zetadocs NAV Server
  Components\Standard Configuration Data*

- Pick the relevant xml file, e.g. for English it would be \Zetadocs NAV Server Components\Standard Configuration Data\Zetadocs for NAV Configuration – English.xml and select Import.
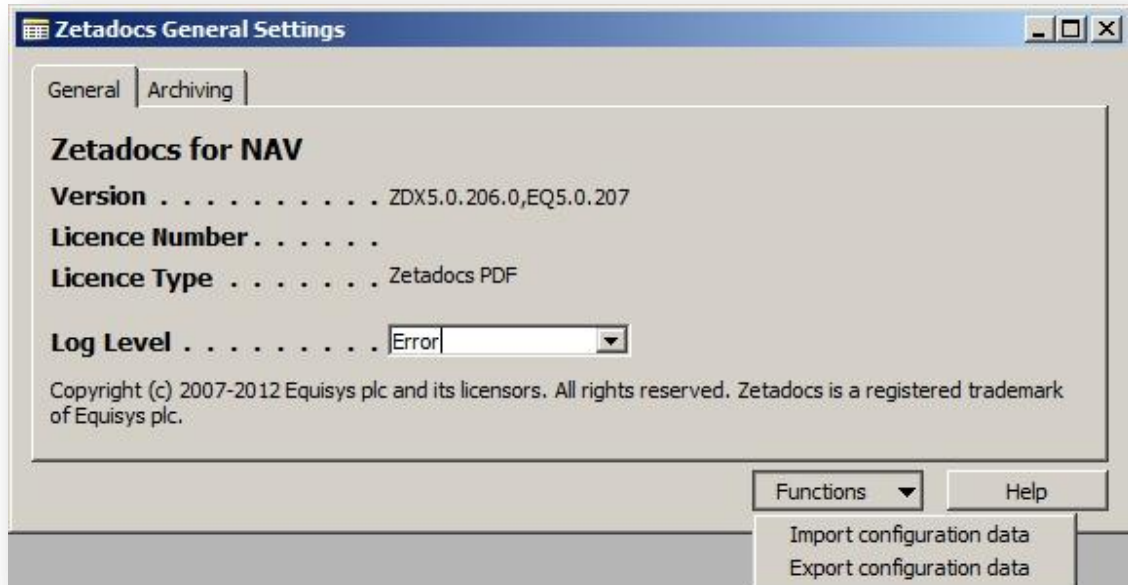

Figure 2 – Zetadocs General Settings Form

- A pair of warning messages will appear, select Yes to continue.
- If you are using SharePoint archiving review the **Archiving tab** and ensure the **Archiving Enabled** Checkbox has been selected before inputting your SharePoint site or site collection address as required. This is the **bold** section shown here:
  https://equisys.SharePoint.com/sites/MicrosoftDynamics/default.aspx.
- **Note**: Please do not include the specific library reference which appears at the end with its .aspx file type.
- Next enter your Archive Library, the default value is Zetadocs. To select an alternative library name please follow the steps detailed in section 22.8 to ensure your SharePoint site is suitably configured.
- Set the **Folder Name Structure**, this subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. You have three levels to work with and each can contain the following options
  - **COMPANY** – The recipient NAV *Customer* name
  - **DATE** – The Date with a format specified by the Date Folder Naming property below
  - **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings.
- If you are using **Date** in the folder structure you now need to specify the **Date Folder Naming**. This allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

Further advice on file plan settings is available here.

5.6   Updating the Zetadocs Report Settings to match your reports

On importing the Zetadocs Standard Configuration data you will have populated the Zetadocs Report Settings. This data points at some blank report objects, you now need to adjust this to match your report id's. As such if you are not using them or you have modified some or all of the existing NAV reports you now need to adjust the Zetadocs Report Settings accordingly to point at the correct reports.

- Select the **Administration → Zetadocs Setup**, then **Advanced Settings**.
- Open the **Zetadocs Report Settings Card**

- Use the lookup and select the report you wish to modify the settings for. Use the Document Set Name as your guide to the respective report setting.
- Select the **Report ID** field and choose your modified report from the Object list.
- Repeat the process for any remaining reports as required.

Properties:
- A report can only be associated with one Zetadocs Document Set.
- Many reports can be associated with one Zetadocs Document Set.

5.7   Setting NAV to run the correct reports

Now that you have completed the report settings modifications to point at your report numbers, we need to set NAV to run the correct reports. The steps below will take you through adjusting the Report Selections in NAV.

Setting NAV to run the new report

If you are intending to use a sample or modified report with a different ID you will need to set NAV to run that report instead of the existing report. In this example we will set NAV to run the sample Order Confirmation report, this process should be repeated for each new report being used.

- Open the NAV client and connect to/open the NAV database.
- Select the **Administration** option from the **Navigation pane.**
- Expand the folder relevant to the report to be setup, in this case **Sales & Marketing.**
- Select **Report Selections**, the Report Selection – Sales card will open.
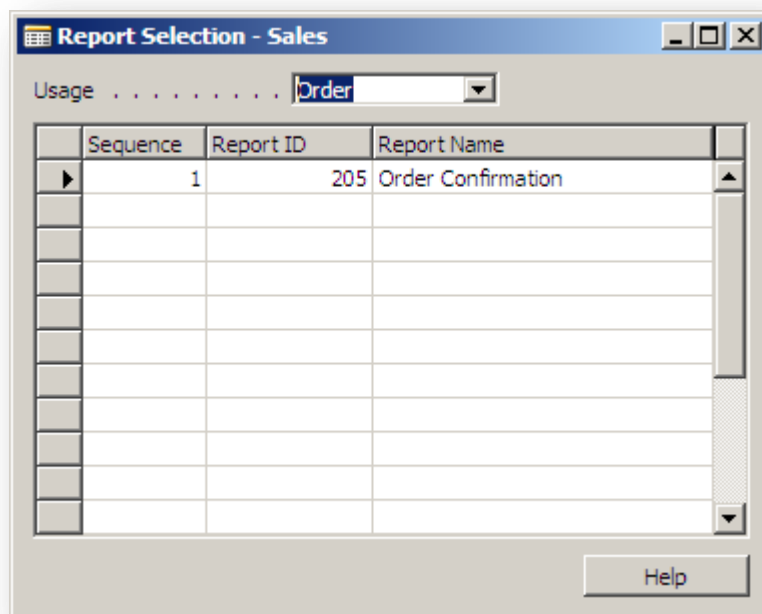
Figure 3 - Report Selection - Sales Card

- Select the Order report from the drop down.
- Click into the **Report ID** field and select the arrow to open the **Objects list**.
- Select the **new object** from the list, in this case 9009962 ZD-Order Confirmation.
- Repeat as required for the other reports.

5.8   Setting up User Permissions

To give the system users access to the features of Zetadocs they need to have their permissions setup with NAV. Zetadocs comes with two xml files which contain the settings for two Zetadocs roles.
- ZETADOCS - grants access to the standard Zetadocs forms and tables and allows you to use Zetadocs for NAV.

- 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.

Roles
- Select Administration → Application Setup → Company Setup → Data Migration.
- The Migration Overview form will appear, select **Functions** and then **Import from XML**.
- Go to your product download and browse to the **Zetadocs NAV Server Components** folder and select the **Zetadocs for NAV Roles.xml** file.
- When the import is complete return to the Migration Overview form, select the **Migration** button and then **Apply Migration Data**.
- Repeat this process to import and apply the **Zetadocs for NAV Permissions.xml** file.
- Next select Tools→ Security→ **Synchronize All Logins**.

Setting up Users
To assign a role to a user simply:
- Click Tools → Security → Roles.
- Select the Zetadocs role you want to assign and click the **Role** button and select the **Windows Logins** option.
- To add a Windows user or group to the list, select an empty row.
- In the **Login ID** field, click **Assist** and the Windows Logins window appears.
- Select the user you want to assign this Zetadocs role to and click OK.
This user or group will now be added to the list shown in the Windows Logins window for this role.

6. Capture Essentials Setup

The Zetadocs Server is simple to install but completing the Zetadocs Capture Essentials setup does require a number of the other steps of the Zetadocs for Microsoft Dynamics installation to have been completed. We recommend that you complete all previous elements of the install you require before attempting to install the Zetadocs Server.

Contents:

Zetadocs Server

Document Queues

References

6.1 Installing the Zetadocs Server

To install the Zetadocs Server simply:

- Go to the Zetadocs Setup program and select your Zetadocs product version from the main menu.
- Next select the Zetadocs Server option and select **Install Zetadocs.**
- Click **Next** and choose a destination folder for the installation and then **Next** to continue.

Installing OCR Support

Note: This requires a Capture Plus licence, Essentials users should proceed to step 6.2.

- Next you will be asked to **Choose whether you want to include OCR support**, to include the ZD OCR Processor you are required to have a valid licence.
- Choose the relevant option for your install:
    - o I have an Abbyy licence and would like OCR support.
    - o I do not have an Abbyy licence number.
- Click **Next,** if you have included Abbyy OCR you will be asked to review their licence agreement.
- Once you have reviewed and selected **I Agree**, click **Next**.
- The Installation Wizard is now ready to install the Zetadocs Server, select **Install** and the wizard will complete the install.

Licensing Abbyy FineReader

Note: This requires an Abbyy and Capture Plus licence.

- If you earlier specified that you wished to include Abbyy OCR support then you now need to license the Abbyy FineReader Engine.
- The Abbyy License Manager will open automatically.
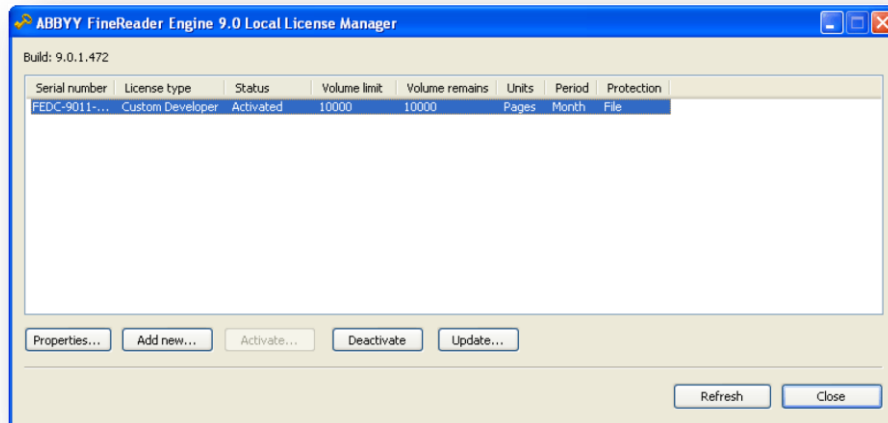
Figure 4 - Abbyy FineReader License Manager

- Click the **Add new...** button and then add your Abbyy license number and click **Add.**
- The Abbyy FineReader Activation Wizard will appear for you to activate your product.

Activation methods:
- **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.

Once activated Abbyy should be ready to work with the Zetadocs Server.

6.2 Configuring the Zetadocs Server

The Zetadocs server has a number of settings which allow you to specify a series of options on how it handles documents, these are:

1. Document Queue Location
2. Adjusting the PDF Quality
3. Enabling and Disabling Abbyy (Capture Plus only)
4. Stellent Bypass PDF Option (Capture Plus only)
5. Log Level
6. Log Location
7. Batch Scanning Settings
8. Barcode Settings (Capture Plus only)
9. File Name Prefix

To configure the Zetadocs Server it is necessary to modify the Config.xml file which controls it, this is located in the Zetadocs Server installation location usually C:\Program Files (x86)\Zetadocs Server\Document Converter. Open this file in a text editing program such as Notepad.exe and edit as per the instructions in this chapter.

The Config.xml file consist of specific instruction for each queue setup, in the example below there is a Sales and a Purchase Document Queue inside the <docsQueue></docsQueue> tags and the general Zetadocs Server settings below that. Once you have changed the options as required save the updated Config.xml file.

WARNING: The Zetadocs Server Config.xml file is case sensitive, therefore 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.

```
<?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>
```

1. Document Queue Locations
The location of the folders used by the document queues, items added into these 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
use. Information on sharing the folders is available later in section 6.4.

2. Adjusting the PDF Quality
The quality of the pdf's the Zetadocs Server produces during conversion can be adjusted to meet your
requirements of file size, quality and conversion speed.
The options are:
- Better
  - o   Use this option when pdf quality is important, e.g. when using OCR.
- Smaller
  - o   Use this option when storage space is at a premium and high resolution is not required.

To adjust the quality of the pdf files produced simply change the value shown here to one of the following
options:
<PDFQuality>Better</PDFQuality>
<PDFQuality>Smaller</PDFQuality>

3. Enabling and Disabling Abbyy
Note: Non Capture Plus users should leave this value set to false.
In some circumstances it may be necessary to deactivate Abbyy for example if you were approaching the
end of your licensed document limit and wished to save the remaining capacity for a specific group of work.
To deactivate Abbyy simply change the entry to false, similarly to reactivate it change the value to true.

```
<EnableAbbyy>true</EnableAbbyy>
<EnableAbbyy>false</EnableAbbyy>
```

4. StellentBypassPDF Option

This option causes the Zetadocs Server to bypass pdf files added to the conversion folder. 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.

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

5. Adjusting the Logging Level

The logging level options are as follows:

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

As such simply change the value in the config.xml file to either of these.

```
<LogLevel>Error</LogLevel>
<LogLevel>Warning</LogLevel>
<LogLevel>Debug</LogLevel>
```

6. Specifying the Log Location

The Zetadocs Server log can be set to save to a file and/or the event log, change these values to true and false as appropriate.

```
<LogToFile>true</LogToFile>
<LogToEventLog>false</LogToEventLog>
```

The Zetadocs Server log file is written to:

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

7. Batch Scanning Settings

This setting is specific to each document queue. Each document queue can be configured to use only one type of splitting method. The splitting methods are:

- Off - By default, the Zetadocs Server doesn't process any batches present in the Batch Split folder of your document queue.
- Barcode - The Zetadocs Server splits the batches on every page that contains a barcode.
- BarcodeValue - 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.

```
<BatchScanSplitType>Off</BatchScanSplitType>
<BatchScanSplitType>Barcode</BatchScanSplitType>
<BatchScanSplitType>BarcodeValue</BatchScanSplitType>
<BatchScanSplitType>PageInterval</BatchScanSplitType>
```

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.

```
<BatchScanPageInterval>"Value"<BatchScanPageInterval>
```

Where "Value" is a positive number, note this field cannot be left blank. For those not using page interval splitting we recommend adding the value 1, this will be ignored unless the BatchScanSplitType has been set to PageInterval.

8. Barcode Settings

Note: Non Capture Plus users should leave this value set to false.

We will cover adding barcodes to your NAV reports later in chapter 12, if you are intending to use barcode splitting on captured documents to streamline your processes you need to configure the Zetadocs Server accordingly using the options below.

Barcode Detection
Zetadocs can detect barcodes if the OCR module has been installed, this option determines whether the Zetadocs Server searches for readable barcodes or not.

<EnableBarcodeDetection>true</EnableBarcodeDetection>
<EnableBarcodeDetection>false</EnableBarcodeDetection>

Barcode Prefixes
This setting is specific to each document queue. When using the Barcode and BarcodeValue splitting methods, a barcode prefix can be set to ensure the Zetadocs Server only processes barcodes that contain the prefix. The prefix is defined under the BatchScanBarcodePrefix parameter shown below.

<BatchScanBarcodePrefix>Prefix<BatchScanBarcodePrefix>
Note: The Prefix value is case sensitive.

Enabling Automatic deletion of the split page
This setting is specific to each document queue. When using the Barcode and BarcodeValue splitting methods, if you use a splitting page containing a barcode, you may want to delete the split page. This can be set under the BatchScanBarcodeDeleteSplitPage parameter. This feature is often used when splitter pages have been added throughout a batch to define when each multipage document ends and prevents these pages from ending up in the archive.

Note: By activating this feature any page containing a barcode used to split the batch will be deleted, if you are using barcode splitting all pages with a readable barcode will be deleted after splitting. If using the barcode prefix option, only those pages with the correct barcode prefix will be used to split on and will then, if not a single page, be deleted.
<BatchScanBarcodeDeleteSplitPage>true</BatchScanBarcodeDeleteSplitPage>
<BatchScanBarcodeDeleteSplitPage>false</BatchScanBarcodeDeleteSplitPage>

Note: Non Capture Plus users should leave this value set to false.
Save the updated Config.xml file when finished.

9. File Name Prefix

It is often useful to be able to identify which Document Queue a document originated from post conversion and queue processing. The file name prefix settings allows you to prefix all files processed by a queue with some text descriptor. 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.

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:

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

<FilenamePrefix>"Value"</FilenamePrefix>

Restarting the Zetadocs Server
Once you have detailed the location of the Zetadocs Server you need to restart the conversion service.
- Go to Start→Run, then enter Services.msc
- Scroll to **Zetadocs Document Converter** and right click on it and select **Restart**.

6.3   The Sales and Purchase Document Queues

Zetadocs comes with two Document Queues setup a standard, a Sales and a Purchase Document Queue. These come with a number of pre-programmed menu items which allow you to perform a variety of actions from them. They are designed to cover a variety of standard Sales and Purchase scenarios. In this section we will take you through how to setup the Sales and Purchase Document Queues.
These document queues have been created with the archiving and link items pre-programmed, this offers you a quick and easy document queue solution. The queues come with the following menu items setup:

Sales Document Queue	Purchase Document Queue
Create new blanket order	Create new blanket order
Create new credit memo	Create new credit memo
Create new invoice	Create new invoice
Create new order	Create new order
Create new quote	Create new quote
Create new return order	Create new return order
Link to existing blanket order	Link to existing blanket order
Link to existing credit memo	Link to existing credit memo
Link to existing invoice	Link to existing invoice
Link to existing order	Link to existing order
Link to existing posted credit memo	Link to existing posted credit memo
Link to existing posted invoice	Link to existing posted invoice
Link to existing posted return receipt	Link to existing posted receipt
Link to existing posted shipment	Link to existing posted return shipment
Link to existing quote	Link to existing quote
Link to existing return order	Link to existing return order

6.4   Create a shared network folder

The document queue requires a network folder into which captured documents are placed and to which all users of the queue have full access permissions.

- Create the required folders e.g. Sales Document Queue
- View its **Properties** and ensure the **Share this Folder** radio button is checked
- Select the **Permissions** button and assign the necessary permissions.
  - USERS: Share permissions with a minimum of Change and Read Permissions. Full Permissions are recommended.
  - SERVICE: The Zetadocs DIRMonitor Service must have access to the queue folders. To do this add FULL Permissions to the SYSTEM user or whatever network user the service is running as.

6.5   Setting Document Queue Settings in NAV 2013

The Zetadocs Document Queue card is where all Zetadocs Document Queue settings are defined. It already contains the default settings imported earlier for the Sales and Purchase Document Queues, revise these as required following the steps below. To add a new queue simply create another record on this card and fill it out appropriately.

To open the card:
- Navigate to Administration→Application Setup→Zetadocs Setup →Zetadocs Document Queue List.
- Select the Queue you wish to adjust the settings for, you will be presented with the options below, adjust these as required to setup the queue.

No.: The document Queue ID.

Name: The name of the Document Queue.
Path: The location of the document queue folder you created e.g. \\ExampleServer\Sales Document Queue\
Archive Documents: Enables archiving of processed documents to SharePoint.
Delete After Archive: Documents are to be deleted from the document queue after successful archive.
Show Delete Confirmation: Determines whether a user is to be asked to confirm deletion.
Auto Link Documents: Enables Auto Link functionality. This determines whether the document queue will call the **GetAutoLink** function in the Zetadocs-Send Customize codeunit.

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. Each menu item selects an action. Through these actions the user can link the captured document with an existing or new NAV record.

Continuing with your setup

This completes the installation of Zetadocs Delivery and Capture Essentials. The next section covers standard configuration data and how to adjust it to your specific needs. If you are not carrying out any more configuration you may wish to validate your installation, we have a series of recommended tests in section 20 Testing Zetadocs Delivery and Capture Essentials.

6.6   Setting Document Queue Settings in NAV 5 and 6

The Zetadocs Document Queue card is where all Zetadocs Document Queue settings are defined. It already contains the default settings imported earlier for the Sales and Purchase Document Queues, revise these as required following the steps below. To add a new queue simply create another record on this card and fill it out appropriately.

To open the card:
* Navigate to Administration→Application Setup→Zetadocs Setup →Zetadocs Document Queue Setup.

Figure 5 - Zetadocs Document Queue Card

No.: The document Queue ID.
Name: The name of the Document Queue.
Path: The location of the document queue folder you created e.g. \\ExampleServer\Sales Document Queue\
Archive Document: Enables archiving of processed documents to SharePoint.
Delete After Archive: Documents are to be deleted from the document queue after successful archive.
Show Delete Confirmation: Determines whether a user is to be asked to confirm deletion.
Auto Link Documents: Enables Auto Link functionality. This determines whether the document queue will call the **GetAutoLink** function in the Zetadocs-Send Customize codeunit.

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. Each menu item selects an action. Through these actions the user can link the captured document with an existing or new NAV record.

Continuing with your setup

This completes the installation of Zetadocs Delivery and Capture Essentials. The next section covers standard configuration data and how to adjust it to your specific needs. If you are not carrying out any more configuration you may wish to validate your installation, we have a series of recommended tests in section 20 Testing Zetadocs Delivery and Capture Essentials.

Zetadocs Advanced Configuration

The advanced configuration section of the guide covers the setup of some of the extra features and the modification of the standard configuration to match your requirements.

Chapters

7. Modifying the Zetadocs Standard Configuration in NAV 7 (NAV 2013)

Having imported the standard configuration data you should have a basic working system at this point. It should be capable of sending reports from NAV to recipients using the standard templates included and, should you have completed the SharePoint installation, documents should also be archived to SharePoint. This chapter covers how you modify the standard configuration data to fulfill your specific requirements.

The settings are contained in a number of different pages which each have a different area of focus, we will go through each of these in turn and have provided a description of each of the fields.

7.1 The Zetadocs General Settings

The Zetadocs General Settings contains settings covering the logging level and archiving to SharePoint. To access the Zetadocs General Settings:

- Open the Role Tailored client and in the Navigation Pane select **Departments →
  Administration→Application Setup→Zetadocs Setup → Zetadocs General Settings**.

General
Version: Contains the Zetadocs version numbers, which can prove useful in gaining technical assistance.
Licence Number: Displays the systems Zetadocs licence number.
Licence Type: Displays the systems Zetadocs licence type.
Log Level: Determines the level of information stored in the Zetadocs log file, it offers the following options.
- **ERROR** – Only writes error information to the log
- **INFO** – Writes processing information such as key processing values and the error information
- **WARNING** – Writes out any potentially problematic states during processing and the info and error information
- **DEBUG**- Writes all levels of detail for troubleshooting difficult problems, recommended only when obtaining support or during installation and configuration

Archiving
Archiving Enabled: This option denotes whether Zetadocs will attempt to archive documents to SharePoint during Capture or Delivery processing.
SharePoint Site: This setting should be the address of your SharePoint site collection, should you be utilizing one. e.g. **https://example.SharePoint.com/sites/yoursitecollection**
Note: If you are integrating with SharePoint online then you must specify the valid *https://*protocol and not *http://*
Document Library: Only specify the SharePoint document library name, not the full URL.
Archive URL: Displays the full target archive library by concatenating the SharePoint Site from the Zetadocs System Settings and the Archive Library property.
Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. You can specify up to three of these values to generate your file plan.
- **COMPANY** – The recipient NAV *Customer* name
- **DATE** – The Date with a format specified by the Date Folder Naming property
- **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings
Date Folder Naming: Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

Further advice on file plan settings is available here.

7.2 Zetadocs Document Queue
The Document Queue contains a record for each of the configured document queues and is used to control their functionality and actions. The Document Queue settings were covered earlier in this guide, please refer to the section 6.5 Setting Document Queue Settings.

Specializing Document Queues

It may be advantageous to modify the standard document queue configuration to suit your requirements. You may want to remove some of the document queue actions if they will be unused or you may want to create a new queue which has only one possible action. For example, having a document queue specifically for processing quote requests will mean that there is only one action and therefore the user will not have to select the action each time. **TIP:** Reducing the scope of a queue may improve the end user efficiency.

7.3   Zetadocs Delivery Settings

To access the Zetadocs Delivery Settings:

- Open the Role Tailored client and in the Navigation Pane select **Departments** → **Administration**→**Application Setup**→**Zetadocs Setup** → **Zetadocs Delivery Settings**.

General

Fax Enabled: Provides Fax functionality, requires the installation of the separate product Zetafax.
Reference Prefix: The reference prefix is the first part of the reference code printed onto documents sent using Zetadocs, it can be a maximum of 15 characters long.

Sent Items

Archiving Sent Items Enabled: Checking this box results in documents, sent using Zetadocs PDF, being archived in a central shared network folder. This occurs in addition to any SharePoint archiving setup.
Archive Location: The location of the shared network folder for archiving, it requires a suitable network folder location. You must also ensure that all Zetadocs enabled users have permission to access this folder. **Note:** This option does not support any of the Zetadocs for NAV search features which require SharePoint integration.
Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. You can specify up to three of these values to generate your file plan using the Folder Option 1, 2 and 3 fields.
   o   **COMPANY** – The recipient NAV *Customer* name
   o   **DATE** – The Date with a format specified by the Date Folder Naming property
   o   **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings
Date Folder Naming: Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.
Further advice on file plan settings is available here.

7.4   Zetadocs Report Settings

The Zetadocs Report Settings is where Zetadocs enabled reports can be associated with a particular Zetadocs Document Set and therefore a rule definition for sending (template, delivery method, archiving settings, additional recipients). It is also where recipient information settings are specified. The configuration data will populate these fields with our standard data setup, it may be necessary to adjust these values to meet your requirements.

To access the Zetadocs Report Settings:

- Open the Role Tailored client and in the Navigation Pane select **Departments** → **Administration**→**Application Setup**→**Zetadocs Setup** → **Zetadocs Report Settings**.

Properties:
- A report can only be associated with one Zetadocs Document Set.
- Many reports can be associated with the same Zetadocs Document Set.

Fields

Report ID: The Report ID is unique value given to identify each report.
Report Name: This field is populated when the Report ID is selected.
Document Set No.: The 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.

Company Type Code: This specifies a table relation between the report record and the recipient. For example, the standard Sales Quote report is to be sent to a Customer. Therefore, we select 'CUST' for the Company Type Code from the Company Type Code List.

Company No. Field No.: Specifies the field no. of the field in the table the report is based on where the Company No. should be taken from. For example, the standard Sales Quote report is based on the Sales Header table. The Customer No. in the Sales Header table is the field "Sell-to Customer No." field no. 2.

Contact No. Field No.: Specifies the field no. of the field in the table the report is based on where the Contact No. should be taken from. For example, the standard Sales Quote report is based on the Sales Header table. The Contact No. in the Sales Header table is field "Sell-to Contact No." field no. 5052.

Record No. Field No.: Specifies the field no. of the field in the table the report is based on where the records No. should be taken from. This can be used as a dynamic field for writing the record no. into a template message as a reference to the recipient and also as a searchable field in the Zetadocs SharePoint archive.

Default Batch Name: When a report prints a number of records to Zetadocs they are held in a batch in the Zetadocs Client. This field allows you to specify a name for the batch that will be visible in the Zetadocs Client document explorer.

Show Delivery Dialog: Controls the display of the delivery dialog which allows users to override the sending rule result for a single report send. For example, the recipient email address.

Show Batch Delivery Dialog: Controls the display of the batch delivery dialog which allows users to override the sending rule results for a batch of reports. This can be useful to allow users to fix any sending rule result errors.

Preview in Zetadocs Client: Controls the default value of previewing the Zetadocs documents in the Zetadocs Client before sending. If the delivery dialog is shown the default can be overridden by the user.

Test Mode: This field allows the administrator to prevent the report from printing the report results to Zetadocs. It is useful when troubleshooting problems on a live system. When the report is run it will run as normal up to the point of printing the report documents to Zetadocs.

Comments: Field for any additional information you may wish to add.

7.5   Template Settings

Zetadocs Templates combine stationery overlays and attachment documents as well as supplementary addressing for any document sent using that template from the Zetadocs Client. The templates can be created in the Zetadocs Client and saved to a shared network location. Zetadocs will already have created entries for each type of report supported, these can be modified in the Zetadocs Client, the section on document templates explains this further. Should you wish to change the template a report uses, for example if you wished to send out all correspondence for a period with special attachments or a message as part of a special offer. Then you can create additional templates in the Zetadocs client and assign them by doing the following.

- Open the Role Tailored client and in the Navigation Pane select **Departments** → **Administration**→**Application Setup**→**Zetadocs Setup** → **Zetadocs Template List**

Fields

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.

To modify or create a template entry:
- Choose the Template you wish to modify or create a new record and select OK.
- Select Path to choose another template.
- The name field will automatically populate, add a suitable Description and close the window.

7.6   Understanding Zetadocs Rules

Before we discuss the Zetadocs Rule setup we need to outline how the rules operate. When printing a Zetadocs enabled report, Zetadocs analyses each selected record in turn against the Zetadocs Rules. A rule is a collection of specific settings which are applied when sending a document with specific properties. 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. On printing a document to Zetadocs the rules are applied in ascending order. a. Using rules it is possible to be highly specific about the way documents are handled allowing a great deal of automation of the delivery process.

Rules Levels:

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.

Rule levels are much easier to understand by looking at an example. Our NAV user needs to send out three Sales Orders to different customers called Sample Company 1, 2 and 3. In an effort to cut down on delivery costs the standard way of sending documents (default level 1 rule) is to send using email and archive them to SharePoint. The standard way of sending Sales Orders (a document set) is via Email using the Sales Order Template (Lv2 rule per document set). There are numerous other settings available when creating rules but we will focus on delivery method to keep this example simple, please note that other settings are likewise overridden by higher level rules.

Record 1	Sales Order 33659
Company	Sample Company 1
Rule Setup	No specific company rules (Lv3 and Lv4 rules).

Record 2	Sales order 33660
Company	Sample Company 2
Rule Setup	This company likes to receive all correspondence via Fax (Lv3 per Company Rule).

Record 3	Sales Order 33661
Company	Sample Company 3
Rule Setup	This company likes to receive most correspondence via fax however they are happy to receive Sales Orders via email (Lv3 and Lv4 rules).

On selecting Print on the Sales Order card they are asked to filter to the desired records, on pressing Print again each record in the print job will be processed in turn. On processing the Zetadocs rule settings are interrogated to determine the delivery information to associate with each record.

For our first record the system will search for a Lv4 rule and on not finding one would check this would set delivery to email and the template to the Sales Order template. The details necessary to delivery and archive are attached as Embedded Commands and the Order is release to the Zetadocs Client for delivery and archiving.

The second record is then considered, the level 3 rule for this means that Fax is the chosen delivery method again the details necessary to delivery and archive are attached as Embedded Commands.

The final record has both level 3 and 4 rules, as level 4 rules override those below the document is set to be delivered by email. The records are then gathered together and sent as a single print job to the Zetadocs Client. Here the embedded commands are removed and analysed, the templates are applied and the email message body is created as shown below with values from NAV in red. This provides automated generation of personalised correspondence, with the delivery information also set the documents are ready to be delivered and archived.

Subject: Order Confirmation for order number: 33659 for Sample Company 1
Message Body:
FAO: John Smith
Dear Customer,
     I'm pleased to attach your order confirmation, reference number 33659.

Kind regards,
     Sales Team

7.7 Zetadocs System Rule

To access the Zetadocs System Rule Card:

- Open the Role Tailored client and in the Navigation Pane select **Departments →
  Administration→Application Setup→Zetadocs Setup → Zetadocs System Rule List**.
- Select the system rule you wish to review and modify to open the Zetadocs System Rule Card.

General

Document Set No.: Identifies the document set being used.
Document Set Name: Describes the document set being used.
Template ID: Allows you to specify an alternate template to use when using this rule.
Template Name: Displays the selected template name.
Delivery Method Priority: Implies that if the contact information being used during the sending of a document that uses this rule is missing addressing information, the next highest priority method will be used. For example, if the *Delivery Method Priority* was **"E-Mail, Fax, Hard-copy"** and the contact information being used had no email information but did have fax information, then fax addressing would be used. Similarly, if there was neither email or fax information, then the document would be printed from Zetadocs to the local system default printer.
Email From: Optional. The user must have access to send emails using the address entered. If left blank the user's default email account will be used.
Archive Sent Documents: Determines whether Zetadocs for NAV will attempt to archive sent documents.
Comments: Field for any additional information you may wish to add.

Additional Recipients: Optional. Enter additional recipients either by selecting a contact or by entering the information manually. The delivery methods available are E-Mail (To, CC or BCC) and Fax. You can enter a maximum of 5 additional recipients for a system rule. E-Mail distribution lists are supported but they must be entered as their full E-Mail address and not an alias (E.g. support@equisys.com)

7.8   Customer and Vendor Rule Card

The Zetadocs Customer and Vendor Rule Cards allows you to create a sending rule for a particular customer/vendor. You must set up a card for each rule, on which you enter the template to use, the contact details of the recipient and how you want to send your documents.

To access the Zetadocs Customer and Vendor Rule Cards:

- Open the Role Tailored client and in the Navigation Pane select **Departments →
  Administration→Application Setup→Zetadocs Setup → Zetadocs Customer Rules**.
- This displays the Customer Rules List, select the Customer you wish or the new button to view the Zetadocs Customer Rule Card.
- By replacing Vendor for Customer in the above steps you can access the equivalent vendor options.

General

Customer No.: Allows you to identify the customer, by selecting the arrow you can select them from the Customer List.
Customer Name: This field is populated when you select the Customer No.
Document Set No.: Selecting the arrow in this field opens the Zetadocs Document Set List from which you can select the document set.
Document Set Name: This field is populated when you select the Zd Document Set No.

Additional Recipients

Delivery Type: Use the drop down arrow to select the preferred method of sending the document.
Contact No.: Selecting the arrow in this field will open the contact list enabling you to select the additional contact you wish to send the document to. **Note**: should you wish to send the item to an address not listed in the contact list simply fill in the three (manual) fields below.
Name (manual): Enter the contacts name.
Company (manual): Enter the company name.
Address (manual): Enter the address to send documents to, it will be either email address or fax number depending on the chosen delivery method.

Delivery

Use Default Contact: The radio button is by default set this setting.

Use Contact: By selecting this option you can specify an alternate contact to use, by selecting the arrow you can open the Contact List enabling you to choose an alternative contact.
Other: This option allows you to specify an alternate contact that is not contained within the Contact List.
Delivery Method: available options are Use Customer Default, Hard Copy, E-mail and Fax.

Template
Use Default Template: The radio button is by default set this setting.
Use Template: By selecting this option you can specify an alternate template to use, by selecting the arrow you can open the Zetadocs Template List enabling you to choose an alternative template.

7.9   Zetadocs Delivery Rules

The Zetadocs System Rules were explained earlier as the ability to define how a message being sent is delivered (Email, Fax or Hard-Copy), how it is formatted (Zetadocs Templates), from which address the message is sent and where it is archived. Each Zetadocs Document Set can have a separate definition of these sending settings.

Zetadocs for NAV also has Company Rules, these are the Zetadocs Customer Rules and the Zetadocs Vendor Rules which add another level of control. The sending rules are best explained as a set of override rule definitions. It can be viewed as a 4 level system which overrides particular rule settings dependent upon the document set, the company or a combination of both.

LEVELS:
1. The Default Rule
    o   Allows you to specify a basic rule that can be used by any Zetadocs enabled report.
2. Per Document Set
    o   Allows you to specify more specific settings for Zetadocs enabled documents by type.
3. Per Company
    o   All Zetadocs enabled documents being sent to a particular company can have the following rule settings overridden (This includes documents which are being sent using either the Level 1 or a Level 2 rule settings):
        i. The contact information to which the document will be sent
        ii. The method of delivery by which the document will be sent (Email, Fax, Hard-Copy)
4. Per Company, per Document Set
    o   All Zetadocs enabled documents being sent to a particular company and that are part of a particular document set can have the following rule settings overridden (this includes documents which are being sent using either the Level 1 or a Level 2 rule settings and has had some settings already overridden by a Level 3 rule settings)
        i. The Zetadocs Template that will be applied to the document
        ii. The contact information to which the document will be sent
        iii. The method of delivery by which the document will be sent (Email, Fax, Hard-Copy)

The default Zetadocs for NAV Delivery Rules
By examining this table you should be able to identify the areas where the standard document delivery settings differ from your needs. The steps below will explain how to adjust these settings.

Report Name	Doc Set No.	Doc Set Name	Template ID.	Template Name	Delivery Method 1	Delivery Method 2	Delivery Method 3
Default	0	Default	ZT00000	Blank	Email		
Purchase Quote	ZD0001	Purchase - Quotes	ZT00001	ZD-Purchase Quote Template	Email		
Purchase Order	ZD0002	Purchase - Orders	ZT00002	ZD-Purchase Order Template	Email		
Purchase Return Order	ZD0003	Purchase - Return Orders	ZT00003	ZD-Purchase Return Order Template	Email		
Blanket Purchase Order	ZD0004	Blanket Purchase Orders	ZT00004	ZD-Blanket Purchase Order Template	Email		

Sales Quote	ZD0005	Sales Quotes	ZT00005	ZD-Sales Quote Template	Email		
Order Confirmation	ZD0006	Order Confirmations	ZT00006	ZD-Order Confirmation Template	Email		
Sales Invoice	ZD0007	Sales - Invoices	ZT00007	ZD-Sales Invoice Template	Email		
Sales Credit Memo	ZD0008	Sales Credit Memos	ZT00008	ZD-Sales Credit Memo Template	Email		
Sales Return Order	ZD0009	Sales Return Orders	ZT00009	ZD- Sales Return Order Template	Email		
Blanket Sales Order	ZD0010	Blanket Sales Orders	ZT00010	ZD- Blanket Sales Order Template	Email		
Remittance Advice Journal	ZD0011	Remittance Advice - Journals	ZT00011	ZD-Remittance Advice Journal Template	Email		
Statements	ZD0012	Statements	ZT00012	ZD- Statements Template	Email		
Purchase Invoice	ZD0013	Purchase Invoice	ZT00013	ZD-Sales Invoice Template	Email		
Work Order	ZD0014	Work Orders	ZT00014		Email		
Purchase Credit Memo	ZD0015	Purchase Credit Memo	ZT00015		Email		

Let's look at an example of Zetadocs Rules and their configuration in action. In this case the default configuration has been imported using the steps earlier in this guide. We will walk through a series of scenarios which require the creation of level 2, 3 and 4 rules.

The Level 1 Rule – Default Rule
The Zetadocs System Rule card below shows the level 1 rule that will apply to all documents by default unless overridden by a higher level rule. In this case documents are sent using email with the default template. We can also set the archiving options on the Archiving Tab, in this example we will set the system not to archive.

The Level 2 Rule – per document set

Requirement
The sales team has stated a requirement whereby all order confirmations are sent with a copy of the terms and conditions and use a standard email template.

Solution
Zetadocs templates can be setup to provide all this functionality as described in section 9.1. Assuming we have created a suitable template or modified one of the Zetadocs templates provided as required. A level 2 rule needs to be setup to ensure this template is applied but only to order confirmations.

- Select the Rule button and select List, next scroll to the Document Set name field and choose Order Confirmations.
- The card will populate, notice how the ZD-Order Confirmation Template has been assigned as this is configured as part of the standard configuration data imported earlier.

The level 2 rule details shown below will apply to all documents with the document set Order Confirmation, meaning that any Order Confirmation document will be sent using the ZD- Order Confirmation Template whilst the others will use the level 1 rule and thus the default template.

The Level 3 Rule – per Customer

Requirement
Following discussions with one of our customers New Concepts Furniture, the sales team has requested that all correspondence be sent to Belinda Newman, with the exception of Order Confirmations which should instead go to John Emory by fax.

Solution

We need to make a change which affects all items sent to a particular customer, this is done by creating a level 3 customer rule. We then need to specify a level 4 rule to cover Order Confirmations.

- In the NAV Windows Client type **Zetadocs Customer Rule** in the search bar and navigate to that page.
- Select the Customer No. field and choose New Concepts Furniture.
- Select the Document Set No. field and set it to 0 the default value as this is to apply to all items.
- Select the delivery tab, shown below, and select **Use Contact:** if the new contact is already in your NAV database or **Use Alternate**: if it is not.
- In this case we're adding an existing user so select **Use Contact** and choose Belinda Newman.
- All documents sent to New Concepts Furniture will now use these details.

The Level 4 Rule – per Customer per Document Set

Requirement

The previous level 3 rule will now send all documents to Belinda Newman, but there was also a requirement for Order Confirmations to go John Emory by fax.

Solution

We need to make a change which affects all items sent using the Document set Order Confirmation and to a particular customer, this is done by creating a level 4.

- In the NAV Windows Client type **Zetadocs Customer Rule** in the search bar and navigate to that page.
- Create a new rule by pressing F3, select the Customer No. field and choose New Concepts Furniture.
- Select the **Document Set No.** field and select **Order Confirmation**.
- Select the delivery tab and click **Use Alternate**.
- Add the details of the recipient, in this case John Emory, as required.
- Next go to the **Delivery Method** field and select fax.
- Close the page and you have now created the level 4 rule.

Starting from the top then, the internal processing determines the send settings by building the results from the lower level rules up. Assume we are sending an order confirmation and it uses the document set *ZD00006 – Orders Confirmations*.
This will determine the delivery information from the **Level 1 & 2** rules specified above:
- Delivery Method: Email
- Template: ZT00006 - Order
- Archiving Settings: Do not archive
- Contact: *Use Default contact*

When Zetadocs consults the **Level 3** Rules it sees that any document being sent to "New Concepts Furniture" will be sent to "Belinda Newman" instead of the contact specified by default for the company we are sending to.
This would mean:
- Delivery Method: Email
- Template: ZT00006 - Order
- Archiving Settings: Do not archive
- Contact: Belinda Newman

However when Zetadocs consults the **Level 4** Rules, it sees that for situations where the company name = New Concepts Furniture and the Document Set = ZD00006 or an Order Confirmation the **Level 4** settings need to be applied.
So the final settings will be:
- Delivery Method: Fax
- Template: ZD0006 – Order Confirmation
- Archiving Settings: Do not archive
- Contact: John Emory

Additional Recipients

The additional recipients define in the system and company rules do not override those from the lower level rule as the other settings do. They are additive. If additional recipients are added for a document set (ZD00006 – Order Confirmations for example), any document sent using that document set will be addressed to these additional recipients, along with the additional recipients set at a higher level.

Continuing with your setup

This completes the installation of Zetadocs Delivery and Capture Essentials. The next sections cover the Plus edition setup steps. You may now wish to validate your system, to do this we have a series of recommended tests in section 20 Testing Zetadocs Delivery and Capture Essentials.

8. Modifying the Zetadocs Standard Configuration in NAV 5 and 6

Having imported the standard configuration data you should have a basic working system at this point. It should be capable of sending reports from NAV to recipients using the standard templates included and, should you have completed the SharePoint installation, documents should also be archived to SharePoint. This chapter covers how you modify the standard configuration data to create fulfil your specific requirements.

Contents

The settings are contained in a number of different forms which each have a different area of focus, we will go through each of these in turn and have provided a description of each of the fields.

8.1 The Zetadocs General Settings Form

The Zetadocs General Settings Form contains settings covering the logging level and archiving to SharePoint. To access the Zetadocs General Settings:

- Navigate to Administration → Application Setup → Zetadocs Setup →Zetadocs General Settings form.

Figure 6 - Zetadocs General Settings

General Tab
Version: Contains the Zetadocs version numbers, which can prove useful in gaining technical assistance.
Licence Number: Displays the systems Zetadocs licence number.

Licence Type: Displays the systems Zetadocs licence type.

Log Level: Determines the level of information stored in the Zetadocs log file, it offers the following options.

- **ERROR** – Only writes error information to the log
- **INFO** – Writes processing information such as key processing values and the error information
- **WARNING** – Writes out any potentially problematic states during processing and the info and error information
- **DEBUG**- Writes all levels of detail for troubleshooting difficult problems, recommended only when obtaining support or during installation and configuration

Archiving tab

Archiving Enabled: This option denotes whether Zetadocs will attempt to archive documents to SharePoint during Capture or Delivery processing.

SharePoint Site: This setting should be the address of your SharePoint site collection, should you be utilizing one. e.g. **https://example.SharePoint.com/sites/yoursitecollection**

Note: If you are integrating with SharePoint online then you must specify the valid *https://* protocol and not *http://*

Archive Library: Only specify the SharePoint document library name, not the full URL.

Archive URL: Displays the full target archive library by concatenating the SharePoint Site from the Zetadocs System Settings and the Archive Library property.

Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. You can specify up to three of these values to generate your file plan.

- **COMPANY** – The recipient NAV *Customer* name
- **DATE** – The Date with a format specified by the Date Folder Naming property
- **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings

Date Folder Naming: Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

Further advice on file plan settings is available here.

8.2   Zetadocs Document Queue Form

The Document Queue Form contains a record for each of the configured document queues and is used to control their functionality and actions. The Document Queue form settings were covered earlier in this guide, please refer to the section 6.6 Setting Document Queue Settings.

Specializing Document Queues

It may be advantageous to modify the standard document queue configuration to suit your requirements. You may want to remove some of the document queue actions if they will be unused or you may want to create a new queue which has only one possible action. For example, having a document queue specifically for processing quote requests will mean that there is only one action and therefore the user will not have to select the action each time. **TIP:** Reducing the scope of a queue may improve the end user efficiency.

8.3   Zetadocs Delivery Settings Form

To access the Zetadocs Delivery Settings:

- Navigate to Administration → Application Setup → Zetadocs Setup →Zetadocs Delivery Settings form.

General Tab

Fax Enabled: Provides Fax functionality, requires the installation of the separate product Zetafax.

Reference Prefix: The reference prefix is the first part of the reference code printed onto documents sent using Zetadocs, it can be a maximum of 15 characters long.

Network Archiving

Archive Delivered documents: Checking this box results in documents, sent using Zetadocs PDF, being archived in a central shared network folder. This occurs in addition to any SharePoint archiving setup.

Archive Location: The location of the shared network folder for archiving, it requires a suitable network folder location. You must also ensure that all Zetadocs enabled users have permission to access this folder.

Note: This option does not support any of the Zetadocs for NAV search features which require SharePoint integration.

Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. You can specify up to three of these values to generate your file plan.

- o **COMPANY** – The recipient NAV *Customer* name
- o **DATE** – The Date with a format specified by the Date Folder Naming property
- o **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings

Date Folder Naming: Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

Further advice on file plan settings is available here.

8.4 Zetadocs Report Settings

The Zetadocs Report Settings is where Zetadocs enabled reports can be associated with a particular Zetadocs Document Set and therefore a rule definition for sending (template, delivery method, archiving settings, additional recipients). It is also where recipient information settings are specified. The configuration data will populate these fields with our standard data setup, it may be necessary to adjust these values to meet your requirements.

To access the Zetadocs Report Settings:

- Open NAV and select the **Administration** option from the Navigation Pane.
- Select the **Application Setup** sub folder within it and then **Zetadocs Advanced Setup.**
- Select the Zetadocs Report Settings form.

Properties:
- A report can only be associated with one Zetadocs Document Set.
- Many reports can be associated with the same Zetadocs Document Set.

Figure 7 - Zetadocs Report Settings Card – General Tab

Form Fields

General Tab
Report ID: The Report ID is unique value given to identify each report.
Report Name: This field is populated when the Report ID is selected.
Document Set No.: The 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.
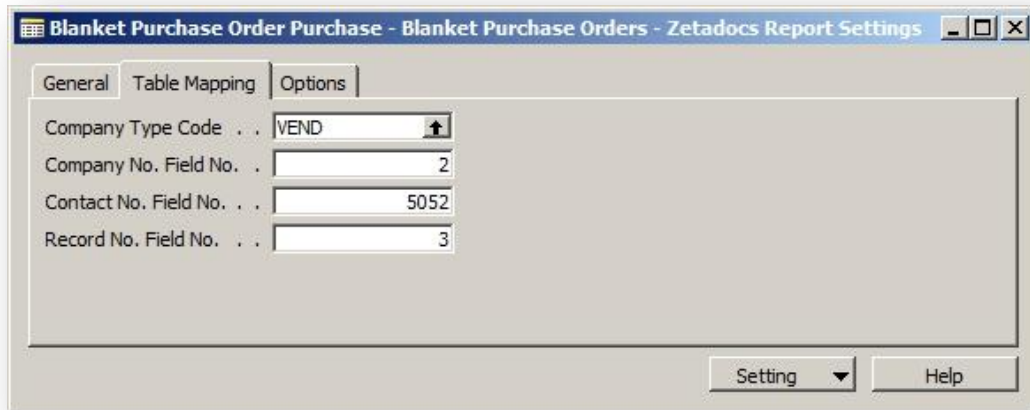
Archive Document Type: The Archive Document Type determines the document type the report will be stored under in SharePoint, please ensure you have created the appropriate content types in your SharePoint archive to match these settings.

Default Batch Name: When a report prints a number of records to Zetadocs they are held in a batch in the Zetadocs Client. This field allows you to specify a name for the batch that will be visible in the Zetadocs Client document explorer.

Comments: Field for any additional information you may wish to add.

Figure 8 - Zetadocs Report Settings Card – Table Mapping Tab
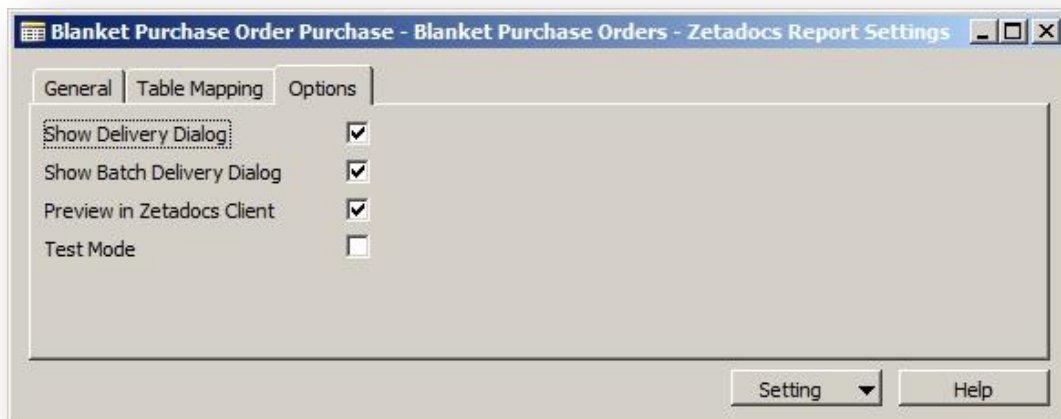
Table Mapping Tab

Company Type Code: This specifies a table relation between the report record and the recipient. For example, the standard Sales Quote report is to be sent to a Customer. Therefore, we select 'CUST' for the Company Type Code from the Company Type Code List.

Company No. Field No.: Specifies the field no. of the field in the table the report is based on where the Company No. should be taken from. For example, the standard Sales Quote report is based on the Sales Header table. The Customer No. in the Sales Header table is the field "Sell-to Customer No." field no. 2.

Contact No. Field No.: Specifies the field no. of the field in the table the report is based on where the Contact No. should be taken from. For example, the standard Sales Quote report is based on the Sales Header table. The Contact No. in the Sales Header table is field "Sell-to Contact No." field no. 5052.

Record No. Field No.: Specifies the field no. of the field in the table the report is based on where the records No. should be taken from. This can be used as a dynamic field for writing the record no. into a template message as a reference to the recipient and also as a searchable field in the Zetadocs SharePoint archive.

Figure 9 - Zetadocs Report Settings Card – Options Tab

Options Tab
Show Delivery Dialog: Controls the display of the delivery dialog which allows users to override the sending rule result for a single report send. For example, the recipient email address.
Show Batch Delivery Dialog: Controls the display of the batch delivery dialog which allows users to override the sending rule results for a batch of reports. This can be useful to allow users to fix any sending rule result errors.
Preview in Zetadocs Client: Controls the default value of previewing the Zetadocs documents in the Zetadocs Client before sending. If the delivery dialog is shown the default can be overridden by the user.
Test Mode: This field allows the administrator to prevent the report from printing the report results to Zetadocs. It is useful when troubleshooting problems on a live system. When the report is run it will run as normal up to the point of printing the report documents to Zetadocs.

8.5   Template Settings
Zetadocs Templates combine stationery overlays and attachment documents as well as supplementary addressing for any document sent using that template from the Zetadocs Client. The templates can be created in the Zetadocs Client and saved to a shared network location. Zetadocs will already have created entries for each type of report supported, these can be modified in the Zetadocs Client, the section on document templates explains this further. Should you wish to change the template a report uses, for example if you wished to send out all correspondence for a period with special attachments or a message as part of a special offer. Then you can create additional templates in the Zetadocs client and assign them by doing the following.

To access the Zetadocs Templates Settings:
- Open NAV and select the **Administration** option from the Navigation Pane.
- Select the **Application Setup** sub folder within it and then **Zetadocs Advanced Setup.**
- Select the Zetadocs Templates form.

Form Fields
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.

To modify or create a template entry:
- Select Template→List or press F5.
- Choose the Template you wish to modify or create a new record and select OK.
- Select Path to choose another template.
- The name field will automatically populate, add a suitable Description and close the form.
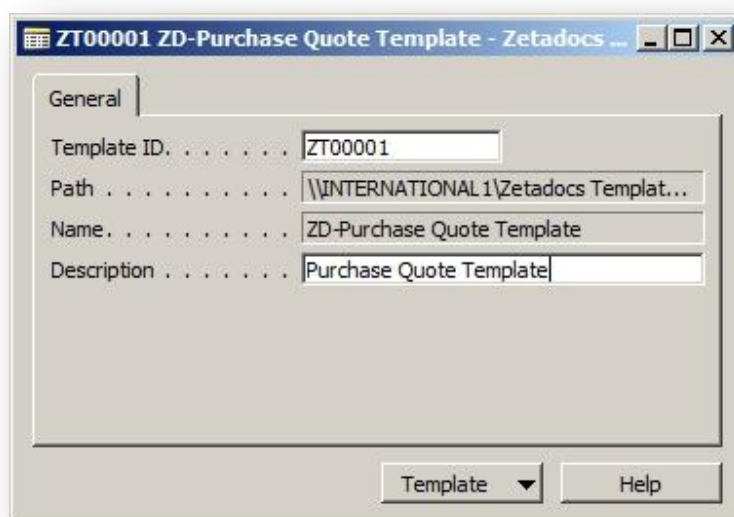
Figure 10 - Zetadocs Template Card

8.6 Understanding Zetadocs Rules

Before we discuss the Zetadocs Rule setup we need to outline how the rules operate. When printing a Zetadocs enabled report, Zetadocs analyses each selected record in turn against the Zetadocs Rules. A rule is a collection of specific settings which are applied when sending a document with specific properties. 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. On printing a document to Zetadocs the rules are applied in ascending order. a. Using rules it is possible to be highly specific about the way documents are handled allowing a great deal of automation of the delivery process.

Rules Levels:
5. The Default Rule – a basic rule that can be used by any Zetadocs enabled report.
6. Per Document Set – specific settings for Zetadocs enabled documents by type.
7. Per Company – specific settings for Zetadocs enabled documents by company.
8. Per Company, per Document Set – specific settings applied to specific document types when sent to a specific company.

Rule levels are much easier to understand by looking at an example. Our NAV user needs to send out three Sales Orders to different customers called Sample Company 1, 2 and 3. In an effort to cut down on delivery costs the standard way of sending documents (default level 1 rule) is to send using email and archive them to SharePoint. The standard way of sending Sales Orders (a document set) is via Email using the Sales Order Template (Lv2 rule per document set). There are numerous other settings available when creating rules but we will focus on delivery method to keep this example simple, please note that other settings are likewise overridden by higher level rules.

Record 1	Sales Order 33659
Company	Sample Company 1
Rule Setup	No specific company rules (Lv3 and Lv4 rules).

Record 2	Sales order 33660
Company	Sample Company 2
Rule Setup	This company likes to receive all correspondence via Fax (Lv3 per Company Rule).

Record 3	Sales Order 33661
Company	Sample Company 3
Rule Setup	This company likes to receive most correspondence via fax however they are happy to receive

Sales Orders via email (Lv3 and Lv4 rules).

On selecting Print on the Sales Order card they are asked to filter to the desired records, on pressing Print again each record in the print job will be processed in turn. On processing the Zetadocs rule settings are interrogated to determine the delivery information to associate with each record.

For our first record the system will search for a Lv4 rule and on not finding one would check this would set delivery to email and the template to the Sales Order template. The details necessary to delivery and archive are attached as Embedded Commands and the Order is release to the Zetadocs Client for delivery and archiving.

The second record is then considered, the level 3 rule for this means that Fax is the chosen delivery method again the details necessary to delivery and archive are attached as Embedded Commands.

The final record has both level 3 and 4 rules, as level 4 rules override those below the document is set to be delivered by email. The records are then gathered together and sent as a single print job to the Zetadocs Client. Here the embedded commands are removed and analysed, the templates are applied and the email message body is created as shown below with values from NAV in red. This provides automated generation of personalised correspondence, with the delivery information also set the documents are ready to be delivered and archived.

Subject: Order Confirmation for order number: 33659 for Sample Company 1
Message Body:
FAO: John Smith
Dear Customer,
    I'm pleased to attach your order confirmation, reference number 33659.

Kind regards,

    Sales Team

8.7   Zetadocs System Rule Card

To access the Zetadocs System Rule Card:

- Open NAV and select the **Administration** option from the Navigation Pane.
- Select the **Application Setup** sub folder within it and then **Zetadocs Advanced Setup.**
- Select the Zetadocs System Rule Card.

Figure 11 - Zetadocs System Rule Card – General Tab

Form Fields

General Tab
Document Set No.: Identifies the document set being used.
Document Set Name: Describes the document set being used.
Template ID: Allows you to specify an alternate template to use when using this rule.
Template Name: Displays the selected template name.
Delivery Method Priority: Implies that if the contact information being used during the sending of a document that uses this rule is missing addressing information, the next highest priority method will be used. For example, if the *Delivery Method Priority* was **"E-Mail, Fax, Hard-copy"** and the contact information being used had no email information but did have fax information, then fax addressing would be used. Similarly, if there was neither email or fax information, then the document would be printed from Zetadocs to the local system default printer.
Email From: Optional. The user must have access to send emails using the address entered. If left blank the user's default email account will be used.
Archive Sent Documents: Determines whether Zetadocs for NAV will attempt to archive sent documents.
Comments: Field for any additional information you may wish to add.

Additional Recipients: Optional. This field is available on both the general and archiving tabs. Enter additional recipients either by selecting a contact or by entering the information manually. The delivery methods available are E-Mail (To, CC or BCC) and Fax. You can enter a maximum of 5 additional recipients for a system rule. E-Mail distribution lists are supported but they must be entered as their full E-Mail address and not an alias (E.g. support@equisys.com)

8.8 Customer and Vendor Rule Card
The Zetadocs Customer and Vendor Rule Cards allows you to create a sending rule for a particular customer/vendor. You must set up a card for each rule, on which you enter the template to use, the contact details of the recipient and how you want to send your documents.

Figure 12 - Zetadocs Customer Rule Card – General Tab

General Tab
Customer No.: Allows you to identify the customer, by selecting the arrow you can select them from the Customer List.
Customer Name: This field is populated when you select the Customer No.
Document Set No.: Selecting the arrow in this field opens the Zetadocs Document Set List from which you can select the document set.
Document Set Name: This field is populated when you select the Zd Document Set No.

Delivery Tab
Use Default Contact: The radio button is by default set this setting.
Use Contact: By selecting this option you can specify an alternate contact to use, by selecting the arrow you can open the Contact List enabling you to choose an alternative contact.
Other: This option allows you to specify an alternate contact that is not contained within the Contact List.
Delivery Method: available options are Use Customer Default, Hard Copy, E-mail and Fax.

Template Tab
Use Default Template: The radio button is by default set this setting.
Use Template: By selecting this option you can specify an alternate template to use, by selecting the arrow you can open the Zetadocs Template List enabling you to choose an alternative template.

Additional Recipients
The additional recipients section is visible on all tabs at the bottom of the card.
Delivery Type: Use the drop down arrow to select the preferred method of sending the document.
Contact No.: Selecting the arrow in this field will open the contact list enabling you to select the additional contact you wish to send the document to. **Note**: should you wish to send the item to an address not listed in the contact list simply fill in the three (manual) fields below.
Name (manual): Enter the contacts name.
Company (manual): Enter the company name.
Address (manual): Enter the address to send documents to, it will be either email address or fax number depending on the chosen delivery method.

8.9   Zetadocs Delivery Rules
The Zetadocs System Rules were explained earlier as the ability to define how a message being sent is delivered (Email, Fax or Hard-Copy), how it is formatted (Zetadocs Templates), from which address the

message is sent and where it is archived. Each Zetadocs Document Set can have a separate definition of these sending settings.

Zetadocs for NAV also has Company Rules, these are the Zetadocs Customer Rules and the Zetadocs Vendor Rules which add another level of control. The sending rules are best explained as a set of override rule definitions. It can be viewed as a 4 level system which overrides particular rule settings dependent upon the document set, the company or a combination of both.

LEVELS:

5. The Default Rule
   o Allows you to specify a basic rule that can be used by any Zetadocs enabled report.
6. Per Document Set
   o Allows you to specify more specific settings for Zetadocs enabled documents by type.
7. Per Company
   o All Zetadocs enabled documents being sent to a particular company can have the following rule settings overridden (This includes documents which are being sent using either the Level 1 or a Level 2 rule settings):
      i. The contact information to which the document will be sent
      ii. The method of delivery by which the document will be sent (Email, Fax, Hard-Copy)
8. Per Company, per Document Set
   o All Zetadocs enabled documents being sent to a particular company and that are part of a particular document set can have the following rule settings overridden (this includes documents which are being sent using either the Level 1 or a Level 2 rule settings and has had some settings already overridden by a Level 3 rule settings)
      i. The Zetadocs Template that will be applied to the document
      ii. The contact information to which the document will be sent
      iii. The method of delivery by which the document will be sent (Email, Fax, Hard-Copy)

The default Zetadocs for NAV Delivery Rules

By examining this table you should be able to identify the areas where the standard document delivery settings differ from your needs. The steps below will explain how to adjust these settings.

Report Name	Doc Set No.	Doc Set Name	Template ID.	Template Name	Delivery Method 1	Delivery Method 2	Delivery Method 3
Default	0	Default	ZT00000	Blank	Email		
Purchase Quote	ZD0001	Purchase - Quotes	ZT00001	ZD-Purchase Quote Template	Email		
Purchase Order	ZD0002	Purchase - Orders	ZT00002	ZD-Purchase Order Template	Email		
Purchase Return Order	ZD0003	Purchase - Return Orders	ZT00003	ZD-Purchase Return Order Template	Email		
Blanket Purchase Order	ZD0004	Blanket Purchase Orders	ZT00004	ZD-Blanket Purchase Order Template	Email		
Sales Quote	ZD0005	Sales Quotes	ZT00005	ZD-Sales Quote Template	Email		
Order Confirmation	ZD0006	Order Confirmations	ZT00006	ZD-Order Confirmation Template	Email		
Sales Invoice	ZD0007	Sales - Invoices	ZT00007	ZD-Sales Invoice Template	Email		
Sales Credit Memo	ZD0008	Sales Credit Memos	ZT00008	ZD-Sales Credit Memo Template	Email		
Sales Return Order	ZD0009	Sales Return Orders	ZT00009	ZD- Sales Return Order Template	Email		
Blanket Sales Order	ZD0010	Blanket Sales Orders	ZT00010	ZD- Blanket Sales Order Template	Email		
Remittance	ZD0011	Remittance	ZT00011	ZD-Remittance	Email		

Advice Journal		Advice - Journals		Advice Journal Template			
Statements	ZD0012	Statements	ZT00012	ZD- Statements Template	Email		
Purchase Invoice	ZD0013	Purchase Invoice	ZT00013	ZD-Sales Invoice Template	Email		
Work Order	ZD0014	Work Orders	ZT00014		Email		
Purchase Credit Memo	ZD0015	Purchase Credit Memo	ZT00015		Email		

Let's look at an example of Zetadocs Rules and their configuration in action. In this case the default configuration has been imported using the steps earlier in this guide. We will walk through a series of scenarios which require the creation of level 2, 3 and 4 rules.

The Level 1 Rule – Default Rule

The Zetadocs System Rule card below shows the level 1 rule that will apply to all documents by default unless overridden by a higher level rule. In this case documents are sent using email with the default template. We can also set the archiving options on the Archiving Tab, in this example we will set the system not to archive.

Figure 13 – Level 1 Zetadocs System Rule Card

The Level 2 Rule – per document set

Requirement

The sales team has stated a requirement whereby all order confirmations are sent with a copy of the terms and conditions and use a standard email template.

Solution

Zetadocs templates can be setup to provide all this functionality as described in section 9.1. Assuming we have created a suitable template or modified one of the Zetadocs templates provided as required. A level 2 rule needs to be setup to ensure this template is applied but only to order confirmations.

- Select the Rule button and select List, next scroll to the Document Set name field and choose Order Confirmations.
- The card will populate as shown in the figure below, notice how the ZD-Order Confirmation Template has been assigned as this is configured as part of the standard configuration data imported earlier.

The level 2 rule details shown below will apply to all documents with the document set Order Confirmation, meaning that any Order Confirmation document will be sent using the ZD- Order Confirmation Template whilst the others will use the level 1 rule and thus the default template.
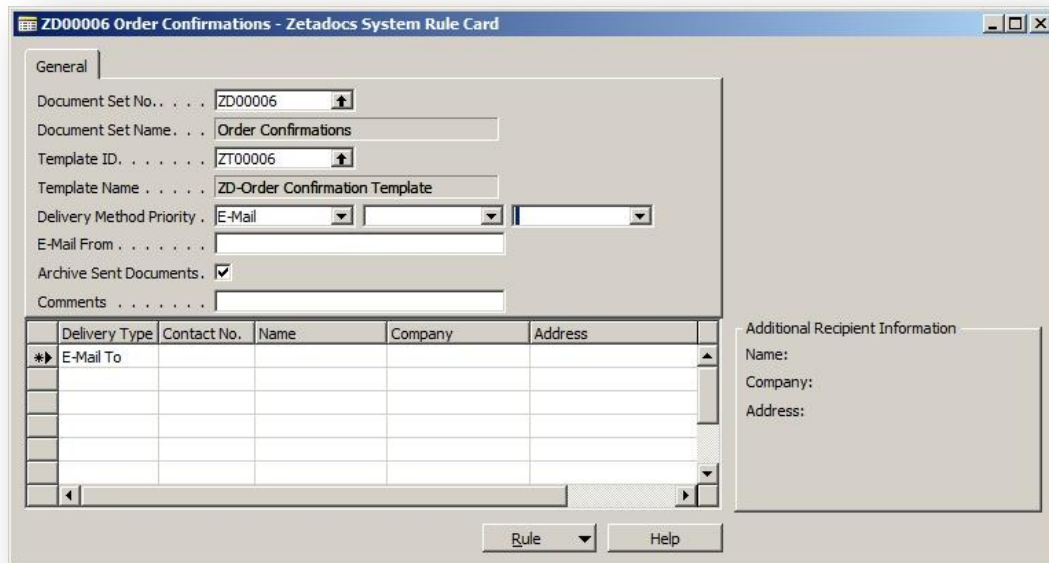
Figure 14 - Level 2 Zetadocs System Rule Card

The Level 3 Rule – per Customer

Requirement
Following discussions with one of our customers New Concepts Furniture, the sales team has requested that all correspondence be sent to Belinda Newman, with the exception of Order Confirmations which should instead go to John Emory by fax.

Solution
We need to make a change which affects all items sent to a particular customer, this is done by creating a level 3 customer rule. We then need to specify a level 4 rule to cover Order Confirmations.

- Select the **Administration** option in the Navigation pane and then **Application** Setup.
- Open the **Zetadocs Setup →Advanced Settings** section and select the **Zetadocs Customer Rule Card**.
- Select the Customer No. field and choose New Concepts Furniture.
- Select the Document Set No. field and set it to 0 the default value as this is to apply to all items.
- Select the delivery tab, shown below, and select **Use Contact:** if the new contact is already in your NAV database or **Use Alternate:** if it is not.
- In this case we're adding an existing user so select **Use Contact** and choose Belinda Newman.
- All documents sent to New Concepts Furniture will now use these details.
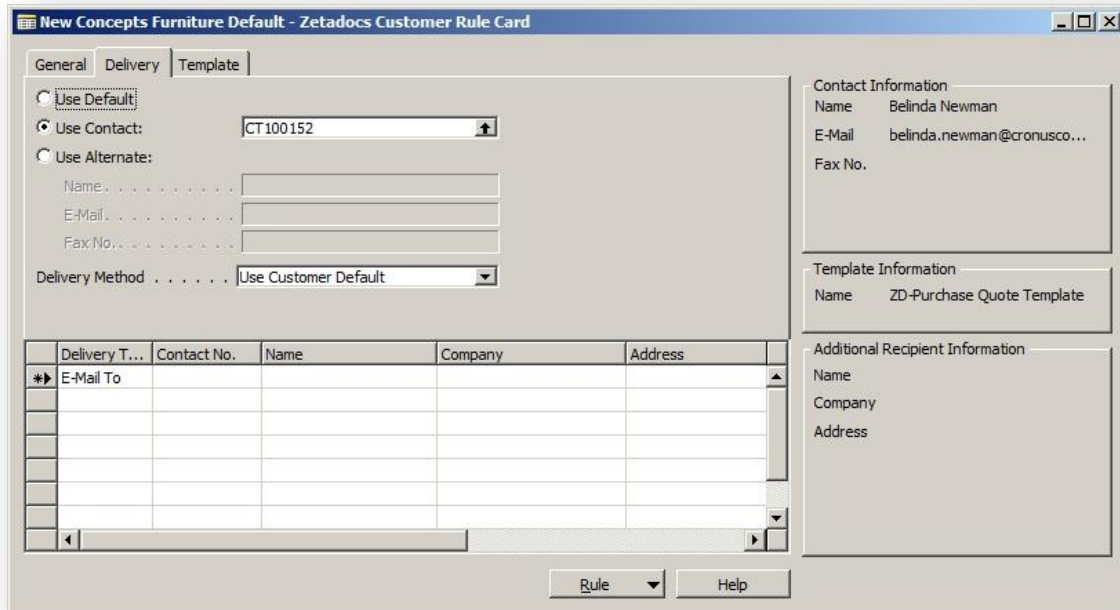
Figure 15 - Level 3 rule shown on Customer Rule Card

The Level 4 Rule – per Customer per Document Set

Requirement
The previous level 3 rule will now send all documents to Belinda Newman, but there was also a requirement for Order Confirmations to go John Emory by fax.

Solution
We need to make a change which affects all items sent using the Document set Order Confirmation and to a particular customer, this is done by creating a level 4.

- Select the **Administration** option in the Navigation pane and then **Application** Setup.
- Open the **Zetadocs Setup** section and select the **Zetadocs Customer Rule Card**.
- Create a new rule by pressing F3, select the Customer No. field and choose New Concepts Furniture.
- Select the **Document Set No.** field and select **Order Confirmation**.
- Select the delivery tab and click **Use Alternate**.
- Add the details of the recipient, in this case John Emory, as required.
- Next go to the **Delivery Method** field and select fax.
- Close the form and you have now created the level 4 rule.
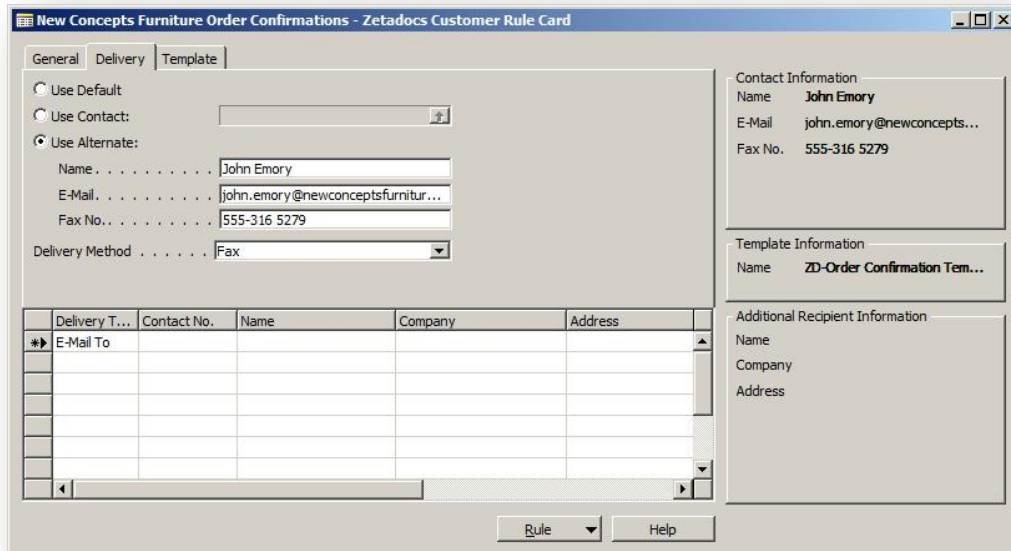
Figure 16 - Level 4 rule shown in the Customer Rule List

Starting from the top then, the internal processing determines the send settings by building the results from the lower level rules up. Assume we are sending an order confirmation and it uses the document set *ZDoo006 – Orders Confirmations*.
This will determine the delivery information from the **Level 1 & 2** rules specified above:
- Delivery Method: Email
- Template: ZToo006 - Order
- Archiving Settings: Do not archive
- Contact: *Use Default contact*

When Zetadocs consults the **Level 3** Rules it sees that any document being sent to "New Concepts Furniture" will be sent to "Belinda Newman" instead of the contact specified by default for the company we are sending to.
This would mean:
- Delivery Method: Email
- Template: ZToo006 - Order
- Archiving Settings: Do not archive
- Contact: Belinda Newman

However when Zetadocs consults the **Level 4** Rules, it sees that for situations where the company name = New Concepts Furniture and the Document Set = ZDoo006 or an Order Confirmation the **Level 4** settings need to be applied.
So the final settings will be:
- Delivery Method: Fax
- Template: ZDoo06 – Order Confirmation
- Archiving Settings: Do not archive
- Contact: John Emory

Additional Recipients
The additional recipients define in the system and company rules do not override those from the lower level rule as the other settings do. They are additive. If additional recipients are added for a document set (ZDoo006 – Order Confirmations for example), any document sent using that document set will be addressed to these additional recipients, along with the additional recipients set at a higher level.

Continuing with your setup
This completes the installation of Zetadocs Delivery and Capture Essentials. The next sections cover the Plus edition setup steps. You may now wish to validate your system, to do this we have a series of recommended tests in section 20 Testing Zetadocs Delivery and Capture Essentials.

9. Using Document Templates

Zetadocs for NAV has a number of preconfigured document templates included within it to make setting up a system quicker and easier. These templates contain Zetadocs stationery and a message body which have been deliberately constructed to provide a starting point from which to build and customize your system. Should you wish to construct your own templates instructions on manually creating them are available in the help installed with the Zetadocs Client. You should though find it easier to follow the instructions here to modify the standard templates to your needs.

Note: If you are installing in a language other than English you should first check your templates folder as it should contain a folder with templates specific to your language. Copy these files into the main templates folder replacing the existing English language templates before proceeding with the steps below.

Contents

Preconfigured Document Template Features
Template Wizard - Adding an attachment to a template
Replacing the stationery
Adjusting the Email message

9.1 Preconfigured Document Template Features

The document templates contain Zetadocs stationery and a suitably generic message body reflective of each templates purpose.

Attachments

The document templates come without an attachment included to allow you to include your own company specific documents like terms and conditions that you may wish to distribute.

Stationery

A single stationery file has been provided which by default is applied to all ZD Templates included with your installation. This means you would only be required to update this stationery once for it to apply to all document templates.

Message Body Text

The message body text contains a default message which would form the email message body and subject when the document is sent using Zetadocs for NAV. This allows for the use of dynamics fields to populate information from NAV automatically into the email reducing the time required to process business documents. In the message in section 9.4 you can clearly see several examples of these fields.

Viewing the Template details

To view the Zetadocs for NAV template details simply:

- Open the Zetadocs Client.
- Select the Shared network folder setup earlier containing your templates in the **accessories pane** on the right hand side using the **folder** drop down box shown below. If the accessories pane is not displayed select the **Accessories** button from the toolbar to display it.
- Ensure the Type drop down box is set to **Templates**.
- Double click on the Template you wish to adjust to open the Document Template Wizard.
- The pages of the wizard cover contain:
  - An Introduction to templates
  - Assignment of attachments
  - Assignment of Stationery
  - Email properties
  - Template Review and Save
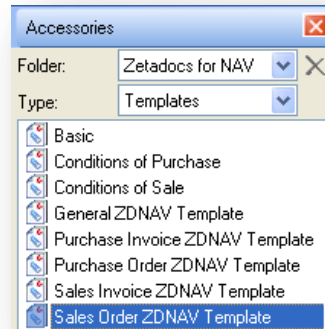
Figure 17 – Opening the Document Template Wizard

9.2   Template Wizard - Adding an attachment to a template

The preconfigured templates supplied do not come with an attachment included as this would make them unusable 'out of the box' as such if you require attachments to be sent along with your business documents then please follow the steps below.

Any file that you use on a regular basis can be stored as an attachment file for ease of use. These files can be attached to any spooled document prior to sending quickly and easily using the Accessories tool. By specifying an attachment in a template you ensure it is always included when a document is sent using that template with Zetadocs for NAV.

Note: That if your attached file is large this may reduce performance when sending large batches as the attachment would have to be processed for each document delivered. As such we would recommend that you check to ensure that attachments are as efficient in terms of memory required as possible.

To add an attachment simply:

- Copy your desired attachment (e.g. terms and conditions) in pdf format into the shared folder location, likely to be in the form *ServerName*\Zetadocs Templates\
- Open the **Zetadocs Client** and select the template you wish to modify by double clicking on it in the Accessories pane, see Figure 17.
- The template wizard will open, Select **Next** to reach the attachments step of the wizard.
- Select the Shared Network Folder by selecting the **Folder** drop down box.
- Your attachment should appear as one of the attachment options.
- Select the attachment and click the **Add** button.
- Select **Next** to be taken to the stationery template wizard page. If you are happy with the existing settings in the remaining wizard steps skip past them using next and select **Finish** to save your changes.

9.3   Replacing the stationery

The templates comes with stationery included, this single piece of stationery is applied to all of the templates provided. As such by simply replacing this one file you can ensure your stationery is applied to all of the provided templates.

Note: That if your stationery file requires a large amount of memory this may reduce the performance of Zetadocs when sending large batches. This is because it would have to be processed for each page of each document delivered. To reduce the size of this document we would recommend ensuring that any images used are of a suitable format, quality and size. We would also recommend that users avoid scanning their existing paper stationery as this creates large files, it is better instead to isolate and extract any images or required elements before recreating the overall effect using word for example. It should be possible to create stationery of a suitable quality which is around 30kb's in size or less.

Adding company stationery to the Zetadocs client

To add your stationery to the Zetadocs Client simply open your existing company stationery and print it selecting the Zetadocs PDF printer using the steps below.

- Open your stationery in Word or another suitable application. The standard stationery has been provided to you in Word format in the templates folders as well, so you can adjust and print that if desired.
- Select **print** and select **Zetadocs PDF** as your printer.
- This will open the Zetadocs client with your stationery within it.
- Select the **File** menu and then **Save As Stationery.**
- You will then be prompted to provide the name and save location of the stationery, you should select the shared network folder mentioned earlier this is likely to be in the form *ServerName*\Zetadocs Templates\.
- If you wish to apply this stationery to the existing preconfigured templates this file should be named **ZD - Stationery.zds** this will over-right the existing standard stationery and will now be used by all of the templates provided.
- Should you wish to apply this stationery to a single template, name the file as you see fit then open the Zetadocs client.
- Next open the template wizard by double clicking on the template you wish to modify.
- Go to the third page of the wizard using the next button the screen shown in Figure 18 will appear.
- Select your stationery by selecting the Folder drop down box and selecting the Shared Network folder.
- Selecting the existing stationery from the selected stationery window as shown.
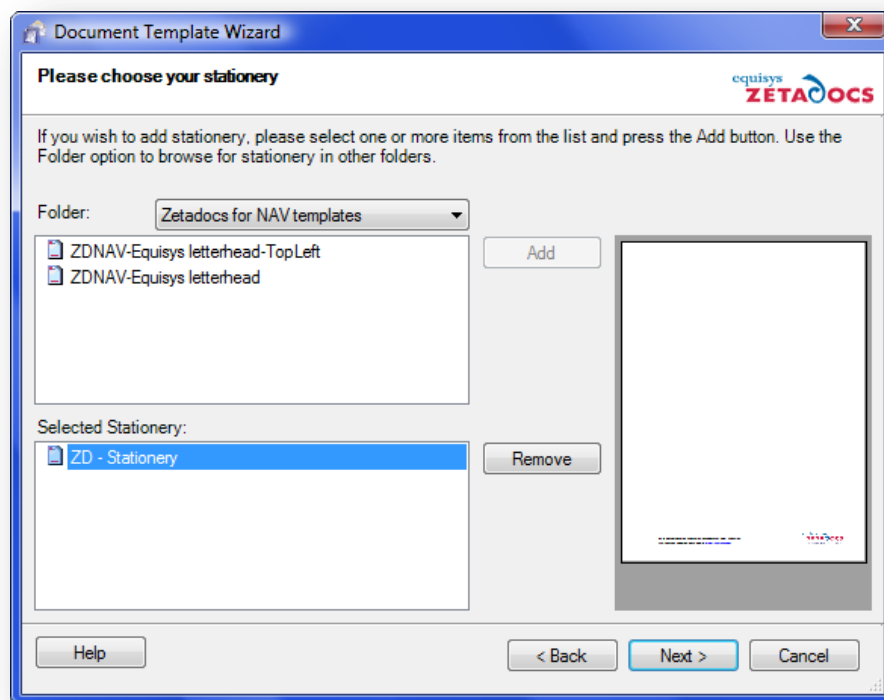
Figure 18 – The Document Template Wizard

- Click the **Remove** button.
- Select your new stationery file and press **Add**.
- Select **Next** to be taken to the email message template wizard page. If you are happy with the existing message select next again and then select **Finish** to save your changes. Note: the class feature is not required for NAV users.

9.4   Adjusting the Email message

The preconfigured templates contain an email message populated with dynamics field data from NAV and static text generically phrased to allow them to be applicable in a number of situations. The messages, like the one shown below, work with NAV to automatically create a personalised message that contains contact details, names, order numbers and organization names.

Messages using Dynamics Fields

> *Subject:* Order Confirmation for order number: %%[ZetadocsRecordNo] for %%[Organization]
>
> *Message Body:*
>
> FAO: %%[Name]
>
> Dear Customer,
> I'm pleased to attach your order confirmation, reference number %%[ZetadocsRecordNo].
>
> Kind regards,
>
> Sales Team

When sent using the Zetadocs for NAV Client these fields are replaced with the corresponding fields from NAV, and would appear thus:

Message with Dynamic Fields Populated

> *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

By amending the document template you will be able change the content of every email message sent using that template. It is possible to include a variety of other dynamically populated fields within your email; by default you will have access to the following:

- %%[Name]
- %%[FirstName]
- %%[Surname]
- %%[ZetadocsCompanyNo]
- %%[ZetadocsRecordNo]
- %%[Organization]
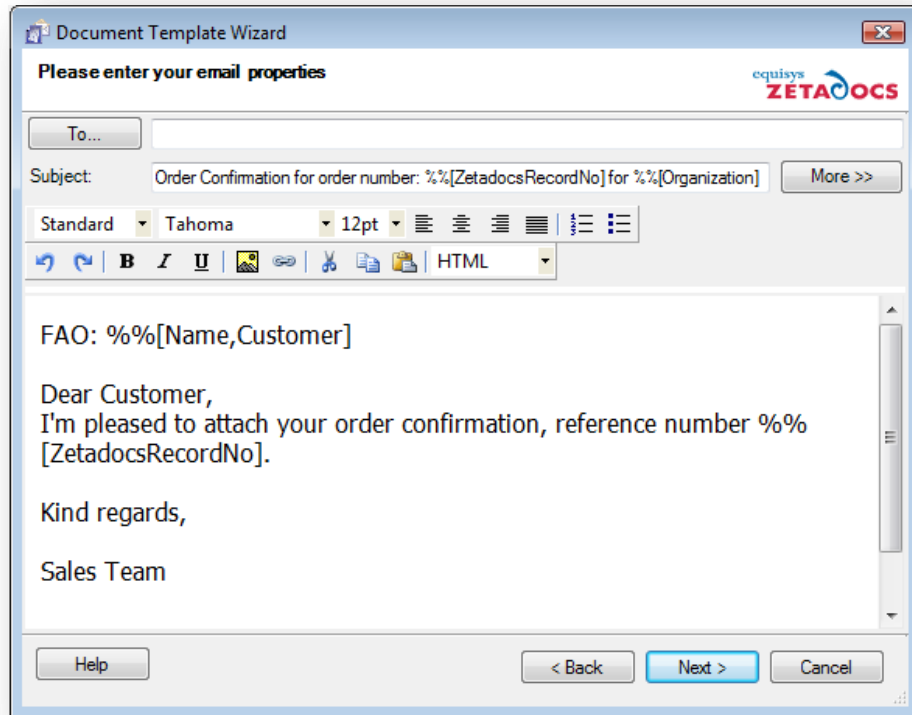
Figure 19 - Document Template Wizard – Email Message Body

To adjust the email message you need to view the template in the Zetadocs Client using the document template wizard. To open the document template wizard for a particular template follow the steps in section 9.1.

- The first three pages of the wizard contain:
- An introduction to templates
- The assignment of attachments
- The selection of stationery
- Click **Next** on each page to move past these wizard stages until you reach the email properties page (see Figure 18 above).
- Adjust this content to match your needs remembering that the dynamic fields use the format %%[Name] and will be replaced in the message by the corresponding NAV value.
- Click **Next** to review the templates contents and select **Finish** to save your changes.

Zetadocs for NAV SDK

Chapters

SDK Primer

Zetadocs Capture Plus

Zetadocs Delivery Plus

10. SDK Primer

The Zetadocs for NAV SDK is made up of two parts, Zetadocs Capture Plus and Zetadocs Delivery Plus. It was created to allow NAV developers to further customize the Zetadocs for NAV features to meet bespoke requirements. With the SDK it is easy to leverage the core features of Zetadocs for NAV, Delivery and Capture, to provide complex, high value business processes that are fully integrated into NAV.

NOTE: To get the most from the Zetadocs for NAV SDK it is recommended that you take a moment to understand the goals of the SDK and the logic behind the framework. This section aims to give a short overview of the SDK framework which will then simplify your understanding of the Capture and Delivery Plus examples in the subsequent chapters and help you in designing good solutions with Zetadocs.

10.1 Goals of the SDK

It is common in the NAV community that customizations are implemented as and where the developer sees fit. Most NAV objects are open to developers to modify. The positive aspect of this is the speed of implementation. However there is a negative aspect and that is the cost of maintenance and upgrade. Equisys identified the challenge this presents for developers and has designed this SDK with this in mind. Our goal is to make upgrades and patches of the Zetadocs for NAV product much simpler and faster by removing the need to merge customizations into updated object versions. Our SDK goals are:

1. Structured - Provide designated entry points for NAV developer code
2. Flexible - Integrate Zetadocs for NAV features with any records of NAV*
3. Intuitive – Use a framework to provide a consistent style of customization implementation

This refers to the use of the typeless RecordID and RecordRef types over the strongly typed Record type. There is no guarantee of the suitability of any NAV record for use with Zetadocs.

10.2 Understanding the Framework

There are three elements to the Zetadocs for NAV SDK. They are:

1. Interfaces
   - This is the name given to existing NAV forms, pages, codeunits or reports that are modified to call the Zetadocs for NAV Core codeunits to provide Zetadocs for NAV functionality. Our aim is to make these modifications as minimal as possible.
2. Zetadocs Core Codeunits
   - These are our codeunits which developers do not have modify permissions for. They perform the bulk of Zetadocs for NAV processing and call the Integration and Customization codeunits to run developer code.
3. Integration and Customization Codeunits
   - These are our codeunits which developers with the Zetadocs SDK granule do have modify permissions for. They provide simple call out functions which the developer implements his custom code in.

Developers should look to understand the integration and customization entry points before designing their solution.

10.3 Process Flow

The processing flow follows the same pattern in both Plus feature areas.

1. The interfaces calls the Zetadocs Core codeunits which use the Zetadocs for NAV settings to perform the action.
2. If there is no suitable configuration available for the records being processed then the Zetadocs Code calls out to the Integration and Customization codeunits to get the information. It is here that the developer can implement bespoke settings and integrate with custom records.
3. Once all processing has been completed, the Zetadocs Core calls out to the Customization codeunits with modifiable data sets to instruct the core codeunits on how to complete the action processing. It is here that the developer can implement custom business logic, enhanced Zetadocs feature functionality and integration with other subsystems.

4. Finally, having processed the developer modifications, the Zetadocs Core codeunits call outside of NAV to use the Zetadocs for NAV Client components to complete the functionality.
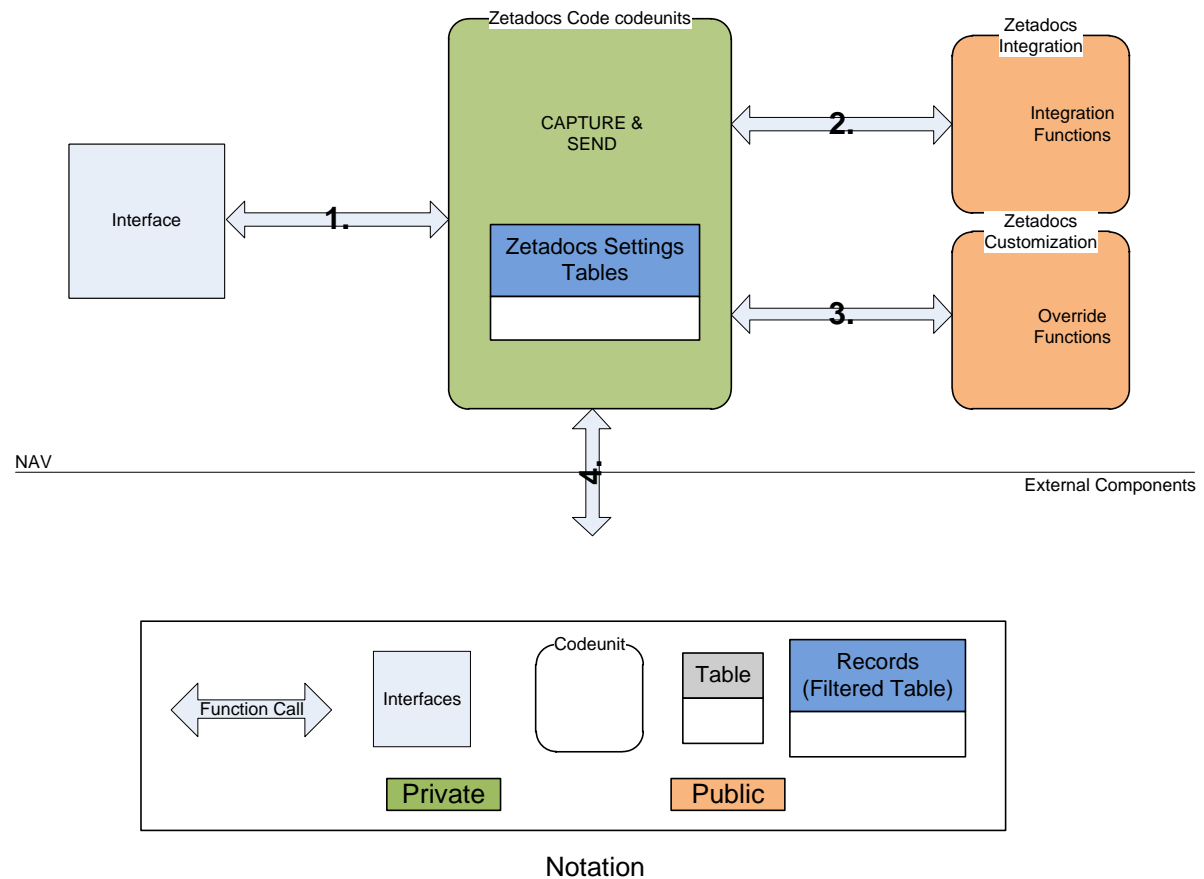
Figure 20 - Zetadocs for NAV SDK Architecture

Capture Plus Setup

Chapters

11. Zetadocs Capture Plus

Note: The following sections of the installation guide cover the installation and setup of the features provided as part of the Zetadocs for NAV Capture Plus module. These changes can only be made by those with the Zetadocs Capture Plus SDK which requires Capture Plus module licence from Equisys.

The Zetadocs Capture Plus is an optional component of Zetadocs for Microsoft Dynamics and is required for implementing custom Document Queues and bespoke business logic in Zetadocs for NAV capture features. At its core is the Zetadocs Server which runs on your server and converts documents placed into a Shared Network folder into PDF/A format. It works with Microsoft Dynamics NAV and enables the document queues to work with a wide range of documents by converting inbound documents into PDF/A. As standard the document queue supports a variety of file types, allowing viewing, processing and eventual archive of these documents to SharePoint.

This provides a number of benefits:
- Documents are stored in a standard storage format (PDF/A)
- Document content is searchable within SharePoint including text which is part of graphics, if OCR is enabled (optional requires additional licence)

By storing all documents within SharePoint you enable a wider range of your company's staff to access these documents despite perhaps not having a copy of the native software for the document. It also means that you have a copy of the document that is an accurate representation of the document when it was received.

The list below covers some of the options available to Capture Plus customers, typically these are used to streamline document handling and management processes.

Capture Plus Features Include:
- Capture and Conversion of inbound documents to PDF/A format
- Custom Document Queues
- Optical Character Recognition
- Barcode Recognition
- On screen approval with workflows
- Document Association
- Bespoke business logic and capture feature customizations

11.1 Understanding the Capture Plus SDK Framework

Before continuing it is recommended that you read the Zetadocs for NAV SDK Primer section of this document.

The three elements to the Zetadocs for NAV Capture Plus SDK are:

1. **Interfaces**
   - Zetadocs Document Queue (Form / Page)
     - This has been designed to work for any queue and should not be modified to implement customizations without consulting Equisys Ltd.
   - NAS
     - It is possible to author a NAS service to automatically perform scheduled document queue processing.
2. **Zetadocs Core Codeunits**
   - Zetadocs Capture codeunit
     - This codeunit provides functions that are called by the Interfaces to complete linking actions.
3. **Integration and Customization Codeunits**
   - Zetadocs Capture Integration codeunit
     - This is currently not used and is only present for backward compatibility with earlier versions

- Zetadocs Capture Customize codeunit
  - This codeunit has functions called by the Zetadocs Core codeunits to allow the developer to implement custom queues and bespoke business logic.

11.2 Process Flow

The processing flow follows the standard Zetadocs for NAV SDK pattern.
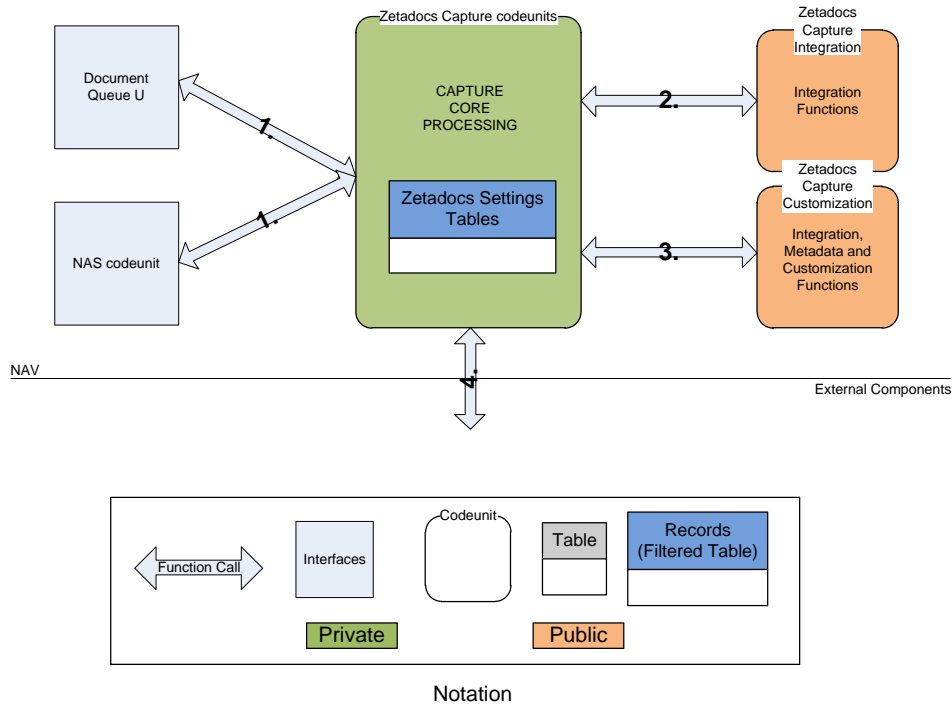
Figure 21 - Zetadocs Capture Plus Process Flow

11.3 Capture Plus Example Scenario

It is easier to understand how these features all come together by looking at a brief example of how they can be used to improve document handling.

Scenario: A company sends out Shipment notes printed from NAV with their deliveries, these are signed by the customer and returned before being processed and filed.

Solution: By using Capture Plus you can automate and streamline this process significantly, firstly on printing the Shipment note from NAV, Zetadocs can add a Barcode to the document. It is then signed as usual by the customer but on return it is simply scanned. Zetadocs can then recognise the barcode and automatically adds a Pdf copy of the document to your archive and associates it with the original order that the Shipment note was based upon. This is done using a custom Shipment Document Queue. It gives the user processing these documents a single location from where they can view the signed Shipment Note and create and send the corresponding invoice. This provides the organisation with an archive that is populated with related records e.g. a Quote, Order, Shipment Note, Returned Signed Shipment Note, Invoice which enables them to view the whole transaction workflow from SharePoint. We will demonstrate how to setup this Shipment example in the coming pages.

The sample code to achieve this is shipped as part of the Zetadocs-Capture Customize codeunit (9009964).

11.4 Overview of the Zetadocs Capture Plus Install
Zetadocs Capture Plus is based around the integration of the Zetadocs Server with NAV and your other Zetadocs components to provide a range of enhanced functionality.

This section will take you through the setup of each of the following:

- Zetadocs Server
- Custom Document Queues
- Barcode support
- Adding Document Queues to a Role Center

11.5 Zetadocs Server Install

Installing the Zetadocs Server for use as part of the Capture Plus solution is no different to a standard Capture Essential installation. The only steps that are different in this example scenario will be the creation of a Shared Network folder specifically for our custom Shipment Queue and configuring the Zetadocs Server to point at this folder. Please refer to the sections in the chapter Capture Essentials Setup for instructions on how to install the Zetadocs Server and adding a queue to the configuration either instead of or on top of configuring the Sales and Purchase Queue paths add a Document Queue section for the Shipment Queue depending on your requirement.

Summary of steps:
1. Install the Zetadocs Server
2. Create a shared network folder on the same machine and share as:
   - *yourmachinename*\Shipment Queue
3. Configure the Zetadocs Server to point at this shared network folder as one of the queues.

11.6 Custom Document Queue Configuration in NAV

To start processing documents from a queue we need to add the queue settings to Zetadocs for NAV. Let's continue our example by configuring the Shipment Queue in NAV.

First you need to decide on the actions that you will implement for your queue. The action that is performed is up to you. Obviously the typical action is to associate (often referred to as linking) the document with a record in NAV and then to archive the document. There is potential to use the document queues as events that will start other operations or modify NAV data tables. It is entirely up to you what you want to implement in your actions. In this example we will implement just one linking action. To add new actions you need to run the Zetadocs Doc. Queue Actions table from the Object Designer and enter the item.

1. Run table 9009991
2. Add a new action ID ZDSHIP and its description
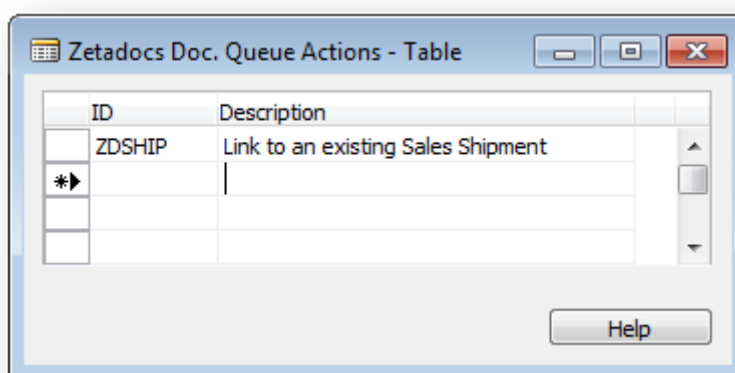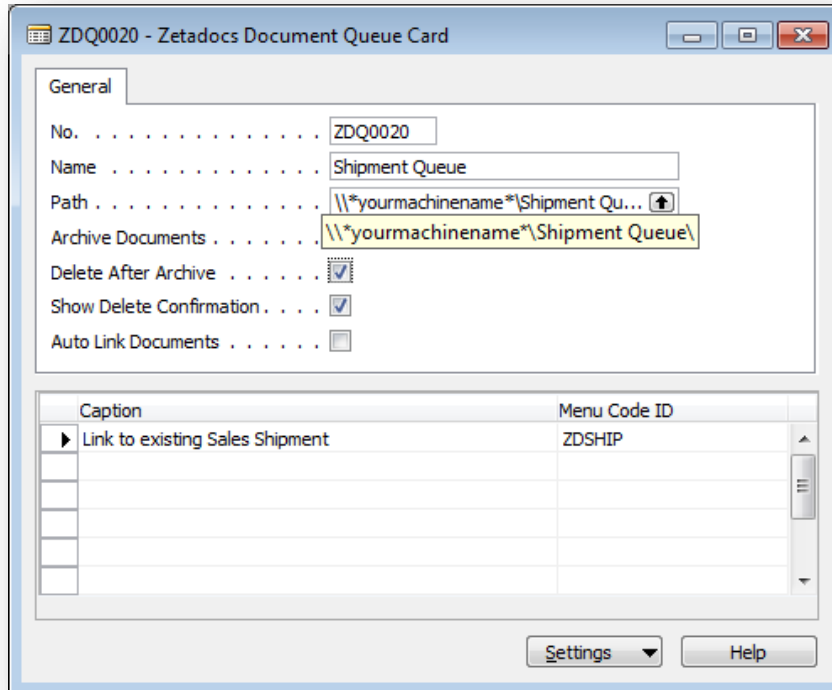
Figure 22 - Creating new Document Queue Actions codes

Next you need to create a new Zetadocs Document Queue.

- Open the **Zetadocs Document Queue Card**
  - For NAV 2013 select Administration→Application Setup→Zetadocs Setup→Zetadocs Document Queue List and select the queue you wish to modify to open the card.

o   For NAV 5 and 6 select Administration→Application Setup→Zetadocs Setup→Zetadocs Document Queue Setup.
- Create a new queue record noting the No. allocated.
- Enter the rest of the details as shown below. Note that the Caption added here will be displayed to the user when processing in the document queue and so it should give sufficient information to the user about the action. However, when there is only one action it is performed by default.

Figure 23 - Document Queue Settings

11.7 Adding Document Queues to your NAV Menusuite NAV

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.
- Open the object designer within NAV and select the menusuite option.
- Create a new menusuite or edit an existing one as per your requirements.
- If creating a new one select the New button and then select the Design level appropriate to your install, e.g. Company.
- Locate the area in the Navigation pane where you wish to add the item to the menusuite.
- Right click on the area and select Create item.
- Select the object type of Form and pick the document queue in question from the object id field.
- Select OK when satisfied and the use ctrl+shift and the arrow keys to move your new item around the menusuite until you are happy with its location.
- Press ctrl+s to save your changes.
- Repeat for any remaining document queues.

Note: Document Queues will not be available via the menusuite until you have closed and restarted NAV.

11.8 Adding Document Queues to a Role Centre

Overview
The NAV role tailored client is designed around a user's role and each role has its own Role Centre. This is the ideal place to show information about the Zetadocs document queues, as each one is a queue of documents that needs processing.

The following section gives a step by step guide explaining how to show document queue information in the Activities area of the order processor Role Center in the role tailored client. The same steps can be used to display document queue information on any Role Center for any role.

Add document queues to the Role Center
The page that you need to modify for this example is number 9060 – SO Processor Activities.
- Add the following global variables:

Name	Data Type	Sub Type
QueueItems	Record	Zetadocs Doc. Queue Item
QueueSettings	Record	Zetadocs Document Queue
ZdDocQueue	Page	Zetadocs Document Queue

- Add the following line of code to the **OnOpenPage** trigger where ZDQ0001 is the ID of the document queue that you want to display the information for:

    QueueItems.SETRANGE(QueueItems."Zetadocs Doc. Queue No.", 'ZDQ0001');

- Add a group to the page with a sub type of **CueGroup**. Set the caption to **Zetadocs Document Queues**.
- Add a field to the group. Set the caption to **Document Queue** and set the source expression to **QueueItems.COUNT** as shown in the screenshot below:
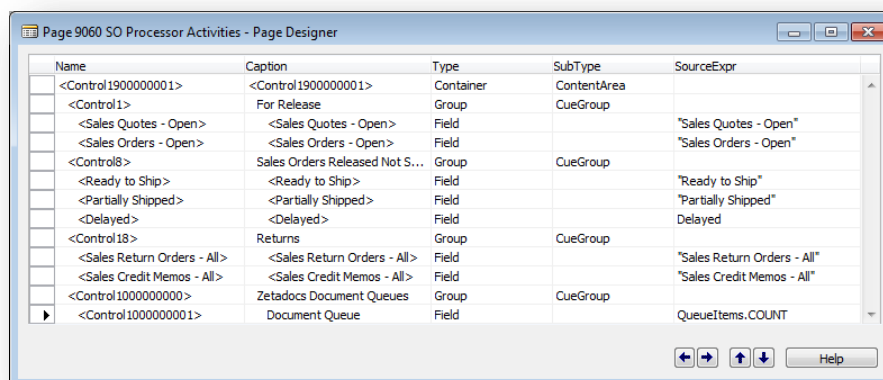
Figure 24 - SO Processor Activities - Page Designer

- Select the new field and press F9 to view code. Add the following code to the **OnDrillDown** trigger:

```
IF QueueSettings.GET('ZDQ0001') THEN
BEGIN
 ZdDocQueue.SetQueueSettings(QueueSettings);
 ZdDocQueue.RUN;
END;
```

The previous steps can be repeated to add any other document queues to the display.

11.9 Modify record forms for archive search and retrieval

To allow a user to search, retrieve and view captured documents from a NAV record form it is necessary to modify the form to provide a menu item that will do the search. For example the Posted Sales Shipment record form would be modified to add a Zetadocs Archive item on the Shipment menu, as below.
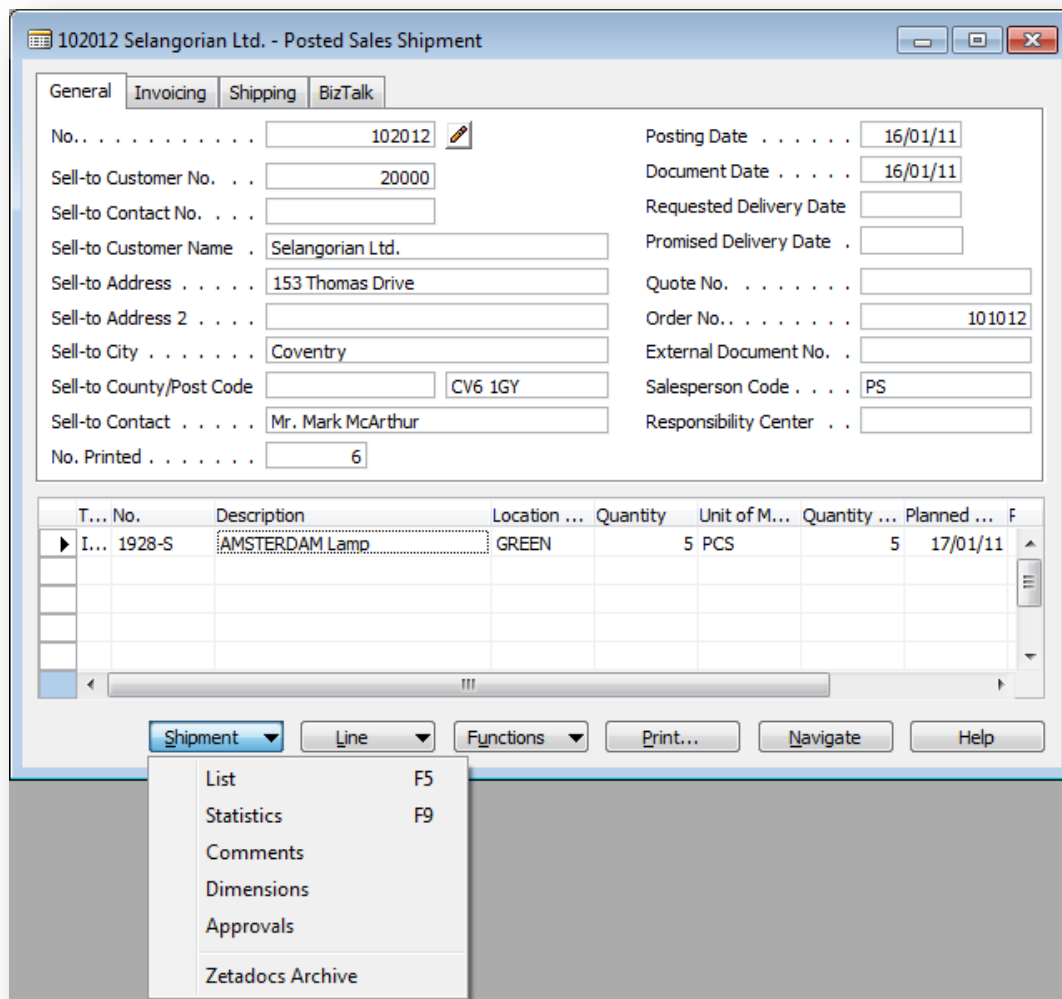
Figure 25 - Posted Sales Shipment form showing Zetadocs Archive menu item

In our example scenario we need to modify the Posted Sales Shipment form (and page if using RTC) to show the related document from the archive. To do this, please follow the instructions in section 4.5 Zetadocs Interface Modification Tool.

If you are using the Role Tailored Client, then make the equivalent changes in the page editor for the RTC record page.

11.10 Implementing you Custom Document Queue Actions (Custom Queues Only)

Overview

In this section we write the code to enable document linking and archiving for a particular document queue action. Zetadocs Capture Essentials comes with some standard Sales and Purchase Order actions already implemented. This section shows you how to implement your own custom actions. There are a number of functions that Zetadocs calls in the Zetadocs-Capture Customize codeunit that you need to implement. The steps to follow are:

- Write code in the **GetLink** function
- Write code in the **GetAdditionalMetadata** function

- Add permissions to codeunit
- Test document archiving

The following sections provide more detail on each step.

Write code in the GetLink function

For each action that is defined for the Archive button, you need to write some code in the function **GetLink**, to carry out that action in NAV.

For example, if the action is to link the captured document to an existing record, then in this function you would code the lookup that displays a form to allow the user to select the record and then return that RecordID. Zetadocs will then use the record ID during the document archive and extract the correct metadata.

The **GetLink** function has the following parameters:

Name	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.
ZdLinkResult	Record	Zetadocs Link Result	Read/Write	A writable runtime table to allow you to return the un-typed RecordID reference to a NAV record, error states and messaging.
ZdControlFile	Text [250]		Read	Path to the DQF file for the document queue item (XML file). Provided to allow you to fetch other information about converted files.

Sample Code:

This sample code shows an implementation of the GetLink function allowing the user to select the associated Sales Shipment record. Note that this function will be called for every Action. You will need to add a CASE statement using the Menu Code ID to identify the action the user has selected and write the appropriate code against each case.

```
   PROCEDURE GetLink@1000000007(ZdArchiveContext@1000000000 : Record 9009992;VAR
ZdLinkResult@1000000001 : Record 9009997;ZdControlFile@1000000002 : Text[250]);
  VAR
    SalesShipmentRec@1000000003 : Record 110;
    RecRef@1000000004 : RecordRef;
  BEGIN
    ZdUtilities.Log(0, 'C9009964 - Link');
    // Menu Code ID find out what action to perform

    // if there are any errors during processing set the error flag in ZdLinkResult to TRUE
    // and set the error description field to a useful error message

    CASE ZdArchiveContext."Menu Code ID" OF
      'ZDSHIP': // link to existing sales shipment
       BEGIN
         // make sure the sales shipment record does not have any filters
         SalesShipmentRec.RESET;
         // run the lookup form and check the result
         IF FORM.RUNMODAL(0, SalesShipmentRec) = ACTION::LookupOK THEN
         BEGIN
```

```
            // if the user selected a record use a RecordRef to get the RecordID for the record
            // and modify the ZdLinkResult record to include it
            RecRef.GETTABLE(SalesShipmentRec);
            ZdLinkResult."Record ID" := RecRef.RECORDID;
          END
          ELSE
          BEGIN
            // if the user cancelled, set the cancel flag in ZdLinkResult to true
            ZdLinkResult.Cancel := TRUE;
          END;
          // Call MODIFY to save the changes to the record
          ZdLinkResult.MODIFY;
        END;
      END;
    END;
```

Write code in the GetAdditionalMetadata function

Zetadocs calls the function **GetAdditionalMetadata** to get the values of metadata to be added to SharePoint when the document is archived.

The **GetAdditionalMetadata** function has the following parameters:

Name	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.
ZdLinkResult	Record	Zetadocs Link Result	Read/Write	A writable runtime table to allow you to return the un-typed RecordID reference to a NAV record, error states and messaging.
ZdArchiveMetadata	Record	Zetadocs Archive Metadata	Read/Write	A writable runtime table to allow you to modify the field values being archived to SharePoint and to fill in custom metadata that has multi-level table relations.

Sample Code:

This sample code shows an implementation of GetAdditionalMetadata that sets the values for the metadata for Record Type, Record Number, Company Number, Name and Organization. Note that this function will be called for every Action. You will need to add a CASE statement using the Record ID to identify the linked record and then write the appropriate code against each case to pull the specific metadata required.

```
  PROCEDURE GetAdditionalMetadata@1000000005(ZdArchiveContext@1000000000 : Record
9009992;ZdLinkResult@1000000001 : Record 9009997;VAR ZdArchiveMetadata@1000000002 : Record 9009993);
  VAR
    RecRef@1000000003 : RecordRef;
    fRef@1000000004 : FieldRef;
  BEGIN
    ZdUtilities.Log(0, 'C9009964 - GetAdditionalMetadata');

    // Use the record id to get the table number.  From the table number we know which fields to get the metadata from.

    // We are using short codes for the standard Zetadocs SharePoint fields.
    // These codes will be translated into the correct field names.
    // For custom fields just put the full field name in and it will be used.

    IF RecRef.GET(ZdLinkResult."Record ID") THEN
```

```
    BEGIN
      CASE RecRef.NUMBER OF
        110: // Sales Shipment Header Table
          BEGIN
            // First fill in the record type
            ZdArchiveMetadata.INIT;
            ZdArchiveMetadata.Name := 'ZetadocsRecordType';
            ZdArchiveMetadata.Value := 'Posted Sales Shipment';
            ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
            ZdArchiveMetadata.INSERT;

            // Field 3- "No."
            fRef := RecRef.FIELD(3);
            ZdArchiveMetadata.INIT;
            ZdArchiveMetadata.Name := 'RECORDNUMBER';
            ZdArchiveMetadata.Value := fRef.VALUE;
            ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::NUMBER;
            ZdArchiveMetadata.INSERT;

            // Field 2 - "Sell-to Customer No."
            fRef := RecRef.FIELD(2);
            ZdArchiveMetadata.INIT;
            ZdArchiveMetadata.Name := 'COMPANYNUMBER';
            ZdArchiveMetadata.Value := fRef.VALUE;
            ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
            ZdArchiveMetadata.INSERT;

            // Field 84 - "Sell-to Contact"
            fRef := RecRef.FIELD(84);
            ZdArchiveMetadata.INIT;
            ZdArchiveMetadata.Name := 'NAME';
            ZdArchiveMetadata.Value := fRef.VALUE;
            ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
            ZdArchiveMetadata.INSERT;

            // Field 79 - "Sell-to Customer Name"
            fRef := RecRef.FIELD(79);
            ZdArchiveMetadata.INIT;
            ZdArchiveMetadata.Name := 'ORGANIZATION';
            ZdArchiveMetadata.Value := fRef.VALUE;
            ZdArchiveMetadata.Type := ZdArchiveMetadata.Type::STRING;
            ZdArchiveMetadata.INSERT;
          END;
      END;
    END;
  END;
```

Add Permissions to codeunits

It is advisable to check that the correct permissions are granted to the Zetadocs-Capture Customize and the Zetadocs-Capture Integration codeunits for the table data of the records you wish to link to. This ensures that the codeunits will be able to read all the record information necessary as part of your custom link actions.

Test document archiving

At this stage you should test that the functionality you have added works by doing the following:

- Scan a document to your new document queue.
- Check that the document is listed in the document queue within NAV and can be viewed correctly.
- With the document selected click the Archive button and complete the actions.

- Browse to the SharePoint library and check that the document has been archived successfully in the correct location.
- View the document properties in SharePoint and check these are as expected.
- Check the Zetadocs Archive option from the record form finds the archived document in SharePoint.
- (Finally, when you have completed your testing delete any test documents from the SharePoint archive.)

12. **Enabling Barcode Support**

Zetadocs supports the addition of barcodes to reports printed from NAV using a barcode font to print unique information about an NAV object. This places a barcode into the report output, which can be used in a number of manners. For example, with documents like invoices or sign off sheets which are distributed from NAV before being signed or filled in and returned. In these cases when the document is added back into the system document queue via scanning or email etc, it is captured back into the system and OCR'd. This process detects the barcode and decodes the information contained within it. It is then used to link the returned document to the original document in the archive. This enables users to track documents through a variety of business processes.

Barcode Formats

Zetadocs for NAV supports Code 128 format barcodes only, however the OCR software has the capacity to read and process those listed below. We recommend a minimum of Font-size 32 and a scanner resolution dpi of 300 or greater. It should also be noted that some barcode formats only support upper case letters, such as Code 39, if using such a barcode format please ensure you only use supported characters in your barcodes.

Numeric-only barcodes

- EAN-13 (European Article Numbering, an international retail product code)
- EAN-8 (compressed version of EAN code for use on small products)
- UPC-A (Universal Product Code seen on almost all retail products in the USA and Canada)
- UPC-E (compressed version of UPC code for use on small products)
- Code 11 (used primarily for labelling telecommunications equipment)
- Interleaved 2 of 5 (compact numeric code, widely used in industry, air cargo, other applications)
- Industrial 2 of 5 (older code not in common use)
- Standard 2 of 5 (older code not in common use)
- Codabar (older code often used in library systems, sometimes in blood banks)
- Plessey (older code commonly used for retail shelf marking)
- MSI (variation of the Plessey code commonly used in USA)
- PostNet (used by U.S. Postal Service for automated mail sorting)

Alphanumeric barcodes

- Code 39 (de facto standard for Government, Manufacturing, BarCode Industry, Education, and Business applications, in use world-wide)
- Code 93 (compact code similar to Code 39)
- Code 128 (very capable code, excellent density, high reliability; in very wide use world-wide)
- LOGMARS (same as Code 39, this is the U.S. Government specification)

Barcode Options

- The Zetadocs server searches for barcode information when processing graphics and PDF image files. Any barcodes which are included in the file are saved alongside the document, and can be used by custom processing functions to identify the document and automate its processing.
- A typical usage is to encode the NAV document number directly – eg adding the shipping note number as a barcode. However for more complex requirements a separate ID could be stored instead – eg storing a lookup key into a custom table within NAV which is used to store custom information about the document. Barcode information is passed transparently to the custom code when processing for maximum flexibility.
- Zetadocs for NAV is supplied with a standard barcode font. When used with this font, the barcode recognition supports the following features:
  - Encoding of variable length data strings, including letters A-Z (from ANSI standard Western European character set), digits 0-9, plus a selection of punctuation characters.
  - Barcode including text (user readable) version for manual checking or processing.
  - Protection against misreading, using automatically generated checksum data.
  - Support for documents scanned upside down.
  - Most other common barcode formats can also be supported. Please contact Equisys for further details if there is a requirement to use a specific barcode format.
  - Barcode processing requires the OCR add-on module.

> o Use of the barcode to identify and process the document requires customization work by the VAR using the Zetadocs for NAV Capture SDK, as described below.

Note: This method works for most reports; however, due to the customizable nature of reports it may not fit all reports exactly. Therefore, the location of where to insert the code below may need to vary but the code will remain the same.

Installation Overview

In this section we write the code to enable document auto linking and archiving. You will need to modify the printed report to include a barcode and there are also a number of functions that Zetadocs calls from the Zetadocs-Capture Customize codeunit that you need to implement. The steps to follow are:

- Installing the barcode font
- Modify a report to add a barcode
- Write code in the **GetLinkDisplayString** function
- Write code in the **GetAutoLink** function
- Test document auto linking

The following sections provide more detail on each step.

12.1 Installing the barcode font

Barcodes can be added to reports by simply using a suitable font. The chosen barcode font must be installed on each client PC that will be used to print the report. There are many different types of barcode font available, but we have found that Code 39 barcodes work well with Zetadocs. You can download and install a free Code 39 barcode font from http://www.barcodesinc.com/free-barcode-font/. Choose either the standard or extended font and follow the included instructions to install the font on each client PC. Barcode fonts often have limited character support e.g. A-Z and 0-9. So please ensure that the characters you wish to use are supported by the font.

12.2 Modify an NAV report to add a barcode

Before you modify your report, you need to decide what unique piece of information you will use for the barcode, so that the printed report can subsequently be identified in the capture stage. This will usually be the record number of the NAV record. For example for the Shipment Note report you could use the Shipment record number from the Posted Sales Shipment Record.

Follow these instructions to modify a report to add a barcode:

- Open the NAV Development Environment/classic client and open the Object Designer (Shift+F12).
- Locate the report you wish to modify in the Object Designer and select **Design**.
- In the Report Designer select **View➜Sections**.
- Open the toolbox **View➜Toolbox**.
- Select the text box tool and create one in a suitable location for the barcode - we suggest the main header section.
- Right-click on the text box and select **properties**.
- Set the text box **FontName** to the barcode font name
  e.g. FontName = Free 3 of 9 Extended
- Edit the **FontSize** to a suitable value, we recommend a minimum size of 32.
- Set the text box SourceExpr property to the value to be used for the barcode
  e.g. SourceExpr = STRSUBSTNO('*SHIP%1*',"Sales Shipment Header"."No.")
- Ensure that the barcode starts with and ends with **"*"**, otherwise the barcode will not be recognized by the scanner.
- We also suggest that you add another text box below the barcode to display the value in a standard font so that it is also human readable.
- Save the changes to the report.
- Test that the report prints OK and that the barcode is clearly legible.

If you are using the Role Tailored Client, then make the equivalent changes in the report editor for the RTC report.

12.3 Adding code to the GetLinkDisplayString function

Zetadocs calls the function **GetLinkDisplayString** to allow you to return a suitable text string to be displayed in the document queue form. If no value is returned by this function, then the display will default to the barcode text for the first barcode found in the captured document. If the document contains multiple barcodes, these will be represented as multiple records in the table.

The **GetLinkDisplayString** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdDocQueueBarcodes	Record	Zetadocs Doc. Queue Barcodes	Read	A read only runtime table that allows you to access the values of all barcodes from the document queue item.
Return Value	Text[120]		Write	The text to display in the document queue "Link" column.

- Open the NAV Development Environment/classic client and open the Object Designer (Shift+F12).
- Locate the Codeunit ID:9009964 **Zetadocs-Capture Customise** in the Object Designer and select **Design**.
- Scroll down to the GetLinkDisplayString section.
- You will notice the code matches that displayed below, this indicates that it is setup for the Shipment Report, which we provide as a sample report.
- To add support for other reports we need to add additional if statements to ensure your system is configured to deal with barcodes which start with other details.

Sample Code:
This sample code shows an implementation of GetLinkDisplayString that returns a display string for a Shipment record.

```
// Call reset to clear any filters that may be on the barcodes temporary table
ZdDocQueueItemBarcodes.RESET;

IF NOT ZdDocQueueItemBarcodes.FIND('-') THEN
BEGIN
 // There are no barcodes so we leave the link string blank
 EXIT('');
END;

info := ZdDocQueueItemBarcodes.Value;

// if the barcode starts with SHIP
IF (STRLEN(info) > 4) AND (COPYSTR(info, 1, 4) = 'SHIP') THEN
BEGIN
  info := STRSUBSTNO(strSalesShipment, COPYSTR(info, 5));
 END;
END;
```

Customising the GetLinkDisplayString function

The document specific section of code below contains an IF statement which enables the codeunit to add additional information to the document queue when it detects a barcode which begins with SHIP. The makeup of this string is obviously determined by the unique value you wish to use for your barcode.

String in the report which generates the barcode
```
SourceExpr = STRSUBSTNO('*SHIP%1*',"Sales Shipment Header"."No.")
```

This would for example generate a value of *SHIP 102028*.

Corresponding code required in the codeunit
```
// if the barcode starts with SHIP
```

```
IF (STRLEN(info) > 4) AND (COPYSTR(info, 1, 4) = 'SHIP') THEN
BEGIN
  info := STRSUBSTNO(strSalesShipment, COPYSTR(info, 5));
END;
```

The code then detects that our barcode starts with SHIP and acts accordingly.

Adding additional IF statements for other reports

If then you wanted to add barcode support to another report then you would need to modify the report as per the steps in section 12.2 adding the SourceExpr value shown below. Note you can use whatever identifier seems appropriate in this case we have chosen to setup a Sales Invoice report so have chosen SINV and have replaced Sales Shipment Header for Sales Invoice Header.

```
SourceExpr = STRSUBSTNO('*SINV%1*',"Sales Invoice Header"."No.")
```

We then need to add an additional if statement to match this:

```
// if the barcode starts with SINV
IF (STRLEN(info) > 4) AND (COPYSTR(info, 1, 4) = ' SINV ') THEN
BEGIN
  info := STRSUBSTNO(strSalesInvoice, COPYSTR(info, 5));
END;
```

This can be repeated as desired for any remaining reports.

12.4 Write code in the GetAutoLink function

Zetadocs calls the function **GetAutoLink** for each item in the queue so that you can determine if it can be automatically associated with a NAV record. Details of recognized barcodes are included so that you can write any necessary functionality to lookup the NAV record. If you plan to have this function called automatically from the NAS server or from other codeunits, it is recommended that you do not include user input operations.

The **GetAutoLink** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.
ZdDocQueueBarcodes	Record	Zetadocs Doc. Queue Barcodes	Read	A read only runtime table that allows you to access the values of all barcodes from the document queue item.
ZdLinkResult	Record	Zetadocs Link Result	Read/Write	A writable runtime table to allow you to return the un-typed RecordID reference to a NAV record, error states and messaging.
ZdControlFile	Text [250]		Read	Path to the DQF file for the document queue item (XML file). Provided to allow you to fetch other information about converted files.

Sample Code:
This sample code shows an implementation of GetAutoLink that finds and returns the matching record ID.

```
   PROCEDURE GetAutoLink@1000000006(ZdArchiveContext@1000000002 : Record 9009992;VAR
ZdLinkResult@1000000001 : Record 9009997;ZdControlFile@1000000000 : Text[250];VAR
ZdDocQueueBarcodes@1000000003 : Record 9009995);
   VAR
     msgNoBarcodes@1000000005 : TextConst 'DAN=Auto linking failed.  No barcodes were detected on the
document.;DEU=Auto linking failed.  No barcodes were detected on the document.;ENU=Auto linking failed.  No barcodes
were detected on the document.;ESP=Auto linking failed.  No barcodes were detected on the document.;FRA=Auto linking
failed.  No barcodes were detected on the document.;ITA=Auto linking failed.  No barcodes were detected on the
document.;NLD=Auto linking failed.  No barcodes were detected on the document.;ENG=Auto linking failed.  No barcodes
were detected on the document.';
     msgCouldNotFindRecord@1000000006 : TextConst 'DAN=Auto linking failed.  Could not find record matching barcode:
%1;DEU=Auto linking failed.  Could not find record matching barcode: %1;ENU=Auto linking failed.  Could not find record
matching barcode: %1;ESP=Auto linking failed.  Could not find record matching barcode: %1;FRA=Auto linking failed.
Could not find record matching barcode: %1;ITA=Auto linking failed.  Could not find record matching barcode:
%1;NLD=Auto linking failed.  Could not find record matching barcode: %1;ENG=Auto linking failed.  Could not find record
matching barcode: %1';
     barcodeVal@1000000004 : Text[80];
     ShipmentRec@1000000007 : Record 110;
     RecRef@1000000008 : RecordRef;
   BEGIN
     ZdUtilities.Log(0, 'C9009964 - AutoLink');
```

This code should be the same for every report and doesn't need repeating with each if statement.

```
   // Use the barcodes that are passed in to find the record to link to.

   // Call reset to clear any filters that may be on the barcodes temporary table
   ZdDocQueueBarcodes.RESET;

   IF NOT ZdDocQueueBarcodes.FIND('-') THEN
   BEGIN
    // There are no barcodes so don't modify the record.
    // Processing will fall back to calling the Link function for the manual method.
    EXIT;
   END;

   barcodeVal := ZdDocQueueBarcodes.Value;
```

IF Statement
```
 // If the barcode starts with SHIP it means it is a shipment note.
   // The barcode will be in the format SHIP000000, where 000000 is the shipment number
   IF (STRLEN(barcodeVal) > 4) AND (COPYSTR(barcodeVal, 1, 4) = 'SHIP') THEN
   BEGIN
    ShipmentRec.RESET;
    ShipmentRec."No." := COPYSTR(barcodeVal, 5);
    // If we can find the record that the barcode refers to
    IF ShipmentRec.FIND THEN
    BEGIN
     // if the user selected a record use a RecordRef to get the RecordID for the record
     // and modify the ZdLinkResult record to include it
     RecRef.GETTABLE(ShipmentRec);
     ZdLinkResult."Record ID" := RecRef.RECORDID;
     ZdLinkResult.MODIFY;
    END;
   END;

   EXIT;
   END;
```

Modified IF Statement for the Sales Invoice

```
// If the barcode starts with SINV it means it is a Sales Invoice.
   // The barcode will be in the format SINV000000, where 000000 is the Sales Invoice number
   IF (STRLEN(barcodeVal) > 4) AND (COPYSTR(barcodeVal, 1, 4) = 'SINV') THEN
   BEGIN
     ShipmentRec.RESET;
     ShipmentRec."No." := COPYSTR(barcodeVal, 5);
     // If we can find the record that the barcode refers to
     IF ShipmentRec.FIND THEN
     BEGIN
       // if the user selected a record use a RecordRef to get the RecordID for the record
       // and modify the ZdLinkResult record to include it
       RecRef.GETTABLE(ShipmentRec);
       ZdLinkResult."Record ID" := RecRef.RECORDID;
       ZdLinkResult.MODIFY;
     END;
   END;


   EXIT;
 END;
```

Test document auto linking

At this stage you should test that the functionality you have added works by doing the following:

- Print a modified report that includes a barcode.
- Scan the printed report into your new document queue.
- Check that the document is listed in the document queue within NAV and can be viewed correctly.
- Check that the scanned document displays the appropriate text in the Link column.
- Click the Archive button and complete the actions.
- Browse to the SharePoint library and check that the document has been archived successfully in the correct location.
- View the document properties in SharePoint and check these are as expected.
- (Finally, when you have completed your testing delete any test documents from the SharePoint archive.)

12.5 Further Capture Customizations

Overview

In this section a number of advanced functions are described that will help you to do further customisation of the document queue capture process. The functions available are:

- PreArchive
- PostArchive

PreArchive

The **PreArchive** function is similar to the **OverrideSendResult** function in the delivery parts of the Zetadocs SDK. This function gives a writable copy of the final information to be used in the archiving of the document from the queue. It is at this point that you get the opportunity to override the archive location and content type.

The **PreArchive** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provide context information like the queue the item is in and the menu item that was clicked by the user.
ZdArchiveSettings	Record	Zetadocs	Read/Write	A writable runtime table to allow

Parameter	Type	Sub-type	Read/Write	Description
		Archive Settings		you to modify properties of the archive action such as whether to archive and the archive location.

PostArchive

Zetadocs calls the **PostArchive** function to inform you of the archiving result and to allow you to implement workflow based on that information.

The **PostArchive** function has the following parameters:

Parameter	Type	Sub-type	Read/Write	Description
ZdArchiveContext	Record	Zetadocs Archive Context	Read	A read only runtime table to provides context information like the queue the item is in and the menu item that was clicked by the user.
ZdArchiveResult	Record	Zetadocs Archive Result	Read/Write	A writable runtime table to allow you to find out if the archive was successful and get the URL of the archived file.
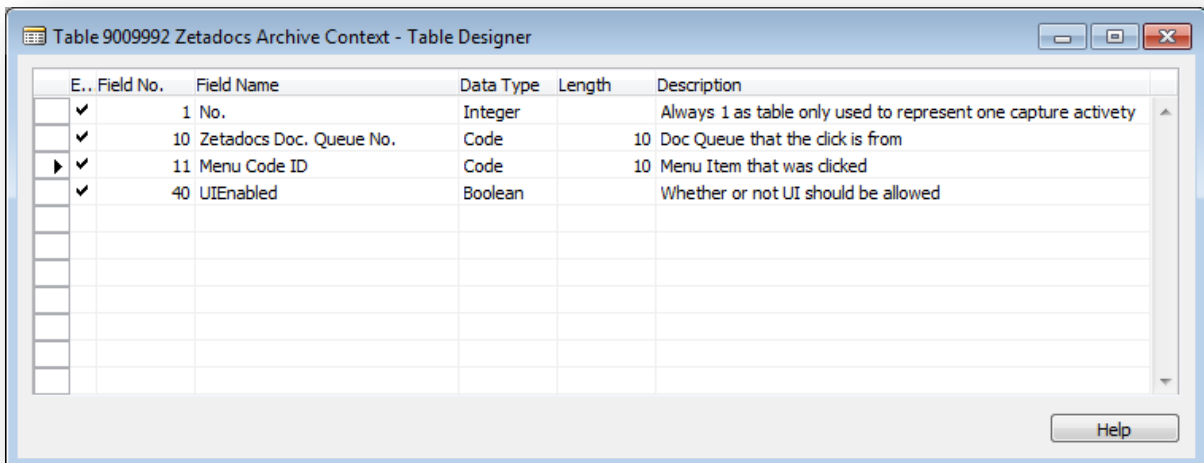
12.6 Capture Reference

Overview

This section gives details of the records used by the capture functions:
- Zetadocs Archive Context
- Zetadocs Archive Metadata
- Zetadocs Archive Result
- Zetadocs Archive Settings
- Zetadocs Doc. Q. Item Barcode
- Zetadocs Link Result

Zetadocs Archive Context
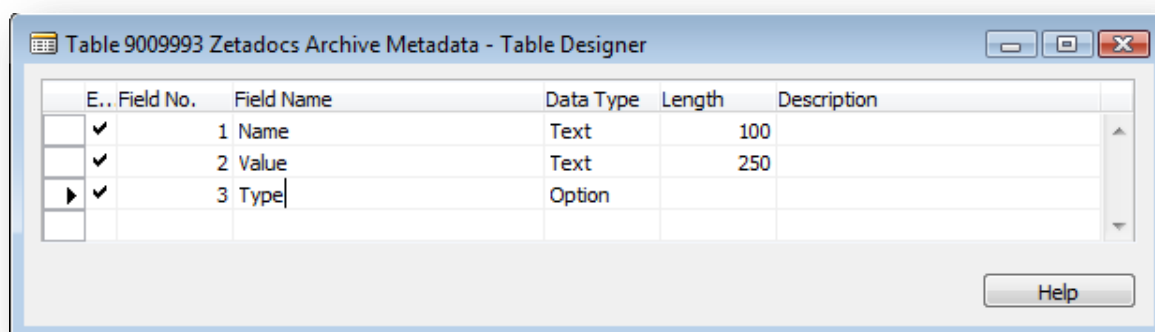
Figure 26 - Zetadocs Archive Context Table

The Zetadocs Archive Context table has the following fields:
- **No.:** Table record entry - please ignore

- **Zetadocs Doc. Queue No. :** Foreign Key to Zetadocs Document Queue table to allow you to know from which document queue the Link function has been called.
- **Menu Code ID:** Foreign Key to Zetadocs Document Queue Menu Item No. table to allow you to know which menu item had been selected by the user. Blank if used with GetAutoLink function.
- **UIEnabled:** Indicates whether UI (User Interface) dialogs should be shown or suppressed.

Zetadocs Archive Metadata
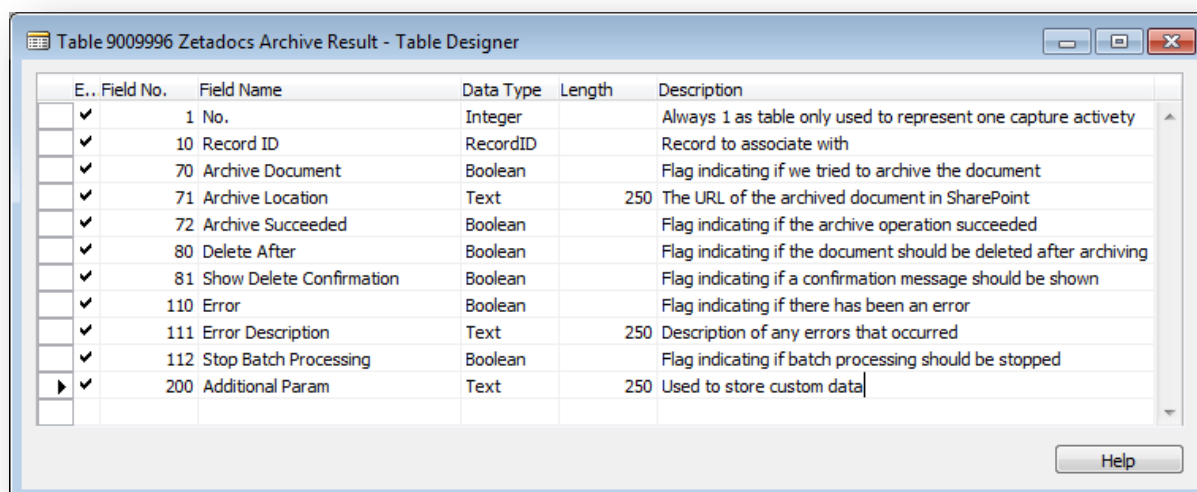
Figure 27 - Zetadocs Archive Metadata Table

The Zetadocs Archive Metadata table has the following fields:
- **Name:** Archive column name in SharePoint
- **Value:** The metadata value expressed as a string
- **Type:** The metadata type. Available types are NUMBER, DATE and STRING.

Zetadocs Archive Result

Figure 28 - Zetadocs Archive Result Table

The Zetadocs Archive Result table has the following fields:
- **No.:** Table record entry - please ignore
- **Record ID:** Un-typed record ID of the NAV record that the captured document is associated with.
- **Archive Document:** Indicates if the captured document is to be archived to SharePoint
- **Archive Location:** The URL of the archived document in SharePoint.
- **Archive Succeeded:** Indicates if the archive was successful.
- **Delete After:** Indicates if the document should be deleted
- **Show Delete Confirmation:** Indicates to Zetadocs whether prompt the user for confirmation of delete.

- **Error:** Indicates to Zetadocs whether an error occurred during the function.
- **Error Description:** A description of the error that occurred.
- **Stop Batch Processing:** Used only when auto linking where this Boolean indicates whether batch processing should stop or continue.
- **Additional Param:** Additional parameter to allow extra data to be passed between Zetadocs functions.

Zetadocs Archive Settings

Figure 29 - Zetadocs Archive Settings Table

The Zetadocs Archive Settings table has the following fields:
- **No.:** Table record entry - please ignore
- **Record ID:** Un-typed record ID of the NAV record that the captured document is associated with.
- **Archive Document:** Indicates if the captured document is to be archived to SharePoint
- **Archive Location:** The location to archive the document to in SharePoint.
- **Archive Document Type:** The SharePoint content type to be used when archiving.
- **Error:** Indicates to Zetadocs whether an error occurred during the function.
- **Error Description:** A description of the error that occurred.
- **Stop Batch Processing:** Used only when auto linking where this Boolean indicates whether batch processing should stop or continue.
- **Additional Param:** Additional parameter to allow extra data to be passed between Zetadocs functions.

Zetadocs Doc. Q. Item Barcode
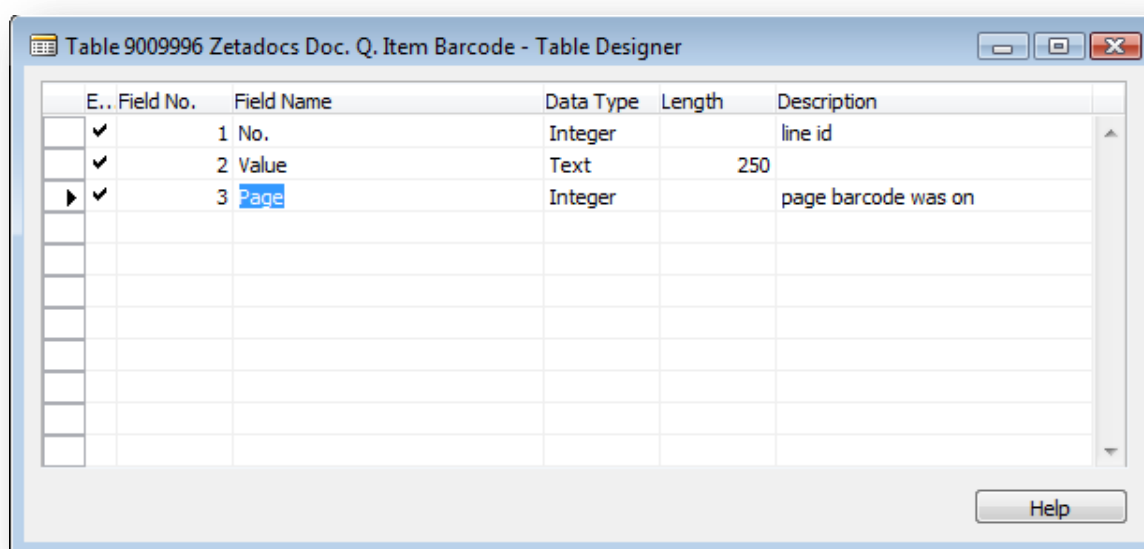
Figure 30 - Zetadocs Doc. Q. Item Barcode Table

The Zetadocs Doc. Q. Item Barcode table has the following fields:
- **No.:** Table record entry - please ignore
- **Value:** The barcode expressed as a string
- **Page:** The page number the barcode was on

Zetadocs Link Result
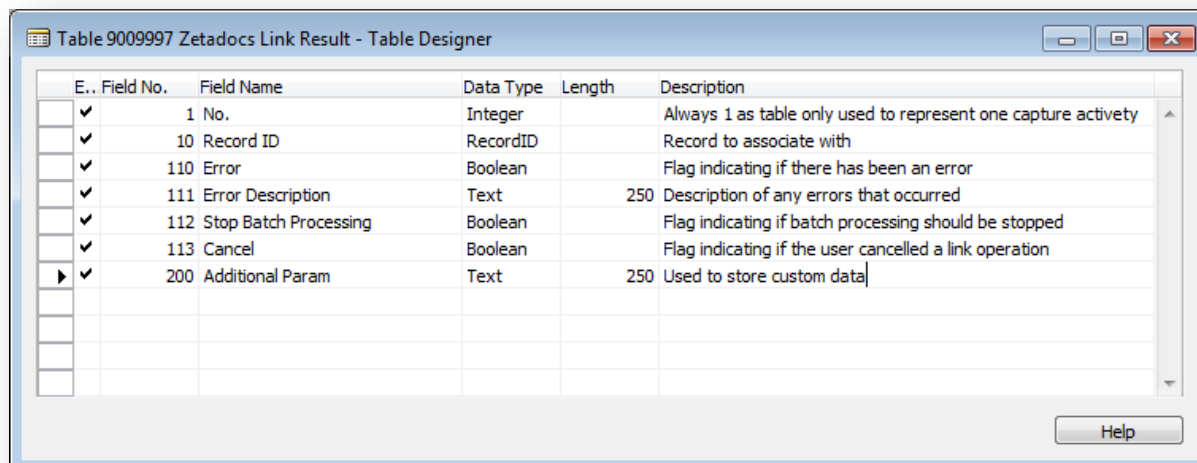
Figure 31 - Zetadocs Link Result Table

The Zetadocs Link Result table has the following fields:
- **No.:** Table record entry - please ignore
- **Record ID:** Un-typed record ID of the NAV record that the captured document is associated with.
- **Error:** Indicates to Zetadocs whether an error occurred during linking.
- **Error Description:** A description of the error that occurred.
- **Stop Batch Processing:** Used only when auto linking where this Boolean indicates whether batch processing should stop or continue.
- **Cancel:** Indicates whether the Archive action should be cancelled.
- **Additional Param:** Additional parameter to allow extra data to be passed between Zetadocs functions.

13. Automation using Extracted Text

Now that we have covered how you can use barcodes to automate some of your processes, we are going to demonstrate how text extraction on document capture can be used to add yet further automation. This section will deal with how to extract the text from a captured document and then an example of how this can be used to automate processes.

13.1 Enabling Zetadocs Document Capture Text Extraction

Zetadocs Capture Plus supports the parsing of document text, this can be used for identification numbers and metadata to facilitate document recognition. This then allows the automated linking and archiving of documents with NAV records. Implementing automated document recognition has many benefits including the streamlining of processes, by the automation of tedious repetitive activities and by automatically initiating internal workflows. To access this functionality you must enable text extraction on Zetadocs Document Queues configurations in the Zetadocs Server and then use a Zetadocs for NAV SDK function to get the path to the extracted text file.

Enabling text extraction in the Zetadocs Server

Each configured queue in the Zetadocs Server can have text extraction enabled independently. This allows you to enable text extraction processing on the queues in which you expect to implement document recognition. Furthermore it means that the unnecessary processing of documents is avoided. It is therefore recommended that you create separate queues for documents for which you intend to implement document recognition and for those you do not.

Configuring the Zetadocs Server

The image below shows a sample Zetadocs Server config.xml file. Note the element <EnablePDFTextExtractionToFile> on each queue <DocsQ>.

To enable text extraction set the value of the xml element to **true** to enable text extraction. NOTE: Due to xml serialization the value is case sensitive and must be set to **true** or **false**. True or TRUE or any other variation will be invalid.

```
<?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>
  </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>
  </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>

Accessing the extracted text file from NAV

Once you have enabled the text extraction in the Zetadocs Server you will need to implement parsing of the text file in NAV. This is done using the Zetadocs Capture Customize codeunit.

In the Zetadocs- Capture Customize codeunit trigger GetAutoLink() the path to the control file for queue items is available as the ZdControlFile :Text[250] parameter. Using this you can call a Zetadocs Utilities function to return the associated extracted text file path for that item.

textFilePath := ZdUtilities.GetExtractedTextFilePath(ZdControlFile);

You can now implement your own functionality to parse the text file for expected text metadata which will help you to identify the document and its associated record in much the same manner as is described for the barcode recognition feature of Zetadocs for NAV. For more information, please see section 12.

13.2 Approvals in NAV using Extracted Text

Now that we have successfully identified and extracted the information we require we can put it to work in NAV, in this example we will be setting NAV so that it starts an approval process.

In this example we will be looking at the following business process:

- Raise and send out a purchase order from NAV using Zetadocs
- Received by the vendor who will raise a sales order and send the goods.
- They will attach a shipment note to the delivery and also send a purchase order.
- These documents will be Captured into the relevant Zetadocs Document Queue either via scanning of hardcopies or processing of other documents by the Zetadocs Server.
- When the Purchase Invoice is Captured, Zetadocs extracts the text including the original purchase order number.
- When the Purchase Invoice is processed and added to the Zetadocs Archive this set in motion the approval process in NAV.

The existing Document Queues as setup by default do not support the initialization of the approval process. As such we need to adjust the Zetadocs-Capture Customize codeunit so that it begins the approval process when an invoice is archived.

Creating the IsValueInFile function

- Select the Zetadocs-Capture Customize codeunit in the object designer, and select Design.
- Select View→C/AL Globals and choose the functions tab.
- Add the function **IsValueInFile**, details below.

Name	IsValueInFile (Value, FilePath)
Description	Searches if a given **Value** is present in the file pointed by **FilePath**
Arguments	**Value** text[30] The value to search for **FilePath** text[1024] The associated text file to look in
Returned value	**True** if the number is present **False** if not

Adding Code into the IsValueInFile function

Now that we have added the function into the codeunit we need to add the following code, open the C/AL editor (F9) and paste in the code below into the IsValueInFile section. We recommend that you review this now to gain an understanding of how it operates, comments have been included throughout to explain the various sections.

CODE:
```
IsValueInFile(text[30] Value; text[1024] FilePath)
{
 // Set file to be opened in text mode and for reading only
 file.TEXTMODE(TRUE);
```

```
file.WRITEMODE(FALSE);

// If we can't open the file, just return false as we cannot match a value
IF NOT file.OPEN(FilePath) THEN
BEGIN
  EXIT(FALSE);
END;

// Cycle through all lines in the file until we find te value we were
// looking for or
// we reach the end of the file
REPEAT
  // Read each line at a time
  IF file.READ(line) <> 0 THEN
  BEGIN
    // Check if value appears anywhere in the line
    // NOTE: If values wrap over more than one line they will not be matched
    pos := STRPOS(line, Value);
    IF (pos <> 0) THEN
    BEGIN
      // We've found the value we were looking for, close the file and
              // return true
      file.CLOSE;
      EXIT(TRUE);
    END;
  END;
UNTIL file.POS = file.LEN; // Check if we have reached the end of the file

// We've reached the end of the file without finding the value we were
//looking for
// Close the file and return false
file.CLOSE;
EXIT(FALSE);
}
```

Creating the GetMatchingPurchaseOrder function

- Next return to the functions tab, View→C/AL Globals.
- Add the function **GetMatchingPurchaseOrder,** details below.

Name	**GetMatchingPurchaseOrder (Orders, ZdControlFile)**
Description	Searches through the ZdControlFile to find a matching Purchase Order
Arguments	**Orders** record List of opened purchase orders **ZdControlFile** text[1024] The control file of the document queue item
Returned value	**True** if the Order matches the DQF file **False** if not

Adding Code into the GetMatchingPurchaseOrder function

Now that we have added the function into the codeunit we need to add the following code, open the C/AL editor (F9) and paste in the code below into the GetMatchingPurchaseOrder section. We have included comments throughout to explain the various sections.

CODE:
```
GetMatchingPurchaseOrder (Record Orders, Text[1024] ZdControlFile)
{
// Clear any filters on the Orders record
Orders.RESET;

// Set range so we are only looking at orders
Orders.SETRANGE(Orders."Document Type",Orders."Document Type"::Order);
```

```
// Make sure there are records to search through
IF Orders.FIND('-') THEN
BEGIN
        //Loop through records until we find a matching one or reach the end
REPEAT
        // Check if the order number can be found in the file
        // NOTE: For this example we have changed the orders number
        //series so order numbers will look like:
        // "PO-00001" This should be unique in the file so we don't get
        //false matches
        IF IsValueInFile(     Orders."No.",
                ZdUtilities.GetExtractedTextFilePath(
                                        ZdControlFile)) THEN
        BEGIN
        // We've found the right purchase order so return true
        EXIT(TRUE);
        END;
UNTIL Orders.NEXT = 0;
END;

// Reached the end of the orders without matching one, so return false
EXIT(FALSE);
}
```

Adjusting the GetAutoLink Function

Now we have created and added code to our variables we need to adjust the **GetAutoLink** function. This is so it can look through all the Orders and find out if one of them matches up the Purchase Order number that is present in the associated file being archived. Scroll to the GetAutoLink section and add the code so that it surrounds the existing code as shown below.

CODE:

```
GetAutoLink  (…)
{
ZdUtilities.Log(0, 'C9009964 - AutoLink');

CASE ZdArchiveContext."Zetadocs Doc. Queue No." OF
        'ZDQ0020','ZDQ0021':
        // Purchase Invoice and Purchase Receipt Document Queues
        BEGIN
    // Use the information in the control file to find a matching purchase order
    IF GetMatchingPurchaseOrder(Orders, ZdControlFile) THEN
    BEGIN
     // use a RecordRef to get the record id for the matching record
     RecRef.GETTABLE(Orders);
     ZdLinkResult."Record ID" := RecRef.RECORDID;
     ZdLinkResult.MODIFY;
    END;
  END
 ELSE
  BEGIN
                ...
                << EXISTING CODE HERE >>
                ...
  END
 EXIT;
}
```

Adjusting the PostArchive Function

Next we need to add some extra code into the **PostArchive** function to send the Purchase Approval for a given item. Again this code needs to be pasted around the existing code.

```
PostArchive (…)
{
 // Check if the archive was successful
 IF NOT ( ZdArchiveResult."Archive Document" AND
         ZdArchiveResult."Archive Succeeded") THEN
 BEGIN
  EXIT;
 END;


 // Check this is the purchase invoice document queue
 IF ZdArchiveContext."Zetadocs Doc. Queue No." = 'ZDQ0020' THEN
 BEGIN
         // Use a RecordRef to get values from the record
         IF NOT RecRef.GET(ZdArchiveResult."Record ID") THEN
         BEGIN
                 // Could not get the record from the record id
                 EXIT;
         END;

         // Get a fieldref to the document type field
         fRef := RecRef.FIELD(1);

         // Store the value as an integer so that we can compare it
         DocType := fRef.VALUE;

         // Check we have linked to an order
         IF (DocType <> PurchaseOrder."Document Type"::Order) THEN
         BEGIN
                 // If it is not an order we cannot start approval, so exit
                 EXIT;
         END;

         // Get a fieldref to the No. field
         fRef := RecRef.FIELD(3);

         // Store the order no
         OrderNo := fRef.VALUE;

         // Set range of the purchase order record so only looking at
         // orders
         PurchaseOrder.SETRANGE( "Document Type",
                         PurchaseOrder."Document Type"::Order);

         // Set range so only looking at this specific order
         PurchaseOrder.SETRANGE("No.",OrderNo);

         // Check that an order exists in the range
 IF PurchaseOrder.FIND('-') THEN
 BEGIN
   // Call into approvals management codeunit to start the approval process
   IF ApprovalsMgmt.SendPurchaseApprovalRequest(PurchaseOrder) THEN;
 END;
END;
```

```
{
 …
 << EXISTING CODE HERE >>
 …

}
```

This should complete the setup required for the Purchase Invoices to generate an approval process, obviously the above example can be modified using different queue id's to effect different queues and thus document types.

Delivery Plus

This following sections setup of the features provided as part of the Zetadocs for NAV Delivery Plus module. Users who wish to install and utilise these features will need to purchase the appropriate licence from Equisys.

Chapters

Zetadocs Delivery Plus

Send Any Report

Bespoke Contacts and Company Types

Zetadocs-Send Customize codeunit

14. Zetadocs Delivery Plus

The Zetadocs for NAV Addin can be split into 2 main areas, data and processing. The installation guide dealt primarily with setting up the data that would determine our report formatting and send information when sent to the Zetadocs Client. We saw how reports could be grouped into Document Sets which share a common rule for formatting and archiving and we saw how rules can be stored which alter formatting and send information dependant on who we were sending to. It is assumed then that we have a good understanding of the information involved in sending a report using Zetadocs for NAV. In this architectural overview the process of collating the sending information, which we refer to as the "Send Results", is explained. This includes a breakdown of the main processing areas and their use in integrating with NAV as well as an insight into the customization potential and extensibility of Zetadocs for NAV.

14.1 Understanding the SDK Framework

Before continuing it is recommended that you read the Zetadocs for NAV SDK Primer section of this document.

The three elements to the Zetadocs for NAV Delivery Plus SDK are:

1. **Interfaces**
   - NAV Reports
     - Reports need to be modified to call the Zetadocs for NAV Core sending codeunits. Instructions on this are available in section 4.6 the Zetadocs Report Modification Tool.
2. **Zetadocs Core Codeunits**
   - Zetadocs Send codeunit
     - This codeunit provides functions that are called by the Interfaces.
3. **Integration and Customization Codeunits**
   - Zetadocs Send Integration codeunit
     - This codeunit provides functions called by the Zetadocs Core codeunits to integrate Zetadocs Delivery functionality into bespoke records or other areas of NAV beyond Sales and Purchase Order Processing
   - Zetadocs Send Customize
     - This codeunit has functions called by the Zetadocs Core codeunits to allow the developer to implement bespoke business logic and delivery and archive settings.

14.2 Process Flow

Now let's look at the flow of data that occurs when sending a report. The following diagram helps to visualize the process and will aid us in discussing the relevant parts of the product.

As you can see from the diagram it starts with a NAV report that has been modified for Zetadocs for NAV. A report is generally based on a set of records that are used to produce some report output, a document for each record. The records contain information that relates to a contact and possibly a company, to whom the report should be sent (i.e. the recipient). Sometimes that information can be a direct table reference to an existing table that represents a contact or company for example, or it may contain some other form of references which can be used to find the contact information from another source. This could be a look up table of some sort based on some bespoke logic. The Zetadocs Send Results Gen codeunit is the central processing controller and builds a runtime list of send results in a temporary table of type "Zetadocs Send Result" for each record in the report.
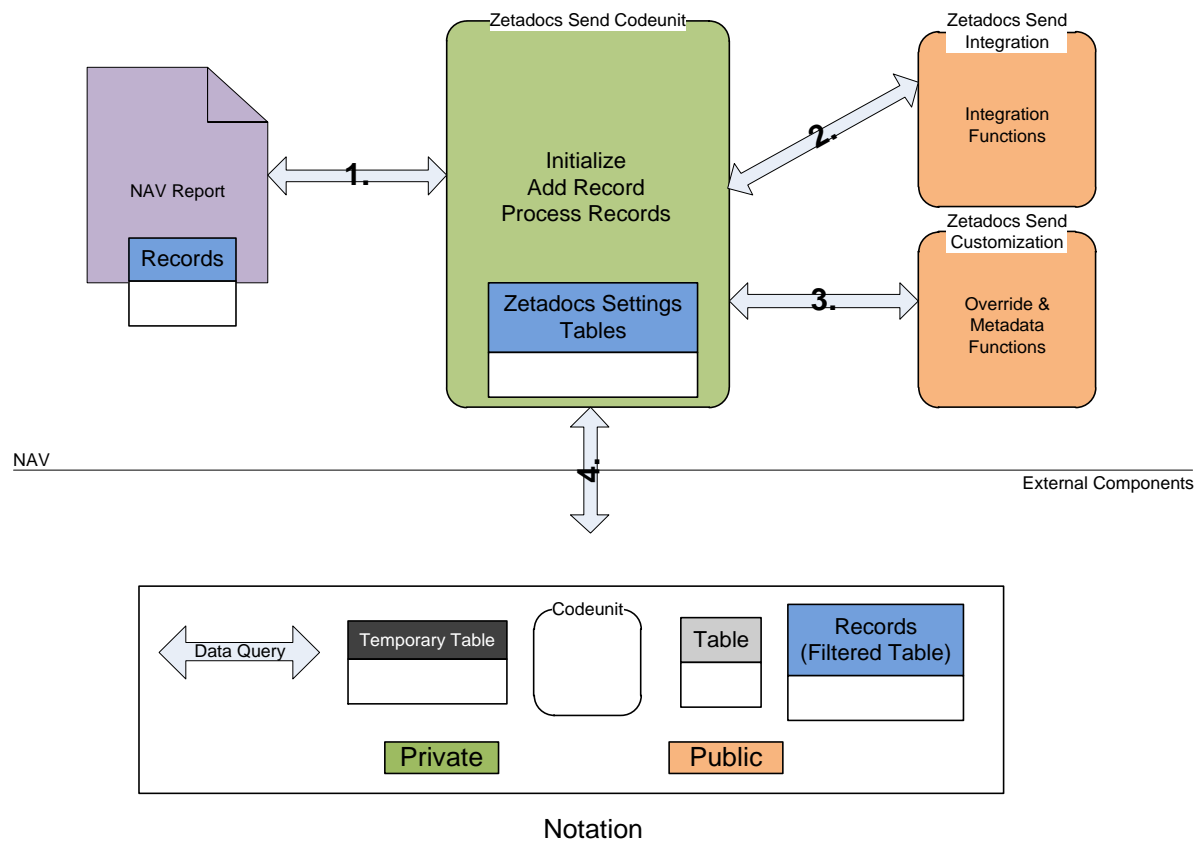
Figure 32 - Zetadocs for NAV Delivery Plus Architecture

Interfacing with the Zetadocs Send Results Gen codeunit (1.)

A report modified for Zetadocs for NAV will call the three trigger functions on the Zetadocs Send codeunit. Firstly, **Initialize (1.)** is called to set the report that is being printed. The initialization information allows us to determine what report settings, if any, have been specified **(2.)**. After initialization we start to process individual record specifics. Each record reference is passed to the send results codeunit by calling **AddRecord (1.)**. Each record is then processed to extract the contact information **(3.)**. Depending on who the company is we may apply specific rules covering how the contact or the template is determined. Once all the records have been added **Process Records (1.)** is called to start finalizing the results. When all rules and settings have been applied the "Zetadocs Customize" codeunit is called to offer overriding of the result **(4.)** . Lastly, Zetadocs Send code will run to offer run-time user result override and error resolution dialogs.

Querying the Zetadocs Settings (2.)

Based on the ID of the report that is being printed we can determine what template and archiving settings to use for the report and potentially how to automatically find the company and contact references from the report records. Internally the Zetadocs Send Results Gen codeunit will query the Zetadocs Report Settings using the report ID. These settings control the flow of processing from this point on.
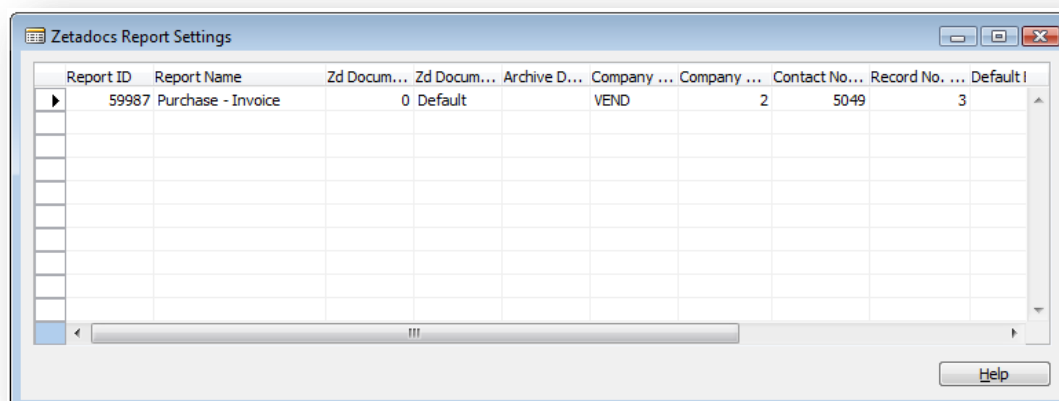
Figure 33 - Zetadocs Report Settings

Resolving the Company and Contact Information (3.)

This can happen in a number of ways depending on the Zetadocs Report Settings for that report. The report settings control whether the Zetadocs Send Results Gen codeunit can copy the company and contact references from a field in the record or whether it should call out to the "Zetadocs-Send Integration" codeunit for the information. It is in this public codeunit that a VAR will implement their custom integration code for their system. This is explained in more detail in a later section of this guide; however, this should highlight the main purpose of the Zetadocs-Send Integration codeunit and the Zetadocs Send Result table being public. It means that when we need to access data from typed NAV tables this code is exposed to the VAR developer to allow them to integrate or customize successfully. The private Zetadocs Send Results Gen codeunit only correlates and manages the data, unaware of its meaning (typelessly).

Overriding in Customize Codeunit (4.)

There is the ability to alter the Zetadocs Send Results record directly in this codeunit before continuing with sending of a report. Each send result is passed to this codeunit by calling **OverrideSendResult** internally in the Zetadocs Send Results Gen codeunit. This gives the VAR a great opportunity to implement customized business logic above that offered by Zetadocs for NAV. An example would be altering the recipient (contact) depending on the value of an order. The second potential customization is to add additional embedded commands for tailoring email messages using dynamic fields in Zetadocs Templates or adding extra metadata to be archived with the document.

14.3 Summary

Now that we have been introduced to the architectural overview of Zetadocs for NAV it should be easier for us to understand the sections which follow and begin to allow us to imagine the potential customizations and workflow that could be created with the Zetadocs for NAV Addin.

15. **Send Any Report**

In the installation guide earlier we saw how to configure Zetadocs for NAV to send reports from the Sales Order and Purchasing processes. We edited the NAV reports for Zetadocs for NAV and set the report settings to point at the Customer or Vendor reference for that report and the respective Contact reference. With this information Zetadocs for NAV was able to extract the references and query the names, email addresses and fax addresses of the contact, as well as, cross reference the company (Customer or Vendor) reference with the associated Zetadocs Customer or Vendor rules tables to apply per company formatting and addressing logic. This however is not the limit of Zetadocs for NAV functionality. This principle of field reference and related information resolution can be applied to almost any report. In this section we will see how small changes in the report settings can control and alter the information used to address, format, send and archive a report using Zetadocs for NAV.

15.1 **Configured Send**

It should be clear by now from the installation guide that by setting the "Company Type Code", "Company No. Field No." and "Contact No. Field No." fields in the Zetadocs Report Settings that you can configure Zetadocs for NAV to automatically resolve your contact information and apply company specific rules if they exist. In this way it is possible to reference any fields which contain the right type of reference (i.e. customer/vendor or contact etc). There is some logic to the application of these settings that is important to know to help decide what settings to enter but it also gives the opportunity for some variations in configuration.

Zetadocs Report Settings Field No.'s Reference Logic (Pseudo Code)

```
IF Company Type Code <> NULL THEN
  IF Company No. Field No. <> NULL THEN
    Get the Company No. from Record using Field No.
  ELSE
    CALL Integration codeunit GetCompanyForReport for VAR to get Company No.
  END
END

Send Result.VALIDATE(Company No., Company No. Value)

IF Contact No. Field No. <> NULL THEN
    Get the Contact No. from Record using Field No.
  ELSE
    CALL Integration codeunit GetContactForReport for VAR to get Contact No.
  END

Send Result.VALIDATE(Contact No., Contact No. Value)
```

From this it is important to notice the order that validation happens in as this coordinates with the Zetadocs Send Result table **OnValidate** trigger code for "Company No." and "Contact No.". Since the company information is validated first no contact reference will be set yet. We can check for this and default to using the company's communication information, later when the contact reference is validated we can override the addressing information (email, fax). This provides the fallback addressing logic of Zetadocs for NAV so that if a record has a blank reference for a contact we will still end up with the company correspondence information. This means that we can deliberately control what information is used by altering the settings. It also means that this behavior can be customized by the VAR by implementing the get trigger functions in the Zetadocs-Send Integration codeunit and/or changing the OnValidate triggers in the Zetadocs Send Result table.

Company Type Code	Company No. Field No.	Contact No. Field No.	Resulting Addressing Info Used
SET	SET	SET	Contact Info unless the reference in record is blank THEN Company

			Info
SET	NULL	SET	Contact Info unless the reference in record is blank THEN Company Info using Company Reference implemented by VAR
SET	NULL	NULL	Contact Info using Contact Reference Implemented by VAR unless that reference is blank THEN Company Info using Company Reference implemented by VAR
NULL	NULL	SET	Contact Info
NULL	SET	SET/NULL	Invalid – You must specify a company type to enable use of company field.

Table - Zetadocs Report Settings Addressing Information Control Options

To get a strong understanding of this it is recommended that you review the OnValidate triggers for "Company No." and "Contact No." in the Zetadocs Send Result table and familiarize yourself with the trigger functions in the Zetadocs-Send Integration codeunit. These are explained in detail in the next section.

15.2 Custom Send

We saw in the last section how selecting certain report settings can control the flow of the operation of the Zetadocs processing codeunits. By exploiting these settings and implementing the trigger functions in the Zetadocs-Send Integration codeunit we can highly customize our report sending. In this section we will focus on the trigger functions in the Zetadocs-Send Integration codeunit and explain how they can be used.
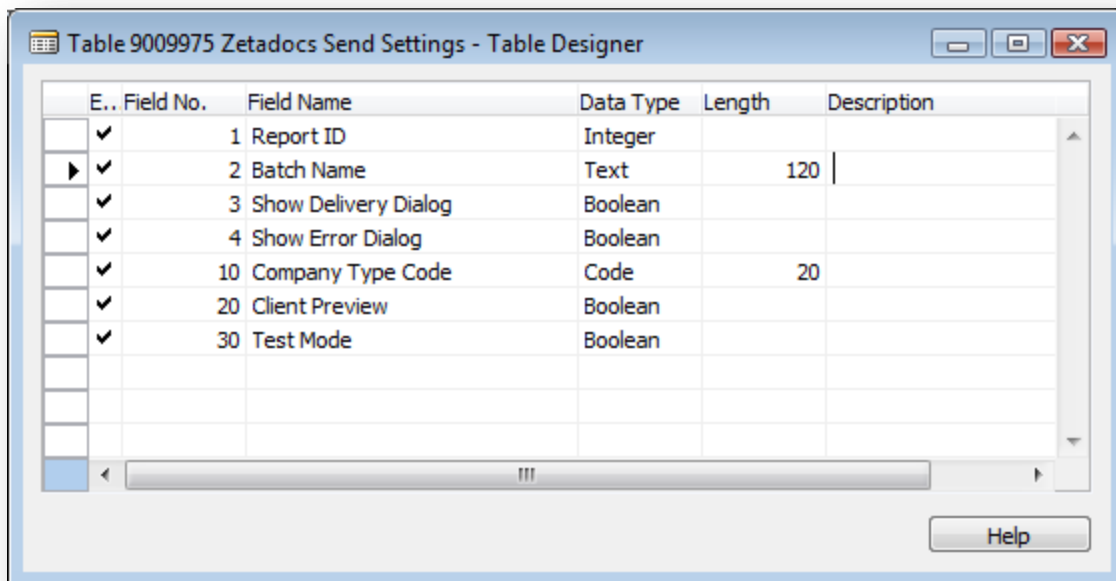
GetZetadocsArchiveID

This function has been deprecated in version 5.0 of Zetadocs for NAV and remains in the code for backward compatibility. For system upgrades please read the warning below.

WARNING: This function should be left unchanged. It is only exposed in this codeunit to allow a VAR to add additional permissions to the codeunit for reading and writing the Zetadocs Archive ID value to and from additional tables!

OverrideSendSettings

Apart from setting up the company and contact field number references in the Zetadocs Report Settings there are a number of other options that control the display options and the report batch information settings. During the **Initialize** function (See Understanding the SDK Framework) these settings are copied in to a temporary table called the Zetadocs Send Settings. This gives us the ability to adjust these settings at runtime. Once the report settings have been copied into the temporary send settings table described, the Zetadocs Send Results Gen codeunit calls the **OverrideSendSettings** trigger function in the Zetadocs-Send Integration codeunit. Here you can modify the settings based on some logic for that send instance. Let's have a look at the Zetadocs Send Settings table.

Figure 34 - Zetadocs Send Settings

- **Report ID:** WARNING: This is not for editing. It is here to allow the developer to determine which report is being printed in the trigger and to branch CASE or IF statements depending on its value.
- **Batch Name:** In the Zetadocs Report Settings you have the ability to specify **Default Batch Name**. This is the name that will be displayed in the Zetadocs Client for the report records printed to Zetadocs. This default value can be overridden in this function.
- Show Delivery Dialog, Show batch Delivery Dialogs, Preview in Zetadocs Client and Test Mode: All these can be dynamically overridden in this trigger at runtime.
- **Company Type Code:** Similar to the Report ID, this value is not for editing but is present to allow the developer to determine the target company type configured for this report without having to query the Zetadocs Report Settings Table.

A good example of when you might use this function is if you wish to have a report run uninterrupted by UI dialogs and previewing in the Zetadocs Client if it is being sent during the night. All previews could be turned off.

GetContactForReport

As explained in the previous section, not specifying a **Contact No. Field No**. means that this function will be called for you to return the value. This means that you are not restricted to extracting the reference directly from the record being reported. The report id, record id and send settings are passed as parameters into this function and therefore you can implement your own custom logic for each report and record type to determine a contact. Note that the return value Code is not typed and is extra long. This means that the code is not tied to a specific NAV type. This will be covered more in the next chapter.

GetCompanyForReport

Similar to GetContactForReport this function allows you to implement custom logic for determining the **Company No.** value. The report id, record id and send settings are passed as parameters to this function and therefore you can implement your own custom logic for each report and record type to determine a company. Note that the return value Code is not typed and is extra long. This means that the code is not tied to a specific NAV type. This will be covered more in the next chapter.

GetHardCopyPrinter

This function is always called to get the printer to use for the current user when the delivery method is set to Hard Copy. It defaults to using the NAV Printer Selections setting for that user for that report otherwise it uses the user's system default printer. It is provided here to allow you to change this logic.

GetOutputFileName

When a report is printed to Zetadocs, converted to a pdf and sent to a recipient it is desirable to be able to name that pdf file something relevant. This function is called from the AddRecord function in the Zetadocs Send Results Gen codeunit (i.e. once per report record) to allow you to specify independent file names.

GetRecordNoForReport

Similar to the Company No. Field No. and Contact No. Field No. settings in the Zetadocs Report Settings there is an option to specify the Record No. Field No. This field's purpose is primarily for customizing Zetadocs message content. For example it is often desirable to include a Ref. number in the subject of email correspondence. This can be set by adding %%[ZetadocsRecordNo] into the subject of a Zetadocs Template.
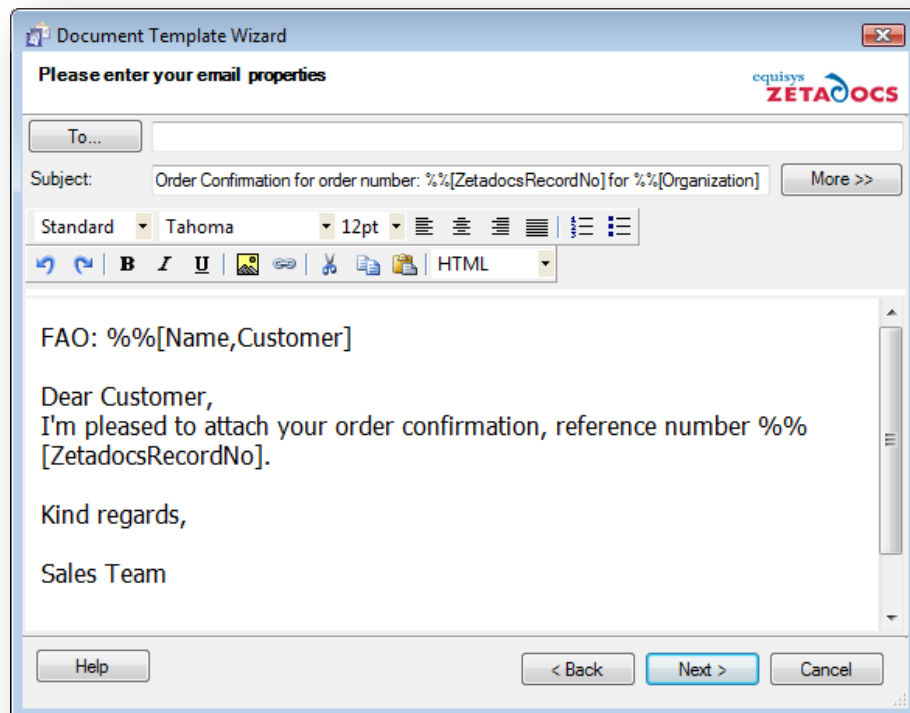
Figure 35 - Zetadocs Template Wizard

Once again this field no. reference setting operates similar to Contact No. Field No. such that if the field is left blank in the Zetadocs Report Settings then this function will be called from the **AddRecord** function in the Zetadocs Send Results Gen codeunit. This may be necessary if your reference number is composed of more than one field value. If so these field values could be concatenated and returned from this function.

GetCompanyRule

This function is exposed here for a number of reasons. Firstly it allows the customization of rules dynamically at runtime but primarily it can used in conjunction with the Company Type Code to provide company rules for bespoke company types (i.e. types other than Customer and Vendor). This is explained in more detail in the next chapter. The important thing to note about this function is the parameter that is passed. The "Zetadocs Company Rule" is another temporary table maintained in the Zetadocs Send Results Gen codeunit. This is used to get the rule override information irrespective of the company type. This will become clearer in the next chapter. It is recommended that you review the implementation of this trigger function in the Zetadocs-Send Integration codeunit to further your understanding.

16. Bespoke Contacts and Company Types

Due to the nature of NAV system installations and the hugely customizable potential it is acceptable that some systems may or may not use the company tables **18 Customer** and **23 Vendor**. Similarly some systems may not use the Contact Management Module or the native NAV **5050 Contact** table. These entities may have bespoke tables, this section details how Zetadocs for NAV can be integrated into such systems. This section focuses on the abstract relationship between the "Zetadocs Company Types" table and the tables that represent these types. We will also see how Zetadocs for NAV can be extended to integrate with other existing native company types.

16.1 Company Types

Zetadocs for NAV integrates with two native company types in its initial configuration, Customer and Vendor. However, the code which directly accesses these tables is kept in 2 locations that are public to a NAV VAR. As an example of how one could implement a new bespoke company type or in fact edit one of the existing company types CUST and VEND the following example is presented.

NOTE: the Zetadocs Sales Document Queue form (9009962) operates for the Sales process only and uses direct references to the Customer and Contact names field in the **Sales Header** table. If you have modified the Sales Header table (36) to work with your bespoke Customer and/or Contact implementations then you may need to alter the references to **Sell-to Customer...** and **Sell-to Contact...** field references.

BANK Example

Consider the business relation BANK. To integrate Zetadocs for NAV with reports that are sent to BANK contacts you would follow these instructions.

- Create a Zetadocs Company Type **BANK**.
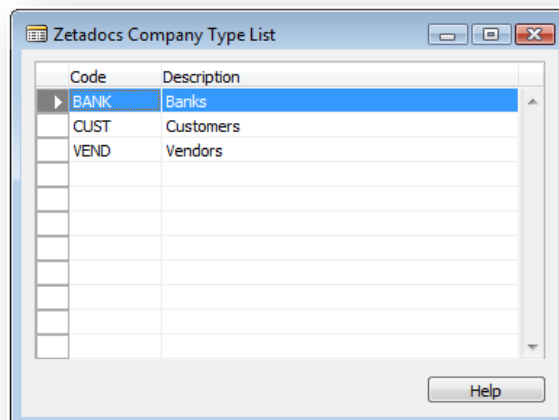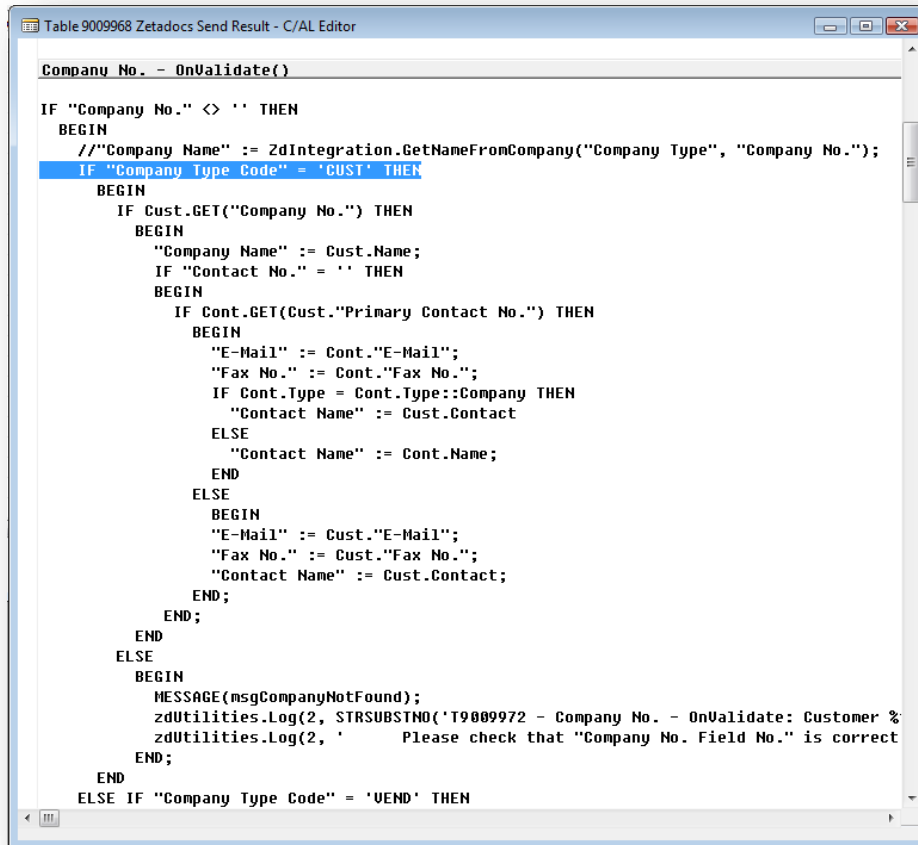
Figure 36 - Zetadocs Company Types

- Implement the BANK **IF** case to get the bank name and addressing information from your bank table in the Zetadocs Send Result table (9009968) similar to the CUST case.

```
Table 9009968 Zetadocs Send Result - C/AL Editor

Company No. - OnValidate()

IF "Company No." <> '' THEN
  BEGIN
    //"Company Name" := ZdIntegration.GetNameFromCompany("Company Type", "Company No.");
    IF "Company Type Code" = 'CUST' THEN
      BEGIN
        IF Cust.GET("Company No.") THEN
          BEGIN
            "Company Name" := Cust.Name;
            IF "Contact No." = '' THEN
            BEGIN
              IF Cont.GET(Cust."Primary Contact No.") THEN
                BEGIN
                  "E-Mail" := Cont."E-Mail";
                  "Fax No." := Cont."Fax No.";
                  IF Cont.Type = Cont.Type::Company THEN
                    "Contact Name" := Cust.Contact
                  ELSE
                    "Contact Name" := Cont.Name;
                END
              ELSE
                BEGIN
                  "E-Mail" := Cust."E-Mail";
                  "Fax No." := Cust."Fax No.";
                  "Contact Name" := Cust.Contact;
                END;
            END;
          END
        ELSE
          BEGIN
            MESSAGE(msgCompanyNotFound);
            zdUtilities.Log(2, STRSUBSTNO('T9009972 - Company No. - OnValidate: Customer %
            zdUtilities.Log(2, '      Please check that "Company No. Field No." is correct
          END;
      END
    ELSE IF "Company Type Code" = 'VEND' THEN
```

- Also update the **Company No. - OnLookup** trigger and **Contact No. - OnLookup** trigger to include the IF case for your BANK type.
- Update the **tbContName – OnLookup** trigger in the Zetadocs Delivery Form (9009966) to use the correct ContactBusinessRelation information if necessary.
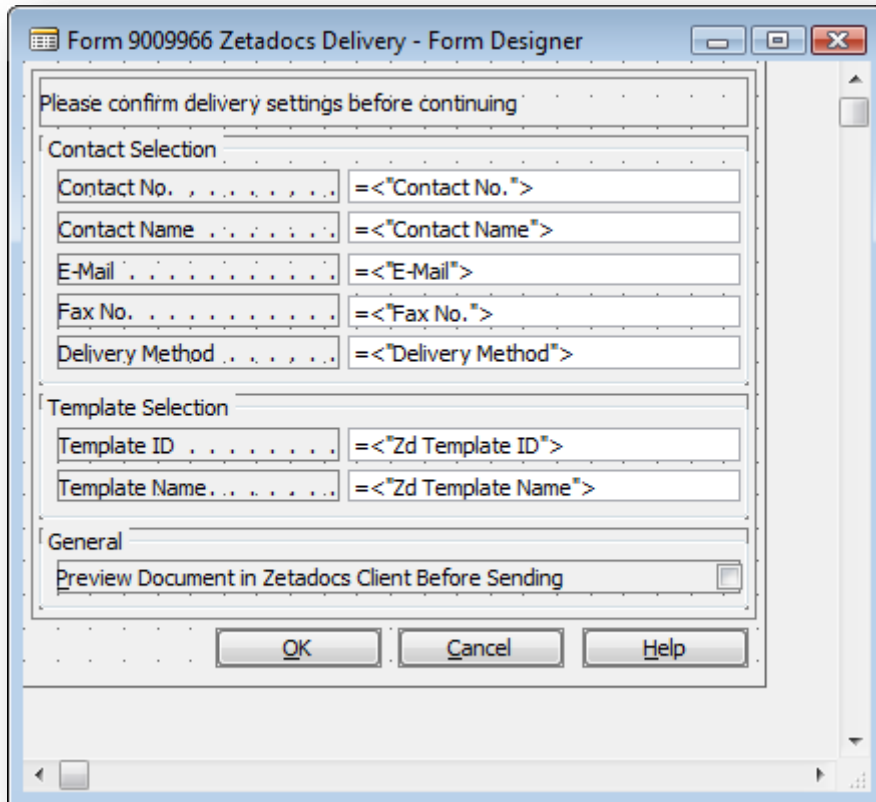
Figure 38 - Zetadocs Delivery Form "tbContName" textbox

- Then in the Zetadocs Report Settings set the BANK Company Type for the report that has BANK recipients and set the respective **Company No. Field No**. and **Contact No. Field No**. references for the report source table.
- If you have implemented a bespoke **Customer** table for use with Sales and Marketing then you may need to update the Zetadocs Sales Document Queue Form (9009962) to use your bespoke Customer record type references where necessary.

16.2 Contacts

Similar to Company it is possible that there may be a bespoke implementation of Contact information or there may be a requirement to change the default contact address resolution logic of Zetadocs for NAV.

Validating

As has been explained the Zetadocs Report Settings the **Contact No. Field No**. determines whether the contact reference can be extracted from a field in the record that is passed to the Zetadocs Send Results Gen codeunit or whether this is implemented by the VAR and called from the codeunit. Once the reference has been set in the **Contact No.** field in the Zetadocs Send Result table the OnValidate trigger is called. Therefore to modify the contact addressing resolution or to change the code to use a bespoke contact table you must follow these instructions:

- Modify the **Contact No. – OnValidate** trigger in the Zetadocs Send Result table (9009968) to get the name and addressing information from your bespoke contact.
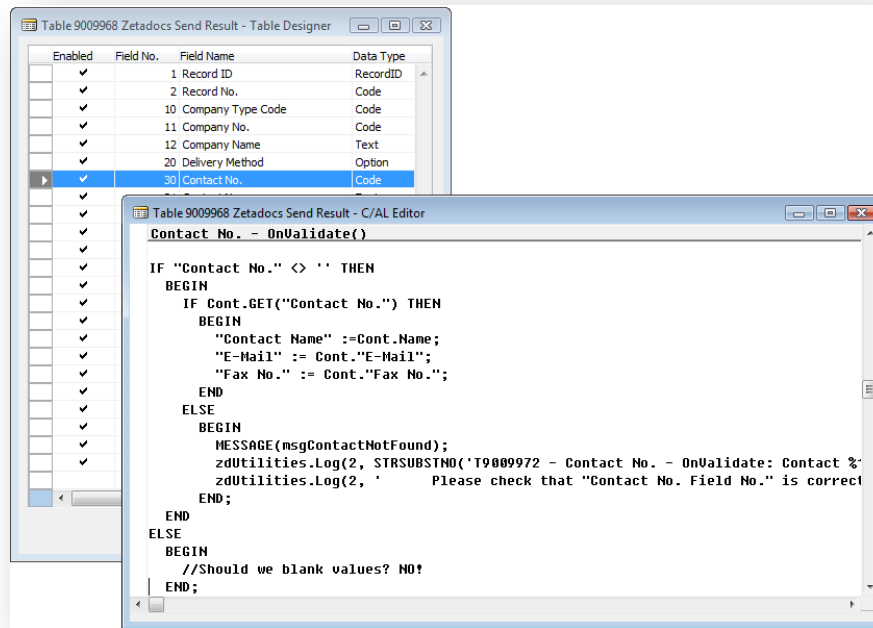
Figure 39 - Zetadocs Send Result table - Contact No. code

- Modify the **Contact No. – OnLookup** trigger in the Zetadocs Send Result table (9009968) to use the correct ContactBusinessRelation information dependant on the **Company Type Code**.
- Update the Zetadocs Delivery Form (9009966) references to contact information to use your bespoke contact record type and correct ContactBusinessRelation information if necessary.
- If you have implemented a bespoke **Customer** table for use with Sales and Marketing then you may need to update the Zetadocs Sales Document Queue Form (9009962) to use your bespoke contact record type references where necessary.

17. Zetadocs-Send Customize codeunit

By now you should have a good idea of what this codeunit is for. Up until now we have been exploring the internal processing and control flow of the Zetadocs for NAV Addin. By using specific settings and writing some code in the Zetadocs-Send Integration codeunit and the Zetadocs Send Result table triggers it is possible to completely integrate and customize Zetadocs for NAV into an NAV system. We have also seen the potential to implement business specific logic into the sending mechanism and expand on the Zetadocs for NAV product functionality. There is still however room to take it further.
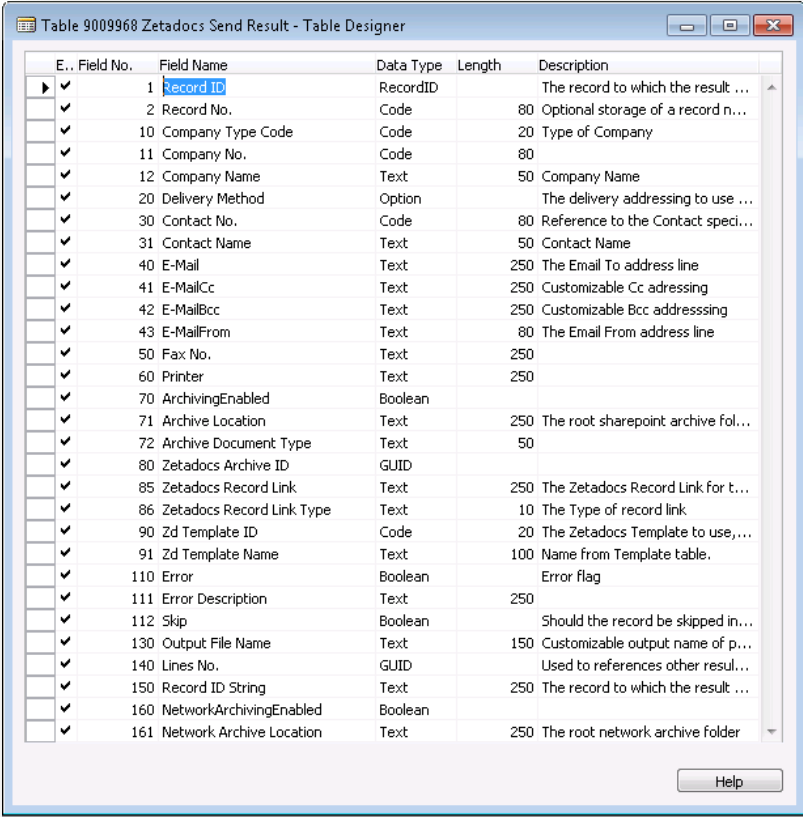
This section details the two basic functions in the Zetadocs-Send Customize codeunit (9009962) that allow the implementation of more business specific send logic as well as document formatting and archiving customizations.

17.1 GetAdditionalEmbComms

This function is deprecated in version 5.0 of Zetadocs for NAV. It remains for backward compatibility with the old report mark-up method. Please use WriteAdditionalEmbCommsToFile instead.

17.2 OverrideSendResult

As the name suggests this function gives you the whole send result. At this point the result has been completely resolved by Zetadocs and any custom code that has been implemented by you in the various areas explained earlier in this document. This then allows you to modify the completed record as a whole. The only place the results can be edited after this are in the Zetadocs Delivery Dialogs or the Zetadocs Errors Dialogs depending on your display settings for these dialogs, as specified in the Zetadocs Report Settings (potentially overridden by the OverrideSendSettings in the Zetadocs-Send Integration codeunit). Let's examine the Zetadocs Send Result table a little more closely now for the first time.

Figure 40 - Zetadocs Send Result

Some of these fields will be familiar from having worked with the Zetadocs Company Rule used in the GetCompanyRule trigger function in the Zetadocs-Send Integration codeunit. Let's break them up into their respective parts and get familiar with their use and how we can exploit this to implement our specific business logic and workflow.

Record Fields (1 – 2)
The **Record ID** and **Record No.** represent the typeless and typed references to the record we are sending. Record ID is used by the core processing of Zetadocs for NAV to tie the send results and records together. Record No. is what will ultimately be passed to Zetadocs for use as an external reference by either the recipient or in archiving to SharePoint. For more information on Record No. click here.

Example Usage:
Having the Record ID of what you are sending means you can get that record and query or use values from that record to implement logic for changing other fields in the Zetadocs Send Result.

Company Fields (10 – 12)
These fields and their use should be extremely clear by now. The **Company Type Code** allows us to integrate with native and bespoke company tables such as Customer, Vendor and one of your own design. **Company No.** and **Company Name** are then obvious references to the id and display name of the company.

Delivery Method (20)
This controls the addressing that is selected for sending, E-Mail, Fax or Hard Copy. Some obvious customization possibilities include implementing a company policy such as "Any company sensitive information should not be emailed under any circumstance and should be faxed or printed only." Depending on particular reports or recipients the delivery method could be checked or changed to uphold company policy.

Contact Fields (30 – 31)
In collaboration with the Company fields these fields can integrate with native and bespoke systems for contact addressing information resolution. By setting and validating this field is it possible to pull the information from the contact based on the logic that is implemented in the Zetadocs Send Result table triggers as discussed previously.

Addressing Fields (40 – 60)
Provides the ability to set additional email recipients in the Cc and Bcc fields, these fields are without relationships to the contact and company references that may or may not be present in the send result record. This means that addressing information can be taken from anywhere for the respective email, cc, bcc, fax and print addressing fields. Care should be taken to clear the company and contact no. fields before setting these values manually.

Archiving Fields (70 – 72)
Set in the Zetadocs General Settings, the SharePoint archiving settings are available for per record modification. This can be used for example in deciding whether or not the document is archived depending on its content or changing the archiving location to a limited permissions document library in SharePoint, or sub categorizing documents using the Zetadocs Archive Document Type.

Properties:
- Archiving Enabled – per document archiving
- Archive Location – the archive connection string takes the following format
  "sharepoint: <site> , <archive library>[/subfolder[/subfolder…]]"
  E.g. "https://mysite.sharepoint.com, Zetadocs/Mysubfolder"
- Archive Document Type

WARNING: Consideration should be taken when modifying the subfoldering of documents to SharePoint as this can dramatically affect performance or visibility of document from SharePoint in NAV. Please refer to the advice on file planning in this guide.

Zetadocs Archive ID (80)

This field has been deprecated in version 5.0 of Zetadocs for NAV and should be ignored. It remains for backward compatibility. For upgrade systems, please read the warning below.

WARNING: This field will contain data which contains a reference for an NAV record to archived documents. **It should not be edited or you risk breaking the archive search functionality of Zetadocs for NAV.**

Zetadocs Record Link (85)

WARNING: This field will contain data which contains a reference for an NAV record to archived documents. **It should not be edited or you risk breaking the archive search functionality of Zetadocs for NAV.**

Zetadocs Record Link Type (86)

WARNING: This field will contain data which contains a reference for an NAV record to archived documents. **It should not be edited or you risk breaking the archive search functionality of Zetadocs for NAV.**

Zetadocs Template Fields (90-91)

The "Zd Template Name" field is set automatically as the "Zd Template ID" field has a table relation with the Zetadocs Template table. The uses of this field are fairly obvious, change the Zetadocs template being used depending on some custom business logic.

Error Fields (110-111)

The Zetadocs Send Result table (9009968) has a trigger function **CheckErrors.** This function is called for each results record in the Zetadocs Send codeunit during the **ProcessRecords** function. This happens after all possible modifications of the send result values have taken place in the Zetadocs-Send Integration trigger functions and Zetadocs-Send Customize codeunit override function **OverrideSendResult.** This function checks the addressing information (email, fax, and printer) against the specified Delivery Method (Email, Fax, Hard Copy) to pre-empt potential send failures in the Zetadocs Client. If an error is found in a Zetadocs Send Result record the **Error** field is set to TRUE and a description of the error written in **Error description**. It is possible to implement your own error checks by editing the code in the **CheckErrors** function in the Zetadocs Send Result table. Note that the presence of an just 1 error record in the Zetadocs Send Result record for a particular send will cause the Zetadocs Batch Delivery Dialog to display <u>IF</u> the **Zetadocs Send Settings** for that send has **Show Batch Delivery Dialog** set to TRUE otherwise all errors will be marked as Skip = TRUE.

Skip (112)

When Skip = TRUE this will cause the report to use CurrReport.Skip for the associated record. For example if your report contains 3 reports and one is marked to skip then only 2 will be printed to Zetadocs. If the Zetadocs Batch Delivery Dialog is displayed either by there being errors in the send results or by the user choosing to preview the send results, they can manually set a report to skip particular report records.
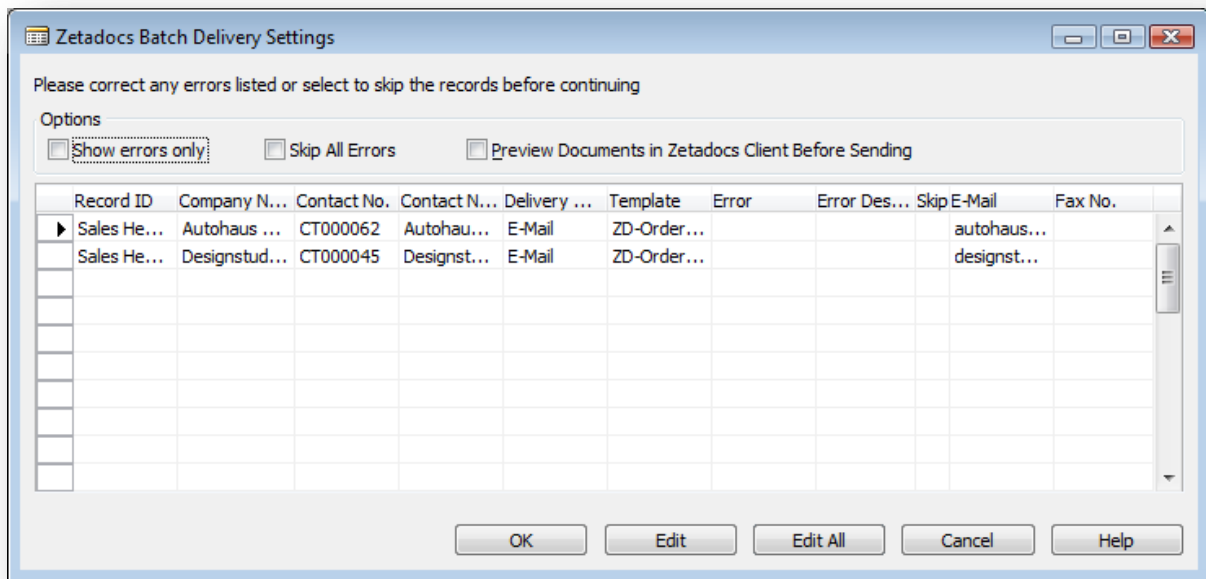
Figure 41 - Zetadocs Batch Delivery Dialog

Output File Name (130)

When a report is printed to Zetadocs and split into the addressable documents each document is given a name. It is desirable to be able to control the name of these documents as it will be the name of the PDF file produced and attached to emails as well as archived to SharePoint. This field allows you to set that document name. A good example of its use would be to generate the name based on the type of report and the record no. For example: *"Order Confirmation: 10045"*. Using the RecordID you can retrieve any information about the record for generating the output file name.

Lines No. (140)

WARNING: This field will contain data used internally by the Zetadocs core processing.
It should not be edited or you risk breaking functionality of Zetadocs for NAV.

Record ID String (150)

WARNING: This field will contain data used internally by the Zetadocs core processing.
It should not be edited or you risk breaking functionality of Zetadocs for NAV.

Network Archiving Fields (160 - 161)

Set in the Zetadocs Delivery Settings, the archiving settings are available for per record modification. This can be used for example in deciding whether or not the document is archived depending on its content or changing the archiving location.

Properties:

- Network Archiving Enabled – per document archiving
- Network Archive Location – the archive connection string is the desired network archive path and takes the following format
  "//*yourmachinename*/*yoursharedfolder*[/subfolder[/subfolder...]]"

17.3 WriteAdditionalEmbCommsToFile

In the final stage of the reporting process for Zetadocs for NAV the **GetRecordCustComms** function is called from the report on the Zetadocs Send Results Gen codeunit to retrieve the formatted embedded commands which represent the send result for each report record. Internally in the Zetadocs Send Results Gen codeunit we create the Zetadocs embedded commands but before we return it we call this trigger function **WriteAdditionalEmbCommsToFile** in the Zetadocs-Send Customize codeunit. This allows you to return additional embedded commands which can be used to customize your document message subject and body text as well as additional archive metadata to associate with the document when it is archived.

Dynamic Fields

Dynamic Fields are name/value pairs that can be used to pass any information to Zetadocs. The format of the command is:

> *%%[field: <name>, <value>]*

For Example:

> %%[field: salutation, Mr.]

By using this in conjunction with a Zetadocs Templates you can personalize the message as follows.
%%[field: salutation, Mr.]
%%[field:name, McCarthy]
%%[field: company, Widgets Inc.]
%%[field: quote_number, 1234]
%%[field: myname, Sam]

Document Template

When merged to a document template containing the following text:
Dear %%[salutation] %%[name]
I'm pleased to attach your quotation as discussed along with our conditions of sale and product brochure.
Our quotation number for your reference is %%[quote_number], please include this on your sales order.
Regards,
%%[myname]

Expected Output

Zetadocs creates the following email message body:

Dear Mr. McCarthy
I'm pleased to attach your quotation as discussed along with our conditions of sale and product brochure.
Our quotation number for your reference is 1234, please include this on your sales order.
Regards,
Sam

Archiving Metadata

It is also possible to archive any of the dynamic fields as metadata. To do this the embedded command should include the ARCHIVE flag at the end. Here is the format:

> *%%[field: <name>, <value>, ARCHIVE]*

For Example:

> *%%[field: Postcode, N7 0JE , ARCHIVE]*

Whether the dynamic field is used in personalizing the message or not its value name pair will be passed to the SharePoint archive as a content type column.

There are a couple of things to note about this. If the column name does not exist already in SharePoint it will need to be created as a column of the content type Zetadocs or of a content type that is a sub type of the Zetadocs content type, this needs to be done in SharePoint in advance.

Zetadocs documents default to using a Zetadocs content type. If you have specified an Archive Document Type then the content type must be a child type of the Zetadocs content type. NOTE: It is essential that the SharePoint columns and content types are created before archiving a document and that it is well tested before roll out.

Add a File attachment

Allows you to add a file to the email being sent by Zetadocs, this file will not be converted to pdf and merged with the pdf output but will instead be included with the email as an additional attachment.
%%[fileattachment: «Filename»]

Where «Filename» is the file to include located in a public, private folder or even full URL. Make sure to use full path URLs starting with **Error! Hyperlink reference not valid.**

Examples:
%%[fileattachment: C:\Users\Public\Documents\SalesInvoice.docx]
%%[fileattachment: http://www.equisys.com/img/equisys_logo.gif]

Add a File attachment

Appendices

The appendices contain advice on how to troubleshoot your system as well as details on how to perform installations which do not follow the standard pattern, such as upgrades and Terminal Services installs.

Contents

18. Technical Information

18.1 Microsoft Dynamics NAV Compatibility

This product has been developed and tested against Microsoft Dynamics NAV versions 5.0 SP1, 6.0. R2 and 7 (NAV 2013). We also support earlier version databases of NAV, when used with a version 5 SP1 client or later. Database version support starts at NAV 3.6. Some of the integrations and modifications of NAV will require a developer licence.

18.2 Installation Pack Contents

The software is supplied as a download and contains the following:

Zetadocs NAV Server Components

Folder containing the updates for NAV and installation support files:

- NAV .fob files containing code/table/form/pages etc. objects to import into NAV

Zetadocs for NAV Client

Installs everything that is needed on the end user desktop:

- Zetadocs Client application with NAV extensions
- Zetadocs API runtime

Target OS: Windows Server 2012, Windows Server 2008, Windows Server 2003, Windows 7, XP, Vista,

Zetadocs SharePoint Extensions

- SharePoint Extensions wsp file

Target OS: Windows Server 2012, Windows Server 2008,
SharePoint 2010 full, foundation and online.

Zetadocs Server

- Zetadocs Server Installer

Target OS: Windows Server 2012, Windows Server 2008, Windows Server 2003,

Documentation

- Documentation (installation, configuration and deployment instructions)
- Zetadocs for NAV help files

Supported Language

English, French, German, Danish, Italian, Spanish, Dutch

NAV Databases supported out of the box

AU-NZ, NA, DK, FR, DE, IN, IE, IT, NL, ES, GB, W1, AT, BE

18.3 Technical Specifications

This section details the minimum system requirements suitable for using Zetadocs for NAV.

Client Operating systems supported

- Windows 8 (32-bit and 64-bit)
- Windows 7 (32-bit and 64-bit)
- Windows Vista Business, Ultimate and Enterprise (32-bit and 64-bit)
- Windows XP Professional (32-bit)
- Windows Server 2012 (64-bit)
- Windows Server 2008 R2 (64-bit)
- Windows Server 2008 R2 with Remote Desktop Services
- Windows Server 2008 R2 with Citrix XenApp 5 and 6
- Windows Server 2008 Standard Edition (32-bit and 64-bit)
- Windows Server 2008 with Windows Terminal Services
- Windows Server 2008 with Citrix Presentation Server 4.5
- Windows Server 2003 Standard Edition (32-bit and 64-bit)
- Windows Server 2003 with Windows Terminal Services

- Windows Server 2003 with Citrix Presentation Server 4.5

Platform Specific Steps: Please see the additional information available via the links below if you are installing on these platforms - Terminal Services, Group Policy.

- Integrates with Microsoft Office Outlook® 2003 SP2, Microsoft Office Outlook 2007 and Microsoft Office Outlook 2010
- Integrates with Lotus® Notes® V6.5 and above
- Integrates with SMTP email systems
- Active Directory® integration for rapid and easy deployment to all network users

Client Hardware requirements
- It is recommended that systems have Pentium® class CPUs of 1 GHz or higher with 1GB RAM or more

PDF capabilities
- Create PDF files which are readable using Adobe® Reader® software version 5 and later
- Supports PDF attachments created in PDF 1.2, 1.3, 1.4 and 1.5 standards
- Specify PDF security options such as allow printing, content extraction and password protection
- Password protection using 40-bit and 128-bit encryption

18.4 Product Variants

Zetadocs Delivery Essentials
Provides the core functionality of Zetadocs for NAV, with delivery rules to automate document delivery and SharePoint archiving.

Zetadocs Capture Essentials
Capture essentials provides you with our drag and drop capture facility, this means that documents and emails can be dragged into the specifically created areas in our Zetadocs for NAV modified forms within the NAV Role Tailored Client. These are then added to your archive. It also provides the Sales and Purchase Document Queues.

Zetadocs Delivery Plus
Note: Can only be installed by Advanced Solution Partners
Delivery Plus provides a whole host of customisation options for Zetadocs. It is designed for use by NAV VARs and systems integrators with experience in programming within NAV, but can also be used by Equisys to fulfil bespoke requirements for individual systems. For full details on what can be achieved and suitability for your requirements please contact Equisys technical support.

Zetadocs Capture Plus
Note: Can only be installed by Advanced Solution Partners
Zetadocs Capture Plus provides document capture for on screen reference and approval, providing a complete transactional document management system for Microsoft Dynamics that is based upon Microsoft SharePoint. It contains a wide range of features for customising the behaviour of the Capture functionality in a Zetadocs for NAV system. It is designed for use by NAV VARs and systems integrators with experience in programming within NAV, but can also be used by Equisys to fulfil bespoke requirements for individual systems.
Features Include:
- Capture and conversion of inbound documents to PDF/A format
- Custom Document Queues
- Optical Character Recognition
- Barcode Recognition
- On screen approval with workflows
- Document Association

For full details on what can be achieved and suitability for your requirements please contact Equisys technical support.

18.5 Point Solutions

Zetadocs offers a range of specific point solutions to resolve specific business requirements, the setup of these are documented by Technical notes on our website. Details of these will have been provided with your licencing information.

18.6 Zetadocs NAV Licensing

To successfully install Zetadocs for NAV you require a Zetadocs for NAV VAR NFR granule to be added to your license and the appropriate Zetadocs licence for the features and user numbers you are setting up. You will also need a refresh of your standard NAV licence to obtain the free Zetadocs Express Granule.

Required Granules

To use Zetadocs for NAV you require the Zetadocs for NAV Granule to be added to your license.

VAR – Programming access
Granule 9009961 – Zetadocs Execute Granule
End User – Execute only access
Granule 9009970 – Zetadocs for NAV Granule
Granule 9041210 – Zetadocs Express (was added to NAV licenses after June 2011.)

Optional Granules

To take advantage of Zetadocs integration with NAV contacts you require the Contact Management Granule.
Granule 5500 – Contact Management
Granule 5510 – Contact Management – Basic

Zetadocs Feature Licencing

The licence key provided by Equisys reflects the feature set and number of users purchased. The table below identifies the different licences available and their corresponding features.

License Options	Features
Zetadocs PDF	Send functionality No batch capability – basic embedded addressing commands Client displays success dialog after send (No silent mode)
Zetadocs Express	SharePoint Online (Office 365) only Simple file plan (Zetadocs library only – no sub-folders) Simple metadata (organisation, record number, from) Documents Factbox with Simple approval workflow Save and send from standard Sales and Purchase pages Drag and drop to any page. Standard Sales and Purchase pages shipped.
Zetadocs Delivery Essentials	Zetadocs Express Functionality plus: Works with SharePoint 2010 on premise and on-line Single send via print button, Batch send via print button (%%[Batch] commands) Silent mode (Zetadocs client) Support for bespoke tables and reports from NAV Populate standard metadata fields on archive (date sent, email to, cc, bcc, recipient, document type, company number) Delivery method rules engine (additional recipients, templates) Sent Items (Network folder save)
Zetadocs Capture Essentials	Zetadocs Express Functionality plus: Works with SharePoint 2010 on premise and on-line Document queues with standard actions (Sales, Purchase and other using standard actions). Local scan button on Documents Factbox Populate standard metadata fields on archive (record type, date received, company number) PDF/A conversion (using Stellent) OCR of captured documents (requires additional Abbyy license)
Zetadocs Delivery Plus	Zetadocs Delivery Essentials and Express Functionality plus: Customisation in NAV by writing C/AL code including: · adding additional embedded commands (e.g. add additional attachments) · bespoke business logic to modify recipient or preparation details Custom metadata, file plan (site, content type, folders)

Zetadocs Capture Plus	Zetadocs Capture Essentials and Express Functionality plus: Document queues with own actions (non-standard) Customisation in NAV by writing C/AL code (Run additional business logic) Automated filing using barcodes (requires additional Abbyy license) Custom metadata, file plan (site, content type, folders)

18.7 Archiving File plan

Zetadocs allows you to archive captured and delivered documents to a SharePoint archive using our file plan settings to ensure it is all filed according to your settings. Below is advice on how to get the best performance from your SharePoint archive as building very large libraries can impact performance of SharePoint and the rate at which Zetadocs can access your archive.

Settings Available

Zetadocs has settings which determine the plan for storing documents which is set via the General Settings Form. This allows you to configure the following options to create subfoldering for your site.

Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record. You can specify up to three of these values to generate your file plan.
  - o **COMPANY** – The recipient NAV *Customer* name
  - o **DATE** – The Date with a format specified by the Date Folder Naming property
  - o **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Document Set, or its override in the Zetadocs Report Settings

Date Folder Naming: Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

Recommended Settings

It is recommended that you attempt to ensure that the foldering options reflect the likely rate of archiving on the system. For performance reasons it is best to keep the contents of a subfolder to less than 1000 items. For example if you were to process 250 invoices a week, a folder structure changing on a monthly basis would be sufficient to avoid any potential performance issues.

For details on appropriate SharePoint server sizing click here.

19. Zetadocs Server Information

Technical Specifications

Operating systems supported
- Windows Server 2012 (64-bit)
- Windows Server 2008 R2 (64-bit)
- Windows Server 2008 R2 with Remote Desktop Services
- Windows Server 2008 Standard Edition (32-bit and 64-bit)
- Windows Server 2008 with Windows Terminal Services
- Windows Server 2008 with Citrix Presentation Server 4.5
- Windows Server 2003 Standard Edition (32-bit and 64-bit)
- Windows Server 2003 with Windows Terminal Services
- Windows Server 2003 with Citrix Presentation Server 4.5

Hardware requirements
- It is recommended that systems have a minimum of a Pentium® class CPUs of 1 GHz or higher with 1 GB RAM or more. Should the server be running other applications we would recommend you expand the hardware requirements appropriately for more information on suitable configurations please consult Equisys at support@equisys.com.

Licensing Requirements
- The Zetadocs Server requires the purchase of an additional upgrade.

Note: It is recommended that you install Zetadocs Capture Essentials first if you are installing both modules.

19.1 How the Zetadocs Server works

Conversion
Documents are added to the document queue by placing them in a shared network folder. These are then displayed within the document queue allowing the user to process the document and create associated Dynamics entries and documents. The Zetadocs Server application automatically converts documents placed within the shared network folder into PDF/A whilst storing a copy of the original document in another folder.

PDF Format
The Zetadocs Server converts documents in supported formats into **PDF 1.4 (PDF/A-1a)** format. This is an international ISO standard ISO 19005-1:2005 for more details on this format please see (http://www.pdfa.org/doku.php?id=pdfa:en:pdfa_whitepaper).

OCR
If you choose to include OCR as part of your solution all documents converted to PDF will support full text search. This includes graphics documents or documents that contain graphics (e.g. a PDF with embedded graphics), this requires special processing. To provide this we have the ZD OCR Processor, this is an optional module which incorporates the Abbyy FineReader Engine. The full text that is recognised is added to the created PDF file as a text layer, this enables full text search.

Supported Inbound File Formats
The following file formats are supported, how they are processed depends on whether the ZD OCR Processor has been included:
If the OCR module is installed then the following file types will be processed with OCR:
- PDF (.pdf)
- BMP and DIB (.bmp, .dib)
- PCX and DCX (.pcx, .dcx)
- JPEG, JIFF (.jpg, .jpeg, .jpe, .jfif)
- GIF (.gif)

- TIFF (.tif, .tiff, .g3n, .g3f)
- DjVu (.djvu, .djv)

If the ZD OCR Processor is not included files will be passed for conversion without being OCR'd, we support the following file types:
- Office files (v2003 and v2007) – Word and Excel (.doc, .docx, .xls, .xlsx)
- Rich text files (.rtf)
- Web pages (.html, .htm)
- Text files (.txt)
- Email messages (.msg format is recommended as htm format doesn't include attachments)

Email message conversion of .msg files results in conversion of the email message body text and the unpacking and conversion of any supported attachments. Should any of the attachments not be in a supported format then the whole message will be flagged as having failed to convert so the user can review it in its original format.

The following file types are not supported:
- Compression: Zip, Rar, ARJ, TAR, TGZ, CAB ...
- Media: MP3, WMV, AVI, MPG, MPEG, MP4, WAV...
- Executable types: EXE, DLL, BAT, VBS ...

Multipart Files
The Document Converter supports multipart files e.g. an email with an attached purchase order, this is then converted into a pdf file with two or more pages with bookmarks to indicate where the various elements of the message are contained. In the above example you would be presented with a first page containing the email subject line, body text, addressing information and email message.

- The following Email metadata is also retained:
- Sent – time/date
- Received – time/date
- From
- To
- CC
- Priority

Next would follow the attachments, each with its own separate bookmark within the pdf.

Note: Hosting the document queue folders on a separate machine to the one the Zetadocs Server is running on is not supported.

Batch Scan
The Zetadocs Server supports batch scan splitting from a network scanner.
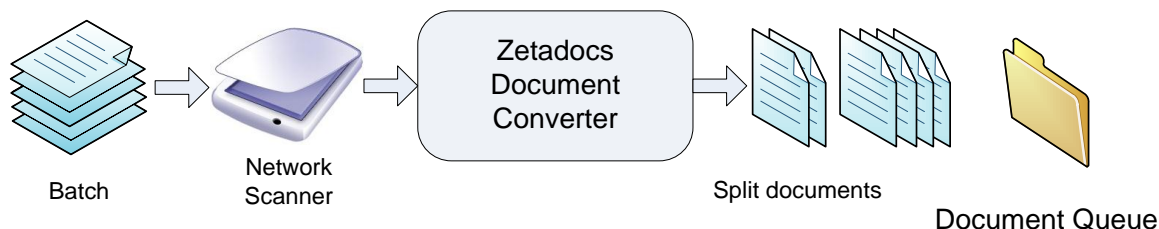
It does this by monitoring a Batch Split subfolder in each of the configured document queues and processing any documents which are deposited in it for splitting. As such you will need to configure settings on your network scanner to drop scanned documents into the relevant folder e.g.:

<DocumentQueuePath>\Batch Split

The Zetadocs Server processes the batch and submits the split documents to your Document Queue using the specified splitting method, these are:

- **Page Interval** - The Zetadocs Server splits the batch of documents using a constant page interval which can be configured, e.g. resulting in the batch being split every 4 pages.
- **Barcode** - The Zetadocs Server reads the document and splits it on detecting a barcode. If you are using a barcode as a whole splitter page, if for example you were adding specific barcode pages to separate the batch, you may want to delete the split page. In this case the Zetadocs Server can be configured to discard the splitter page automatically.
- **Barcode value change** - If you are scanning batches with barcodes on each page, the Zetadocs Server splits the document each time the detected barcode value changes.

Note: The barcode batch splitting methods require Capture Plus and the Abby Software installed and configured. If you are scanning documents that contain several barcodes on the same page, a filtering prefix can be configured exclude all barcodes without a specific prefix.

20. Testing Zetadocs Delivery and Capture Essentials

Now that you have successfully completed the install of the Zetadocs Delivery and Capture Essentials features it is recommended that you test them to ensure that these features operate as expected. For those customers also installing the Delivery Plus or Captures features we would recommend you perform some of these tests to validate your install thus far. Further testing instructions are provided later to cover this extra Advanced functionality following their install.

Contents

20.1 Testing Delivery Essentials

Your system should by this stage have the core delivery functionality successfully installed and configured, as well as potentially having some optional archiving features. Instructions on testing both features are below.

Zetadocs for NAV Document Delivery

The test scenarios below will demonstrate how to test delivery of the Sales Order report under a number of different rule configurations.

Zetadocs Rules

Zetadocs enables you to precisely control how your documents are configured using our system of delivery Rules, these work on four levels:

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.
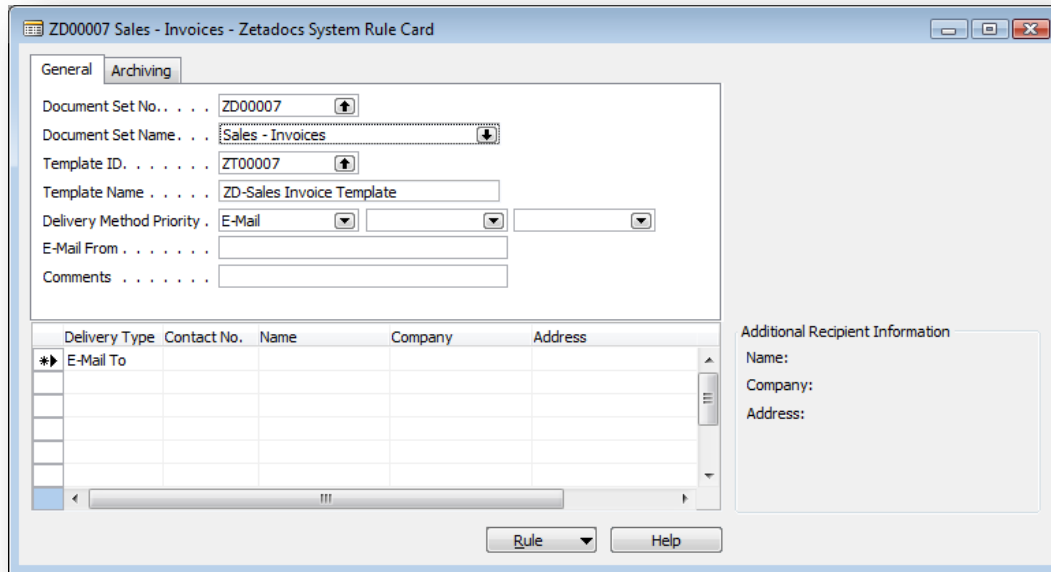
For more details on how rules and document delivery work with Zetadocs please see section 8.6 Understanding Zetadocs Rules.

Rule Testing

Rules are created by making modifications to the settings on the Zetadocs Customer/Vendor Rule Cards and the Zetadocs System Rule Card. The standard configuration data will have created a level 1 and 2 rules by default, so edits to these settings can simply be undone by setting the fields to their previous values. However creating level 3 and 4 rules creates an additional level of rules, these need to be removed as usual in NAV by pressing F4 to delete the entry.

Level 2 Rule Test – Single Send

- Select the **Administration** option in the Navigation pane and then **Application** Setup, open the **Zetadocs Setup** section and select the **Zetadocs System Rule Card**, or search for it in the NAV 2013 Windows Client.
- Select the document set relevant to the report you are testing, the figure below shows this card, it is used to determine how a document set is to be delivered.
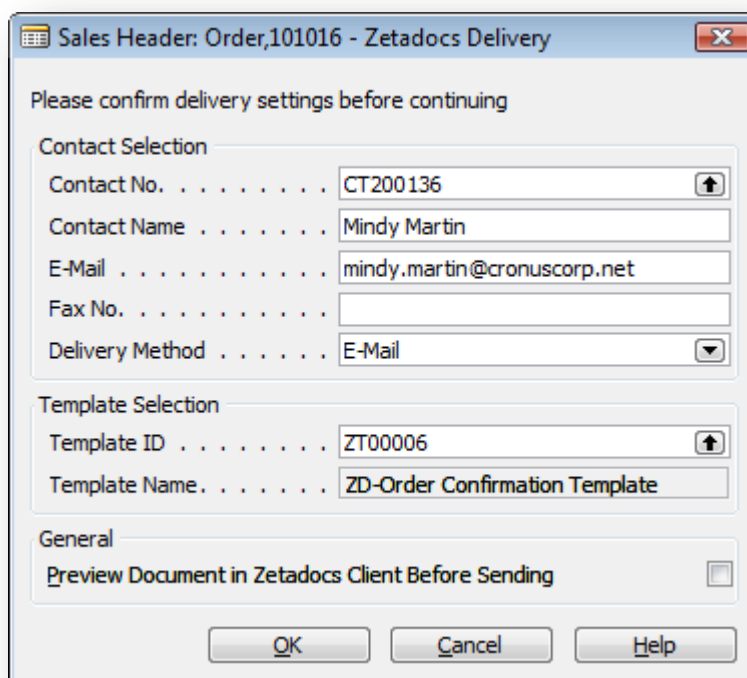
Figure 42 - System Rule Invoice

- Select the **Sales and Marketing** option in the Navigation pane.
- Open the **Order Processing** section and select **Orders,** or search for it in the NAV 2013 Windows Client.
- Select a suitable order record and select **Print → Order Confirmation.**
- The usual print dialog will appear, select **Print.**
- The Zetadocs Delivery card may appear (shown below) depending on your system settings, this will contain all of the delivery details according to your current rule setup.
- Select **OK** to send the report, check to ensure it delivers as expected and archives if this has been configured as well.

Note: If you have configured higher level rules for the customer in question these will supersede the level 2 rule.

Figure 43 - Zetadocs Delivery Dialog

Level 2 Rule Test – Batch Send

- Open the **Order Processing** section and select **Orders.**
- Select a suitable order record and select **Print → Order Confirmation.**
- Select a suitable rage of records and select **Print → Order Confirmation.**
- The usual print dialog will appear, select **Print.**
- 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.
- Select **OK** to send the reports, check to ensure they deliver as expected and archive if this has been configured as well.
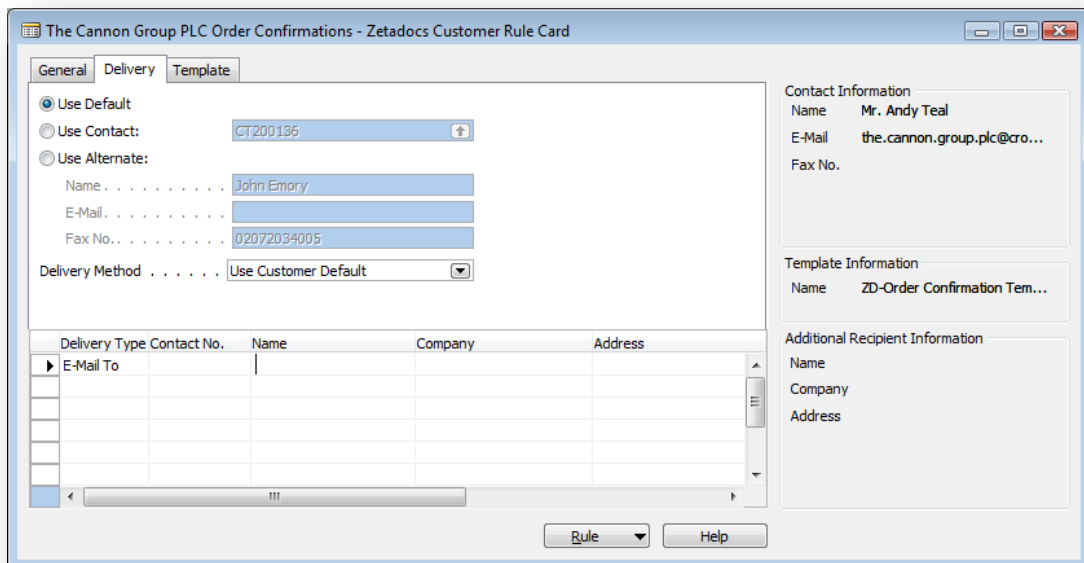
Note: If you have configured higher level rules for the customers in question these will supersede the level 2 rule.

Modifying the Level 2 Rule

- Return to the **Zetadocs System Rule Card** for the report in question and change the delivery details for that particular document set.
- Repeat the above send tests to ensure that they operate as expected.
- Return any settings to your previous values as determined by your requirements.

Level 3 Rule Test

- Go to the Customer Card and select a customer with an order (or one you are able to create one for).
- Click the **Customer Button** and select **Zetadocs Rules**.
- The **Zetadocs Customer Rule Card** will open.
- Select the **Delivery Tab** and select a sending option other than Use Default and/or change the delivery address (by changing any of those settings on that page you create a Level 3 Rule for that customer).

Figure 44 - Customer Card - Zetadocs Tab page

- Send an Order to this customer and check that the NAV document has been delivered as expected.

Modifying the Level 3 Rule

- Return to the **Zetadocs Customer Rule Card** for the customer in question and change the delivery details for them.
- Repeat the above send tests to ensure that they operate using the new rule details as expected.
- Return any settings to your previous values as determined by your requirements.

Level 4 Rule Test

- Go to the Customer Card and select a customer with an order (or one you are able to create one for).
- Click the **Customer Button** and select **Zetadocs Rules**.
- The **Zetadocs Customer Rule Card** will open.
- Set the **Document Set No**. to the document set you wish to modify or create a rule for.
- Modify the settings on the form as desired.
- Print a NAV document and check in the Zetadocs Client that the appropriate settings from that Customer Rule have been applied.

20.2 Testing Optional Delivery Features

You may remember that earlier you were shown a number of steps which would add functionality to a Zetadocs system but which were not required on all setups. Should you have installed any of the features discussed below please ensure you perform the relevant tests to ensure they operate as expected.

NAV Role Tailored Client Compatibility

Those systems which have performed the Role Tailored Client compatibility modifications either manually or by importing the Zetadocs for NAV Interfaces - NAVW16.10 (Pages).fob file need to perform the relevant test below to ensure setup has been successful.

- Log into the Role Tailored Client as a user with a role with access to the modified sections within NAV.
- Locate one of the modified forms setup to work with Zetadocs e.g. Sales Order
- Either select an existing document or create a new one and click **Print.**
- Ensure the document is handled as expected and in-line with the earlier delivery tests.

SharePoint Archiving Support

Those systems with SharePoint Archiving configured should already have populated there archive whilst performing the earlier document delivery and rule tests earlier. As such viewing the document library created earlier should display the items archived. For those without any existing content in their archive you can modify your system settings using the steps in section 8.1 to enable archiving before repeating any of the earlier document delivery tests.

Adding the Documents FactBox to NAV pages

The Documents tab enables Zetadocs to display related documents from your SharePoint archive within the NAV Role Tailored Client.

- Log into the Role Tailored Client as a user with a role with access to the modified sections within NAV.
- Locate one of the modified pages setup to work with Zetadocs e.g. Sales Order
- Open one of the modified pages in NAV and the Documents FactBox should be displayed in the top right hand side of the page.
- Drag and Drop a document into the Drag Files Here area and ensure that it is archived as expected.

Checking Zetadocs Form and Zetadocs Archive option additions to NAV

You will need to perform this test if you have imported the Zetadocs for NAV Interfaces .fob file or performed the equivalent manual steps. The fob file will have added the menu items to the following locations, we would recommend you test a selection of them as a minimum using both the Role Tailored and Classic clients if applicable.

The Zetadocs Archive search menu item can be added to the cards listed in the table below:

Form No.	Form Name
21	Customer Card
26	Vendor Card
41	Sales Quote
42	Sales Order
43	Sales Invoice
44	Sales Credit Memo
507	Blanket Sales Order

6630	Sales Return Order
130	Posted Sales Shipment
132	Posted Sales Invoice
134	Posted Sales Credit Memo
6660	Posted Return Receipt
49	Purchase Quote
50	Purchase Order
51	Purchase Invoice
52	Purchase Credit Memo
509	Blanket Purchase Order
6640	Purchase Return Order
138	Posted Purchase Invoice
6650	Posted Return Shipment
140	Posted Purchase Credit Memo
136	Posted Purchase Receipt

The Zetadocs Rules menu item can be added to the cards listed in the table below:

Form No.	Form Name
21	Customer Card
26	Vendor Card

- Open NAV and choose one of the cards above e.g. the Customer Card.
- Click on the **Customer** button and it will expand revealing a number of options.
- **Zetadocs Archive** and **Zetadocs Rules** should appear at the bottom of this list as shown in the figure below.
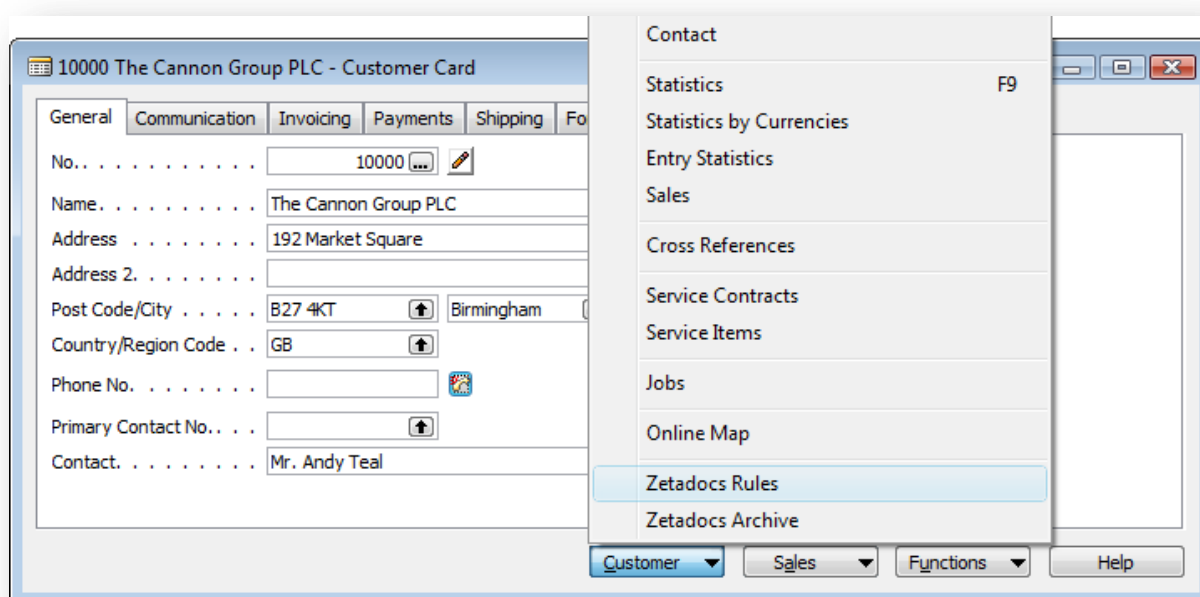
Figure 45 – Customer Card with Zetadocs Rules menu item added

20.3 Testing Capture Essentials Features

If you have installed the Capture Essentials features throughout this guide you will have added a Documents FactBox to several of your NAV systems pages in the Role Tailored Client. This will enable you to drag and drop items into your SharePoint Archive linking them to the document currently displayed within NAV. To test that these are operating as expected you need to do the following.

- Log into the Role Tailored Client as a user with a role with access to the modified sections within NAV.
- Locate one of the modified pages setup to work with Zetadocs e.g. Sales Order

- Open one of the modified pages in NAV and this will display the Documents FactBox in the top right hand side.
- Drag and drop a document to the Drage Files Here area and release it.
- Open the SharePoint archive for the system and search for the original NAV record.
- This should display the document you dragged and dropped into the Documents tab.
- Repeat this with a selection of file types and from locations like the Outlook inbox to ensure they function as expected.

20.4 Document Queues

This section details how to test that the Document Queue is functioning correctly. The terminology "Zetadocs Document Queue" in this section is used to describe all document queues.

Check Scanning (Optional)

If a scanning device is connected, perform the following checks to ensure correct operation.
- Click the **Queue → Scan**… button to initiate scanning which uses the Zetadocs client settings.
- Scan a document; once complete the scanned document name should appear in the Zetadocs Document Queue as the latest entry. The file (typically *"filename.pdf"*) should also be in the Zetadocs Document Queue shared folder location.

Check Shared Location Updating

- Create an email with an attachment and save it as a *.msg* file into the Zetadocs Document Queue's shared folder location.
- Select the **Queue→Refresh** menu button and ensure that the saved email.msg file is now in the Document Queue converted into pdf format.
- Select the entry in the Zetadocs Document Queue and click **Item→View,** ensure that the item is viewable in pdf format
- Select the entry in the Zetadocs Document Queue and click **Item→View Original,** ensure that the item is viewable in its original format.

Check Printing

- Select the scanned *.pdf* file and click **Item→Print,** when prompted select a physical printer and click print. Ensure that the document prints to the printer.
- Select the recently added *email* with attachment(s) now stored as a pdf file and click **Item→Print,** when prompted select a physical printer and click **Print**. Ensure that the document prints to the printer and that the attachments are printed out also.

Check Delete

- Select an entry in the Zetadocs Document Queue and click **Item→Delete**. Ensure that the document is removed from the Queue and also that it successfully deletes the file from the Zetadocs Document Queue network folder location.

20.5 Creating Documents using the Sales and Purchase Document Queues

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

Sales and Purchase Queue Create Options:
- Quote
- Order
- Invoice
- Blanket Order
- Credit Memo
- Return Order
- Link to existing sales document (posted or unposted)

Creating a Document using the Sales and Purchase Document Queues

- Open NAV and open the Zetadocs Sales Document Queue.
- Ensure the queue is populated with a selection of sample or test documents.

- Select one of the items from the queue and select **Create** and then the type of document you wish to test. In this case we'll look at a **Quote,** normally a user would view a queue item using the Zetadocs Viewer and use this as the basis for filling in the quote, order invoice etc details.
- This will display the **Sales Quote** window. Fill in the form as usual and when finished click the **Print** button.
- This displays the Sales - Quote dialog box. To send your documents using Zetadocs, check that **Send using Zetadocs** is selected on the **Options** tab.
- Click Print again. This displays the Sales – Quote - Print dialog box. Click OK. This displays the **Zetadocs Delivery window**, where you can change any settings if you want to, e.g., if you want to address your quote to a different contact, or if you want to change the template.
- On the **Zetadocs Delivery window,** if you select **Preview in Zetadocs Client before sending,** this allows you to preview your document in the Zetadocs Client before actually sending it. But if you do not select this option, your document is sent directly to the recipient.
- After sending the order, the **Send Result** dialog box is displayed, showing you the result. If you click the **Show log** button, you can see information about the Quote you sent, and it will also tell you the location where the Quote has been archived as per your archiving options in Microsoft SharePoint.
- You can now close the Sales Quote window. 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 and will also give you the archive location in Microsoft SharePoint. 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 Microsoft SharePoint location where the document was saved to view it.
- Repeat this process for the other Sales items and the Purchase queue as required.
- Open your SharePoint Archive and ensure the documents have been archived as expected.

20.6 Continuing the Installation

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, should you be performing the install on a test setup please proceed to the section migrating to a live environment.
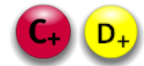
21. Testing Delivery and Capture Plus

You may wish to test on a mixture of the NAV classic and Role Tailored Clients as required by the systems specifications to ensure all functionality operates as expected.

21.1 Creating Documents using the Custom Document Queues

The Custom Document Queues have the capacity to generate a number of different documents within NAV based solely upon the requirements of the system. As these can take a number of forms you should do a test for each that you intend to implement in the system in the manner it is likely to be used. The example below will look at testing a Shipment Document Queue.

Creating a Document using Custom Document Queues

- Open NAV and open the Zetadocs Shipping Document Queue.
- Ensure the queue is populated with a selection of sample or test documents.
- Select one of the items from the queue and select **Archive.**
- The available Actions should be listed. Ensure your Actions are all displayed.
- Select each in turn and create and send a document.
- Repeat this process for the other queues as required.
- Open the SharePoint Archive and ensure the documents have been archived and sent as expected.

Bespoke Solutions

The main benefit of Zetadocs Delivery and Capture Plus is its ability to make a solution specific to your needs, as such it is difficult to provide a comprehensive set of testing instructions. We would recommend that you attempt to use your modifications in a manner consistent with their intended deployment, with special attention on any bespoke business logic used.

22. Manual Modification of the NAV pages, forms and reports

This section contains the steps to manually configure various elements of Zetadocs for scenarios where it is not possible to use the tools provided to modify NAV.

22.1 Role Tailored Client Sample Pages Import

Note: This section should only be performed on systems utilising the Role Tailored client.

To enable the operation of Zetadocs for NAV with the Role Tailored Client, Page Interfaces are provided for NAV 7.00 (2013) and NAV 6.10 (2009 R2). These pages will add the Documents Factbox to your RTC, the drag and drop functionality is installed as part of this process.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and import the interfaces file relevant to your NAV version from the **\Zetadocs NAV Server Components\Page Interfaces** folder. E.g. **Zetadocs for NAV Page Interfaces – NAV7.00W1.fob where the last two letter denote the NAV database version.**
- It can be found in your product download in the folder If there are no collisions continue with the import. If there is a collision it is recommended that you export your existing objects and compare version of the objects with the text file versions of the interfaces detailed above to determine the safety of the available merge/replace options in the import worksheet.

22.2 Modifying NAV Pages Manually

Should you decide not to install the Zetadocs for NAV Interfaces .fob file relevant to your NAV version, the instructions below can be performed to add the related document Factbox, including the Capture Essentials features if licensed, to your Role Tailored Client pages as required.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and select the page that needs to be modified and click the **Design** button.
- Locate the **FactBoxArea** on the page, it is usually at the bottom.
- Insert a new row at the top in the FactBoxArea container and enter the following information
  - o Name: Zetadocs
  - o Caption: Documents (Or translated equivalent)
  - o Type: Part
  - o SubType: Page
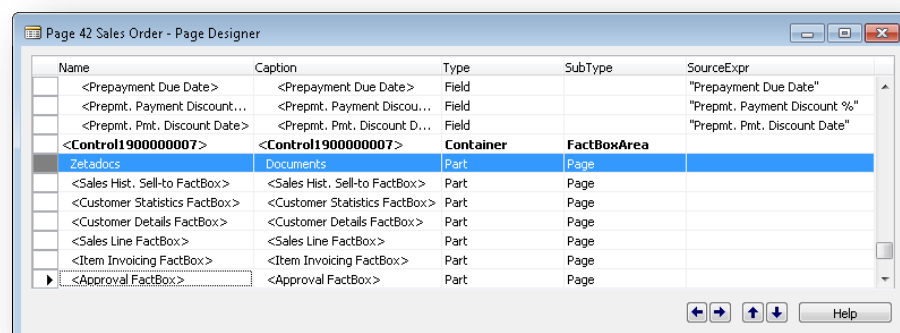
Figure 46 – Page Designer

- Select the new line and press **Shift+F4** to show the properties window.

- Change the **PagepartID** to **Zetadocs Rel. Docs. Page Part** Object ID 9041211. It should look something like the screenshots displayed below:
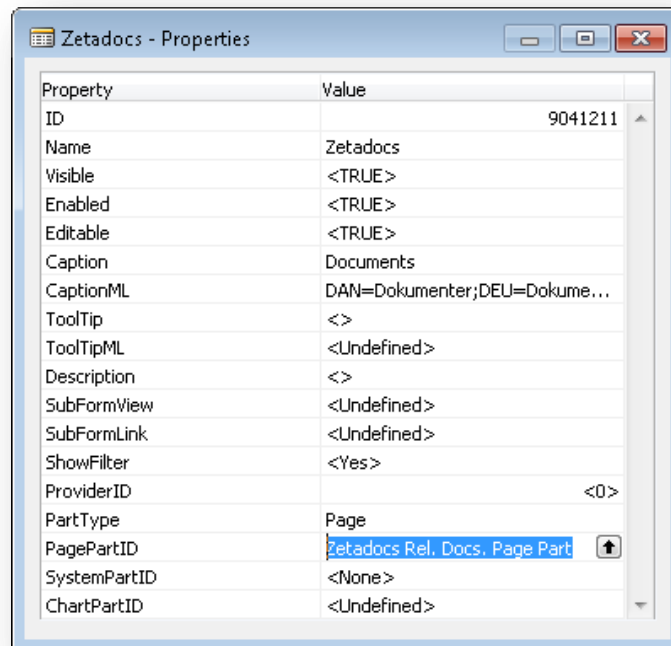
Figure 47 – Zetadocs Properties

- Press **F9** to display the code window.
- In the **OnAfterGetRecord()** trigger add a local variable:
  - **Name:** ZdRecRef
  - **DataType:** RecordRef
- In the trigger add the following code:

For NAV 2013 systems:
```
ZdRecRef.GETTABLE(Rec);
IF ZdRecRef.GET(ZdRecRef.RECORDID) THEN
BEGIN
 CurrPage.Zetadocs.PAGE.SetRecordID(ZdRecRef.RECORDID);
 CurrPage.Zetadocs.PAGE.ACTIVATE(TRUE);
END;
```

For NAV 2009 systems:
```
ZdRecRef.GETTABLE(Rec);
IF ZdRecRef.GET(ZdRecRef.RECORDID) THEN
BEGIN
 CurrPage.Zetadocs.FORM.SetRecordID(ZdRecRef.RECORDID);
END;
```

- Close the page designer windows.
- Click **Yes** when prompted to compile and save the changes.

22.3 Classic Client Sample Forms Import
Note: This section should only be performed on systems utilising the Classic client.
These form interface changes enable users of the NAV system to access the Zetadocs Rules and Archive from throughout various cards and appears in NAV, as shown in the figure below.

Zetadocs Rules: Opens the Zetadocs Customer Rule Card for the customer selected.
Zetadocs Archive: Opens the Documents Factbox form containing documents that have been dragged and dropped into the archive using Zetadocs Capture Essentials. You can drag and drop documents into the archive by dragging them into the "Drag files here" area.

To make the required changes we have provided a Form Interfaces fob file for NAV 2009 R2 for each of the supported languages.
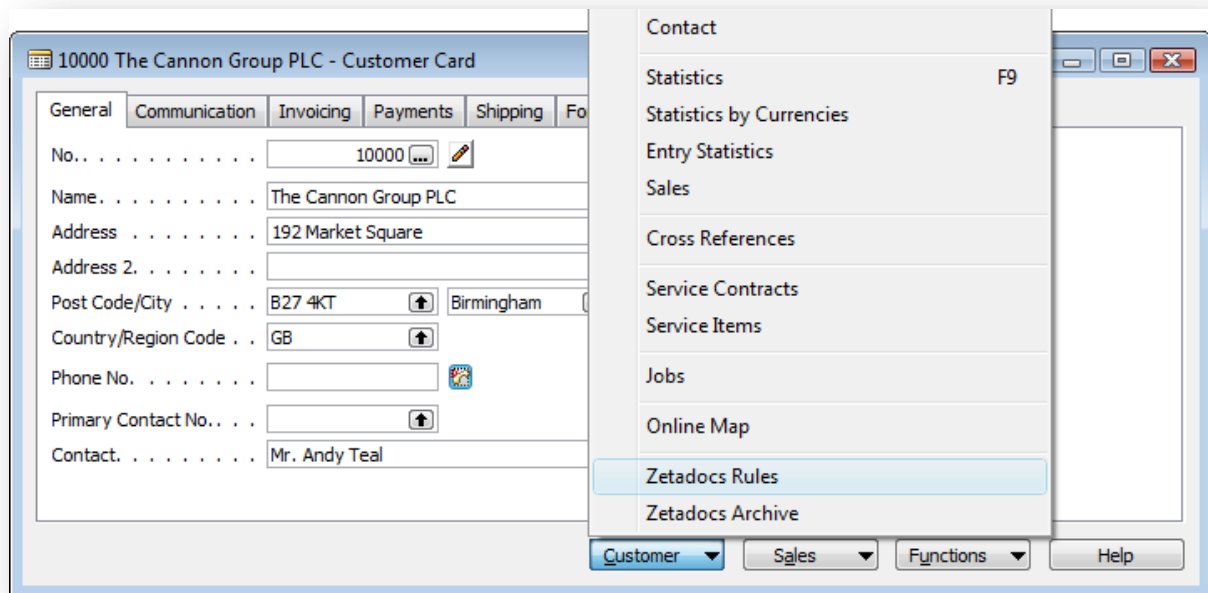
Figure 48 – Customer Card with Zetadocs Rules menu item added

Importing the Forms fob file
- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and import the interfaces file included on your Zetadocs for NAV product download relevant to the version and language of your install. E.g. **Zetadocs for NAV Form Interfaces – NAV6.10W1.fob where the last two letter denote the NAV database version.**
- It can be found in your product download in the folder **\Zetadocs NAV Server Components\Form Interfaces\.**
- If there are no collisions continue with the import. If there is a collision it is recommended that you skip those objects that conflict and then follow the steps below to modify existing forms objects manually.

22.4 Modifying NAV Forms Manually
If when attempting to import the Zetadocs for NAV forms into NAV you have collisions which make it impractical to import the forms the following manual steps can be performed to provide the same functionality.

Zetadocs Rules
To allow users to adjust the rules for a customer or vendor from an option on the relevant card we require a modification of the customer and vendor rule cards. The steps outlined below will add the Zetadocs Rules menu item to the Customer button on the Customer card, see the above figure, and the Vendor button on the Vendor card.

Adding the Zetadocs Rules menu item to the Customer Card
- Open the object designer (Shift + F12)
- Open the Form in **Design View**.
- Select the **Customer** button.
- Right Click and select menu items.
- Scroll down and create the new menu item **Zetadocs Rules**.

- Set the Action to **RunObject**.
- In the RunObject field enter Form Zetadocs Customer Rule List.
- Select **View → Properties** menu item or press Shift+F4.
- Set the run form link to Customer No. = FIELD(No.).
- Repeat this process for the Vendor Card using Vendor No. = FIELD(No.).

SharePoint Archiving

The following changes enable display of the related document grid form which shows existing archived documents from the record in question.

Adding the Zetadocs Archive menu item to the Sales Quote Card

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and select the form that needs to be modified and click the **Design** button.
- In this example we will look at modifying a Sales Quote form, for other form modifications please follow these steps and select the option relevant to your form when prompted.
- Right-click on the **Quote** button, or the corresponding button on your form, and select **Menu Items.**
- Scroll down and at the bottom add a separator by using the **Separator** button.
- Add a menu item with caption **Zetadocs Archive** or a suitable localised equivalent.
- Add a shift+ctrl+A in the ShortCutKey field.

<div align="center">
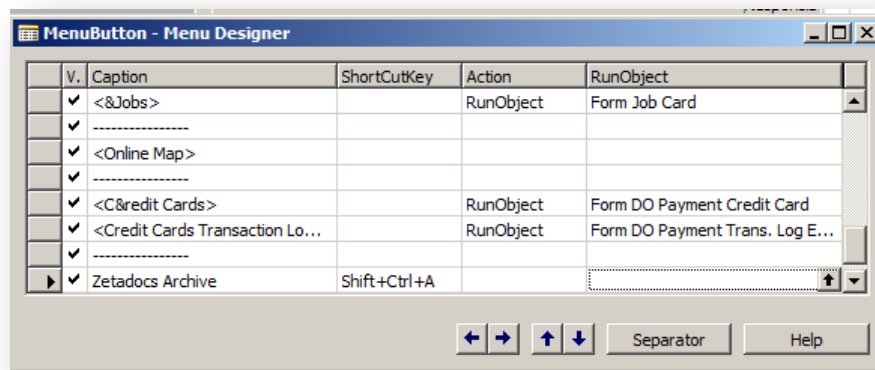
Figure 49 – Menu Designer – MenuButton

</div>

- While still on the Zetadocs Archive menu item, open up the **C/AL Code editor** by pressing **F9**.
- In the **OnPush ()** trigger of the menu item add a local variable (View→Cal Locals):
  - **Name:** RecRef
  - **DataType:** RecordRef
- Add a second local variable
  - **Name:** ZetadocsUtilities
  - DataType: Codeunit
  - **Subtype:** Zetadocs-Utilities

Note: You may find it easier to locate the Zetadocs-Utilities using its ID code 9009959.
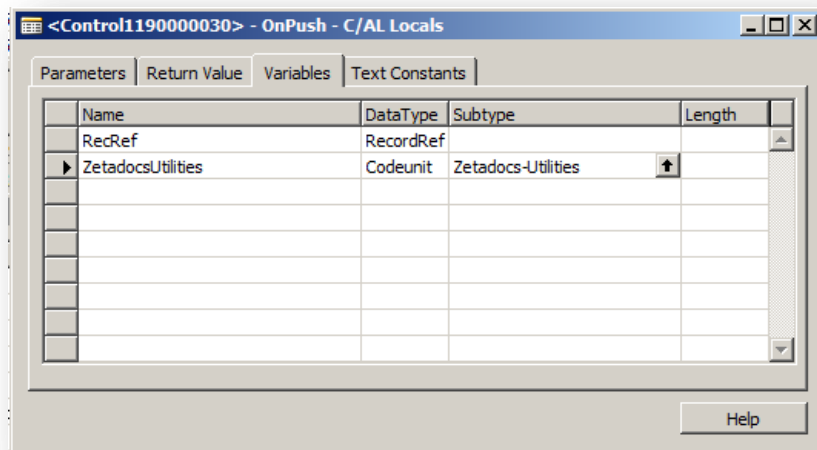
Figure 50 – OnPush – C/AL Locals

- Next, add the following code into the **OnPush()** trigger of the menu item:
RecRef.GETTABLE(Rec);
ZetadocsUtilities.ShowCaptureAddinForm (RecRef.RECORDID, STRSUBSTNO('%1-%2',
CurrForm.CAPTION, "No."));
- Close the form designer windows.
- Click **Yes** when prompted to compile and save the changes.
- Repeat this process for any other required forms.

22.5 Using the Zetadocs Sample Reports
Sample Reports are provided for NAV 7.00 (2013) W1 and NAV 6.10 (2009 R2) W1 systems only.

- Log into Microsoft NAV as a user with **SUPER** user permission rights to allow you to import new objects into the NAV database.
- Open the **object designer** (Shift + F12) and import the sample reports file relevant to your NAV version from the **\Zetadocs NAV Server Components\Sample Reports** folder of your product download. E.g. for NAV 2013 choose the **Zetadocs for NAV Sample Reports – NAV7.00W1.fob.**
- Next assign these reports in NAV so they run in place of the existing reports. Otherwise use the steps below to configure any remaining reports which you require.

Sample Reports provided:

Report ID	Report Name
9009960	ZD-Blanket Purchase Order
9009961	ZD-Blanket Sales Order
9009962	ZD-Order Confirmation
9009963	ZD-Order
9009964	ZD-Purchase – Credit
9009965	ZD-Purchase – Quote
9009966	ZD-Purchase – Invoice
9009967	ZD-Sales – Credit Memo
9009968	ZD-Sales – Invoice
9009969	ZD-Sales – Quote
9009970	ZD-Statement
9009973	ZD-Return Order Confirmation
9009974	ZD-Return Order

22.6 Manually Modifying your Existing Reports

There are two goals of the Zetadocs for NAV report modifications.

1. To determine the page numbers where one report ends and the next begins.
2. To determine the record to which we want to link the document once archived.

Determining the page breaks

Zetadocs for NAV writes a short code at the top of the report page print output to identify which pages belong to which record. This can be once per page or only on the first page depending on how the report is written. This is why we modify the report section / layout. The Zetadocs Ref number also is capable of dealing with copy loops so that only one copy of the document is sent to a recipient.

Determining the record to link to

If I send a Sales Order Confirmation I will want to link that document to the Sales Header record for the report. To achieve this Zetadocs requires that you call AddRecord passing the RECORDID of that record. You can see in the image below how the Sales Header constitutes the main loop of that report.
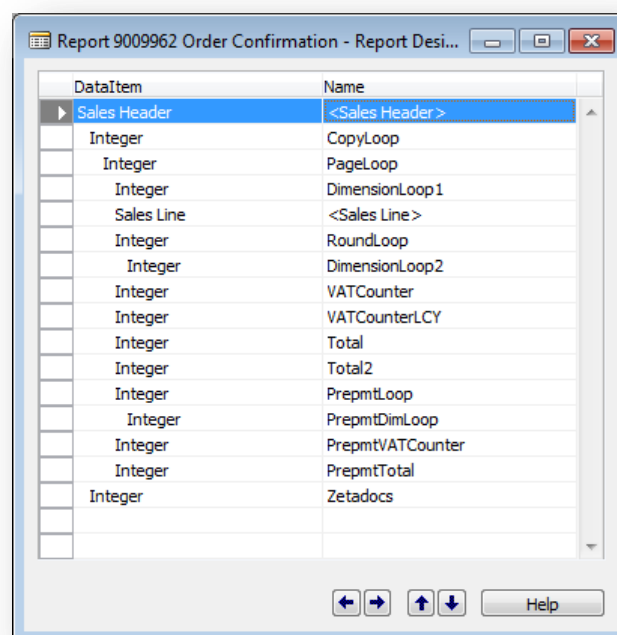
Figure 51 - Order Confirmation Report with Zetadocs Modifications

This is not always the case for all reports and so you must determine the record you want to link to and the dataitem that is constitutes the main print output loop of your report before adding the Zetadocs Integer dataitem and associated code. Often a report which is based on line records filtered by another record type will have different records to link to and as the main output loop.

Report modification best practices

- Only call AddRecord with records that will print output.
  - This is why the Zetadocs dataitem comes at the end of the report loop. That way if there is any reason to skip a record or there is no report output for that record, AddRecord will not get called.
- Only call AddRecord with actual Record RECORDIDs.
  - Do not get the RECORDID of a temporary table and call AddRecord passing that value as this can lead to errors.

Report modification steps NAV 6

The following instructions need to be followed to modify an existing report to work with Zetadocs, simply repeat these steps for each report you wish to configure.

- Open the report designer for the report that you want to modify.
- Scroll to the empty row at the bottom and create a new Integer data item called **Zetadocs**.
- Indent this data item once.
- Change the DataItemTableView property to SORTING(Number).
- Change the **MaxIteration** property to **1**.
- Now add the following global variables:

Name	Data Type	Sub Type
ZdSend	CodeUnit	Zetadocs-Send
ZdRecRef	RecordRef	

- Add the following code to the **OnPostDataItem** trigger for the Zetadocs data item:
  ZdRecRef.GETTABLE(◁┄┄Main Data Item┄┄▷);
  ZdSend.AddRecord(ZdRecRef.RECORDID);
- Select an empty row on the report and press **F9** to view the report code.
- Enter the following code after any existing code in the **OnPreReport** trigger:
  ZdSend.Initialize(CurrReport.OBJECTID(FALSE), CurrReport.PREVIEW);
- Enter the following code after any existing code in the **OnPostReport** trigger:
  ZdSend.ProcessRecords;

Report modification steps NAV 7

The following instructions need to be followed to modify an existing report to work with Zetadocs, simply repeat these steps for each report you wish to configure.

- Open the report designer for the report that you want to modify.
- Now add the following global variables:

Name	Data Type	Sub Type
ZdSend	CodeUnit	Zetadocs-Send
ZdRecRef	RecordRef	

- Under the **DataItem CopyLoop** add a new entry (Right click on the row right underneath it and click **New**).
- Give it the following values:
  - o Data Type: Column
  - o Data Source: ZdSend.GetZdReference(CopyLoop.Number)
  - o Name: Zetadocs_Reference
- Scroll to the empty row at the bottom and create a new Integer data item called **Zetadocs**.
- Indent this data item once.
- Change the DataItemTableView property to SORTING(Number).
- Change the **MaxIteration** property to **1**.
- Add the following code to the **OnPostDataItem** trigger for the Zetadocs data item:
  ZdRecRef.GETTABLE(◁┄┄Main Data Item┄┄▷);
  ZdSend.AddRecord(ZdRecRef.RECORDID);

Note: The Main Data Item is the table upon which the report is based e.g. Sales Reports would usually use the Sales Header table. This information can be found in the report properties.

- Select an empty row on the report and press **F9** to view the report code.
- Enter the following code after any existing code in the **OnPreReport** trigger:
  ZdSend.Initialize(CurrReport.OBJECTID(FALSE), CurrReport.PREVIEW);
- Enter the following code after any existing code in the **OnPostReport** trigger:
  ZdSend.ProcessRecords;

22.7 Classic Client specific layout modifications

Below are the instructions for modifying the classic report layout to include the Zetadocs reference, which is required to add addressing information to the report once it has been printed.

- Click **View → Sections** to show the classic client report designer.
- Open the toolbox and add a text box that it will appear at the top of the report.
- Change the SourceExpr property to ZdSend.GetZdReference(*<COPYNUMBER>*).
- (*<COPYNUMBER>* is **CopyLoop.Number** if you have a copy loop or **1** if not.)
- Change the **FontSize** property to **4**.
- Change the **DataSetFieldName** property to **Zetadocs_Reference**, Note: This field is only available in NAV 6.0 and later and should be ignored on earlier versions of NAV.
- Close the sections window.

22.8 Creating Document Libraries for Zetadocs for NAV

The Zetadocs for NAV SharePoint Extensions create a document library called Zetadocs by default and enables it for operation with Zetadocs for NAV. 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.

- Create a new document library on the site.
- Open the Document Library settings →Advanced Settings.
- Set **Allow management of content types** option to Yes.
- 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:

- From your new Document Library ribbon browse to the library **Workflow Settings.**
- Click on **Add a workflow** ensuring the **These workflows are configured to run on items of this type** option is set to **All**.
- From the workflow list select the **Approval – SharePoint 2010** option.
- You must name the workflow **Zetadocs.**
- 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.
- Once this is complete you can continue with the installation from section 5.5.

Figure 52 - Zetadocs Workflow Setup

23. **Adding Capture Essentials features in other areas of NAV**

Zetadocs for NAV has been optimised for Sales and Purchase documents but its functionality can be added to other areas of NAV to provide the same functionality. The steps below are required to enable Zetadocs to access vital metadata on your NAV records which is used during archiving process.

23.1 Adding additional references to the Metadata information into the Zetadocs Metadata Mappings Table

The Zetadocs configuration files contain details of the fields to use for metadata for the Sales and Purchase Header tables. Therefore to extend the functionality beyond Sales and Purchase documents you must add additional references for the Organisation Name and the Record No. to the Zetadocs Metadata Mappings table. If this is not done and a user attempts to archive documents based upon Company name, then Zetadocs will not be able to archive the document as it will not have access to this information. The steps below add the company name and record no. to the Service Header table, but the steps can be repeated for other areas of NAV by changing the Table and Table Field ID details as required.

- Open the **object designer** (Shift + F12) and locate the table which contains the details for the form/page you wish to configure, in this case the Service Header Table (5900) and select **Design**.
- Locate the fields which contain the **name of the organisation** and the **record no**. and make note of the **field IDs** (79 and 3 respectively for the Service Header Table).
- Return to the object designer and run the **Zetadocs Metadata Mappings Table** (9041212).
- Scroll to the bottom of the list and enter the **Table ID**, in this case the Service Header Table ID: 5900 into the Table ID field.
- Next enter the value **ZetadocsOrganisation** into the **Metadata Field Name** and **79** into the **Table Field ID.**
- Finally add the record no. entry by selecting the bottom row and entering the Table ID (5900 in this example) before adding the value **ZetadocsRecordNo** into the **Metadata Field Name** and **3** into the **Table Field ID**.

23.2 Adding Capture Essentials Features to Forms

To add Capture Essentials to a specific form you need to do the following.

- Open the **object designer** (Shift + F12) and select the form that needs to be modified and click the **Design** button.
- When the Design view opens select **View➔CA/L Globals**.
- Create a global variable with the characteristics:
  - Name: RecRef
  - Type: RecordRef
- Select the **Functions** tab and then create a global function
  - Name: SetRecordID
- Click **View➔C/AL Code** or press F9 to open the C/AL Editor, scroll down the list until you reach the SetRecordID section.
- Add the following code:
  RecRef.GETTABLE(Rec);
  CurrForm.DragAndDropSubForm.FORM.SetRecordID(RecRef.RECORDID);
- Create a subform from the toolbox and place above the buttons making it the width of the items grid.
- Select the Properties for the new subform and give it the following properties:
  - Name: DragAndDropSubForm
  - HorzGlue: Both
  - VertGlue: Bottom
  - Border: No
  - SubFormID: Zetadocs Drag and Drop Subform (ID:9010010)
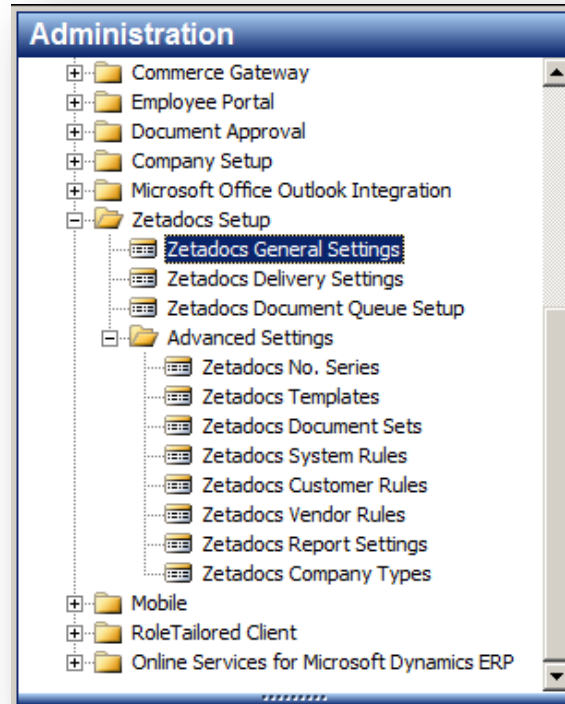
Figure 53 - Zetadocs Drag and Drop in the classic client

- Select the main form again and click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Next copy the following code into the bottom of both the OnAfterGetRecord and OnNewRecord triggers of the form:
        SetRecordID;
- Note that to enable the drag and drop control, focus is taken from the default field on opening of the form. If you wish to have the focus restored to the standard starting point for the user, add the following code to the bottom of the OnOpenForm trigger.
        CurrForm.<controlname>.ACTIVATE;
        (E.G. CurrForm."No.".ACTIVATE;)
- You can now drag and drop documents onto this form, repeat this process for any remaining forms you wish to add the Zetadocs Capture Essentials Drag and Drop control to.

23.3 Adding Capture Essentials Features to pages

- Open the **object designer** (Shift + F12) and select the page that needs to be modified and click the **Design** button, in this example we will be looking at the Employee card.
- Add the following entry inside the <Control1900000001> section:
    o   Name: Zetadocs
    o   Caption: <Zetadocs>
    o   Type: Part
- The Zetadocs Related Documents Grid will appear in this location, as such you can choose where you wish to display it. You can enter the line between, on top of, or at the bottom of the other controls.
- For example, putting the line on top of Control1 will place the related documents list at the top of the Employee Card page in the RTC.
- Place the Zetadocs line in a suitable location, if unsure view the page and find the entry below which you wish it to appear and place it there.
- Once you've added the line select it and open the properties (shift+F4) for it.
- Scroll down to the PagePartID field and select Zetadocs Rel. Docs. Page Part, 9041209.
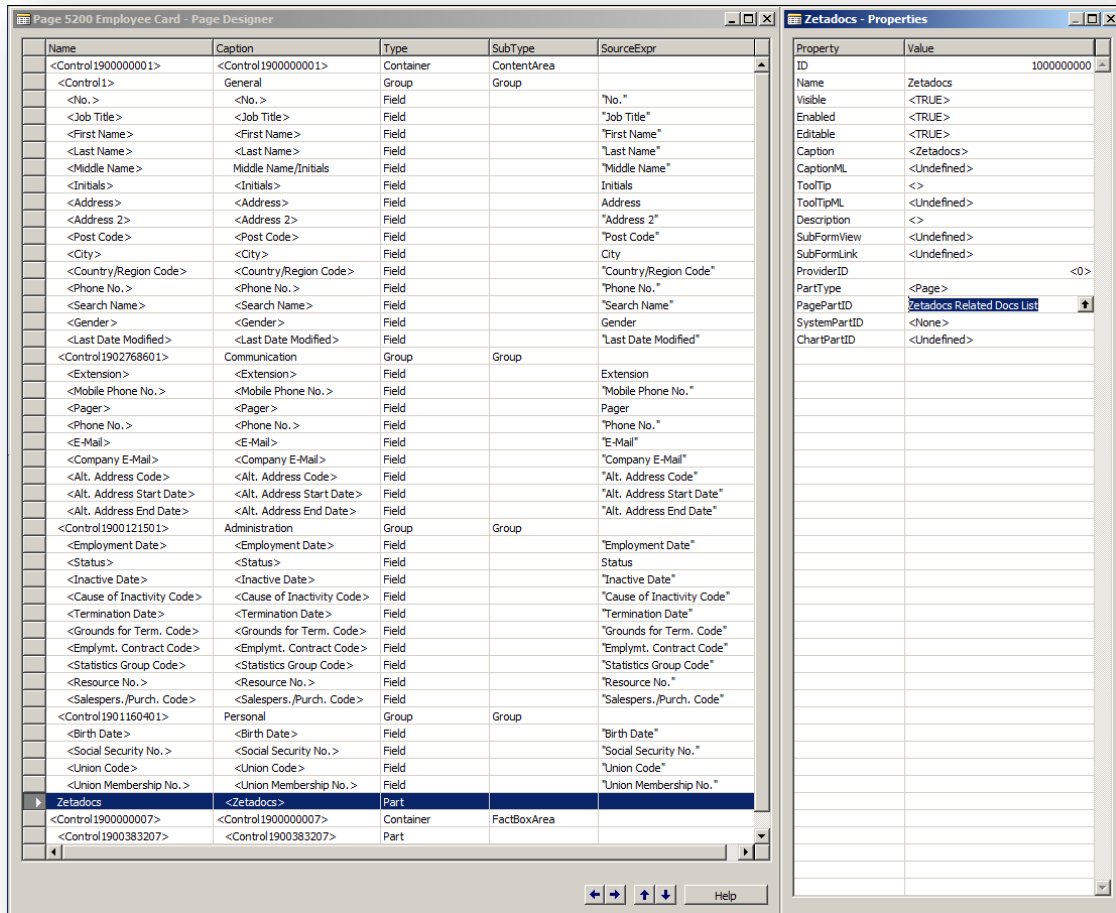
Figure 54 - Zetadocs line addition

- Select **View→CA/L Globals** and select the Variable tab, create a new global variable with the values:
  - Name: RecRef
  - Type: RecordRef
- The Documents FactBox can now be used in the Role Tailored Client.

24. Archive Search Configuration

Zetadocs for NAV has the ability to search for documents archived against a particular NAV record and display the results in the documents fact box. By default this maps records in the Sales and Purchase areas of NAV. Through configuration, it also has the ability to search for documents archived against related NAV records. This is configured in the Zetadocs Record Mapping Header and Zetadocs Record Mapping Line tables. These tables contain a collection of mappings that tell the Zetadocs search code which records are related and how. The only requirement is that there is enough data in the NAV table to be able to find the related records.

When configuring the Zetadocs Mappings you will need to know the table numbers that you are referring to and the field numbers containing the data which allows you to get to the related records. The diagram below shows how the search works when finding records related to a Sales Header or Sales Invoice Header record and the mapping types that are used at each stage. This example adds Job No. mapping but the principle can be used to add similar functionality to areas other than sales and purchase posting routines throughout NAV.
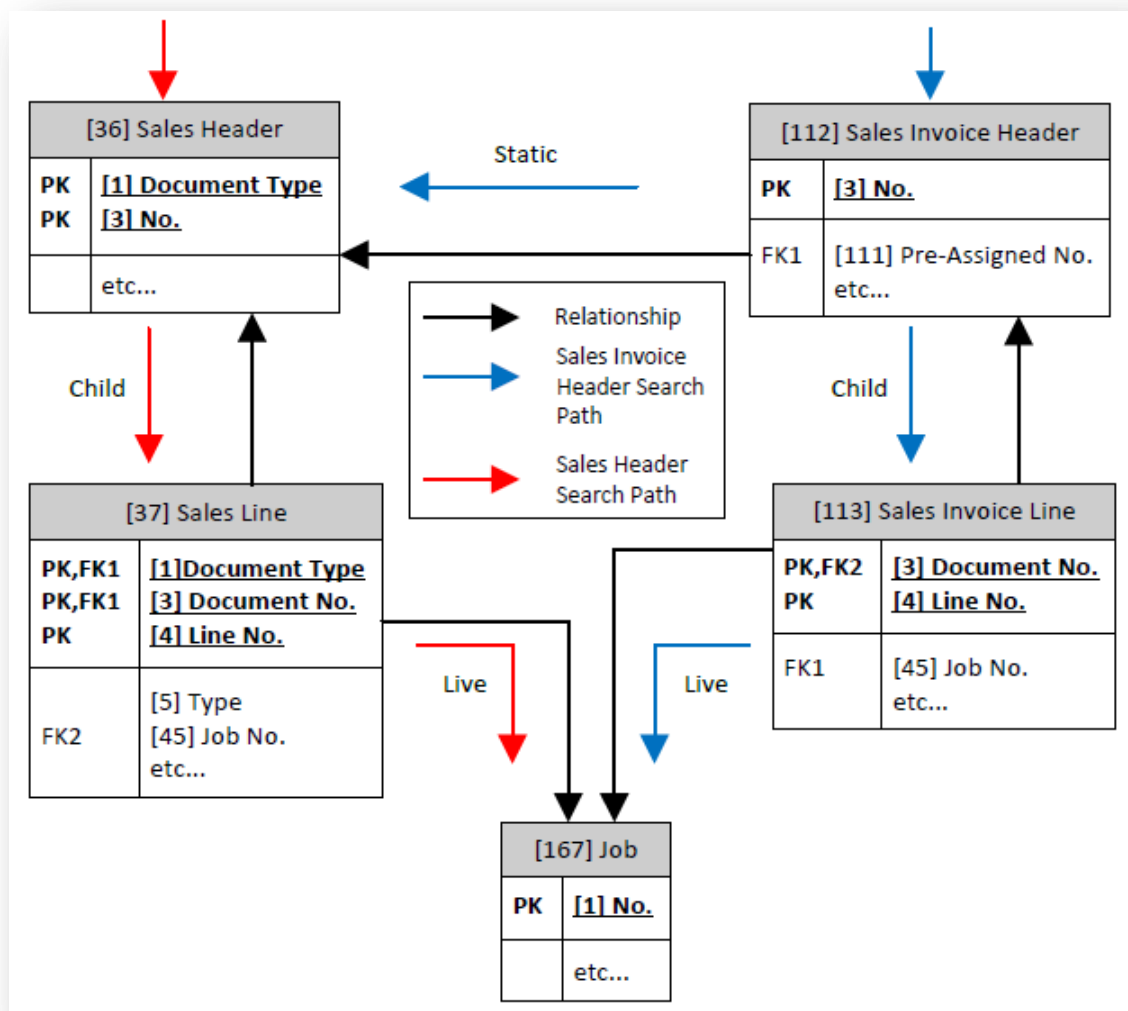
The configuration required to achieve this is displayed below.

Mapping ID	Mapping Type	Source Table	Target Table	Mapping Description
1	Static	112	36	Posted Sales Invoice -> Sales Invoice
2	Child	36	37	Sales Header -> Sales Line
3	Child	112	113	Sales Invoice Header -> Sales Invoice Line
4	Live	37	167	Sales Line -> Job
5	Live	113	167	Sales Invoice Line -> Job

Mapping ID	Line ID	Source Field	Target Field	Target Value
1	1	0	1	2
1	2	111	3	
2	1	1	1	
2	2	3	3	
3	1	3	3	
4	1	45	1	
5	1	45	1	

Mapping Types

- Static – This type of mapping should be used when the target record may no longer exist in the database. Zetadocs search uses the field values provided to find documents archived against the target record.
- Live – This type of mapping should be used for records that will always exist in the database. Zetadocs search uses the key field values to get the target record. Documents archived against this record will be found and documents archived against any records related to this record will also be found.
- Child – This type of mapping should be used when there will be multiple related records found in the same table. Zetadocs search will find documents archived against any of these records or against any record related to these records.

25. Troubleshooting

25.1 Troubleshooting

This section provides help with resolving common problems with the system. To assist in trouble shooting problem with the Zetadocs system there are a number of log files which can help diagnose a problem or assist in getting the configuration of the system correct.

NAV Logging

Ensure that Logging Enabled is ticked ON in the Zetadocs System Settings Form. The Logging Level determines the amount of information written to the log file. For general configuration and trouble shooting, WARNING or ERROR should suffice. The NAV log is saved to the users temp folder location. This can be found by either pressing Start→Run, then type *%Temp%* and press OK; or manually browse to *C:\Users\<username>\AppData\Local\Temp(Vista) or C:\Documents and Settings\<username>\Local\Temp(XP)* directory.

There are two logs produced by the Zetadocs for NAV Addin.

- ZdExternalUtilitiesDll.log – logging of document queue actions and external calls to Zetadocs API. Only valid for troubleshooting issues with Equisys.
- ZetadocsNAV.log – standard logging of activity that occurs in the Zetadocs for NAV objects.

Zetadocs Client

Please refer to the Zetadocs Client help for information on client logging.

Zetadocs API

The Zetadocs API runtime, which is used as part of the Zetadocs for NAV addin logs information to the users Zetadocs folder. Its contents are usually of value when troubleshooting issues with Equisys.

It can be found at:

- C:\Users\<username>\AppData\Local\Equisys/Zetadocs PDF/ZdApi.log(Vista)
- C:\Documents and Settings\<username>\Local\ApplicationData\Equisys\Zetadocs PDF\ZdApi.log (XP).

Object ID collisions when importing the Zetadocs objects .fob file

Unless you are re-importing the objects or performing an upgrade it is unlikely that you will come across an ID collision. If you do, please continue and view the recommendations of the import collision wizard in NAV. It is not recommended to undertake collision resolution unless you are an experienced NAV consultant.

Some objects fail to compile during import of the Zetadocs objects .fob file

Most likely this is due to not having installed the Zetadocs for NAV Client on the machine you are using to import the Zetadocs objects from. Many of the codeunits in Zetadocs for NAV use automation components which must be installed prior to importing to ensure that all objects compile successfully.

Things to check for (in order):

- You have installed the Zetadocs for NAV Client on the machine you are using to import the Zetadocs objects
- You are logged in as the user who installed the Zetadocs for NAV Client
- If the above are true but you are still having problems try uninstalling and re-installing the Zetadocs for NAV Client

When you run the Customer/Vendor Card no information is displayed in the Zetadocs tab

Copy and pasting the Zetadocs subform control on to the Zetadocs tab should copy all required subform links. If you are experiencing problems check the following property values on the subform control on the Zetadocs tab:

- **SubFormID**: Zetadocs Customer Rule Subform
- **SubFormLink**: Customer No.=FIELD(No.),Zd Rule ID No.=CONST(o)

OR For Vendors

- **SubFormID**: Zetadocs Vendor Rule Subform
- **SubFormLink**: Vendor No.=FIELD(No.),Zd Rule ID No.=CONST(o)

SharePoint Logging

The logs for Zetadocs activity on your SharePoint site can be found in the following locations:

SharePoint 2007 Systems
C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\LOGS\Zetadocs

SharePoint 2010 Systems
C:\inetpub\wwwroot\wss\VirtualDirectories\80\%CommonProgramFiles%\Microsoft Shared\Web Server Extensions\14\LOGS\Zetadocs

SharePoint Logging

26. Routine Activities

This section contains details on performing routine tasks and other procedures which may be required to maintain an operable system.

26.1 Operational Checklist
Use these checklists periodically to record operations.

Checklist: System Operation
Follow the checklist to verify system operation.

Completed	Task
	Check the operation of each Zetadocs enabled NAV report.
	Check and verify that messages print to the Zetadocs Client successfully.
	Check and verify that messages deliver successfully.
	Check and verify that messages archive successfully.
	Check the number of documents printed, delivered and archived match.
	Check the operation of each Zetadocs enabled NAV report.

Checklist: Event Logs
Check event logs using the following checklist.

Completed	Task
	Filter application and system logs on each NAV Client to see all Zetadocs errors Note repetitive warning and error logs.
	Filter application and system logs on the SharePoint server to see all Office SharePoint search and crawl errors. Note repetitive warning and error logs
	Respond to discovered failures and problems with the aid of the Troubleshooting section of this guide.

Checklist: Check NAV and SharePoint Backups
Complete this checklist to check supporting systems backups.

Completed	Task
	Ensure that the recommended minimum backup strategy - a daily online backup - is completed.
	Verify that the previous backup operation completed.
	Analyze and respond to errors and warnings during the backup operation.
	Follow the established procedure for tape rotation, labelling, and storage.
	Verify that the transaction logs were successfully purged (if your backup type is purging logs).
	Make sure that backups complete under service level agreements (SLA).

26.2 Security Hardening
Zetadocs for NAV provides the ability to print and send NAV information and in that respect consideration should be made as to ensuring the safety of both the information and the method of delivery. As Zetadocs integrates with Microsoft Dynamics NAV and Microsoft Office Outlook as standard for the source and destination of the information attention should be paid to the access permissions with NAV to particular data. Overall best practices should be followed for the deployment of NAV and Office Outlook.

Similarly the setup and configuration forms within Zetadocs for NAV are recommended for access only by an NAV Administrator and therefore access permission roles should be set up to this effect as with the other areas of NAV. For general advice on Security Hardening for NAV and other general recommendations please refer to the "*Navision Security Hardening Guide*" which is downloadable from http://www.mibuso.com/dlinfo.asp?FileID=474 .

Zetadocs Setup
Some features of Zetadocs for NAV involve the use of shared network folders. It is strongly recommended that only the necessary users are granted access to these folders. Examples of these are: Zetadocs Template folders, Zetadocs Document Queue folders.

The Zetadocs Configuration, which contains details of enabled users, license and location of shared network folders, is stored in the domain partition of Active Directory. Optionally this configuration can be stored on a network share; it is also strongly recommended that only the necessary users are granted access to this folder.

SharePoint Security
If integrating with Microsoft SharePoint as a document archive, consideration should be made as to the access permissions of users to view potentially sensitive archived information. For general security recommendations for Microsoft SharePoint Server please refer to Microsoft documentation. Some information on security hardening can be found here http://technet.microsoft.com/en-us/library/cc262849.aspx .

From Zetadocs for NAV, rules can be setup to change the archive location of documents dependant on type and writing some code in the Zetadocs-Customization codeunit, per record archive locations can be set dependant on content. For this reason it is recommended to consider access permissions when creating the Zetadocs System Rules.

26.3 Performing a Zetadocs for NAV Backup
This section describes how to perform backups of a Zetadocs for Microsoft Dynamics NAV system. This enables you to safeguard your organizations information resources by holding extra copies in secure locations and enables you to restore your systems following problems with the original data.

How Zetadocs for NAV Backup integrates with NAV Backup
Zetadocs for NAV has additional tables contained within NAV which when NAV is fully backed up will also be included within the backup meaning that there is no additional overhead in performing the standard operation. There are however elements to Zetadocs for NAV which exist separately from NAV which will require additional steps to include in a complete backup.

Document Queues – The Zetadocs Document Queues are centralized folders for processing documents from, in essence a virtual in tray. The Zetadocs Document Queues operates by accessing a shared network folders which contains documents received by NAV via email, fax or scanned from hard copy sources. As the folder is not part of NAV it will not be backed up during an NAV backup as such it is desirable to backup the network folders separately.

SharePoint Archive – If the archiving options in Zetadocs have been configured to archive documents into a SharePoint archive then this to would need to be backed up separately as well to ensure that the record of processed documents is not lost. The backup of this data falls under the standard backup of a SharePoint system and therefore may be part of your existing backup procedure.

Preparations before Backing up
It is important to have a clear strategy for dealing with system backups as it is both business critical and also a legal requirement that backups of essential business data be kept. There are obviously a number of decisions to be made when backing up:

- Identify the data to be backed up
- Frequency and Timing of the Backup
- Storage Format
- Storage Location

Performing an NAV System Backup
To perform a backup follow the standard NAV backup instructions, a full system backup will include both NAV and the Zetadocs elements integrated into NAV.

Backing up the Zetadocs Document Queues

To backup the document queues you need to simply locate the network folders used for your queues and copy those folders to the assigned storage location for your backup.

Backing up your SharePoint System

Backup of all SharePoint site and document libraries for Zetadocs for NAV are covered in a standard Microsoft SharePoint backup.

Restoring a Zetadocs for NAV system

To restore your Zetadocs for NAV system following problems with the original data you need to restore 3 separate elements. The NAV system backup itself which contains the additional Zetadocs elements, the document queue backup and the SharePoint archive.

Preparations for Restoring your System

It is important to have a clear strategy for dealing with system restorations as it is critical to the business that the system can be restored. There are obviously a number of decisions to be made when restoring the system:

- Identify the storage location for the backup
- Identify which backup data set is to be restored

Restoring your Zetadocs for NAV System

At some point you may need to restore your system using a backup, this will restore the Zetadocs for NAV system excluding the document queue and the SharePoint archive which will be covered later in this guide. To restore your system follow the standard restore instructions as laid down in NAV.

Backups that were exported with the Microsoft Dynamics NAV backup facility can be imported by using Tools, Restore. You should always restore the database backup into a new (empty) database.

Restoring the Document Queues

- Locate the copy of the network folders which contained the contents of your document queues in your backup location.
- Copy the folders (or the specific elements you desire) to the network folders being used for your respective document queues. The location of these folders will be specified within the Zetadocs Sales Document Queue Setup Form and Zetadocs Purchase Document Queue Setup Form.

Restoring your SharePoint System

All SharePoint sites and document libraries for Zetadocs for NAV can be restored using the standard Microsoft SharePoint Restore instructions.

Reinstalling the Zetadocs for NAV SharePoint Extensions

If you have had to completely rebuild your SharePoint system then you will need to reinstall the Zetadocs for NAV SharePoint Extensions after you have restored your SharePoint system.

27. Migrating to the live database

At this stage the system configuration and testing of Zetadocs Delivery Essentials should be complete, if these are the only elements to be installed in your system and you have been performing these steps on a test version of your system you can now migrate it to the live database. Otherwise please continue installing any remaining components, there will be details on migrating these systems provided following their install and configuration. The process is very similar to the steps taken in sections 7 and 8 save that the configuration file that you will be importing is now configured to your requirements.
This requires a number of steps:

- Exporting the Configuration
- Exporting any Modified Forms, Tables or Reports
- Importing the Zetadocs for NAV Objects
- Importing any Modified Forms, Tables or Reports
- Importing the xml file with your configuration

27.1 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.

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

27.2 Exporting Modified Forms, Tables or Reports

- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Click on **All** button in the designer menu.
- Select **All objects (CTRL + A)** or alternatively select those objects you wish to export.
- Select **Export Objects** in file menu (File→Export).
- Export objects to a suitable file e.g. ***Zetadocs for NAV5.0 Export.fob*** file.
- Keep the Zetadocs for NAV5.0 Export.fob in a safe place.

27.3 Importing Zetadocs to the Live NAV System

The steps to import the Zetadocs for NAV system to your live system are the same as those utilised earlier, save that different files are imported. Instead of importing the config.xml file and tables/forms.fob files straight from the Zetadocs for NAV product download you simply select the configuration xml file you created during the export and any modified versions of your tables and forms.

- Import the Zetadocs for NAV Objects fob file created from you test system.
- Install the Page interfaces and forms as required
- Import the xml file with your configuration from the test system.
- Copy across your Zetadocs Templates.

Once you have imported the configuration you should perform a series of tests like those in chapter 18 to ensure the system have be successfully migrated.

28. Installing Zetadocs for NAV using Group Policy

Those intending to roll out their system using Group Policy should refer to the information available here for further details.

29. Upgrading Zetadocs Express to the full product

Upgrading from Zetadocs Express requires you to do the majority of the standard install steps as the Zetadocs for NAV installers files will detect and remove any Express specific components. The only exception to this are the Page Interfaces import steps which should be skipped to ensure you keep the existing Express functionality. A Zetadocs install will update the components as required and ensure that your existing SharePoint archive links to NAV are maintained.

Differing steps between a full install and an upgrade

- You are required to upgrade the SharePoint Extensions as per the instructions below.
- Do not carry out the Page Interfaces Importation step.

Upgrading the SharePoint Extensions

- To upgrade the Zetadocs SharePoint Extensions you need to add the Zetadocs content type to your Site and configure the Document Library to use it.
- Log into SharePoint as a **Site Collection Administrator** using Internet Explorer 8 or later with Javascript enabled.
- On the **Site Actions** menu, click **Site Settings**.
- In the **Galleries** section, click **Solutions,** if this is not available ensure you are looking at the settings for the correct level. Use the **Go to top level site settings** option to achieve this.
- Click **Solutions** on the ribbon and then click on the **Zetadocs SharePoint Extensions** check box in the table.
- Click on **Deactivate** under the **Solutions** options.
- The Solution Gallery – **Deactivate Solution** dialog box appears, click **Deactivate**.
- Click **Solutions** on the ribbon and then **Upload Solution.**
- Browse to the **Zetadocs SharePoint Extensions** folder of your product download and select the **Zetadocs SharePoint Extensions.wsp** file. In the **Upload Document** dialog box, click **OK**.
- The Solution Gallery – **Activate Solution** dialog box appears, click on **Activate**.
- Return to the **Site Settings** and select **Manage Site Features** from the **Site Actions** section.
- Scroll down the list and activate the Zetadocs elements in the following order:
  - Zetadocs Content Type
  - Zetadocs Document Library
  - Zetadocs Workflow (**Note:** Do not activate this item if using Office 365 Small Business)

30. Uninstalling Zetadocs for NAV

30.1 Uninstallation Overview

This section gives an overview of the uninstallation process. Each step is covered in more detail in the following sections of this manual. It is recommended that you follow these steps in order.

- Rollback of NAV Reports

- Uninstalling the Zetadocs for NAV Objects
    - Remove the Zetadocs for NAV objects and existing object modifications from within Microsoft Dynamics NAV.

- Uninstalling the Zetadocs for NAV Client

- Uninstalling the Zetadocs SharePoint Extensions (Optional- may not have been installed)
    - Removal of the Zetadocs Archive Document library and uninstallation of the Zetadocs for NAV search web parts.

- Verify all components have been removed successfully

- Uninstalling the Zetadocs Server

30.2 Rollback of NAV Reports

To restore you original report versions you should have either **backed up the original versions** of your reports or you produced new versions of your existing reports with **different report ID's.**

Different Report ID's
- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Click the **Report** button on the Object Designer.
- Set a filter ***EQ*** on the Version List column.
- Select all Zetadocs reports (CTRL+ A).
- Click on **Delete** in the Toolbar (F4).
- Click **Yes** to delete selected lines.

Restoring Backed Up Reports
- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Select **Import** Objects in file menu (File→Import).
- Find and select the **Backup of Reports before Zetadocs for NAV5.0.fob** file.
- Choose **Yes** to import all objects.
- Click **No** to open Import Worksheet.
- Click **Replace All**.
- Click **Ok**.

30.3 Removing Zetadocs for NAV Objects

This section details the removal of Zetadocs for NAV objects and editing restored NAV objects back to their original configuration.

To call this function it is suggested that you do the following:
- Create a **new form**.
- Add a button to the form.
- In C/AL Globals, add a variable called **ZDInt** of type codeunit with a subtype of Zetadocs-Send Integration.
- In the on push event for the button add the following code:
  ZDInt.RemoveArchiveIDFromTables(TRUE);
- Save and compile the form.

- Run the form and press the button. You will be prompted if you want to continue. Press Yes if you want to proceed. The Zetadocs Archive ID fields will now have been cleared.
- Delete the form that you just created.

Importing the Backed up objects
- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tool→Object Designer).
- Select **Import** Objects in file menu (File→Import).
- Find and select the **Backup of Objects before Zetadocs for NAV5.0.fob** file.
- Choose **Yes** to import all objects.
- Click **No** to open Import Worksheet.
- Put an ***EQ*** filter on column **Existing Object Version List**.
- Click **Replace All**.
- Click **Ok**.

Uninstalling the Zetadocs for NAV Objects
- Click on the All button in the Object Designer menu.
- Put an ***EQ***filter on column **Version List**.
- Compare the remaining object list with the object list table in the Appendix to ensure you will not delete tables unnecessarily.
- Select table Zetadocs Settings (9009959)

Perform the next steps for all Zetadocs for NAV tables in the following order:
  - 9009963 to 9009982
  - 9009960 to 9009962
- Click **Run**.
- Select all lines (CTRL + A).
- Click on **Delete** in the Toolbar (F4).
- Click **Yes** to delete selected lines.
- Close Table Run (Esc).

Once this has been complete for all tables in the specified ranges.
- Select all Zetadocs for NAV objects (**CTRL+ A**).
- Click on **Delete** in the Toolbar (F4).
- Click **Yes** to delete selected lines.

Note: You may not have permissions to delete all the objects, such as some codeunits. In this case it is ok to leave the codeunits on the system as they will not be used.

30.4 Uninstalling the Zetadocs Client
This section describes how to uninstall the client applications which include the Zetadocs Client, the runtime API and the NAV Extensions. The Zetadocs for NAV Client installation is performed using a combination of installers. You will need to uninstall each of these to remove the Zetadocs for NAV Client. You will need to uninstall the Zetadocs for NAV and the two pre-requisites, the Zetadocs Client and Zetadocs API runtime.
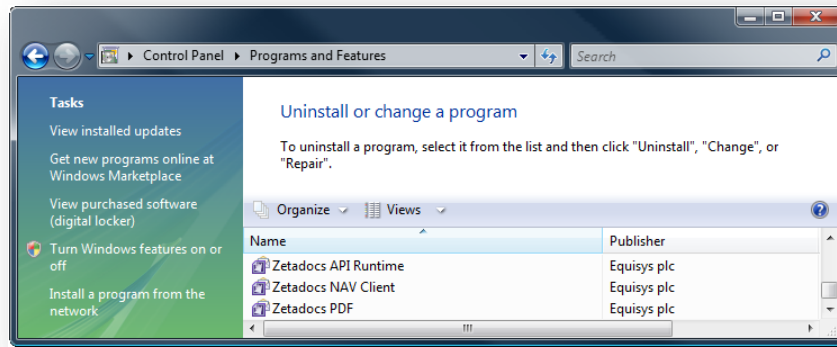
Figure 55 - Add Remove Programs

Open Add/Remove programs (Windows XP) or Programs and Features (Windows Vista) or other uninstallation utility relevant to the environment you are operating in.

- Select Zetadocs NAV Client from the program list and select uninstall.
- Select Zetadocs PDF from the program list and select uninstall.
- Select Zetadocs API Runtime from the program list and select uninstall.
- Select Zetadocs PDF Printer from the program list and select uninstall.

30.5 Uninstalling the Zetadocs SharePoint Extensions

SharePoint Extensions
To uninstall the SharePoint extensions you must be logged onto the machine using an account that has SharePoint Site Collection Administrator privileges **for the front-end web application and the Central Administration program**. Alternatively if you are using SharePoint Online you with need to be an administrator.

Deactivating the Zetadocs Components
- Go to the SharePoint site and select **Site Actions** and then **Site Settings** and click on **Manage Site Features** from the Site Actions section.
- Scroll down the list and deactivate the Zetadocs Content Type, Zetadocs Document Library and Zetadocs Workflow.

Deactivate the Zetadocs SharePoint Extensions Solution
- On the **Site Actions** menu, click **Site Settings**. In the Galleries sections, click **Solutions**.
- Scroll down until you locate the **Zetadocs SharePoint Extensions** solution and click **Deactivate**.
- With the Zetadocs SharePoint Extensions solution selected, choose Solutions from the ribbon and then **Delete**.

30.6 Uninstall Zetadocs for NAV Client Help Files
The Zetadocs for NAV help files should have been copied to the Microsoft Dynamics NAV help folder and given names that will not clash with other help files.
These files were originally:
- addin_a.chm
- addin_a.hh

This folder may have contained other help files which may have used the 'a' post-fix name. As such you should select and open the addin_a.chm file and identify whether it is the Zetadocs for NAV help file. If it is not then try the next unused post-fix letter between a and j until you locate the Zetadocs for NAV help files. Note that the post-fix on both file names must match. (e.g. addin_f.chm and addin_f.hh) Once identified these files should be deleted from:

Program Files\Microsoft Dynamics NAV\CSIDE Client\ENG

Or removed from the equivalent installation folder of Microsoft Dynamics NAV on the machine.

30.7 Uninstalling the Zetadocs Server

The Zetadocs Server converts items placed into the document queues into pdf format, to remove it follow the steps below.

- Open Programs and Features (Windows Server 2008) or other uninstallation utility relevant to the environment you are operating in.
- Select Zetadocs Server from the program list and select uninstall.
- Some files are created after installation of the Zetadocs Server, to ensure all related files are removed, delete the Zetadocs Server folder. This is by default located in the Program Files directory.

31. Assigning a specific icon for your pdf files in SharePoint (Optional)

Should you wish to assign a recognisable icon to the pdf files in your archive it is possible to have any suitable image represent your content. If you do not wish to add a specific icon simply skip the steps below and continue with the additional steps relevant to your SharePoint version.

- Firstly you need to locate a suitable icon to represent pdf files in your SharePoint system.
- Copy this icon file to C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\Template\Images
- Go to C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\Template\XML and open the Docicon.xml file in a text editor such as Notepad.exe.
- Adjust the file to include the .pdf extension by adding **<Mapping Key="pdf" Value="<your image file name with extension>"/>** and saving the file.

Additional steps required on SharePoint 2010 Systems

These next steps are relevant to SharePoint 2010 systems only, if you are using foundation please proceed to the next step.

- Launch the SharePoint Central Administration program.
- Click **General Application Settings** from the left-hand menu.
- Select **Farm Search Administration** from the Search section.
- Select the Search Service Application option.
- Select **File Types** from the Crawling section.
- Click New File Type.
- Enter **pdf** in the File Extension text box and click **OK**.
- Perform a Search Service stop: **Start → Run → net stop spsearch**
- Perform a Search Service start: **Start → Run → net start spsearch**

Additional steps required on foundation systems

On foundation systems you will also have to carry out the following steps.

- Click **Start → Run → REGEDIT** and then locate the following registry subkey: Foundation Systems
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Shared Tools\Web Server Extensions\14.0\Search\Applications\<GUID>\Gather\Search\Extensions\ExtensionList\
- Select Edit → New → String Value
- Assign the name **38** to the new string or the next available number.
- Give it the value **pdf**
- Perform a Search Service stop: **Start → Run → net stop spsearch**
- Perform a Search Service start: **Start → Run → net start spsearch**

Contents