

Document Archive

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

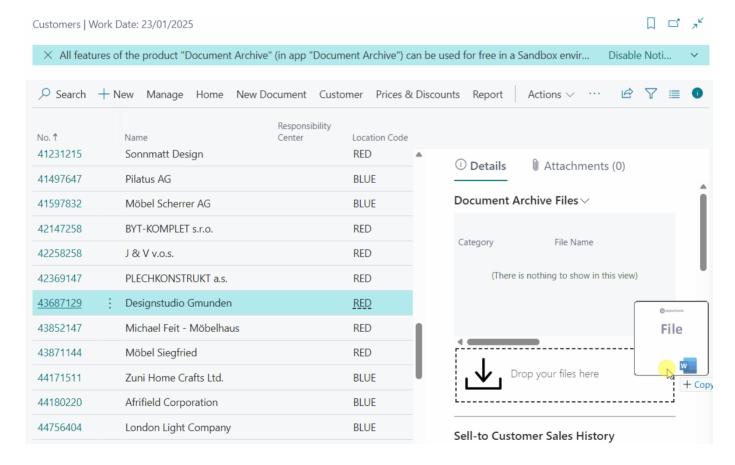
Are you ready to digitize your processes and move to a paperless office with just a few clicks?

Then start now with Document Archive!

Store Files with Ease - Just a matter of drag & drop!

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

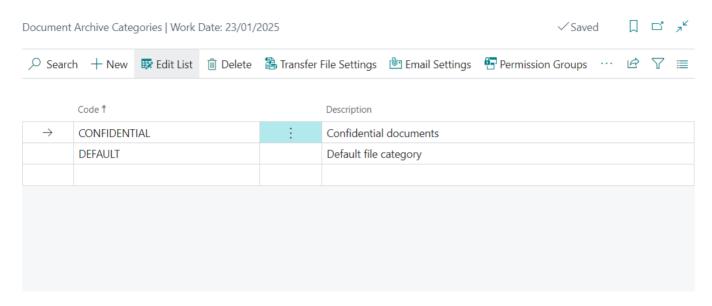
This with an easy drag-and-drop method to prevent unnecessary actions like saving on your desktop before storing it in Microsoft Dynamics 365 Business Central.



Instaltetjorizenalndseutvlarizel- Assign categories to files, managed by permissions

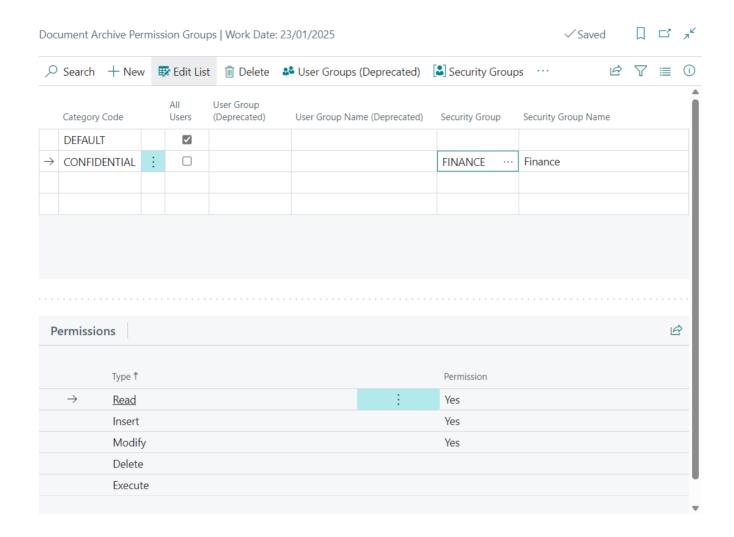
Categorize and Authorize - Assign categories to files, managed by permissions

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



Create categories for files and manage permissions, transfer settings and email settings for them.

Installation and User ManualRemote File Storage - All your files, easily accessible!



Manage who can see, add, modify, delete and/or download files.

Remote File Storage - All your files, easily accessible!

Document Archive stores the data in an online environment (like SharePoint and Azure Blob Storage). This way you can have all your business documents available in a organized way, even for users or accountants that do not have full access to Microsoft Dynamics 365 Business Central.

Installationcarrivalus/amatically archive the PDF documents that you print or sent

Document Archive Setup Wizard





Set up SharePoint File Handler

Now, we can configure the settings for the SharePoint file handler.

Destination

Configure where you want your files to be stored.

Site ID · · · · · · · · · · · · · · · · · ·	mytenant.sharepoint.com,25342603-e99c-4	
Site Name	My SharePoint Site	
Drive ID	b!AyY0JZzp40SYtGjEbfC8PPLUBASrobJNlQl ∨	
Drive Name	Documents	
Refres	h Back Next Finish	

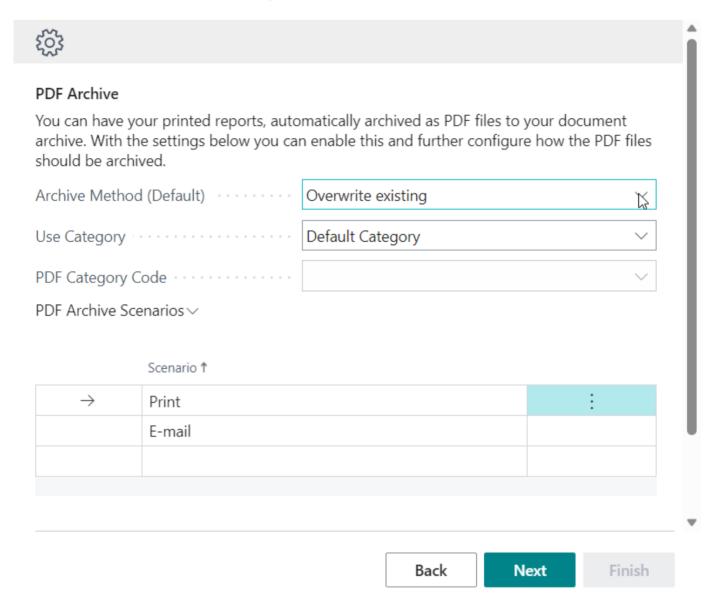
Set up the remote file location where you would like your files to be stored.

PDF Archive - Automatically archive the PDF documents that you print or sent

The PDF Archive feature enables you to automatically save sent documents like Sales Invoices or Purchase Orders as a PDF file on your remote file storage location (e.g., on a Microsoft SharePoint drive or Azure Blob Storage container).

Document Archive Setup Wizard





Set up how you would like PDF documents to be categorized and how file name conflicts should be handled.

Features and Benefits

A full list of all the features and benefits:

Watch the video and discover all the benefits of Document Archive in just 10 minutes!

- Easy storage with drag-and-drop functionality
- Drag-and-Drop directly from Microsoft Outlook
- Available on more than 95 pages for master data like customers, vendors and items, documents and posted documents of purchase and sales and more!
- Use document categories to organizing your attachments
- Set up permissions per document category and security group
- Online storage options like Microsoft SharePoint and Azure Blob Storage
- (Customizable) Folder structure options for the remote file storage location
- PDF Archive functionality to automatically archive your sent documents, like Sales Invoices or Purchase Orders
- Automatically transfer Document Archive files from Item / Resource to Purchase / Sales documents
- Use Document Archive files as attachments when mailing documents
- Easy setup with a convenient setup wizard to get your started quickly!

Learn more about how to set up and use Document Archive:

- Installation Manual
- · User Manual

Last update: January 22, 2024



Features and Benefits



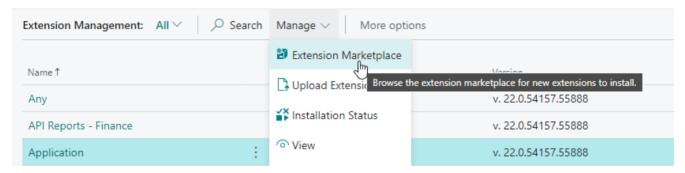
Installing the Extension

The extension can be installed for Microsoft Dynamics 365 Business Central (online) or Microsoft Dynamics 365 Business Central on-premise. The installation instructions for both can be found in the following sections.

Microsoft Dynamics 365 Business Central (online)

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

- 1. In Microsoft Dynamics 365 Business Central, go to **Setup & Extensions** | **Extensions** (or, use the *Tell Me* search feature to search for and open the **Extension Management** page).
- 2. Open the Extension Marketplace (AppSource) via: Manage | Extension Marketplace



- 3. In the page that opens, search on the extension name and select it.
- 4. Please take note of the End-User License Agreement and Privacy Statement
- 5. Choose **FREE TRIAL**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.

Microsoft Dynamics 365 Business Central on-premise

For Microsoft Dynamics 365 Business Central on-premise the extension can be installed using the **Business Central Administration Shell**. Please follow the instructions that can be found on the How to: Publish and Install an Extension v2.0 - Business Central | Microsoft Docs page. If you are upgrading from a previous version, then please see Upgrading Extensions - Business Central | Microsoft Docs for instructions on how to perform an upgrade with the cmdlets of the **Business Central Administration Shell**.

Prerequisites

Your Business Central license should include the "Apportunix Suite" ISV module.
 This ISV module can be added to the license through PartnerSource Business Center by a reseller.

• Download the latest .app files for the extension and the required libraries ("System Library" and "Monet") for your version of Microsoft Dynamics 365 Business Central.

Instructions

- 1. Download and install the latest (compatible) version of the "System Library" app.
- 2. Download and install the latest (compatible) version of the "Monet" app.
- 3. Download and install the latest (compatible) version of the app.

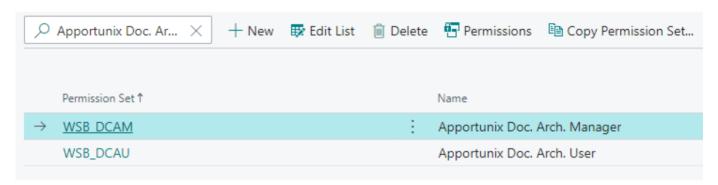
Last update: December 21, 2023

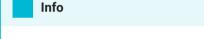


Permission Configuration

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

Permission Sets | Work Date: 23/01/2025





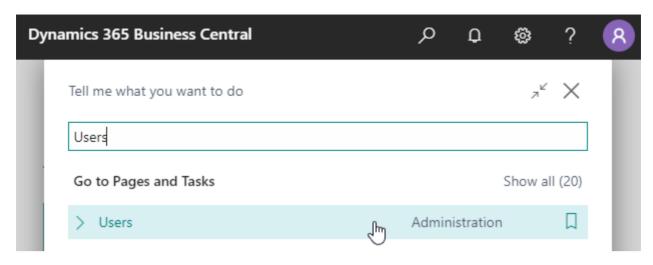
The following permission sets are available:

- Apportunix Doc. Arch. Manager A permission set for a manager or administrator that allows to edit configurations and setup of the app.
- Apportunix Doc. Arch. User A permission set for users, i.e., allows for viewing and adding files, but not for changing the setup of the app.

The permission sets should be assigned to relevant users or groups of users.

To assign the permission set to users:

1. Use the **Tell Me** search feature ('magnifying glass icon in the top right corner') to search for and open the **Users** page.



2. Select the user that you want to assign permission to.

Any permission sets that are already assigned to the user are displayed in the Permission Sets factbox.

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

For more information, please refer to Dynamics 365 Business Central documentation page, Managing Users and Permissions on Microsoft Learn.

Last update: January 4, 2024



Permission Configuration



License Activation



Important

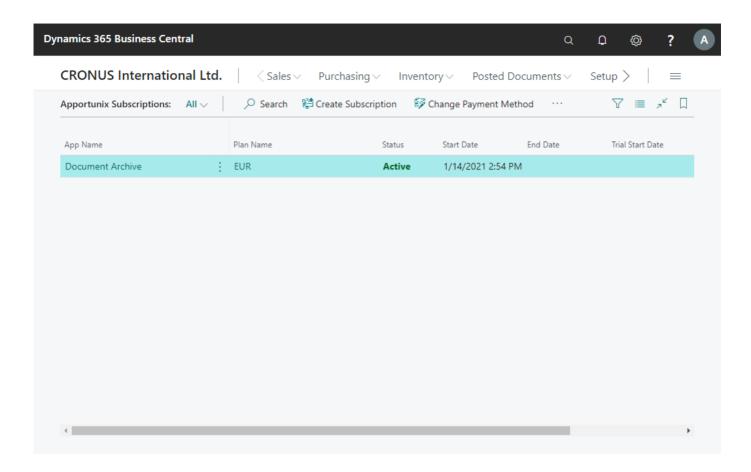
You can use the app for **free** in your Business Central **Sandbox** environment. For **Sandbox** environments, you can skip the instructions in this section of the installation manual. Please find more information on the licensing and pricing on our website.

To activate **Document Archive** for a **Production** environment, please start a subscription via the **Apportunix Subscriptions** page as described in this chapter.

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

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

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

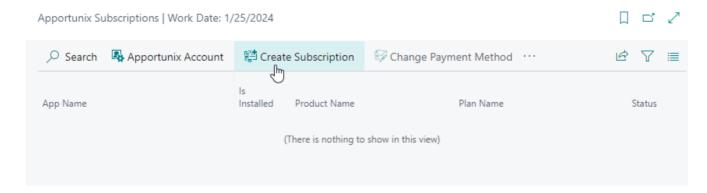


Please note that your payments are handled safely, in a PCI-compliant manner, in cooperation with our payment provider **Stripe**. For more information, please feel free to contact us by visiting the Contact page on our website.

Create a Subscription

To set up a subscription for the **Document Archive** app, in a **Production** environment, please follow these steps:

- 1. Open the Apportunix Subscriptions page.
- 2. Invoke the Create Subscription action, which will open the Create Subscription wizard.



3. In the Create Subscription wizard, select the product for the Document Archive app. Then, choose Next.

Create Subscription - Step 1 of 9





Choose a product

Choose a product from the list below.

Apportunix Products ~

			App Name ↑	Product Name	Publisher
			Confidential Data Protection	Confidential Data Protection	Apportunix
\rightarrow	~	:	Document Archive	Document Archive	Apportunix
			Document Creator	Document Creator	Apportunix
			PDF Merge	PDF Merge	Apportunix
			PDF Merge	PDF Merge	

Back

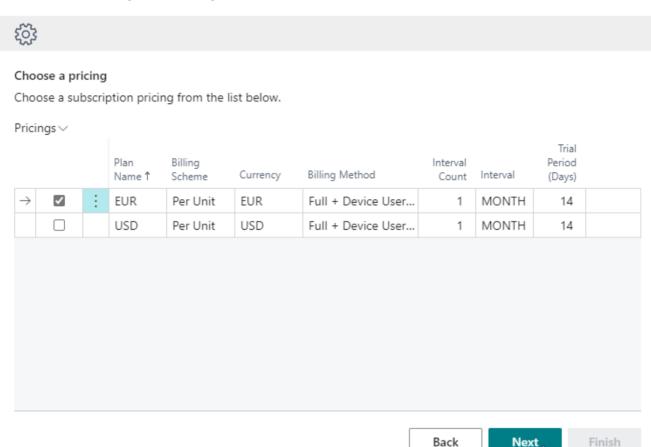
Next

Finish

4. Next, select the plan/pricing for the product that applies for you. Choose **Next**.

Create Subscription - Step 2 of 9



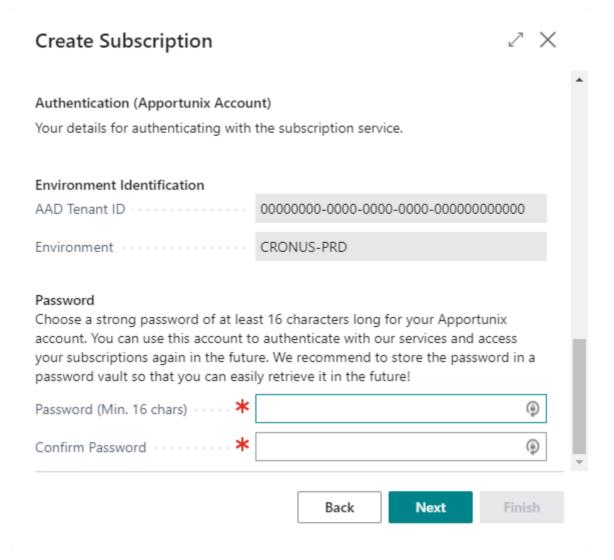


Note: You can find more information about a plan, using the View action.

5. Take note of the information in the next step. Note that you only need a subscription for **Production** environments. You can use the app for free in a **Sandbox** environment.

Choose Next.

- 6. Enter your company information. Make sure to enter a correct **Tax ID** and **Tax ID Type** combination.
- 7. Also, choose a strong password and store/remember it well, so that you can activate the designer with this account later as well.



8. Follow and finish the remainder of the wizard.

When you are done you will be met with the final step of the wizard that informs you that the subscription was set up successfully and you are ready to go.

Create Subscription	x [∠] ×
✓	
All Done Your subscription has been created successfully!	
Back Next	Finish

Last update: August 7, 2023



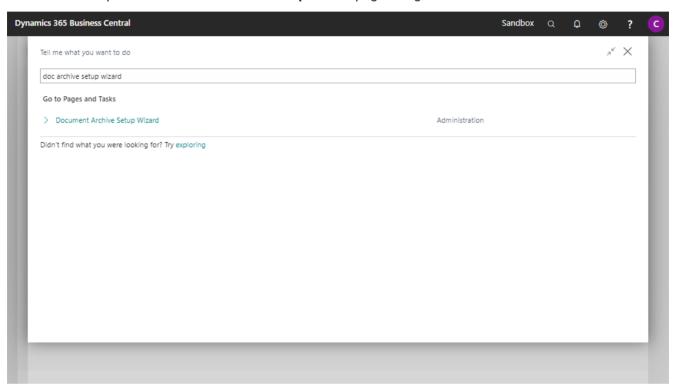
Create a Subscription



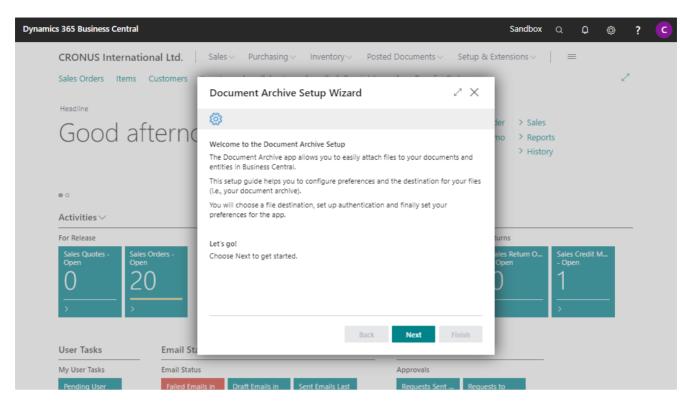
Setup

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

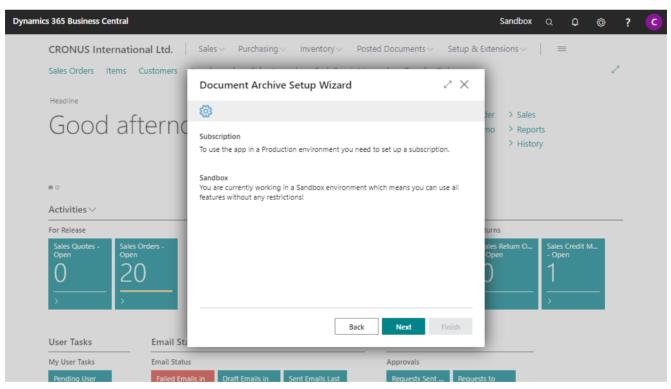
1. Search for and open the **Document Archive Setup Wizard** page using the **Tell Me** search feature.



2. Read the introduction and click on Next

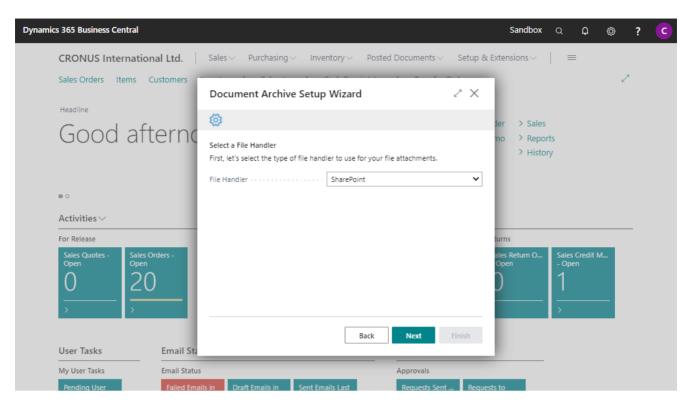


3. Read the notes of the subscription and click on Next



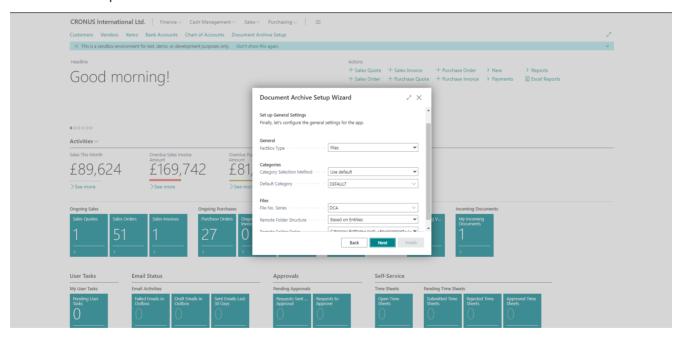
4. Choose your preferred File Handler and click on Next

For more information of the available File Handlers & how to set these up: see File Handlers



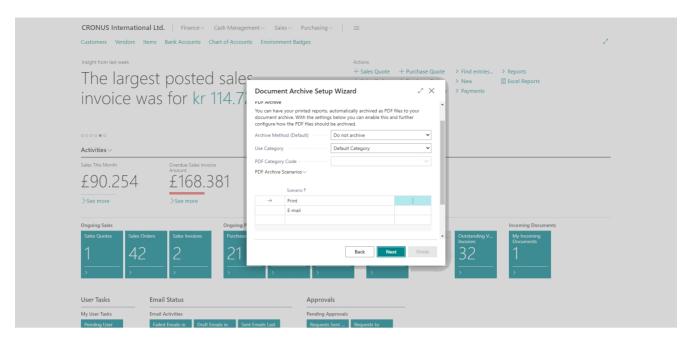
5. Check the following default setup and change if preferred. Details of the following setup will be listed further on in the manual.

Click on Next to proceed with the wizard.

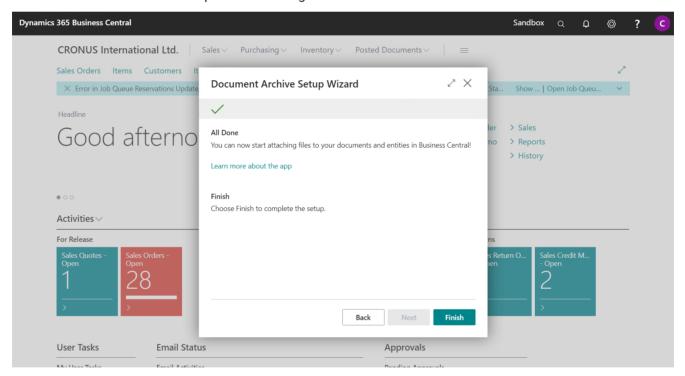


6. Check the following setup and change if preferred. Details of the following setup will be listed further on in the manual.

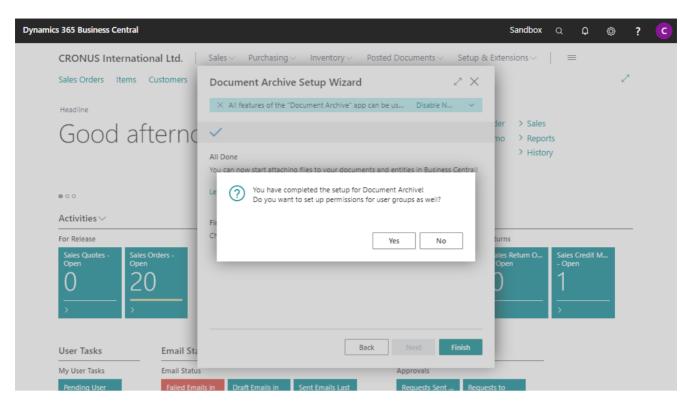
Click on Next to proceed with the wizard.



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



8. If you would like to set up permissions for security groups (per file category) you can access the **Document Archive Permission Groups** page directly by clicking on **Yes** in the confirmation dialog that will be shown.
If you would like to do this later on, please choose **No**.



More details about setting up Document Archive permission groups can be found in the Permission Groups section of this manual.

Apportunix Document Archive is now configured and can be used.

Last update: December 15, 2023



File Handlers

A File Handler specifies the storage platform where Document Archive will store the attachments.

The following **File Handlers** are available:

- 1. Microsoft SharePoint
- 2. Microsoft Azure Blob Storage

The selected File Handler does not change the behaviour nor the features of Document Archive.

We recommend to set up your **File Handler** in collaboration with you IT department.

To assist you with the decision which file handler to use, we have provided a short comparision for you below:

Feature	Azure Blob Storage	SharePoint
Cost	Azure Storage is cheaper	SharePoint is costlier, especially as more data is stored
Access	Requires programmatic access or using the Azure Portal	Provides a user-friendly UI and is more readily available
File Versioning	Not readily available	Supports file versioning
File Sharing	Requires programmatic access or using the Azure Portal	Designed for file sharing
Usage	Better for long-term storage or archival purposes	Better suited for document collaboration
Storage Capacity	Offers a higher storage capacity	Storage is included with current 365 licenses



Info

It is not possible yet to transfer files automatically between the file handlers after switching the filer handler after the implementation. This needs to be performed manually if needed.

Please choose your file handler wisely.

Microsoft SharePoint

Microsoft SharePoint is a central hub for teams to store, organise, and share documents and information. It offers features such as document libraries, lists, and workflows, enabling efficient collaboration and process automation. It integrates seamlessly with other Microsoft tools, providing a unified experience.

SharePoint ensures data protection with robust security measures, access controls, and encryption. Organisations utilise it for various purposes, including intranet portals, Project Management, and knowledge sharing. Its user-friendly interface and customisation options make it a versatile solution for enhancing the team's productivity ¹.

If you would like to set up SharePoint as your **File Handler**, please follow these steps:

1. Choose a Destination SharePoint Site and Drive

Either use an existing site and use a drive from that site to store your **Document Archive** files, or create a new site and/or drive.

For more information on how to create a new SharePoint site, please see: Create a Site in SharePoint

2. Create an Azure App Registration

Create an Azure App Registration and click on Next.

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



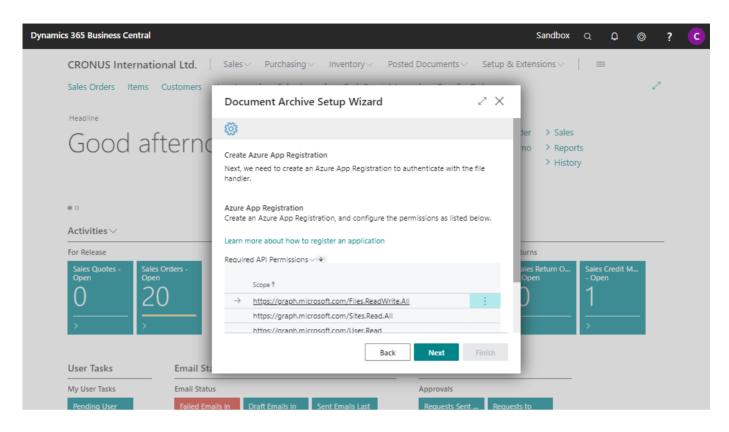
As redirect URI, please use: https://businesscentral.dynamics.com/OAuthLanding.htm

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

Please, also check our how-to video on apportunix.com: Azure App Registration How to video - Apportunix.

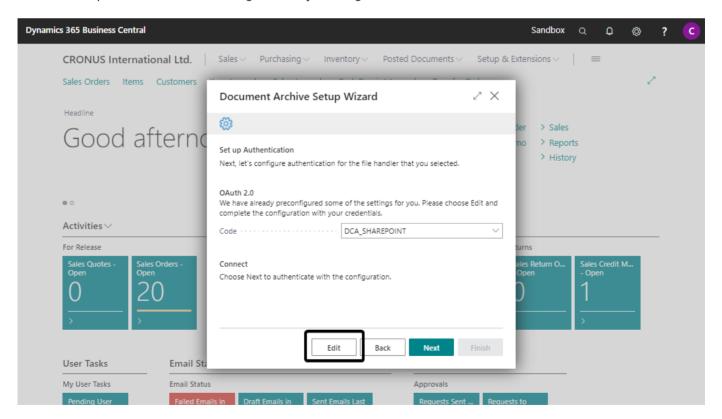
ı

How to - Azure App Registration



3. Edit the OAuth 2.0 Configuration

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



4. Complete the OAuth 2.0 Configuration

Perform the following steps in the next page and click on Next:

- a. The fields Code and Description are filled in with a default value, but can be changed manually.
- b. Fill in the **Application / Client ID** and the **Client Secret** which are provided during the **Azure App Registration** of step 5.



Please make absolutely sure to keep track of when your Client Secret expires.

Let your IT department keep track of this so that the client secret can be replaced with a new one, before it expires.

c. Grant Type is set up with Authorization Code as default and as preferred grant type.

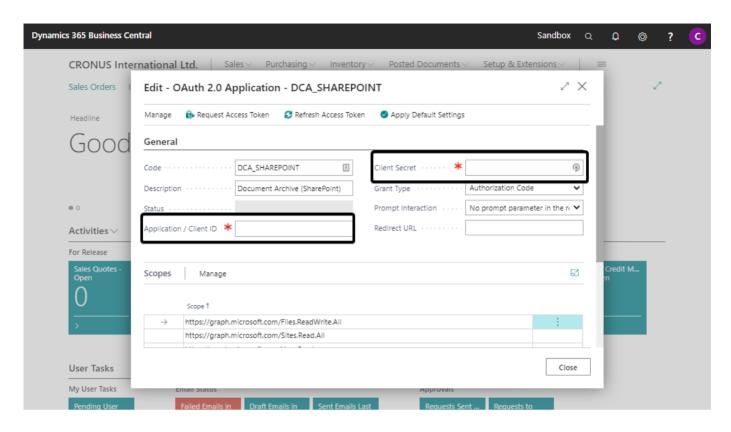
This can be changed manually to your preferences.



If you would like to use **Grant Type = Client Credentials** instead, then please use https://graph.microsoft.com/.default as the only **Scope** record.

Please consult with your IT department which Grant Type to use for your company.

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

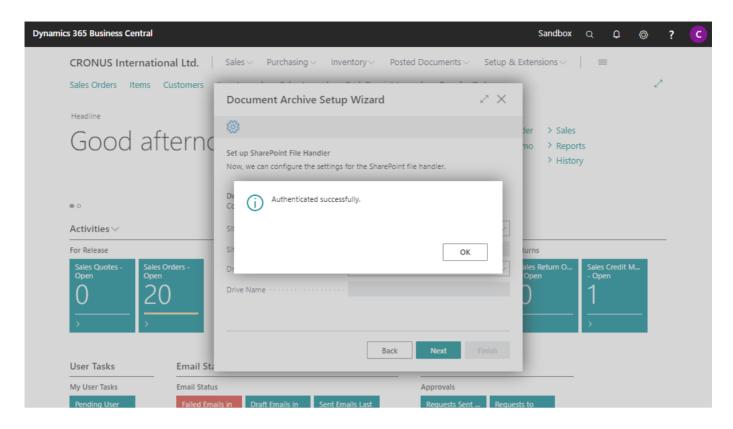


5. Authenticate OAuth 2.0 configuration

After clicking on **Next**, Document Archive will validate the connection and credentials that you set up and will provide a message when the authentication is successful.

Please fix the **OAuth 2.0 Application** if an error is raised by carefully reading the error message.

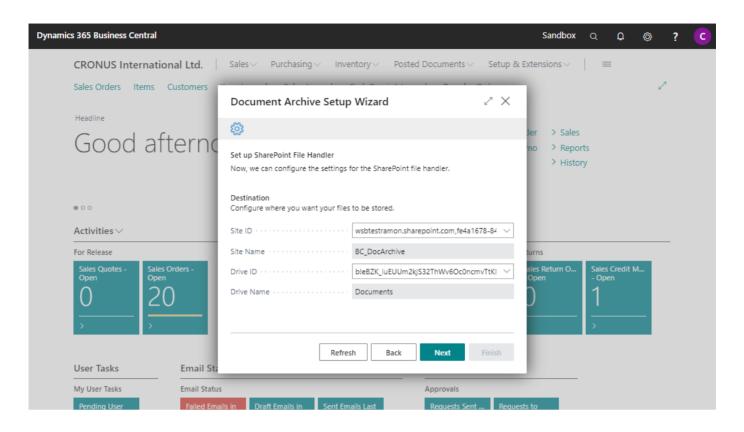
Close the message by clicking on **OK**.

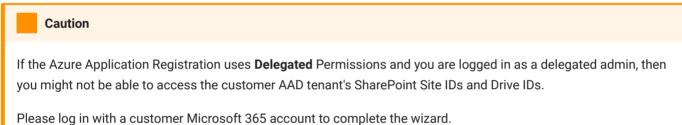


6. Confgure SharePoint File Handler

Fill in the **Site ID** and **Drive ID** of the preferred SharePoint site and drive combination. The options available are based on your Microsoft 365 AAD tenant.

If you create a new site and drive in your AAD tenant during this setup, you can refresh the available sites and drives by clicking the **Refresh** button.





Press Next to continue.

Microsoft Azure Blob Storage

Azure is a leading cloud computing platform offered by Microsoft. It provides various services for building, deploying, and managing applications and infrastructure. It allows organisations to scale resources on demand, ensuring optimal performance and cost efficiency. It offers robust security features, data encryption, and compliance certifications to protect sensitive information.

Azure supports various programming languages, frameworks, and tools, making it highly flexible and adaptable. Additionally, it integrates seamlessly with other Microsoft products and services. Overall, it empowers businesses with the scalability, reliability, and agility needed to drive innovation and digital transformation in the cloud ¹.

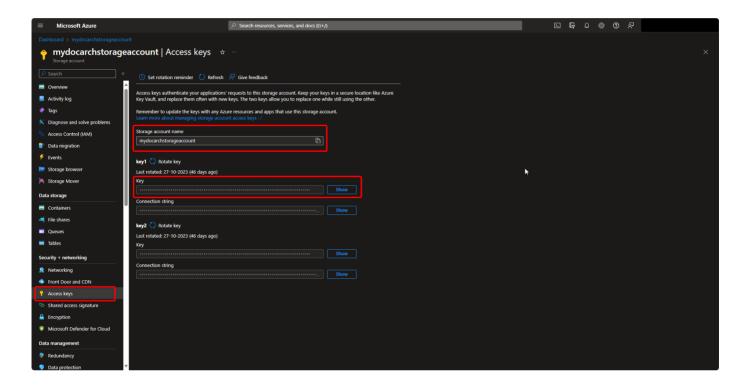
If you would like to use Azure Blob Storage as a File Handler, please follow these steps:

1. Create a Storage Account in Azure

See: Create a storage account in Azure



Copy and save the Storage Account name and Storage Key from the Access keys tab for later use.



2. Create a Container in the Azure Storage Account

See: Create a container in Azure

3. Confgure the Azure Blob File Handler

Fill in the Storage Account Name and Storage Key from step 1.

Afterwards choose the container from step 2 in the container **Name**.

Press Next to continue.

Document Archive Setup Wizard





Set up Azu	re Blob	File I	Handler
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Now, we can configure the settings for the Azure Blob file handler.

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Storage Account Name · · · · · · · · · · · · · · · · · · ·	mydocarchstorageaccount
Storage Key · · · · · · · · · · · · · · · · · · ·	
Container Name · · · · · · · · · · · · · · · · · · ·	rootcontainer

View Available Containers

View Container Files

Back

Next

Finish



Info

To use the option View Container Files you will need the Apportunix Doc. Arch. Manager permission set.

1. Source: The Knowledge Academy - Microsoft Azure vs SharePoint: Which Platform is Better?

Last update: January 4, 2024

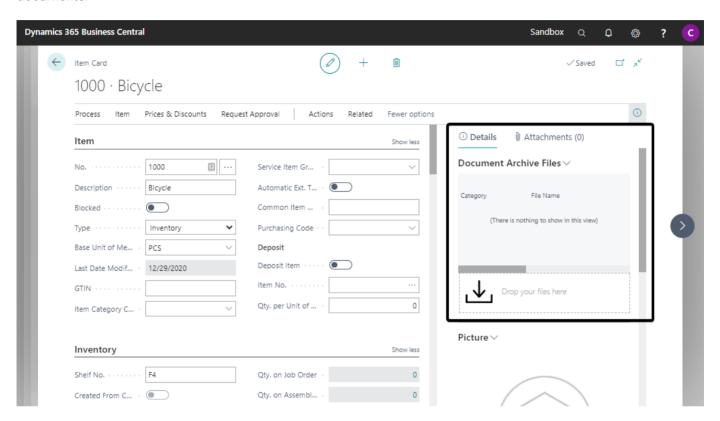


Microsoft Azure Blob Storage

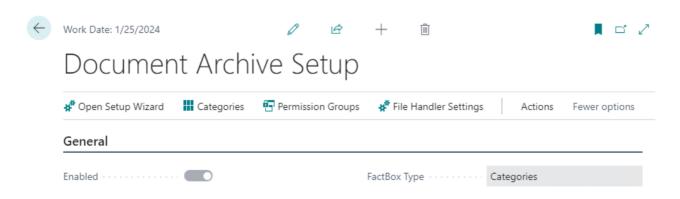


Files FactBox

Document Archive adds a file factbox that can be found in the factbox area on the pages for your master data and documents.

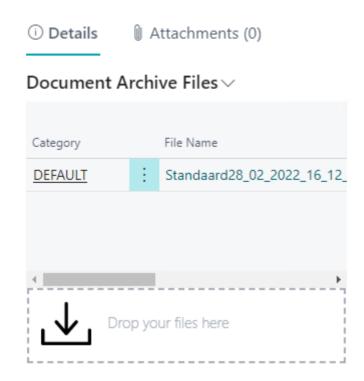


In the **Document Archive Setup** page you will find a **FactBox Type** setting which allows you to configure which type of file factbox should be used.

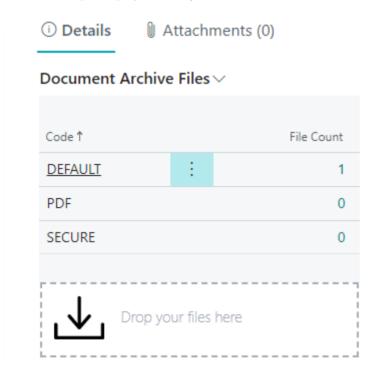


The **FactBox Type** setup field has the following 2 options:

1. Files: The factbox shows all the files attached to the current record.



2. **Categories**: The factbox shows the categories and the number of files per category. Drilling down on the number will open a page where you can view the files in the respective category.

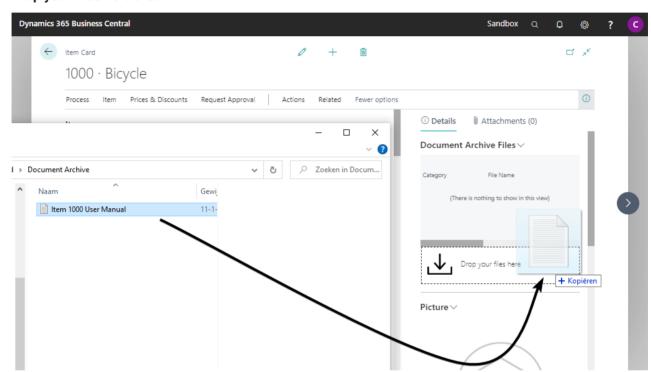


A complete list of the pages where the factbox is available can be found in the **Document Archive Pages** section of this manual.

How to Store an Attachment

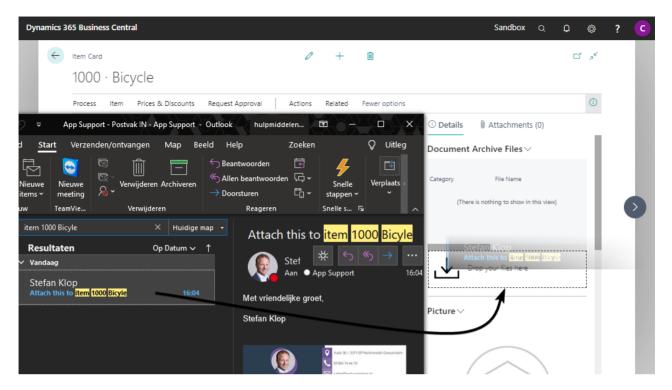
- 1. Open the page of a preferred entity.
 - In the example screenshots that follow, you will see that the Item Card page is opened for: Item 1000 Bicycle
- 2. Use one of the following options to attach a document to the entity:
 - a. Drag and drop a file from a local or cloud folder to the

Drop your files here area.



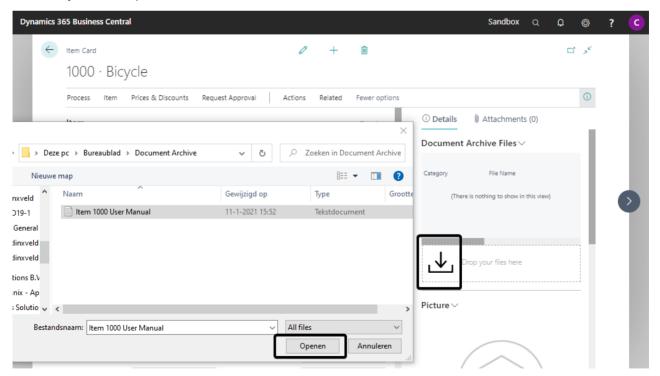
b. Drag and drop a e-mail directly from Microsoft Outlook to the

Drop your files here area.



c. Click on the

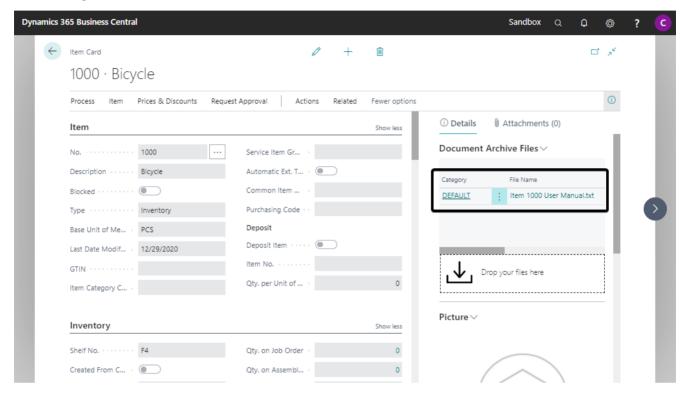
Drop your files here area, browse for and select the file that you would like to attach in the file explorer, and finally click on *Open*:



- 3. The document is now attached to the entity with the following data
 - a. Category: The category of the document

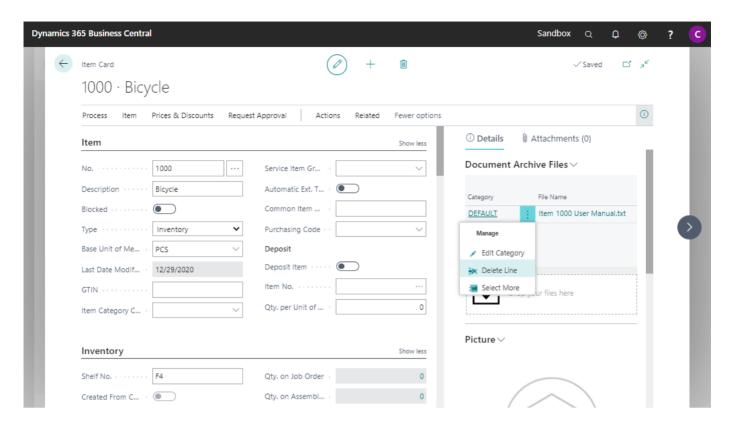
Now setup with **DEFAULT** due to the configuration in the **Document Archive Setup (Wizard)**.

- h File Name: The file name and extension of the document
- c. Created Date/Time: The date and time that the document was stored.
- d. Message From: Name of the sender of the e-mail
- e. Message Date/Time: Date and time of the e-mail



How to Delete a Document Archive File

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



After deleting the **Document Archive File** record, the file will be removed from the remote file storage location.

Page Extensions

Document Archive is available on the following pages (by default):

Page Name		
Customer Card	Sales Order Archive	Blanket Purchase Orders
Customer List	Sales Quote Archive	Purchase Return Order List
Vendor Card	Purchase Quote Archive	Service Quotes
Vendor List	Purchase Order Archive	Service Orders
Item Card	Warehouse Receipt	Service Invoices
Sales Quote	Service Order	Service Credit Memos
Sales Order	Service Invoice	Service Contracts

Page Name		
Sales Invoice	Service Credit Memo	Service Contract Quotes
Sales Credit Memo	Service Quote	Purchase Quote Archives
Purchase Quote	Posted Service Credit Memos	Purchase Order Archives
Purchase Order	Posted Service Credit Memo	Sales Quote Archives
Purchase Invoice	Posted Service Shipments	Sales Order Archives
Purchase Credit Memo	Posted Service Shipment	Planned Production Order
Resource Card	Posted Service Invoices	Firm Planned Prod. Order
Job Card	Posted Service Invoice	Released Production Order
Job List	Service Item Card	Simulated Production Order
Posted Sales Shipment	Service Item List	Assembly Orders
Posted Sales Invoice	Service Contract	Item List
Posted Sales Credit Memo	Service Contract Quote	Sales Invoice List
Posted Purchase Receipt	Sales Return Order Archive	Sales Credit Memos
Posted Purchase Invoice	Sales Return Order	Sales Quotes
Posted Purchase Credit Memo	Purchase Return Order	Production Order List
Posted Sales Shipments	Purchase Return Order Archive	Resource List
Posted Sales Invoices	Posted Return Shipment	Reminder
Posted Sales Credit Memos	Posted Return Shipments	Reminder List
Posted Purchase Receipts	Posted Return Receipt	Issued Reminder

Page Name		
Posted Purchase Invoices	Posted Return Receipts	Issued Reminder List
Posted Purchase Credit Memos	Posted Whse. Receipt	Finance Charge Memo
Blanket Sales Order	Warehouse Shipment	Finance Charge Memo List
Blanket Purchase Order	Posted Whse. Shipment	Issued Finance Charge Memo
Assembly Order	Posted Whse. Shipment List	Issued Fin. Ch. Memo List
Contact Card	Blanket Sales Orders	
Contact List	Sales Return Order List	
Opportunity List	Sales Order List	
Opportunity Card	Purchase Quotes	

Adding the FactBox to Other Pages

You can add the **Document Archive Files** factbox to new pages via a pageextension as follows:

```
1
     pageextension 50100 AssemblyOrderExt extends "Assembly Order"
 2
 3
         layout
 4
         {
 5
             addfirst(Factboxes)
 6
                 part(DCACategoryFactBox; WSB_DCACategoryFactBox)
 7
 8
 9
                     ApplicationArea = All;
10
                     Enabled = CategoryFactBoxVisible;
                     SubPageLink = TableNoFilter = const(Database:: "Assembly Header"),
11
     SourceTypeFilter = field("Document Type"), SourceNoFilter = field("No.");
12
                     Visible = CategoryFactBoxVisible;
13
14
                 part(DCAFileFactBox; WSB_DCAFileFactBox)
15
16
17
                     ApplicationArea = All;
18
                     Enabled = FileFactBoxVisible;
                     SubPageLink = TableNo = const(Database::"Assembly Header"), SourceType =
19
     field("Document Type"), SourceNo = field("No.");
20
                     Visible = FileFactBoxVisible;
21
22
23
             }
24
         }
25
26
         var
27
             CategoryFactBoxVisible: Boolean;
28
             FileFactBoxVisible: Boolean;
29
30
         trigger OnAfterGetCurrRecord()
31
         begin
             CurrPage.WSB_DCACategoryFactBox.Page.wgFncSetRecordId(Rec.RecordId());
32
             CurrPage.WSB_DCAFileFactBox.Page.wgFncSetRecordId(Rec.RecordId());
33
34
         end;
35
36
         trigger OnOpenPage()
37
         begin
             CategoryFactBoxVisible := CurrPage.WSB_DCACategoryFactBox.Page.wgFncShowFactBox();
38
             FileFactBoxVisible := CurrPage.WSB_DCAFileFactBox.Page.wgFncShowFactBox();
         end;
```

Please note that you should also implement an event subscriber for the following event:

• WSB_DCAFileMgt.wlEvpOnSetPrimaryValues

Allows you to specify the primary key field values given a RecordRef of the source table record that the file should be linked to.



Adding the FactBox to Other Pages

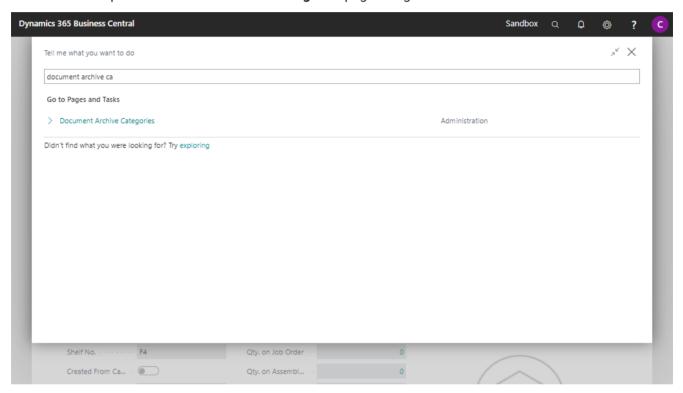


Categories

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

Set Up Categories

1. Search for and open the **Document Archive Categories** page using the **Tell Me** search feature.

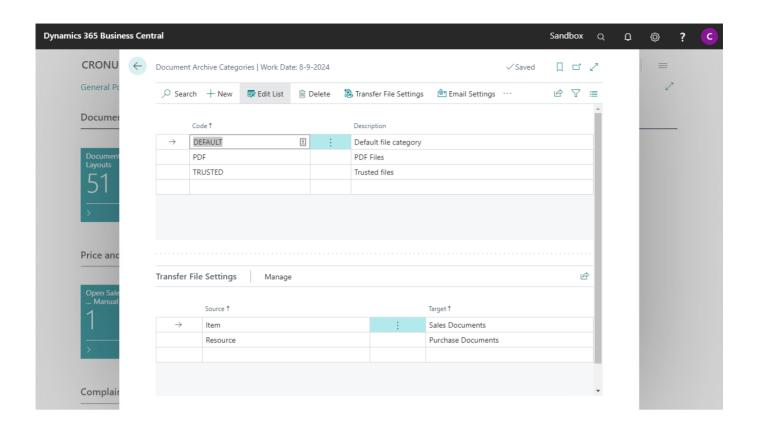


2. Create new categories or edit/delete existing categories in this page.

Each category has the following fields:

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

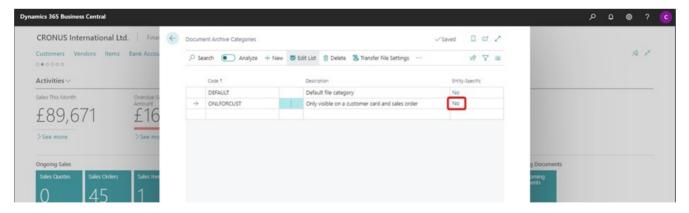
From the **Document Archive Categories** page it is also possible to easily navigate to additional settings that are available per category, such as the **Transfer File Settings** and the **Email Settings**.



Document Archive Category Entity-Specific

When you have entered a document category ONLYFORCUST that you only want to show on the customer card and the sales order.

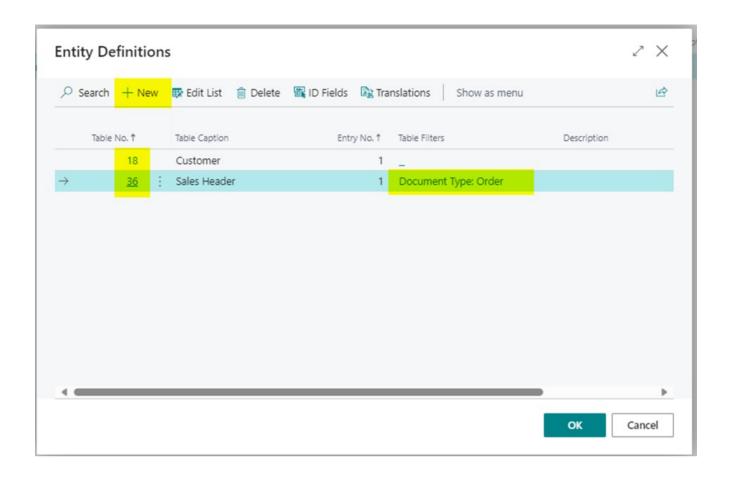
1. You click on the No under Entity-specific.



2. Click on Select Entity Definitions...



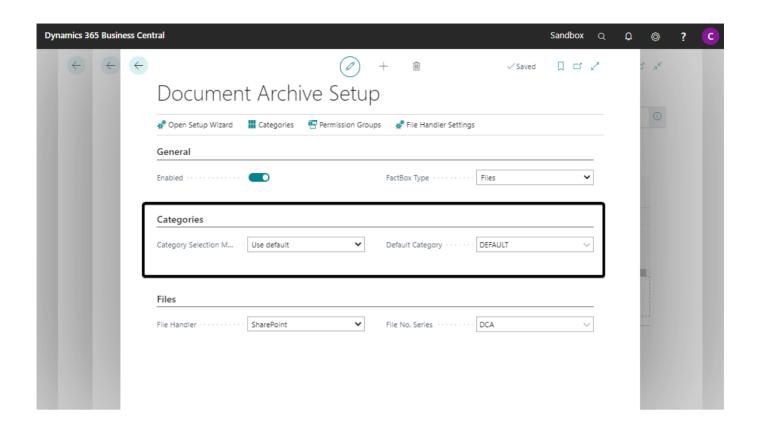
3. Create a new entry and enter the Table No. where to show the categorie, and add Table Filters when needed



Initial Category of File

The initial category of an attachment is determined by the setup in the **Document Archive Setup**. The available settings can be found in the **Categories** section of the setup page, which provides the following options for the **Category Selection Method** setting:

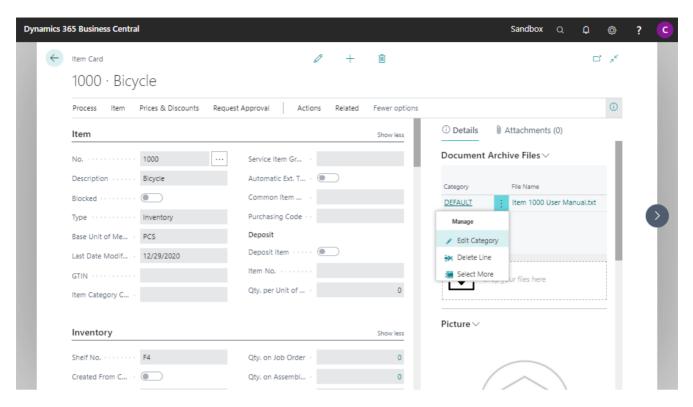
Category Selection Method	Initial Category	Note
Use selected category	Based on the selected category when attaching the document	Only available for FactBox Type = Categories
Select on file upload	Select preferred category after attaching the document	A category lookup page will open automatically (filtered based on the user's category permissions)
Use default	The Default Category of the Document Archive Setup	Default Category is mandatory to set up in the Document Archive Setup



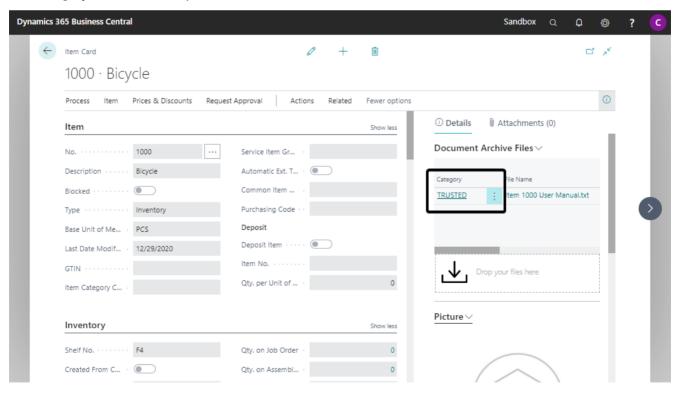
Change Category of File

To change category of an attachment:

- 1. Click on Show more options (
 -) of the file record.
- 2. Invoke the Edit Category action:



- 3. Selected the preferred Category and click on OK.
- 4. The category has now been updated.





Info

Please take into account the following with regards to which categories will be visible to users:

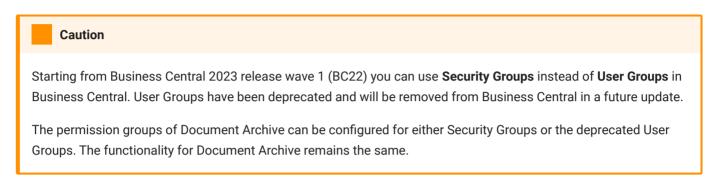
- The visibility of the available categories is based on the setup of the permissions of the category.
- The visibility and accessibility of the file can change after assigning a new category due to the user's permission for the category.
- The visibility of the available categories can differ per entity.

Last update: December 7, 2023

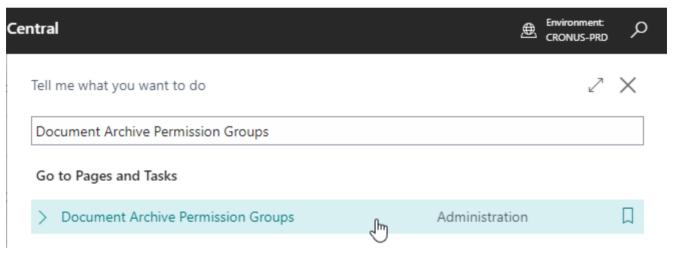


Permission Groups

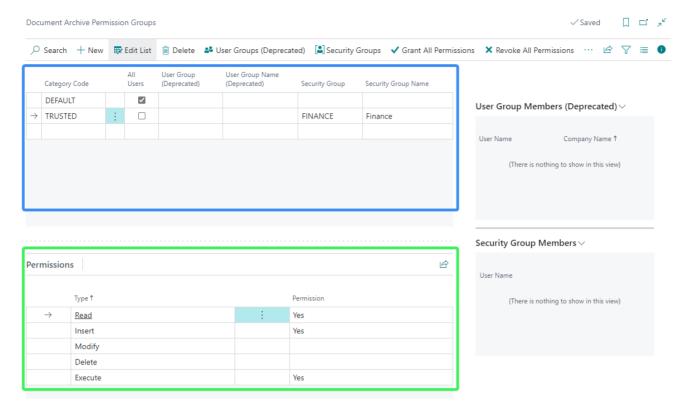
With the **Document Archive Permission Groups** page, you can set up the permissions per **Security Group** or **User Group (Deprecated)** for each **Document Archive Category**.



1. Search for and open the **Document Archive Permission Groups** page using the **Tell Me** search feature.

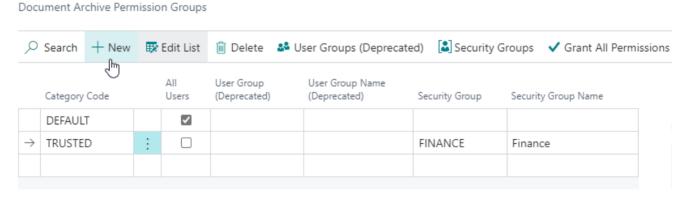


- 2. In the **Document Archive Permissions Groups** page you can see the existing permissions by **Document Category** and **Security Group**.
 - a. **Top section (blue)**: Configured Category / Security Group combinations. b. **Bottom section (green)**: Permissions for the selected Category / Security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

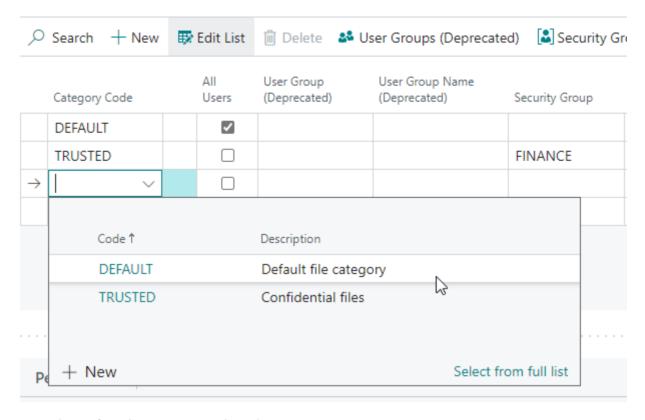


3. To set up a new Document Archive Permission Group

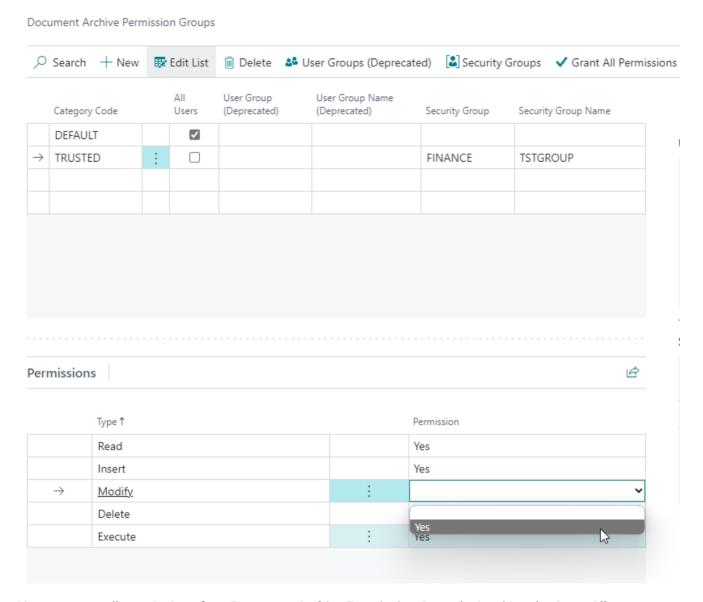
Create a new entry by clicking on New in the ribbon.



4. Fill in the **Category Code** and the **Security Group** combination for which you would like to set up the permissions.

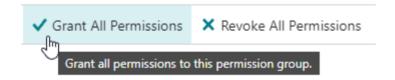


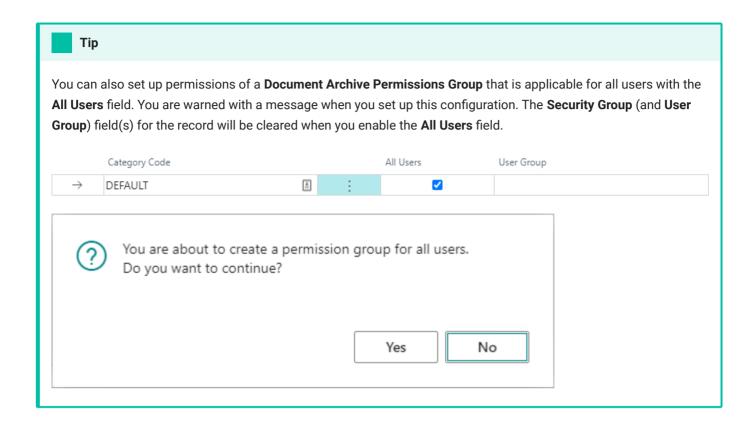
5. Assign the preferred permission in the subpage.



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

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





Last update: August 4, 2023



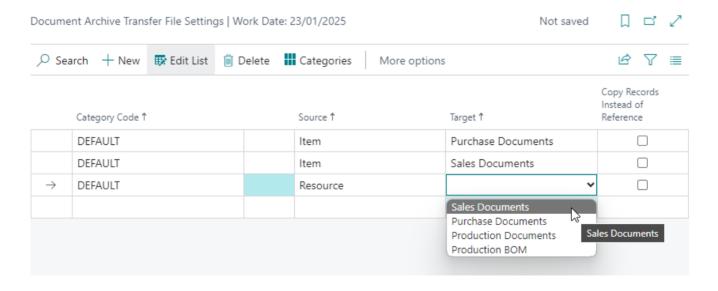
Transfer Files

On the **Document Archive Transfer File Settings** page you can set up whether files of an **Item** or **Resource** should also be transferred to a **document** that uses the Item/Resource (e.g., when you add a **Sales Line** for an **Item** with document archive files). This for example could be used to ensure item-related specifications will be attached to the sales/purchase document and can be set up to be attached when the document is sent by e-mail.

The following combinations are supported:

Source	Target
Item	Purchase Documents Sales Documents Production BOM Production Documents
Resource	Purchase Documents Sales Documents
Customer	Sales Documents
Vendor	Purchase Documents
Posted Sales Invoice	Reminders
Production BOM	Production Documents

Transferring documents can be configured per **Document Archive Category**.





Note

Transferred files to the target won't be deleted when deleting or changing the source used in the target. This needs te be performed manually.

By default, for configured source-target combinations, the file records that are transferred from, e.g., an **Item** to a **Sales Document**, are *only* references and are **NOT** copied on the remote file storage location (i.e., only a single file will be stored). In other words, by default, the file records that are newly created for the *target* documents will only be pointers to existing document archive files of the *source* record.

If you wish to change this behaviour, you can enable the **Copy Records Instead of Reference** checkbox, which causes the files to be copied when document archive files are copied from *source* to *target*.



Caution

Enabling the **Copy Records Instead of Reference** could lead to multiple copies of the same file and requires more storage space.

Therefore, we recommend to have the setting disabled.

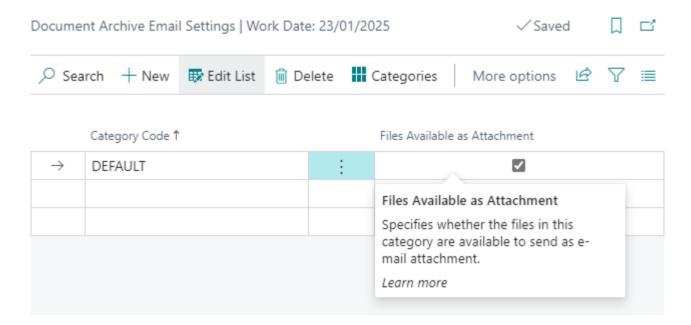
Last update: January 22, 2024



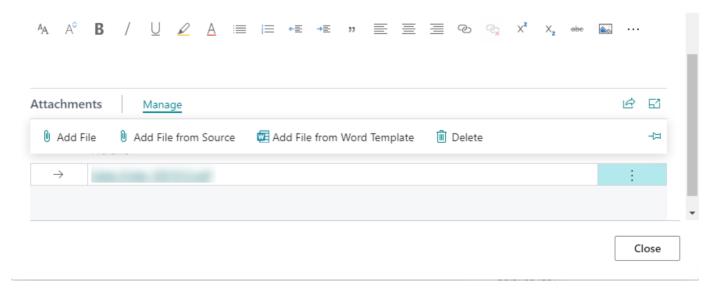
Email Settings

On the **Document Archive Email Settings** page you can set up which document archive files are available to include as email attachments.

On the page you can enable the **Files Available as Attachment** checkbox field to make the files of a **Document Archive Category** available to include as email attachments. This way, you can exclude files from a certain category from being available as email attachments.



Business Central allows you to manually add files via the **Email Editor** page using the **Add File from Source** action when creating an email.



Normally, the standard functionality only allows you add files which are set up as a standard 'Attachment' via the **Attachments** tab. With the activation of these **Email Settings** options the document archive files are also listed as files to add as email attachments.



TIP

: Automate and Schedule Emailing in Business Central

This feature works hand-in-hand with the Apportunix Document Mail Queue extension.

You can set up document archive files of a document to automatically be included as email attachments for the emails that are sent via the Document Mail Queue.

Last update: August 7, 2023



Folder Structure

Folder Structures

In the **Document Archive Setup (wizard)** page the **File Handler** and **File No. Series** fields are already filled with initial/defaults values.

Please note that File Handler currently has a single option: SharePoint.

In the field Remote Folder Structure you can define in which way the files are stored:

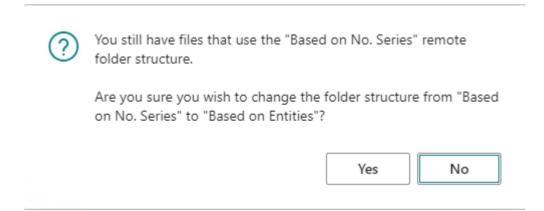
- 1. Based on No. Series Files are stored with an automatically generated ID/"No." as the file name.
- 2. Based on Entities (Recommended) Files are stored in folders per entity/document type.
- 3. Custom Folder Structure Files are stored in a custom folder structure.

When you use the **Based on Entities** option, there are 3 built-in **Remote Folder Order** options that you can select:

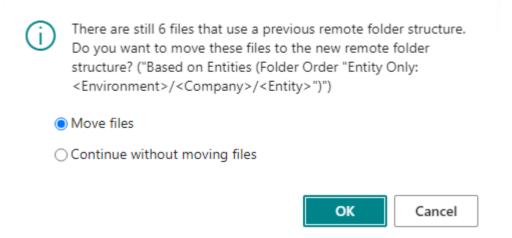
- <Environment>/<Company>/<Entity>
- <Environment>/<Company>/<Category>/<Entity>
- <Environment>/<Company>/<Entity>/<Category>



When you switch from **Based on No. Series** option to **Based on Entities** option (or back) a confirmation dialog will be shown asking you what you would like to do with the existing files:



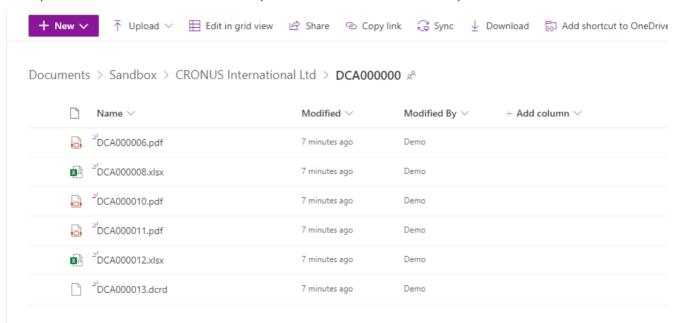
If you choose **Yes**, then you will be prompted whether you want to move any existing files to the new structure:



- Move files will move the files and modify the internal registration of the files.
- Continue without moving files will keep the folder structure and the internal registration as is. However, new files will be stored according to the new setup.

What it looks like on SharePoint:

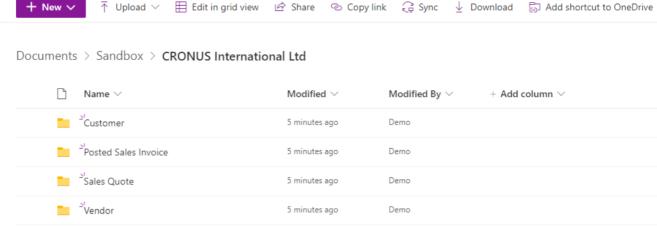
1. Example of Remote Folder Structure set up with the Based on No. Series option:



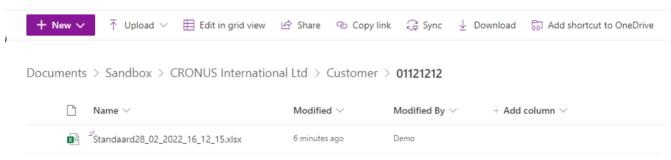
It is based on the type of environment, the name of the company followed by the main folder DCA000000 where it will store the individual files. In Business Central you will see the original filename and extension.

2. Example of Remote Folder Structure set up with the Based on Entities option:

According to the **Remote Folder Order** option: <Environment>/<Company>/<Entity>



Within the *Customer* folder a folder per "Customer No." is created where the files are stored per customer. The same goes for other entities and documents (e.g., a folder per sales order).



The other 2 built-in options to store the files will add the **Category code** as a folder in different places, so you can choose how to store the files.

Custom Folder Structure

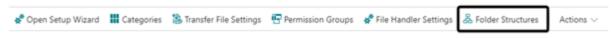
With the **Custom Folder Structure** you can configure the folder structure of the file storage completely free for your business case.

With choosing the option Custom Folder Structure new options are made available.



You can open the *Folder Structures* list page on the *Document Archive Setup* page. On this page you can view and or edit folder structures. These will be available for all companies in the Business Central environment.

Document Archive Setup



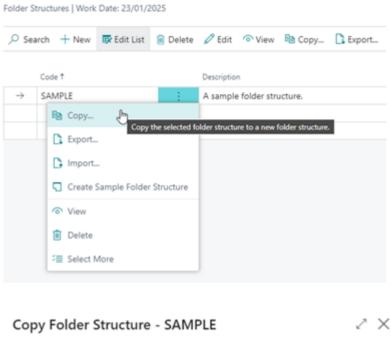
A Folder Structure is defined by the following fields.

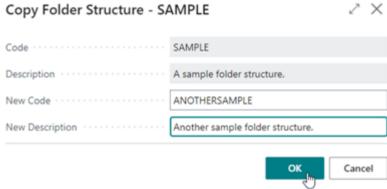
Field	Description
Code	The code of the folder structure configuration that the current company should use when files are uploaded to the remote file storage location
Description	The description of the folder structure configuration that the current company should use.
Language	The language that should be used for generating folder structure paths (e.g., translate Table Caption in a single language). This field is mandatory. For upgrading customers it is initialized with "English (United States)" considering previously the folder name parts were fixed to English untranslated labels. For new customers it is initialized with the language that the user selected on extension installation (i.e., user language).



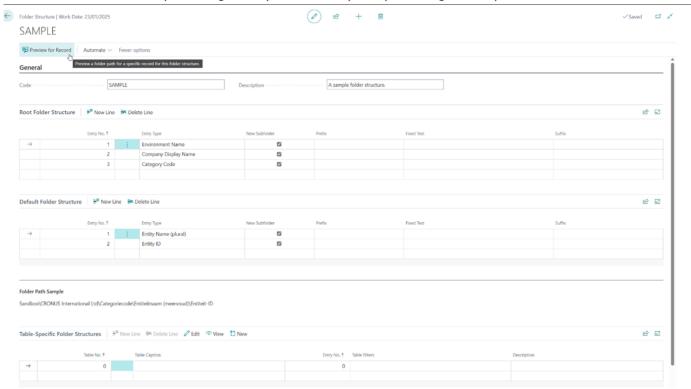
You can also Export and Import (one or more) folder structures to an XML file. A sample folder structure will be available automatically (it is automatically generated on-install or on-upgrade of the extension). You can also choose to (re)create it using the Create Sample Folder Structure action.

There is a **Copy** action to copy an existing folder structure to a new folder structure:





On the *Folder Structure* card page you can find the configuration of the folder structure. First of all, each folder structure will have a *Code* (max. length = 30) and a *Description* (max. length = 100).



A folder structure can have a *Root Folder Structure* which makes up the first part of the folder paths that will be generated by the folder structure configuration when it is used. You can also specify a **Default Folder Structure** which specifies how the folder path part that comes after the root folder path will be determined. For both the **Root** and **Default Folder Structure** you can choose generic properties using the **Entry Type** field.

The following options are available to select for the Entry Type field for the root and/or default folder structure.

Option	Description
Environment Name	The current Business Central environment's name
Company Name	The name of the current company
Company Display Name	The display name of the current company
No. Series No.	The number of the file record
Category Code	The code of the category of the file record

Option	Description
Category Description	The description of the category of the file record
Table No.	The table number of the source record that the file record is linked to
Table Name	The table name of the source record that the file record is linked to
Table Caption	The table caption of the source record that the file record is linked to
Entity Name (singular)	Use the name of known entities such as "Posted Sales Invoice" (singular form). For unknown entities/tables fall back on the "Table Caption"
Entity Name (plural)	Use the name of known entities such as "Posted Sales Invoices" (plural form). For unknown entities/tables fall back on the "Table Caption"

Both the **Root** and **Default Folder Structure** definitions are made up multiple entries. The entry numbers begin at 1. The **New** Subfolder property can be used to specify whether the entry will start a new subfolder in the folder path or if the entry's value will be appended to the text of the current (sub)folder.

You can also use the **Prefix** and **Suffix** properties to prepend or append fixed text to the entry's value (e.g., you could let the entry make a new subfolder that starts with "Environment - " followed by the BC environment name).

If you selected **Entry Type = Fixed Text** then you can enter a fixed text to add to the folder path in the **Fixed Text** field.

Folder Path Sample

Sandbox\CRONUS International Ltd\Categoriecode\Entiteitnaam (meervoud)\Entiteit-ID

In the **Folder Path Sample** group you can find a preview of a sample folder path to get an idea of what the folder path will look like.

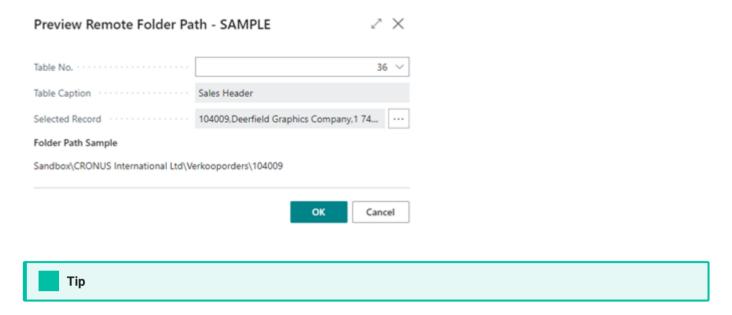


Some changes you might need to refresh the page to update this sample.

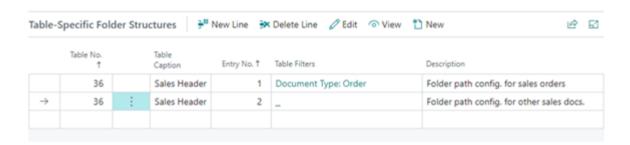


Note

The sample will be translated based on the *Language* you selected in the *Document Archive Setup* in the current company. (So, in the example above the folder path sample was translated to "Dutch".)



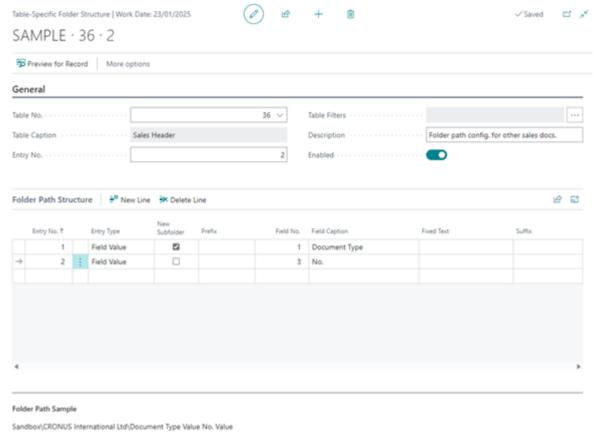
If you would like to get a sample folder path that would be produced for an actual record in BC then you can use the **Preview for Record** action on the card page to select a record to get a preview of the folder path that would be used for that record.



With the **Table-Specific Folder Structure** list part you can specify folder structures for specific tables that should be used instead of the **Default** folder structure.

You can even use the **Table Filters** field to restrict these table-specific folder structures to specific records (e.g., considering sales orders and sales quotes are both stored in the same table (36 "Sales Header") you could set up a table-specific folder structure specifically for Sales Orders if you would wish to).

You could use the (optional) **Description** field to provide more details/explanation for the table-specific folder structure configurations.



On the **Table-Specific Folder Structure** card page you can configure the table-specific folder structure for specific table(record)s.

If you switch off the **Enabled** field you can make it so that this table-specific folder configuration is skipped when Document Archive determines the folder path for a file.

On the **Folder Path Structure** list part you have the same options available as for the Root and Default Folder structure, but note that there are a few additional options

In the **Entry Type** field you now have some table-specific entry types next to the generic entry types, which include.

Entry Type	Description
Field No.	A field number
Field Name	The name of a field of the source record that the file record is linked to
Field Caption	The caption of a field of the source record that the file record is linked to
Field Value	The caption of a field of the source record that the file record is linked to

If you select any of the "Field"-related entry types, then you can specify which table field to use using the **Field No.** field on the folder path entry record.

Again on this page you will find a **Folder Path Sample** group and **Preview for Record** action that you can use to view sample folder paths for this table and specific records from this table.



Caution

Changing to or changing the **Custom Folder Structure** itself won't move the original files to the new file location. The files need to be moved manually.

Last update: January 22, 2024



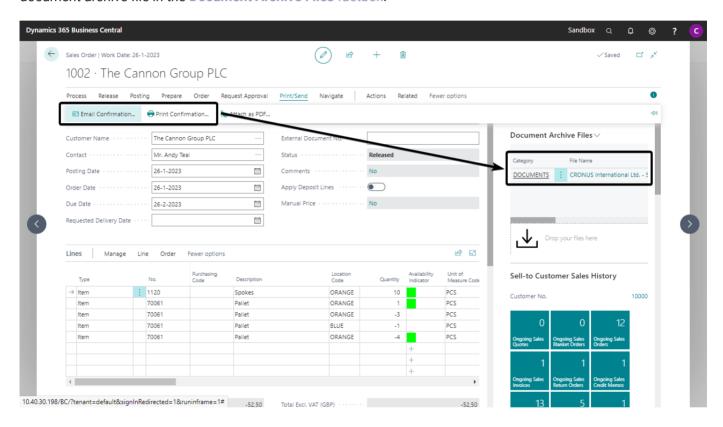
Custom Folder Structure



PDF Archive

The **PDF Archive** feature allows you to automatically archive documents when printing or when emailing the document. Each report based on the report selections can be archived automatically.

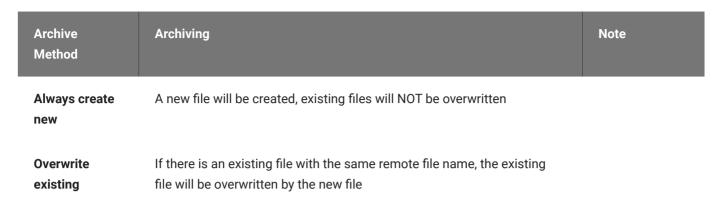
For example: If you have enabled the **PDF Archive** feature for *Sales Order Confirmation* documents, the PDFs that are printed or emailed will be stored to the remote file storage location automatically and be visible as new document archive file in the **Document Archive Files** factbox.

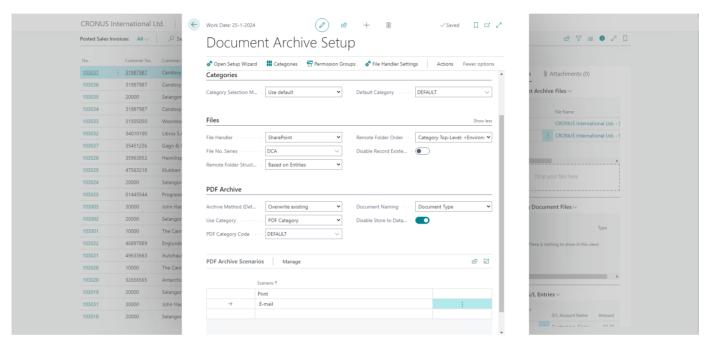


PDF Archive Method

In the **Document Archive Setup** page you can adjust The **PDF Archive Method** to specify whether the PDF Archive feature should be enabled and how conflicts should be handled. The **PDF Archive Method** setting has the following options:

Archive Method	Archiving	Note
Do not archive	No automatic archiving activated	This is the default .





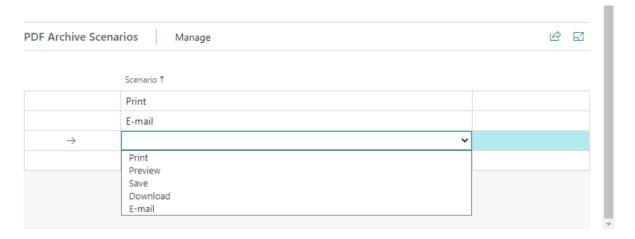
PDF Archive Category

Documents that are archived via the PDF Archive feature are grouped into a category. The category that will be used is determined by the **Use Category** setting in the PDF Archive section in the setup:

Use Category Selection Method	Initial Category	Note
Report Selection Category	The PDF Category Code of the report selection for the document type/report selection usage is used.	
PDF Category	The PDF Category Code from the setup is used. Only when this option is selected, field PDF Category Code can be changed.	PDF Category Code is mandatory when this option is chosen.
Default Category	The Default Category Code from the setup is used.	

PDF Archive Scenarios

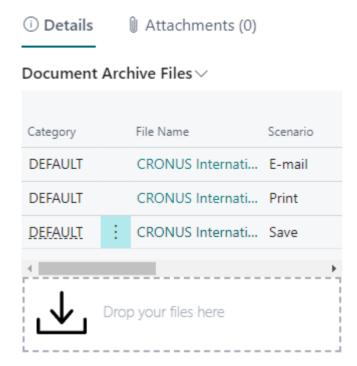
You can use the **PDF Archive Scenarios** tab to specify when the **PDF Archive** feature should archive documents. **Print** and **Email** are the default values, which can be restored using the **Restore Defaults** action in the **Document Archive Setup** page.



The available options are as follows:

- **Print** When a document is printed, the PDF file will be stored. Note that the PDF is also archived when the print action is handled by the browser, i.e., this is not restricted to cloud printers (anymore).
- Preview When a document is previewed, the PDF file will be stored.
- Save When a document is saved, the PDF file will be stored.
- Download When a PDF file is downloaded, the PDF file will be stored.
- E-mail When a PDF file is generated for e-mail attachment, the PDF file will be stored.

The default is set to **Print** and **E-mail**, which means that when a document is printed or e-mailed (i.e., as PDF file attachment), then the PDF file will be stored in the document archive remote file location.



Document Archive also logs the scenario for which the PDF file was archived (on the *Document Archive File* record), so that you can see the reason why the file was stored to the document archive. In the **Scenario** field in the **Document Archive Files** factbox you can check the reason the PDF file was archived (e.g., due to a print, e-mail, save).

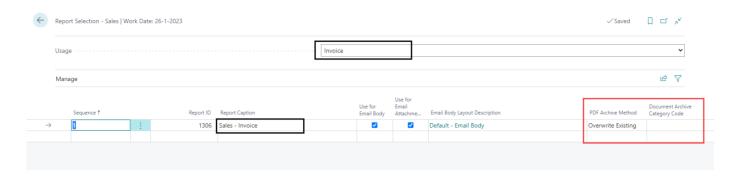
PDF Archive Document Naming

For **Document Naming** there are two options. By default, the name of the file is always started by the name of the company followed by a name depending on the setup:

- 1. **Report Caption**: The caption of the report object is used followed by the document's number. For example. "Sales Invoice SI12345".
- 2. **Document Type**: Business Central's default document naming is used followed by the document's number. For example, "Invoice SI12345".

Settings per Report Selection

The **PDF Archive** feature settings cannot only be configured on the **Document Archive Setup** page, but also on report selection level. You can access the settings on the report selection level on the **Report Selection** pages in Business Central.



In the screenshot (marked in red) you will see the settings available on report selection level, i.e., you can adjust the PDF Archive method and the Category Code to use for this report selection specifically.

On report selection level, the **PDF Archive Method** setting has the following options:

Archive Method	Archiving	Note
Do not archive	No automatic archiving activated	This is the default.
Always create new	A new file will be created, existing files will NOT be overwritten	
Overwrite existing	If there is an existing file with the same remote file name, the existing file will be overwritten by the new file	
Use default	Simply use the settings from the Document Archive Setup . (Default)	



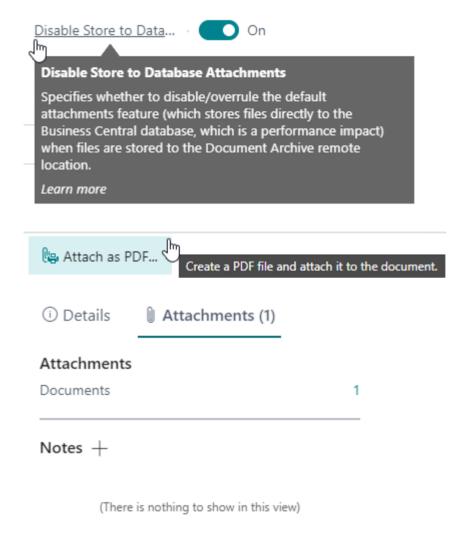
Field **Document Archive Category Code** will only be visible when the option **Report Selection Category** for setup field **Use Category** is selected in the **Document Archive Setup** page.

Attach as PDF Action

If you use the standard Attach as PDF action it will react according to the setup of PDF Archive feature.

- · Documents for which PDF Archive is NOT enabled, will be attached to the standard Attachments
- Documents for which PDF Archive is enabled, will be uploaded to the Document Archive remote file storage and visible as files in the Document Archive Files factbox.

The "Disable Store to Database Attachments" field (Default: true) allows you to specify whether Document Archive should overrule the default Attachments feature in Microsoft Dynamics 365 Business Central (i.e., whether the Attach as PDF... action should still archive files as database-stored attachments, visible in the Attachments factbox).



Support New Document Types

To add support for the **PDF Archive** feature for a new report selection usage, please make sure your reports are printed via one of the dedicated "Report Selections".PrintWith... procedures.

Next to that, you should add event subscribers for the following event publishers:

- WSB_DCAFileMgt.wlEvpOnSetPrimaryValues
 - Allows you to specify the primary key field values given a RecordRef of the source table record that the file should be linked to.
- "Report Distribution Management".OnAfterGetFullDocumentTypeText

Allows you to specify the text which will be used for the document report PDF file name, given a (record-related) Variant of the source table record that the file will be linked to.

• "Report Distribution Management".OnGetDocumentLanguageCodeCaseElse

Allows you to specify the language code to translate the document report PDF filename into different languages, given a RecordRef of the source table record that the file will be linked to.

• "Electronic Document Format".OnGetDocumentNoCaseElse

Allows you to specify how to retrieve the document no. to use in the document report PDF filename, given a (record-related) Variant of the source table record that the file will be linked to.

Last update: August 7, 2023



Support New Document Types

API Reference Introduction

In this reference documentation you can find an overview of all the objects that make up the public Application Programming Interface (API) of the latest version of the Document Archive extension for Microsoft Dynamics 365 Business Central.

This documentation is intended as a reference for Business Central extension developers who would like to use the exposed functionality in their own extensions.



Codeunit WSB_DCAAppInfo

Implements the IMonetAppInfo interface, which is used for retrieving information about the app.

Properties



Methods

wgFncGetAppID:Guid

Gets the app ID of the app.

Returns

Туре	Description
Guid	The app ID of the app.

wgFncGetChangelogURL:Text

Gets the URL of the changelog of the app.

Returns

Туре	Description
Text	The URL for the changelog.

wgFncGetManualURL:Text

Gets the URL of the manual of the app.

Returns

Туре	Description
Tevt	The LIRL for the manual

Codeunit WSB_DCAAzureBlobFileHandler

Implements the Azure Blob Storage file handler type.

Properties

Name	Value
Access	Public



Codeunit WSB_DCAAzureBlobSetup

Exposes procedures to help with configuring Azure Blob Storage for Document Archive.

Properties



Methods

wgFncSelectContainer(Text@):Boolean

Allows for selecting a container in the current setup's storage account.

Parameters

Туре	Name	Description
Text	vContainerName	The name of the selected container.

Returns

Туре	Description	
Boolean	true iff a container was selected.	

wgFncSelectContainer(Text, Text@):Boolean

Allows for selecting a container in the current setup's storage account.

Parameters

Т	- уре	Name	Description
Т	Text	pStorageAccountName	The name of the storage account to list the containers for.

Туре	Name	Description
Text	vContainerName	The name of the selected container.

Returns

Туре	Description
Boolean	true iff a container was selected.

wgFncViewAvailableContainers(Text)

Opens a page to view the available containers for a storage account.

wgFncViewAvailableContainers

Opens a page to view the available containers for the current setup's storage account.

wgFncViewFilesInContainer

Opens a page to view all the files in the current setup's container.

Fields

ID	Туре	Name	Description
	**	PrimaryKey[10]	A primary key field for this setup record.
	**	StorageAccountName[24]	The name of the storage account to use.
	**	ContainerName[64]	The name of the container of the storage account to use.



Codeunit WSB_DCACategoryMgmt

Exposes procedures for working with Document Archive file categories.

Properties

Name	Value	
Access	Public	

Methods

wgFncEditFileCategory(WSB_DCAFile@)

Edit the category of a Document Archive file (via a page).

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The Document Archive file to change the category for.

wgFncSelectFileCategory(WSB_DCAFile@):Boolean

Opens a dialog to select a category for a Document Archive file.

Parameters

Туре	Name	Description	
Record "WSB_DCAFile"	vRecWSB_DCAFile	A Document Archive file record to write the result to.	

Returns

Туре	Description	
Boolean	System.Xml.XmlElement	

Installation and User Manual	wgFncSelectFileCategory(WSB_DCAFile@):Boolean



Codeunit WSB_DCAEmailMgt

Exposes procedures for adding Document Archive files to email messages as attachments.

Properties



Methods

wgFncAddDocumentArchiveEmailAttachmentsToEmailMessage(Codeunit::Email Message@, RecordRef@):Boolean

Adds all Document Archive Files configured for mailing as E-Mail Attachments for the specified source record.

Parameters

Туре	Name	Description
Codeunit "Email Message"	vCduEmailMessage	The e-mail message
RecordRef	vRecRefSourceDoc	The source record.

Returns

Туре	Description
Boolean	true iff document archive files were added as attachment

wgFncFindRelatedAttachments(Guid, Integer, Email Related Attachment@)

Retrieves the Document Archive Files as E-Mail Attachments for the specified table and system ID.

Installavtigo Frnan Fich de Rei at Veran Autabachments (Guid, Integer, Email Related Attachment @)

Туре	Name	Description
Guid	pSourceSystemID	System ID of the record to retrieve the files for.
Integer	pSourceTableId	Table ID of the record to retrieve the files for.
Record "Email Related Attachment"	vRecEmailRelatedAttachments	The record set to store the email related attachments in.





Codeunit WSB_DCAEntitiesFolderStructure

Implements the entities folder structure.

Properties

Name	Value	
Access	Public	

Methods

wgFncGetDocumentTypeTxt(WSB_DCAFile, Boolean, Text@):Boolean

Retrieve a descriptive text for known documents.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record to get a descriptive name for its source record.
Boolean	pPlural	Whether to use the plural form.
Text	vDocumentTypeText	The descriptive document name that was found.

Returns

Туре	Description
Boolean	true iff a matching name was found for the known document.

$wgFncGetRemoteFolderPath(WSB_DCAFile): Text$

Retrieves the remote folder path for a file record.

Installation and User Manual FncGetSourceIdentifier(WSB_DCAFile, Boolean):Text

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.

Returns

Туре	Description
Text	The remote folder path.

$wgFncGetSourceIdentifier(WSB_DCAFile, Boolean): Text$

Gets an identifier for a file record's source record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record to get an identifier for its source record.
Boolean	pIsKnownDocumentType	Set this to true to skip the "Document Type" from the identifier text.

Returns

Туре	Description
Text	The identifier as a text.

$wgFncSetRemoteFileName(WSB_DCAFile@)$

Sets the remote file name for a file record.

Installation aview Dem African Gelt Document Type Txt (WSB_DCAFile, Text@, Boolean@)

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The file record.

wlEvpOnAfterGetDocumentTypeTxt(WSB_DCAFile, Text@, Boolean@)

Allows to hook into getting a document type text (e.g., "Sales Order") to use in PDF file names.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.
Text	vDocumentTypeText	The document type text to use for that file record.
Boolean	vIsSupportedTable	Whether it is a supported table to get a document type text for.

wlEvpOnAfterGetSourceIdentifier(WSB_DCAFile, Text@)

Allows to hook into getting a source identifier text to use in PDF file names (e.g., the archive sales order no. + occurence + version no.).

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.
Text	vSourceIdentifier	The source identifier text for that file record.

wlEvpOnBeforeGetRemoteFolderPath(WSB_DCAFile, Text@, Boolean@)

Allows to hook into getting the remote folder path for a file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.
Text	vFolderPath	The result folder path for that file record.
Boolean	vIsHandled	Set this to true if your extension handles getting the remote folder path for this file record.

wlEvpOnBeforeHandleFileAlreadyExistingOnRemote(WSB_DCAFile@, WSB_DCAFile, Text@, Option@, Text@, Boolean@)

Allows to hook into how to handle a remote file conflict.

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The file record.
Record "WSB_DCAFile"	pRecWSB_DCAFileExisting	The file record for the conflicting file.
Text	vFileActionStrMenuOptions	The StrMenu options to present to the user.
Option	vDefaultFileAction	The default action to apply.
Text	vFileAlreadyExistsQst	The question to display to the user.
Boolean	vIsHandled	Set this to true if your extension handles this remote file conflict.





Codeunit WSB_DCAEntityDefinition

Exposes procedures for working with Document Archive entity definitions.

Properties

Name	Value
Access	Public

Methods

 $wgFncEditEntityDefinitionFilters (WSB_DCAEntityDefinition@): Boolean$

Edit the filters for a entity definition.

Parameters

Туре	Name	Description
Record "WSB_DCAEntityDefinition"	vRecWSB_DCAEntityDefinition	The entity definition

Returns

Туре	Description
Boolean	true iff the filters were edited successfully.

wgFncEntityDefinitionsExistForTable(Integer):Boolean

Determines whether (enabled) entity definitions exist for a table.

Туре	Name	Description
Integer	pTableID	The ID of the table.

Returns

Туре	Description	
Boolean	true iff entity definitions exist for the table.	

$wgFncGetCategoryFilterForEntityDefinition (WSB_DCAEntityDefinition): Text$

Gets a filter of category-codes restricted to a specific entity definition.

Parameters

Туре	Name	Description
Record "WSB_DCAEntityDefinition"	pRecWSB_DCAEntityDefinition	The entity definition to restrict the filter to.

Returns

Туре	Description
Text	The resulting filter.

$wgFncGetEntityDefinitionFiltersText (WSB_DCAEntityDefinition@): Text\\$

Gets the entity definition's filters as a readable text.

Parameters

Туре	Name	Description
Record "WSB_DCAEntityDefinition"	vRecWSB_DCAEntityDefinition	The entity definition.

Returns

Туре	Description
Tevt	The filters as a readable text

$wgFncGetEntityDefinitionFilterView(WSB_DCAEntityDefinition@): Text$

Gets the entity definition's filter view.

Parameters

Туре	Name	Description
Record "WSB_DCAEntityDefinition"	vRecWSB_DCAEntityDefinition	The entity definition.

Returns

Туре	Description
Text	The filter view.

wgFncGetEntityDefinitionForFileRecord(WSB_DCAFile, WSB_DCAEntityDefinition@):Boolean Gets the entity definition matching for a file.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record to get a matching entity definition for.
Record "WSB_DCAEntityDefinition"	vRecWSB_DCAEntityDefinition	The entity definition that was found.

Returns

Туре	Description
Boolea	n true iff an entity definition was found.

wgFncGetEntityDefinitionForRecord(RecordId, WSB_DCAEntityDefinition@):Boolean Gets the entity definition matching for a record.

Installation and User MagEacGetEntityIdentifierForFileRecord(WSB_DCAFile):Text

Parameters

Туре	Name	Description
RecordId	pSourceRecordID	The record to get a matching entity definition for.
Record "WSB_DCAEntityDefinition"	vRecWSB_DCAEntityDefinition	The entity definition that was found.

Returns

Тур	e	Description	
Вос	olean	true iff an entity definition was found.	

$wgFncGetEntityIdentifierForFileRecord(WSB_DCAFile): Text$

Retrieve the identifier for a file.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record to get a matching entity identifier for.

Returns

Туре	Description
Text	The identifier text.

wgFncGetEntityTranslation(WSB_DCAEntityDefinition, WSB_DCAEntityTranslation@):Boolean Retrieve the translation for an entity definition and session's current language.

Parameters

Туре	Name	Description
Record "WSB_DCAEntityDefinition"	pRecWSB_DCAEntityDefinition	The entity definition.
Record "WSB_DCAEntityTranslation"	vRecWSB_DCAEntityTranslation	The translation that was found.

Returns

Туре	Description	
Boolean	true iff a translation was found.	

wgFncGetEntityTranslation(WSB_DCAEntityDefinition, Code[10], WSB_DCAEntityTranslation@):Boolean

Retrieve the translation for an entity definition and language.

Parameters

Туре	Name	Description
Record "WSB_DCAEntityDefinition"	pRecWSB_DCAEntityDefinition	The entity definition.
Code[10]	pLanguageCode	The code of the language to get the entity translation for.
Record "WSB_DCAEntityTranslation"	vRecWSB_DCAEntityTranslation	The translation that was found.

Returns

Туре	Description	
Boolean	true iff a translation was found.	

wgFncGetEntityTranslationForFile(WSB_DCAFile, WSB_DCAEntityTranslation@):Boolean Retrieve the translation for the entity.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file to get the entity translation for.
Record "WSB_DCAEntityTranslation"	vRecWSB_DCAEntityTranslation	The translation that was found.

Returns

 $wg Fncls Category Available For Entity (Code [20], WSB_DCAEntity Definition): Boolean$

Determines whether the category is available for an entity definition.

Parameters

Туре	Name	Description
Code[20]	pCategoryCode	The code of the category.
Record "WSB_DCAEntityDefinition"	pRecWSB_DCAEntityDefinition	The entity definition.

Returns

Туре	Description
Boolean	true iff the category is available for the entity definition.

wgFncLookupEntityDefinitions(Boolean, WSB_DCAEntityDefinition, WSB_DCAEntityDefinition@):Boolean

Opens the "Entity Definitions" page to select entity definitions. If the user clicks on "OK" to close the page, the selected permission set(s) will be returned.

Parameters

Туре	Name	Description
Boolean	pAllowMultiselect	Whether to allow multi-select.
Record "WSB_DCAEntityDefinition"	pRecSelectedEntityDefinition	The entity definition the user had selected before opening the page.
Record "WSB_DCAEntityDefinition" temporary	vRecTempWSB_DCAEntityDefinition	The entity definition(s).

Returns

wgFncMultiselectCategoryEntityDefinitionLookup(Code[20], WSB_DCACategoryEntity):Boolean

Opens the entity definitions page, allowing for multi-select. When the user clicks "OK", the selected entity definitions are added for the category.

Туре	Name	Description
**	pRecSelectedCategoryEntity	The selected entity definition

Installation and User MaffueSelectTableFilters(Integer, Text, Text, Text@):Boolean

Returns

Type Description

true iff category entity definitions were added.

wgFncSelectTableFilters(Integer, Text, Text, Text@):Boolean

Lets the user select table filters for an entity definition.

Parameters

Туре	Name	Description
Integer	pTableNumber	The ID of the table.
Text	pTableCaption	The caption of the table.
Text	pInputFilterViewAsText	The current filter view.
Text	vOutputFilterViewAsText	The output filter view.

Returns

Туре	Description
Boolean	true iff filters were selected successfully (false if the user aborted).

Fields

ID	Туре	Name	Description
	**	EntityTableNo	The ID of the table that this entity definition applies to.
	**	EntityTableCaption[80]	The caption of the table that this entity definition applies to.
		EntryNo	An entry no. for this entity definition (if there are multiple entries for the same table, but with different filters).

ID	Туре	Name	Description
	**	TableFilterView	A BLOB which saves the table filter view for this entity definition.
	**	Enabled	Specifies whether this entity definition is enabled and should be used.
		Description[200]	An optional description that can be used to describe in more detail what this entity definition is used for.
	**	IDFieldSeparator[10]	Specifies a separator that will be used between the entity ID fields when folder names are generated from this entity definition.



Codeunit WSB_DCAFileMgt

Provides various procedures to process Document Archive files.

Properties



Methods

wgFncAddFileFromBase64String(RecordId, Code[20], Text, Text, Text, DateTime, Text, DateTime)

Adds a new file to the Document Archive from a Base64 string to the configured Document Archive file storage.

Туре	Name	Description
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Code[20]	pCategoryCode	The code of the category the file should be categorized in. If empty, the category will be determined based on the settings in the Document Archive setup.
Text	pBase64String	The Base64 string containing the file contents.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.

wgFncAddFileFromBase64String(WSB_DCAFile, RecordId, Text, Text, Text, DateTime, Text, DateTime)

Adds a new file to the Document Archive from a Base64 string to the configured Document Archive file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Text	pBase64String	The Base64 string containing the file contents.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.

wgFncAddFileFromBase64String(WSB_DCAFile, RecordId, Code[20], Text, Text, Text, DateTime, Text, DateTime)

Adds a new file to the Document Archive from a Base64 string to the configured Document Archive file storage.

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.

nBlolo(Redetidud, accodeseitl/TamaplBlob, Code[20], Text, Text, DateTime, Text, DateTime)

Туре	Name	Description
Code[20]	pCategoryCode	The code of the category the file should be categorized in. If empty, the category will be determined based on the settings in the Document Archive setup.
Text	pBase64String	The Base64 string containing the file contents.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.

wgFncAddFileFromBlob(RecordId, Codeunit::Temp Blob, Code[20], Text, Text, DateTime, Text, DateTime)

Adds a new file to the Document Archive from a Blob to the configured Document Archive file storage.

Туре	Name	Description
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob containing the file contents.
Code[20]	pCategoryCode	The code of the category the file should be categorized in. If empty, the category will be determined based on the settings in the Document Archive setup.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.

b(WSnBs:1a0atFide,anecblsdeld) Cardealnit::Temp Blob, Text, Text, DateTime, Text, DateTime)

Туре	Name	Description
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.

wgFncAddFileFromBlob(WSB_DCAFile, RecordId, Codeunit::Temp Blob, Text, DateTime, Text, DateTime)

Adds a new file to the Document Archive from a Blob to the configured Document Archive file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob containing the file contents.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.

wgFncAddFileFromBlob(WSB_DCAFile, RecordId, Codeunit::Temp Blob, Text, Text, DateTime, Text, DateTime, Enum::WSB_DCAFileSourceType)

Adds a new file to the Document Archive from a Blob to the configured Document Archive file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob containing the file contents.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.
Enum "WSB_DCAFileSourceType"	pFileSourceType	The method which was used to add file to the Document Archive

wgFncAddFileFromBlob(WSB_DCAFile, RecordId, Codeunit::Temp Blob, Code[20], Text, Text, DateTime, Text, DateTime, Enum::WSB_DCAFileSourceType)

Adds a new file to the Document Archive from a Blob to the configured Document Archive file storage.

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob containing the file contents.

Installation and User Manual FncCopyRemoteFile(WSB_DCAFile@, WSB_DCAFile)

Туре	Name	Description	
Code[20]	pCategoryCode	The code of the category the file should be categorized in. If empty, the category will be determined based on the settings in the Document Archive setup.	
Text	pFilename	The file name.	
Text	pExtension	The file extension.	
DateTime	pFileCreatedDateTime	The file creation date.	
Text	pMessageFrom	The sender of the file/mail.	
DateTime	pMessageSentOn	The date the file/mail was sent.	
Enum "WSB_DCAFileSourceType"	pFileSourceType	The method which was used to add file to the Document Archive	

wgFncCopyRemoteFile(WSB_DCAFile@, WSB_DCAFile)

Copy a file to a new location on the remote file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFileTarget	The new file record values.
Record "WSB_DCAFile"	pRec_WSBDCAFileSource	The old file record values.

wgFncDeleteFile(WSB_DCAFile)

Deletes the file associated with the Document Archive File record from the configured Document Archive file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The record that the file to delete is attached to.

wgFncDownloadFile(WSB_DCAFile)

Downloads the file associated with the Document Archive File record from the configured Document Archive file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The record that the file to download is attached to.

wgFncDownloadFile(WSB_DCAFile, Codeunit::Temp Blob@)

Downloads the file associated with the Document Archive File record from the configured Document Archive file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The record that the file to download is attached to.
Codeunit "Temp Blob"	vCduTempBlob	A TempBlob containing the downloaded file contents.

wgFncGetFieldValue(RecordRef, Integer):Text

Gets formatted field text value for a given RecordRef and FieldNo.

Туре	Name	Description
RecordRef	pRecRef	The RecordRef containing the field value.
Integer	pFieldNo	The FieldNo to get the formatted field value from.

wgFncInitDocArchFileRecord(WSB_DCAFile@, RecordId, Text, Text, DateTime, Text, DateTime, Enum::WSB_DCAFileSourceType, Codeunit::NoSeriesManagement@)

Initializes the fields for a new Document Archive file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The file record.
RecordId	pSourceRecID	The source record ID.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date-time.
Text	pMessageFrom	Email address of who the email message was from (for .msg files).
DateTime	pMessageSentOn	The date and time of the email message.
<pre>Enum "WSB_DCAFileSourceType"</pre>	pFileSourceType	The origin of the file record.
Codeunit "NoSeriesManagement"	vCduNoSeriesMgt	Instance of the No. Series Mgt. codeunit to be used for getting a new No. for the file record.

wgFncInitDocArchFileRecord(WSB_DCAFile@, RecordId, Code[20], Text, Text, DateTime, Text, DateTime, Enum::WSB_DCAFileSourceType, Codeunit::NoSeriesManagement@)

Initializes the fields for a new Document Archive file record.

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The file record.

Installation Fance & Fisher For fature and Environment And Company (WSB_DCAFile): Boolean

Туре	Name	Description
RecordId	pSourceRecID	The source record ID.
Code[20]	pCategoryCode	The code of the category the file should be categorized in. If empty, the category will be determined based on the settings in the Document Archive setup.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date-time.
Text	pMessageFrom	Email address of who the email message was from (for .msg files).
DateTime	pMessageSentOn	The date and time of the email message.
Enum "WSB_DCAFileSourceType"	pFileSourceType	The origin of the file record.
Codeunit "NoSeriesManagement"	vCduNoSeriesMgt	Instance of the No. Series Mgt. codeunit to be used for getting a new No. for the file record.

$wg FncIsFile For Current Environment And Company (WSB_DCAFile): Boolean$

Returns whether the file record applies to the current BC environment and company.

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.

Returns

Туре	Description
Boolean	true iff the file belongs to the current BC environment and company.

wgFncMoveRemoteFile(WSB_DCAFile@, WSB_DCAFile)

Moves a file to a new location on the remote file storage.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The new file record values.
Record "WSB_DCAFile"	pxRec_WSBDCAFile	The old file record values.

wlEvpOnAfterAddFileFromBlob(WSB_DCAFile, RecordId, Codeunit::Temp Blob, Text, Text, DateTime, Text, DateTime)

Allows to hook into adding a file from a Blob.

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Codeunit "Temp	pCduTempBlob	The TempBlob containing the file contents.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.

nitDo**brAstallEitieRearodd()\$468BMD0AA**File@, RecordId, Text, Text, DateTime, Text, DateTime)

Туре	Name	Description
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.

wlEvpOnAfterInitDocArchFileRecord(WSB_DCAFile@, RecordId, Text, DateTime, Text, DateTime)

Allows to hook into initializing a Document Archive file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Text	pFilename	The file name.
Text	pExtension	The file extension.
DateTime	pFileCreatedDateTime	The file creation date.
Text	pMessageFrom	The sender of the file/mail.
DateTime	pMessageSentOn	The date the file/mail was sent.

wlEvpOnBeforeCopyRemoteFile(WSB_DCAFile@, WSB_DCAFile, Boolean@)

Allows to hook into copying a remote file.

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The new file record data.

Installation and User MamulalponBeforeGetEnvironmentName(Text@, Boolean@)

Туре	Name	Description
Record "WSB_DCAFile"	pxRec_WSBDCAFile	The old file record data.
Boolean	vIsHandled	Set this to true if your extension handles copying the remote file.

wlEvpOnBeforeGetEnvironmentName(Text@, Boolean@)

Allows to hook into retrieving the BC environment name.

Parameters

Туре	Name	Description
Text	vEnvironmentName	The environment name.
Boolean	vIsHandled	Set this to true if your extension handles getting the current environment.

wlEvpOnBeforeGetRemoteFilePath(WSB_DCAFile, Code[10]@, Text@, Boolean@)

Allows to hook into getting the remote file path for a file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.
Code[10]	vLanguageCode	Language code to use for translating the generated path.
Text	vFilePath	The result remote file path.
Boolean	vIsHandled	Set this to true if your extension handles getting the remote file path.

wlEvpOnBeforeInitDocArchFileRecord(WSB_DCAFile@, RecordId, Text, Text)

Allows to hook into initializing a Document Archive file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	A record containing information on the source record to attach the file to.
RecordId	pSourceRecID	The Record ID of the source record to attach the file to.
Text	pFilename	The file name.
Text	pExtension	The file extension.

wlEvpOnBeforeMoveRemoteFile(WSB_DCAFile@, WSB_DCAFile, Boolean@)

Allows to hook into moving a remote file.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The new file record data.
Record "WSB_DCAFile"	pxRec_WSBDCAFile	The old file record data.
Boolean	vIsHandled	Set this to true if your extension handles moving the remote file.

wlEvpOnInitDocArchFileCategory(Enum::WSB_DCACategorySelectionMethod, WSB_DCAFile@, WSB_DCAFile, Boolean@)

Allows to hook into setting the Document Archive file category for a file record.

Туре	Name	Description
Enum "WSB_DCACategorySelectionMethod"	pCategorySelectionMethod	The category selection method (from the setup).
Record "WSB_DCAFile"	vRecWSB_DCAFile	The file record.

ecorld Red I lattiegea (a) Oode [20] (a) a Code [20] (a) Integer (a) Integer (a) Integer (a) Boolean (a)

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFileSelected	The file record selected on the page/factbox.
Boolean	vIsHandled	Set this to true if your extension handles setting the document archive file category for the file record.

wlEvpOnSetPrimaryValues(RecordRef, Integer@, Code[20]@, Code[20]@, Integer@, Integer@, Integer@, Boolean@)

Allows one to support additional source record types that Document Archive files can be linked.

Туре	Name	Description
RecordRef	pRecRef	The source record as RecordRef.
Integer	vSourceType	The type of the source record (if applicable).
Code[20]	vSourceNo	The no. of the source record (if applicable).
Code[20]	vSourceSubNo	The sub no. of the source record (if applicable).
Integer	vSourceNoOccurrence	The occurrence of the no. of the source record (if applicable).
Integer	vSourceVersionNo	The version no. of the source record (if applicable).
Integer	vSourceLineNo	The line no. of the source record (if applicable).
Boolean	vIsHandled	Set this to true if your extension handles setting the source link field values for the record type specified in the RecordRef.





Codeunit WSB_DCAFolderStructure

Implements the WSB_IDCARemoteFolderStructure for custom folder structures that are defined in the BC client and can be customized by administrators.

Properties



Methods

wgFncCopyRemoteFolderStructure(WSB_DCAFolderStructure):Boolean

Creates a copy of an existing remote folder structure. Opens a page where the user can enter a code and description for the new folder structure.

Parameters

Туре	Name	Description
Record "WSB_DCAFolderStructure"	pRecWSB_DCAFolderStructure	The existing folder structure.

Returns

Туре	Description
Boolean	true iff the folder structure has been copied.

wgFncCopyRemoteFolderStructure(WSB_DCAFolderStructure, Code[30], Text[100])

Creates a copy of an existing remote folder structure.

Parameters

Туре	Name	Description
Record "WSB_DCAFolderStructure"	pRecWSB_DCAFolderStructure	The existing folder structure.
Code[30]	pNewFolderStructureCode	The code of the new folder structure
Text[100]	pNewFolderStructureDesc	The description of the new folder structure.

wg Fnc Create Sample Folder Structure: Boolean

Creates a sample folder structure.

Returns

Туре	Description
Boolean	true iff the sample folder structure has been created by the procedure.

$wgFncEditTableFolderStructureFilters (WSB_DCATableFolderStructure@): Boolean$

Edit the filters for a table-specific folder structure entry.

Parameters

Туре	Name	Description
Record "WSB_DCATableFolderStructure"	vRecWSB_DCATableFolderStructure	The table-specific folder structure entry

Туре	Description
Boolean	true iff the filters were edited successfully.

Installation and User MagFund ExportFolderStructures (WSB_DCAFolderStructure@)

wgFncExportFolderStructures(WSB_DCAFolderStructure@)

Exports folder structure(s) to an XML file.

Parameters

Туре	Name	Description
Record "WSB_DCAFolderStructure"	vRecWSB_DCAFolderStructure	Filter of the folder structures to export.

wgFncExportFolderStructures(WSB_DCAFolderStructure@, Codeunit::Temp Blob@)

Exports folder structure(s) as XML to a BLOB.

Parameters

Туре	Name	Description
Record "WSB_DCAFolderStructure"	vRecWSB_DCAFolderStructure	Filter of the folder structures to export.
Codeunit "Temp Blob"	vCduTempBlob	The TempBlob to write the folder structures to.

wg Fnc Get Document Archive Folder Structure File Filter: Text

Returns the file filter for Document Archive Folder Structure files.

Returns

Туре	Description
Text	Document Archive Folder Structure file filter.

wgFncGetDocumentArchiveFolderStructuresFileExtension:Text[3]

Returns the file extension for Document Archive folder structure files.

Installation and defrec (6.44) From the Instal

Returns

Туре	Description
Text[3]	Document Archive folder structure file extension.

$wg Fnc Get Folder Path Entry Text (WSB_DCAFolder Path Structure): Text$

Gets the folder path part for a folder path structure entry.

Parameters

Туре	Name	Description
Record "WSB_DCAFolderPathStructure"	pRecWSB_DCAFolderPathStructure	The folder path structure entry.

Returns

Туре	Description
Text	The folder path part for the entry.

$wg Fnc Get Folder Path Entry Text (WSB_DCAFolder Path Structure, WSB_DCAFile): Text$

Gets the folder path part for a folder path structure entry.

Туре	Name	Description
Record "WSB_DCAFolderPathStructure"	pRecWSB_DCAFolderPathStructure	The folder path structure entry.
Record "WSB_DCAFile"	pRecWSB_DCAFile	The Document Archive file to get the path for.

Returns

Туре	Description
Text	The folder path part for the entry.

$wgFncGetRemoteFolderPath(WSB_DCAFile): Text$

Retrieves the remote folder path for a file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.

Returns

Туре	Description
Text	The remote folder path.

wgFncGetRemoteFolderPath(Code[30], WSB_DCAFile):Text

Retrieves the remote folder path for a specific folder structure for a file record.

Parameters

Туре	Name	Description
Code[30]	pFolderStructureCode	The code of the folder structure.
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.

Туре	Description
Text	The remote folder path.

wgFncGetRemoteFolderPathSample:Text

Retrieves a sample remote folder path.

Returns

Туре	Description	
Text	The remote folder path.	

$wg Fnc Get Remote Folder Path Sample (WSB_DCAFolder Structure): Text$

Retrieves a sample remote folder path for a specific folder structure.

Parameters

Туре	Name	Description
Record "WSB_DCAFolderStructure"	pRecWSB_DCAFolderStructure	The folder structure.

Returns

Туре	Description
Text	The remote folder path.

wgFncGetRemoteFolderPathSample(Code [30]): Text

Retrieves a sample remote folder path for a specific folder structure.

Туре	Name	Description
Code[30]	pFolderStructureCode	The code of the folder structure.

Installation and User MgFnaGetRemoteFolderPathSample(Code[30], Integer):Text

Returns

Туре	Description
Text	The remote folder path.

wgFncGetRemoteFolderPathSample(Code [30], Integer): Text

Retrieves a sample remote folder path for a specific folder structure, specifically for a table.

Parameters

Туре	Name	Description
Code[30]	pFolderStructureCode	The code of the folder structure.
Integer	pTableNo	The ID of the table to get a sample folder path for.

Returns

Туре	Description
Text	The remote folder path.

$wgFncGetRemoteFolderPathSample(WSB_DCATableFolderStructure): Text$

Retrieves a sample remote folder path for a table-specific folder structure.

Parameters

Туре	Name	Description
Record	pRecWSB_DCATableFolderStructure	The table-specific folder
"WSB_DCATableFolderStructure"		structure.

wgFncGetRemoteFolderPathSample(Code[30], Variant):Text

Retrieves a sample remote folder path for a specific folder structure, specifically for a record.

Parameters

Туре	Name	Description
Code[30]	pFolderStructureCode	The code of the folder structure.
Variant	pRecRelatedVariant	The record.

Returns

Туре	Description
Text	The remote folder path.

wgFncGetSampleFolderStructureCode:Code[30]

Retrieve the code/identifier of the sample folder structure.

Returns

Туре	Description
Code[30]	The code of the sample folder structure.

$wg Fnc Get Table Folder Structure Filters Text (WSB_DCATable Folder Structure @): Text$

Gets the table-specific folder structure entry's filters as a readable text.

Туре	Name	Description
Record	vRecWSB_DCATableFolderStructure	The table-specific folder
"WSB_DCATableFolderStructure"		structure.

Invest@file@entTailbdeUoedelevStmuatureFilterView(WSB_DCATableFolderStructure@):Text

Returns

Туре	Description
Text	The filters as a readable text.

$wgFncGetTableFolderStructureFilterView(WSB_DCATableFolderStructure@): Text$

Gets the table-specific folder structure entry's filter view.

Parameters

Туре	Name	Description
Record "WSB_DCATableFolderStructure"	vRecWSB_DCATableFolderStructure	The table-specific folder structure.

Returns

Туре	Description
Text	The filter view.

wg Fnc Import Folder Structures

Imports folder structures from an XML file.

wgFncImportFolderStructures(Codeunit::Temp Blob)

Imports folder structure(s) that were stored in XML format.

Parameters

Туре	Name	Description
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob to read the folder structure(s) from.

wgFncSelectTableFilters(Integer, Text, Text, Text@):Boolean

Lets the user select table filters for a table-specific folder structure entry.

Parameters

Туре	Name	Description
Integer	pTableNumber	The ID of the table.
Text	pTableCaption	The caption of the table.
Text	pInputFilterViewAsText	The current filter view.
Text	vOutputFilterViewAsText	The output filter view.

Returns

Туре	Description
Boolean	true iff filters were selected successfully (false if the user aborted).

wgFncSetRemoteFileName(WSB_DCAFile@)

Sets the remote file name for a file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The file record.

wlEvpOnBeforeGetFolderPathEntryValueText(WSB_DCAFolderPathStructure, WSB_DCAFile, Text@, Boolean@)

Allows to hook into determining a folder path part for a remote folder path.

Туре	Name	Description
Record "WSR_DCAFolderPathStructure"	pRecWSB_DCAFolderPathStructure	The folder path entry record.

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The Document Archive File record.
Text	vFolderPathEntryValueText	The folder path part.
Boolean	vIsHandled	Set this to true if your extension handles computing a folder path part for this folder path entry record.

Fields

ID	Type	Name	Description
		Code[30]	The code of the folder structure.
	**	Description[100]	The description of the folder structure.



Codeunit WSB_DCANoSeriesFolderStructure

Implements the no. series folder structure.

Properties

Name	Value	
Access	Public	

Methods

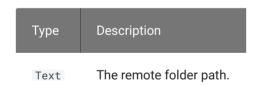
wgFncGetRemoteFolderPath(WSB_DCAFile):Text

Retrieves the remote folder path for a file record.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.

Returns



wgFncSetRemoteFileName(WSB_DCAFile@)

Sets the remote file name for a file record.

Туре	Name	Description
Record "WSB_DCAFile"	vRecWSB_DCAFile	The file record.



wgFncSetRemoteFileName(WSB_DCAFile@)



Codeunit WSB_DCAPDFArchive

Exposes procedures related to the PDF archive feature.

Properties

Name	Value
Access	Public

Methods

wgFncGetCategoryCode(Report Selections):Code[20]

Get a category code for a report selection record.

Parameters

Туре	Name	Description
Record "Report Selections" temporary	pRecTempReportSelections	The report selection record.

Returns

Туре	/pe Description
Code[20]	ode[20] The code of the file category.

wgFncSetArchiveMethodFromDefault(Report Selections@)

Sets the archive method to use from the setup value on a report selection record.

Туре	Name	Description
Record "Report Selections"	vRecReportSelections	The report selection record to set the default on.

wgFncSetPDFArchiveScenarioDefaults (Boolean)

Sets up the PDF Archive scenario defaults.

Parameters

Туре	Name	Description
Boolean	pReset	Whether to reset the defaults.

wlEvpOnAfterAttachDocumentAsPdfToDocumentArchive(RecordRef, Report Selections@, Code[20], Codeunit::Temp Blob, Enum::WSB_DCAPDFArchiveScenario, Code[20], Boolean@)

Raised after the document PDF file has been uploaded to the remote via the PDF Archive feature of Document Archive.

Parameters

Туре	Name	Description
RecordRef	pRecRef	The source record.
Record "Report Selections" temporary	vRecTempReportSelections	Temporary recordset of Report Selection
Code[20]	pDocumentNo	The document no.
Codeunit "Temp Blob"	pCduTempBlob	The file that will be uploaded.
Enum "WSB_DCAPDFArchiveScenario"	pPDFArchiveScenario	Specifies the PDF Archive scenario.
Code[20]	pCategoryCode	The category code of the selected Report Selection.
Boolean	vAttached	True if the document is successfuly uploaded.

wlEvpOnAfterGetPDFArchiveDocumentName(Enum::WSB_DCAPDFArchiveDocNameMethod, Integer, RecordRef, Text@)

Allows to hook into getting a document name for a PDF archive file.

Parameters

Туре	Name	Description
Enum "WSB_DCAPDFArchiveDocNameMethod"	pPDFArchiveDocumentNamingMethod	The naming method used.
Integer	pReportID	The ID of the report object used to generate the PDF.
RecordRef	pRecRef	The source record.
Text	vDocumentNameTxt	The document name text.

wlEvpOnAfterGetPDFArchiveScenarioFromDocumentPayload(Text, JsonObject, Enum::WSB_DCAPDFArchiveScenario@, Boolean@)

Allows to hook into retrieving the PDF Archive scenario from the document payload (from the ReportManagement.OnDocumentReady event).

Parameters

Туре	Name	Description
Text	pIntentAsText	The intent as text.
JsonObject	pDocumentPayload	The full document payload.
Enum "WSB_DCAPDFArchiveScenario"	vPDFArchiveScenario	The result PDF archive scenario.
Boolean	vArchiveScenarioSupported	Whether the archive scenario is supported.

wlEvpOnAfterUploadDMQEmailAttachmentPdfToDocumentArchive(Integer, RecordRef, Report Selections@, Enum::WSB_DCAPDFArchiveScenario, Code[20], Codeunit::Temp Blob, Boolean)

Raised after the document PDF file from an email sent from Document Mail Queue has been uploaded to the remote via the PDF Archive feature of Document Archive.

EvpOlnBtafbateiGet&ndfAlsseri Webiretallame(Integer, RecordRef, Code[20], Text@, Boolean@)

Parameters

Туре	Name	Description
Integer	pQueueEntryNo	The Document Mail Queue Entry No.
RecordRef	pRecRef	The source record.
Record "Report Selections" temporary	vRecTempReportSelections	Temporary recordset of Report Selection.
Enum "WSB_DCAPDFArchiveScenario"	pPDFArchiveScenario	Specifies the PDF Archive scenario.
Code[20]	pDocumentNo	The document no.
Codeunit "Temp Blob"	pCduTempBlob	The file that will be uploaded.
Boolean	pAttached	True if the document is successfuly uploaded.

wlEvpOnBeforeGetPDFArchiveFileName(Integer, RecordRef, Code[20], Text@, Boolean@)

Allows to hook into getting a file name for a PDF archive file.

Туре	Name	Description
Integer	pReportID	The ID of the report object used to generate the PDF file.
RecordRef	pRecRef	The source record.
Code[20]	pDocumentNo	The document no.
Text	vFileName	The resulting file name.
Boolean	vIsHandled	Set this to true if your extension handles getting a PDF file name.





Codeunit WSB_DCAPDFArchiveBuffer

Properties

Name	Value
Access	Internal
SingleInstance	True

Methods

wgFncClearValues(Integer, Code[10])

Clears the buffered values for the specified report ID and sequence combination.

Parameters

Туре	Name	Description
Integer	pReportID	The ID of the report.
Code[10]	pSequence	The sequence no. (of the report selection)

$wgFncPopValues (Integer, WSB_DCAPDFArchiveBuffer@): Boolean$

Retrieves the first buffered PDF archive entry values for the specified report.

Туре	Name	Description
Integer	pReportID	The ID of the report.
Record "WSB_DCAPDFArchiveBuffer" temporary	vRecTempWSB_DCAPDFArchiveBuffer	The buffered values.

Returns

Туре	Description
Boolean	true iff buffered values could be retrieved for the report.

wgFncSetValues(Integer, Code[10], Code[20], Code[20], Boolean, Enum::WSB_DCAPDFArchiveScenario, Variant):Boolean

Buffers values for the PDF archive for a specified report.

Parameters

Туре	Name	Description
Integer	pReportID	The ID of the report.
Code[10]	pSequence	The sequence no. (of the report selection).
Code[20]	pDocumentNo	The Document No.
Code[20]	pCategoryCode	The category code to store the PDF file to.
Boolean	p0verwriteExisting	Whether to overwrite existing PDF files.
Enum "WSB_DCAPDFArchiveScenario"	pPDFArchiveScenario	The scenario in which the PDF file was archived.
Variant	pRecRelatedVariant	The document record.

Туре	Description
Boolean	true iff values were added successfully.



Codeunit WSB_DCAPermissionGroupType

Implements the Document Archive permission group type.

Properties

Name	Value
Access	Public



Codeunit WSB_DCAPermissionMgt

Exposes procedures for handling permissions to Document Archive files.

Properties

Name	Value
Access	Public

Methods

wgFncCheckPermissions(WSB_DCAFile, Enum::WSB_PermissionType)

Checks whether the current user has permissions for a file.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The Document Archive file.
Enum "WSB_PermissionType"	pCheckPermissionType	The permission type to check for.

 $wgFncCheckPermissions (WSB_DCACategory, Enum::WSB_PermissionType)$

Checks whether the current user has permissions for a category.

Туре	Name	Description
Record "WSB_DCACategory"	pRecWSB_DCACategory	The Document Archive category.
Enum "WSB_PermissionType"	pCheckPermissionType	The permission type to check for.

wgFncGetCategoryReadFilter:Text

Gets a filter of category-codes that the current user has read permissions for.

Returns

Туре	Description
Text	The resulting filter.

wgFncGetCategoryReadFilter(RecordId):Text

Gets a filter of category-codes that the current user has read permissions for.

Parameters

Туре	Name	Description
RecordId	pRecordId	The Record ID of the record type to limit the categories to.

Returns

Туре	Description
Text	The resulting filter.

$wgFncGetCategoryReadFilter(WSB_DCAEntityDefinition): Text$

Gets a filter of category-codes that the current user has read permissions for, restricted to a specific entity definition.

Туре	Name	Description
Record	pRecWSB_DCAEntityDefinition	The entity definition to restrict the
"WSB_DCAEntityDefinition"		filter to.

Installation and Userwig Enu @let Category Read Filter (WSB_Permission Group @): Text

Returns

Туре	Description	
Text	The resulting filter.	

$wgFncGetCategoryReadFilter(WSB_PermissionGroup@): Text$

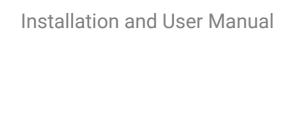
Gets a filter of category-codes from the permission records with read permission.

Parameters

Туре	Name	Description
Record	vRecWSB_PermissionGroup	The Document Archive permission records to
"WSB_PermissionGroup"		create the filter from.

Туре	Description
Text	System.Xml.XmlElement





Codeunit WSB_DCASetup

Exposes procedures related to the Document Archive setup.

Properties

Name	Value
Access	Public

Methods

 $wg Fnc Add Required OAuth 2 Scopes (WSB_OAuth 2 Application, Interface:: WSB_IDCAFile Handler)$

Adds the required OAuth2.0 scopes for a Document Archive File Handler type to an OAuth2.0 Application.

Parameters

Туре	Name	Description
Record "WSB_OAuth2Application"	pRecWSB_OAuth2Application	The OAuth2.0 Application for which to add the scopes.
<pre>Interface "WSB_IDCAFileHandler"</pre>	pIFileHandler	The File Handler type.

 $wgFncGetDefaultOAuth2Application (Enum::WSB_DCAFileHandler, WSB_OAuth2Application@) \\$

Retrieves the default OAuth 2.0 Application for a Document Archive File Handler type.

Туре	Name	Description
Enum "WSB_DCAFileHandler"	pFileHandler	The File Handler type.

Туре	Name	Description
Record	vRecWSB_OAuth2Application	The OAuth 2.0 Application record that
"WSB_OAuth2Application"		will hold the result.

wgFncGetSetup(WSB_DCASetup@)

Retrieves the Document Archive Setup record for the current company.

Parameters

Туре	Name	Description
Record "WSB_DCASetup"	vRecWSB_DCASetup	The setup record.

wgFncInitFileHandlerSetup(Enum::WSB_DCAFileHandler)

Initializes the File Handler Setup for the specified file handler.

Parameters

Туре	Name	Description
Enum "WSB_DCAFileHa	ndler" pFileHandler	The file handler type.

wgFncInitSetup

Initializes the Document Archive Setup record for the current company.

$wgFnclsRemoteFolderOrderEnabled(WSB_DCASetup):Boolean$

Gets whether the remote folder order setting applies/is relevant for the currently set-up remote folder structure.

Туре	Name	Description
Record "WSB_DCASetup"	pRecWSB_DCASetup	The setup.

Installation and User MarwalFncMoveRemoteFilesToSetupRemoteFolderStructure

Returns

Туре	Description
Boolean	true iff the remote folder order setting is in use.

wg Fnc Move Remote Files To Setup Remote Folder Structure

Move all remote files to follow the default settings in the setup.

wgFncOpenFileHandlerSetupPage

Opens the setup page for the currently configured Document Archive File Handler.

wgFncShowFactBox(Text):Boolean

Retrieves whether the factbox page with the specified object ID should be shown.

Parameters

Туре	Name	Description
Text	pPageObjectID	The object ID of the page.

Returns

Туре	Description	
Boolean	true if the page should be shown.	

wgFncShowFactBox(Enum::WSB_DCAFactBoxType):Boolean

Retrieves whether the factbox of a specified type should be shown.

Туре	Name	Description
Enum "WSB_DCAFactBoxType"	pFactBoxType	The type of factbox.

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Returns

Туре	Description
Boolean	System.Xml.XmlElement

wlEvpOnAfterInitFileHandlerSetup(Enum::WSB_DCAFileHandler)

Allows to hook into the initialization of the file handler setup.

Parameters

Туре	Name	Description
Enum "WSB_DCAFileHandler"	pFileHandler	The file handler type.

wlEvpOnBeforeIsRemoteFolderOrderEnabled(WSB_DCASetup, Boolean@, Boolean@)

Allows to hook into determining whether the remote folder order setting is in use.

Parameters

Туре	Name	Description
Record "WSB_DCASetup"	pRecWSB_DCASetup	The setup.
Boolean	vResult	Whether the remote folder order setting is in use.
Boolean	vIsHandled	Set this to true if your extension handles determining.

wlEvpOnBeforeShowFactBox(Enum::WSB_DCAFactBoxType, Boolean@, Boolean@)

Allows to hook into determining whether the factbox of specified type should be shown on pages.

Туре	Name	Description
Enum "WSB_DCAFactBoxType"	pFactBoxType	The factbox type.
Boolean	vHandled	Set this to true if your extension handles determining this.

vpOmbetadretivani dante Reserot/ea roulaler Order (WSB_DCASetup, WSB_DCASetup, Boolean@)

Type Name		Description	
Boolean	vResult	Whether factboxes of this type should be shown.	

wlEvpOnBeforeValidateRemoteFolderOrder(WSB_DCASetup, WSB_DCASetup, Boolean@)

Allows to hook into validating the "Remote Folder Order" setting.

Parameters

Туре	Name	Description
Record "WSB_DCASetup"	pRecWSB_DCASetup	The new setup values.
Record "WSB_DCASetup"	pxRecWSB_DCASetup	The previous setup values.
Boolean	vIsHandled	Set this to true if your extension handles the validation.

wlEvpOnBeforeValidateRemoteFolderStructure(WSB_DCASetup@, WSB_DCASetup, Boolean@)

Allows to hook into validating the "Remote Folder Structure" setting.

Parameters

Туре	Name	Description
**	pRecWSB_DCASetup	The new setup values.
**	pxRecWSB_DCASetup	The previous setup values.
**	vIsHandled	Set this to true if your extension handles the validation.

Fields

ID	Туре	Name	Description
	**	PrimaryKey[10]	A setup primary key field.

ID	Туре	Name	Description
	**	Loaded	Whether the setup is (already) loaded.
	**	Enabled	Whether the app is enabled.
	**	FactBoxType	The type of factbox that should be used throughout BC.
	**	CategorySelectionMethod	The behaviour to use to determine which category should be used when a file is uploaded.
		DefaultCategoryCode[20]	The code of the default file category.
	**	DisableSourceRecCheck	Whether to disable the check to see if the source record exists.
	**	FileHandler	The file handler to use for storing files on a remote storage location.
		FileNoSeries[20]	The code of the No. Series to use for file records.
	**	PDFArchiveDefaultMethod	The default PDF Archive method of how to handle conflicting files.
		PDFArchiveUseCategory	The method the PDF Archive feature should use to determine which category to use.
	``	PDFArchiveCategoryCode[20]	The code of the file category that should be used as the default with the PDF Archive feature.
	**	PDFArchiveDocNamingMethod	The method that should be used for getting a file name for PDF documents stored via the PDF Archive feature.
		PDFArchiveDisableAttachments	Whether to disable the default Attachments feature of BC.
	**	RemoteFolderStructure	The type of remote folder structure to use.
	**	RemoteFolderOrder	The remote folder order to use.
	**	RemoteFolderStructureCode[30]	The code of the folder structure to use.

ID	Туре	Name	Description
	**	RemoteFolderStructureDesc[200]	The description of the folder structure to use.
	**	RemoteFolderLanguageCode[10]	The language to use to translate the folder paths. For example, if you use Table Captions in your folder paths and would like them to be translated in your native language for all users.



Codeunit WSB_DCASharePointAPI

Exposes procedure to make API requests to SharePoint (the Graph API).

Properties

Name	Value
Access	Public

Methods

wgFncDeleteFile(Interface::WSB_IRESTClientSetup, Text, Text, Text):Boolean

Deletes a file from SharePoint.

Parameters

Туре	Name	Description
Interface "WSB_IRESTClientSetup"	pWSB_IRESTClientSetup	The REST Client Setup.
Text	pSiteID	Site ID
Text	pDriveID	Drive ID
Text	pItemPath	Item (File) Path

Returns

Туре	Description
Boolean	true iff successful

wgFncDownloadFile(Interface::WSB_IRESTClientSetup, Text, Text, Text, Codeunit::Temp Blob@):Boolean

Downloads a file from SharePoint.

Parameters

Туре	Name	Description
<pre>Interface "WSB_IRESTClientSetup"</pre>	pWSB_IRESTClientSetup	The REST Client Setup.
Text	pSiteID	Site ID
Text	pDriveID	Drive ID
Text	pItemPath	Item (File) Path
Codeunit "Temp Blob"	vCduTempBlob	VAR Codeunit "Temp Blob".

Returns

Туре	Description
Boolean	true iff successful

 $wgFncFetchDrives (Interface::WSB_IRESTClientSetup, Text, WSB_DCASharePointDrive@):Boolean$

Retrieves the available drives for a site.

Туре	Name	Description
<pre>Interface "WSB_IRESTClientSetup"</pre>	pWSB_IRESTClientSetup	The REST Client Setup.
Text	pSiteID	Site ID
Record "WSB_DCASharePointDrive"	vRecWSB_DCASharePointDrive	Record set storing the info for the resulting drives.

FncF**etstæ8liaeis(nnaenfalcser/W&B).ul@**ESTClientSetup, WSB_DCASharePointSite@):Boolean

Returns

Туре	Description
Boolean	true iff successful.

wgFncFetchSites(Interface::WSB_IRESTClientSetup, WSB_DCASharePointSite@):Boolean Retrieves the available sites.

Parameters

Туре	Name	Description
<pre>Interface "WSB_IRESTClientSetup"</pre>	pWSB_IRESTClientSetup	The REST Client Setup.
Record "WSB_DCASharePointSite"	vRecWSB_DCASharePointSite	Record set holding the info for the resulting sites.

Returns

Туре	Description
Boolean	true iff successful

wgFncRefreshDrives(Interface::WSB_IRESTClientSetup, Text):Boolean

Triggers a refresh of the available drives for a site.

Туре	Name	Description
Interface "WSB_IRESTClientSetup"	pWSB_IRESTClientSetup	The REST Client Setup.
Text	pSiteID	The Site ID.

Returns

Туре	Description	
Boolean	true iff successful	

$wgFncRefreshSites (Interface::WSB_IRESTClientSetup): Boolean$

Triggers a refresh of the available sites.

Parameters

Туре	Name	Description
<pre>Interface "WSB_IRESTClientSetup"</pre>	pWSB_IRESTClientSetup	The REST Client Setup.

Returns

Туре	Description
Boolean	true iff successful

wgFncUploadFile(Interface::WSB_IRESTClientSetup, Text, Text, Text, Codeunit::Temp Blob):Boolean

Uploads a file to SharePoint.

Туре	Name	Description
<pre>Interface "WSB_IRESTClientSetup"</pre>	pWSB_IRESTClientSetup	The REST Client Setup.
Text	pSiteID	Site ID
Text	pDriveID	Drive ID
Text	pRemoteFilePath	Remote File Path for the new item.
Codeunit "Temp Blob"	pCduTempBlob	Temp Blob holding the file.

dFile (Instantation: NaSB_URESTA dirent Setup, Text, Text, Text, Codeunit:: Temp Blob): Boolean

Returns

Туре	Description
Boolean	true iff successful.



Codeunit WSB_DCASharePointFileHandler

Implementation of the SharePoint file handler.

Properties



Methods

wgFncViewFileOnSharePointDrive(WSB_DCAFile)

Opens a browser tab to view the file on SharePoint.

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The file record.

Codeunit WSB_DCASharePointRESTSetup

Implements the basis for making API requests to SharePoint (the Graph API).

Properties

Name	Value
Access	Public



Codeunit WSB_DCATransferFileMgt

Exposes procedures for transferring files from one record to another (N.B. without making actual copies).

Properties



Methods

 $wg Fnc Edit Transfer File Settings Filters (WSB_DCAT ransfer File Settings @, Option): Boolean and the property of the prope$

Edit the source or target filters for a transfer file settings record.

Parameters

Туре	Name	Description
**	vRecWSB_DCATransferFileSettings	The entity definition

Returns

Туре	Description
------	-------------

true iff the filters were edited successfully.

wgFncGetAllowedTargetsForSource(Enum::WSB_DCATransferFileSource, List[WSB_DCATransferFileTarget]@)

Gets the targets that are allowed for a source.

gFndocettallatiofeafrideGettirldafiltedrsText(WSB_DCATransferFileSettings@, Option):Text

Parameters

Туре	Name	Description
Enum "WSB_DCATransferFileSource"	pSource	The source.
List	vAllowedTargets	The allowed targets in a list.

wgFncGetTransferFileSettingsFiltersText(WSB_DCATransferFileSettings@, Option):Text
Gets the transfer file settings' filters as a readable text.

Parameters

Ту	/pe	Name	Description
**		vRecWSB_DCATransferFileSettings	The transfer file settings record.

Returns

Туре	Description
**	The filters as a readable text.

wgFncGetTransferFileSettingsFilterView(WSB_DCATransferFileSettings@, Option):Text Gets the transfer file settings record's filter view.

Parameters

Туре	Name	Description
	vRecWSB_DCATransferFileSettings	The transfer file settings record.

Returns

|--|

" The filter view.

wgFncLookupTransferFileTargets(Boolean, Enum::WSB_DCATransferFileSource, WSB_DCATransferTargetLookup@):Boolean

Opens the "Transfer Target Lookup" page to select transfer targets for a transfer source. If the user clicks on "OK" to close the page, the selected transfer targets will be returned.

Parameters

Туре	Name	Description
Boolean	pAllowMultiselect	Whether to allow multi-select.
Enum "WSB_DCATransferFileSource"	pSource	The source to select targets for.
Record "WSB_DCATransferTargetLookup" temporary	vRecTempWSB_DCATransferTargetLookup	The selected transfer target(s).

Returns

Туре	Description
Boolean	true iff the user entity definition(s) and pressed "OK".

wgFncRemoveTransferredFiles(Variant, Variant):Boolean

Removes all files that were earlier transferred from one record to another record.

Туре	Name	Description
Variant	pSourceRecRelatedVariant	The record where the Document Archive Files were copied from.
Variant	pTargetRecRelatedVariant	The record where the Document Archive Files were copied to, and from which they will be unlinked.

Returns

Туре	Description
Boolean	true iff successfully unlinked/removed the transferred files.

$wg Fnc Set Transfer File Settings Filter View (WSB_DCAT ransfer File Settings @, Option, Text): Boolean$

Set the filter view for a transfer file settings record.

Parameters

Туре	Name	Description
Record "WSB_DCATransferFileSettings"	vRecWSB_DCATransferFileSettings	The transfer file settings record.
Option	рТуре	The type of filter (source or target).
Text	pNewTableViewAsText	The table filter view as text

Returns

Туре	Description
Boolean	true iff applying the view was successful.

wgFncTransferFiles(Variant, Variant):Boolean

Transfers all Document Archive files attached to one record to another record.

Туре	Name	Description
Variant	pSourceRecRelatedVariant	The record to copy the Document Archive Files from.
Variant	pTargetRecRelatedVariant	The record to copy the Document Archive Files to.

Returns

Туре	Description
Boolean	true iff successfully transferred the files.

wgFncTransferFiles(Variant, Variant, Boolean):Boolean

Transfers all Document Archive files attached to one record to another record.

Parameters

Туре	Name	Description
Variant	pSourceRecRelatedVariant	The record to copy the Document Archive Files from.
Variant	pTargetRecRelatedVariant	The record to copy the Document Archive Files to.
Boolean	pFollowTransferSettings	Whether to follow the Transfer File Settings.

Returns

Туре	Description
Boolean	true iff successfully transferred the files.

wlEvpOnAfterGetAllowedTargetsForSource(Enum::WSB_DCATransferFileSource, List[WSB_DCATransferFileTarget]@)

Allows to hook into getting the targets that are allowed for a source.

Туре	Name	Description
Enum "WSB_DCATransferFileSource"	pSource	The source.
List	vAllowedTargets	The allowed targets for the source.

wlEvpOnAfterGetSourceRecordForProdOrderLine(Prod# Order Line, Variant@, Boolean@)

Allows to hook into getting the source record to possibly transfer Document Archive files from.

Parameters

Туре	Name	Description
Record "Prod. Order Line"	pRecProdOrderLine	The production order header record.
Variant	vSourceRecordVariant	The source record for the production order line.
Boolean	vSuccess	Set this to true if your extension successfully found a source record with Document Archive files to transfer files from.

wlEvpOnAfterGetSourceRecordForProductionBOMLine(Production BOM Line, Variant@, Boolean@)

Allows to hook into getting the source record to possibly transfer Document Archive files from.

Parameters

Туре	Name	Description
Record "Production BOM Line"	pRecProductionBOMLine	The production BOM line record.
Variant	vSourceRecordVariant	The source record for the production BOM line.
Boolean	vSuccess	Set this to true if your extension successfully found a source record with Document Archive files to transfer files from.

wlEvpOnAfterGetSourceRecordForProductionOrder(Production Order, Variant@, Boolean@)

Allows to hook into getting the source record to possibly transfer Document Archive files from.

wlEvlp@raAlfttec@cat6du/seRlectaordaforPurchaseLine(Purchase Line, Variant@, Boolean@)

Parameters

Туре	Name	Description
Record "Production Order"	pRecProductionOrder	The production order header record.
Variant	vSourceRecordVariant	The source record for the production order header.
Boolean	vSuccess	Set this to true if your extension successfully found a source record with Document Archive files to transfer files from.

wlEvpOnAfterGetSourceRecordForPurchaseLine(Purchase Line, Variant@, Boolean@)

Allows to hook into getting the source record to possibly transfer Document Archive files from.

Parameters

Туре	Name	Description
Record "Purchase Line"	pRecPurchLine	The purchase line record.
Variant	vSourceRecordVariant	The source record for the purchase line.
Boolean	vSuccess	Set this to true if your extension successfully found a source record with Document Archive files to transfer files from.

wlEvpOnAfterGetSourceRecordForSalesLine(Sales Line, Variant@, Boolean@)

Allows to hook into getting the source record to possibly transfer Document Archive files from.

Туре	Name	Description	
Record	pRecSalesLine	The sales line record.	
"Sales Line"			

Transifestallesiourraeleduseble (amtealer, Enum::WSB_DCATransferFileSource@, Boolean@)

Туре	Name	Description
Variant	vSourceRecordVariant	The source record for the sales line.
Boolean	vSuccess	Set this to true if your extension successfully found a source record with Document Archive files to transfer files from.

wlEvpOnAfterGetTransferFileSourceForTable(Integer, Enum::WSB_DCATransferFileSource@, Boolean@)

Allows to hook into getting the transfer file source for a table ID.

Parameters

Туре	Name	Description
Integer	pTableNo	The ID of the table to get the transfer file source for.
Enum "WSB_DCATransferFileSource"	vTransferFileSource	The transfer file source.
Boolean	vFound	Set this to true if your extension found a transfer file source type for the table with this ID.

wlEvpOnAfterGetTransferFileSourceTableNo(Enum::WSB_DCATransferFileSource, Integer@)

Allows to hook into getting the table ID for a transfer file source.

Туре	Name	Description
Enum "WSB_DCATransferFileSource"	pTransferFileSource	The transfer file source (enum).
Integer	vTableNo	The corresponding table ID.

wlEvpOnAfterGetTransferFileTargetForTable(Integer, Enum::WSB_DCATransferFileTarget@, Boolean@)

Allows to hook into getting the transfer file target for a table ID.

Parameters

Туре	Name	Description
Integer	pTableNo	The ID of the table to get the transfer file target for.
<pre>Enum "WSB_DCATransferFileTarget"</pre>	vTransferFileTarget	The transfer file target.
Boolean	vFound	Set this to true if your extension found a transfer file target type for the table with this ID.

wlEvpOnAfterGetTransferFileTargetTableNo(Enum::WSB_DCATransferFileTarget, Integer@)

Allows to hook into getting the table ID for a transfer file target.

Parameters

Туре	Name	Description
Enum "WSB_DCATransferFileTarget"	pTransferFileTarget	The transfer file target (enum).
Integer	vTableNo	The corresponding table ID.

wlEvpOnAfterTransferFiles(Variant, Variant, Boolean, Boolean@, Boolean@)

Allows to hook into the moment right after files are transferred from a source to target record.

Туре	Name	Description
Variant	pSourceRecRelatedVariant	The source record.
Variant	pTargetRecRelatedVariant	The target record.

InstallatiomBaridreRentovaeTeansferredFiles(Variant, Variant, Boolean@, Boolean@)

Туре	Name	Description
Boolean	pFollowTransferSettings	Whether to follow the transfer settings configuration.
Boolean	vSuccess	Whether transferring files was performed successfully.
Boolean	vIsHandled	Set this to true if your extension handles transferring files for this record-type combination.

wlEvpOnBeforeRemoveTransferredFiles(Variant, Variant, Boolean@, Boolean@)

Allows to hook into removing linked transferred files from a record.

Parameters

Туре	Name	Description
Variant	pSourceRecRelatedVariant	The source record.
Variant	pTargetRecRelatedVariant	The target record.
Boolean	vSuccess	Whether the files were removed successfully.
Boolean	vIsHandled	Set this to true if your extension handles removing the linked transferred files for this record-type combination.

wlEvpOnBeforeTransferFiles(Variant, Variant, Boolean, Boolean@, Boolean@)

Allows to hook into the moment right before files are transferred from a source to target record.

Туре	Name	Description
Variant	pSourceRecRelatedVariant	The source record.
Variant	pTargetRecRelatedVariant	The target record.
Boolean	pFollowSetup	Whether to follow the transfer settings configuration.

Insta**llation**Oa**BefoseTratasfeaF**iles(Variant, Variant, Boolean, Boolean@, Boolean@)

Туре	Name	Description
Boolean	vSuccess	Whether transferring files was performed successfully.
Boolean	vIsHandled	Set this to true if your extension handles transferring files for this record-type combination.

Inst allation a Belose Francisca F iles (Variant, Variant, Boolean, Boolean@, Boolean@)

ControlAddIn WSB_DCADragDropControl

Methods

SetDropAreaText(Text)

Sets the text that is shown in the control add-in (e.g., a text translated to the user's language).

Туре	Name	Description	
Text	pDropAreaText	The text to show in the control add-in.	

Enum WSB_DCACategorySelectionMethod

Specifies the methods/behaviours of how a file category should be selected when uploading a file (e.g., via drag and drop).

Properties

Name	Value	
Access	Public	

Ordinal	Name	Description
0	UseSelectedCategory	Use the selected category.
1	SelectOnFileUpload	Select the category to use after/on uploading the file.
2	UseDefault	Use the default file category from the setup.

Enum WSB_DCAFactBoxType

Specifies the factbox types.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
70257105	Files	A factbox which shows the Document Archive files for the source record directly.
70257108	Categories	A factbox which shows the Document Archive categories and for each category the number of files uploaded for that source record.

Enum WSB_DCAFileHandler

Specifies the supported file handlers for downloading and uploading files from/to a remote storage location.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
1	SharePoint	Use SharePoint drives as the remote storage location.
2	AzureBlob	Use an Azure Blob Storage container as the remote storage location.

Enum WSB_DCAFileSourceType

Specifies the possible origins of Document Archive file records.

Properties

Name	Value
Access	Public

Ordinal	Name	Description
0	DragDrop	The file was uploaded via Drag and Drop.
1	SaveAsPDF	The file was uploaded via a PDF Archive scenario.



Enum WSB_DCAFolderPathEntryType

The type of folder path entries. This enum can be extended with additional options.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
1	EnvironmentName	The current Business Central environment's name.
2	CompanyName	The name of the current company.
3	CompanyDisplayName	The display name of the current company.
10	NoSeriesNo	The number of the file record.
20	CategoryCode	The code of the category of the file record.
21	CategoryDescription	The description of the category of the file record.
50	TableNo	The table number of the source record that the file record is linked to.
51	TableName	The table name of the source record that the file record is linked to.
52	TableCaption	The table caption of the source record that the file record is linked to.
60	EntityNameSingular	Use the name of known entities such as "Posted Sales Invoice" (singular form). For unknown entities/tables fall back on the "Table Caption".

Ordinal	Name	Description
61	EntityNamePlural	Use the name of known entities such as "Posted Sales Invoices" (plural form). For unknown entities/tables fall back on the "Table Caption".
70	PrimaryKeyFieldValues	The primary key field values of the source record that the file record is linked to (separated by spaces).
71	EntityIdentifier	A unique ID for entities, for example, only the "Document No." for "Sales Order" documents (i.e., without "Document Type").
80	FieldNo	A field number.
81	FieldName	The name of a field of the source record that the file record is linked to.
82	FieldCaption	The caption of a field of the source record that the file record is linked to.
83	FieldValue	The value of a field of the source record that the file record is linked to.
100	FixedText	A fixed text entered by the user.

Enum WSB_DCAFolderPathStructureType

The types of folder path structure entry types.

Properties

Name	Value
Access	Public
Extensible	False

Ordinal	Name	Description
0	Root	Root folder structure entry.
1	Default	Default folder structure entry which follows after the root folder structure. This is used if there is no table-specific folder structure that applies for the file record.
2	Table	Table-specific folder structure entry which follows after the root folder structure. This is used if there is a table-specific folder structure that applies for the file record.

Enum WSB_DCAPDFArchDefaultMethod

Specifies what the PDF Archive feature should do, by default, if there are conflicting file names.

Properties

Name	Value
Access	Public

Ordinal	Name	Description
0	DoNotArchive	Skip the file upload, do not archive.
1	AlwaysCreateNew	Creat a new file with a new file name with a number appended to it.
2	OverwriteExisting	Overwrite the existing file on the remote file storage.

Enum WSB_DCAPDFArchMethod

Specifies what the PDF Archive feature should do if there are conflicting file names.

Properties

Name	Value
Access	Public

Ordinal	Name	Description
0	DoNotArchive	Skip the file upload, do not archive.
1	AlwaysCreateNew	Creat a new file with a new file name with a number appended to it.
2	OverwriteExisting	Overwrite the existing file on the remote file storage.
3	UseDefault	Use the default setting specified in the Document Archive Setup table.

Enum WSB_DCAPDFArchiveDocNameMethod

Specifies the built-in supported PDF document naming methods for the PDF Archive feature.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
0	DocumentType	Generate PDF file names based on document type.
1	ReportCaption	Generate PDF file names based on report caption.



Enum WSB_DCAPDFArchiveScenario

Specifies the supported PDF Archive scenarios.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
0	None	Not specified.
1	Print	Archive the PDF when the document is printed.
2	Preview	Archive the PDF when the document is previewed.
3	Save	Archive the PDF when the document is saved.
4	Download	Archive the PDF when the document is downloaded.
5	Email	Archive the PDF when the document is emailed. Only archives from standard e-mailing or e-mailing via Document Mail Queue.
## Fields		

ID	Туре	Name	Description
	**	Scenario	A scenario in which the PDF documents should be archived.

Enum WSB_DCARemoteFolderOrder

Specifies the programmatically-defined/built-in supported remote folder orders.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
0	Undefined	Unconfigured/undefined.
1	EntityOnly	Folders per entity only, no folder per category, e.g. CRONUS US/Sales Order/S098002/Order Conf. S098002.pdf
2	CategoryTopLevel	Folder order with category folder on the top-level, e.g. CRONUS US/SALES/ Sales Order/S098002/Order Conf. S098002.pdf
3	CategoryBottomLevel	Folder order with category folder on the top-level, e.g. CRONUS US/Sales Order/DEFAULT/S098002/Order Conf. S098002.pdf

Enum WSB_DCARemoteFolderStructure

Specifies the supported remote folder structures.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
0	NoSeries	Built-in remote folder structure based on No. Series. Files are stored in folders like DCA11000/DCA11001.txt, DCA11000/DCA11002.pdf, DCA12000/DCA12001.msg
1	Entities	Built-in remote folder structure based on entities and documents. Files are stored in folders like Item/10000/filename.txt, Sales Order/SO450003/filename.pdf, Sales Quote/SQ420001/filename.msg
2	Custom	The remote folder structure is defined in the BC client and can be customized by an administrator.

Enum WSB_DCATransferFileSource

Specifies the supported entity types that files can be transferred from.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
0	None	Not specified.
1	Item	Item records.
2	Resource	Resource records.
4	Customer	Customer records.
5	Vendor	Vendor records.
6	PostedSalesInvoice	Posted Sales Invoices.
3	ProductionBOM	Production BOM.

Enum WSB_DCATransferFileTarget

Specifies the supported entity types that files can be transferred from.

Properties

Name	Value
Access	Public
Extensible	True

Ordinal	Name	Description
0	None	Not specified.
1	SalesDocs	Sales documents.
2	PurchaseDocs	Purchase documents.
3	ProductionDocs	Production documents.
4	ProductionBOM	Production BOM.
5	Reminders	Reminders.

Enum WSB_DCAUseCategory

Specifies the possible behaviours of how to determine which category to use.

Properties

Name	Value
Access	Public

Ordinal	Name	Description
0	DefaultCategoryCode	Use the default category from the Document Archive setup.
1	PDFCategoryCode	Use the default PDF Archive category specified in the setup.
2	ReportSelectionCategoryCode	Use the category specified on the report selection record.



Interface WSB_IDCAFileHandler

Properties



Methods

wgFncDeleteFile(WSB_DCAFile):Boolean

Deletes a file from the Document Archive.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A Document Archive file record containing the details on the file.

Returns

Туре	Description
Boolean	true iff successful

wgFncDownloadFile(WSB_DCAFile, Codeunit::Temp Blob@):Boolean

Downloads a file from the Document Archive.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A Document Archive file record containing the details on the file.

Туре	Name	Description
Codeunit "Temp Blob"	vCduTempBlob	A TempBlob containing the downloaded file contents.

Returns

Туре	Description
Boolean	true iff successful

wgFncGetRequiredOAuth2Scopes(List[Text]@)

Gets the list of scopes that this file handler requires access to.

Parameters

Туре	Name	Description
List	vScopes	The list of scopes that this file handler requires access to.

wgFncGetSetupPage:Integer

Gets the setup page for this file handler where users can configure settings.

Returns

Туре	Description	
Integer	The ID of the file handler's setup page	

wgFncInitFileRecord(WSB_DCAFile@)

Performs initializations for Document Archive file records specific to this file handler.

Parameters

Туре	Name	Description
Record "WSB DCAFile"	vRecWSB DCAFile	A Document Archive file record.

Installation and Usveg MachupabadFile(WSB_DCAFile, Codeunit::Temp Blob):Boolean

wgFncUploadFile(WSB_DCAFile, Codeunit::Temp Blob):Boolean

Uploads a file to the Document Archive.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	A Document Archive file record containing the details on the file.
Codeunit "Temp Blob"	pCduTempBlob	The TempBlob containing the file contents to upload.

Returns

Туре	Description
Boolean	true iff successful





Interface WSB_IDCARemoteFolderStructure

An interface that allows one to implement a remote folder structure programmatically.

Properties



Methods

wgFncGetRemoteFolderPath(WSB_DCAFile):Text

Retrieves the remote folder path to use for a file uploaded to the document archive.

Parameters

Туре	Name	Description
Record "WSB_DCAFile"	pRecWSB_DCAFile	The Document Archive file.

Returns



wgFncSetRemoteFileName(WSB_DCAFile@)

Sets the remote file name to use for a file uploaded to the document archive.

Parameters

Туре	Name	Description
	pRecWSB_DCAFile	The Document Archive file.



wgFncSetRemoteFileName(WSB_DCAFile@)

Page WSB_DCAAzureBlobContContents

A page to view the contents of the Azure Blob container used by Document Archive.

Name	Value
ApplicationArea	#All
Caption	Azure Blob Storage Container Contents
DeleteAllowed	False
Editable	False
InsertAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	9043
SourceTableTemporary	True
UsageCategory	None

Page WSB_DCAAzureBlobContainers

A page to view Blob containers of an Azure Storage Account.

Name	Value
ApplicationArea	#All
Caption	Azure Blob Containers
DeleteAllowed	False
Editable	False
InsertAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	9044
SourceTableTemporary	True
UsageCategory	None

Page WSB_DCACategories

A page to view or edit the Document Archive file categories.

Name	Value
ApplicationArea	#All
Caption	Document Archive Categories
ContextSensitiveHelpPage	Categories.html
PageType	List
SourceTable	70257101
UsageCategory	Administration

Page WSB_DCACategoryEntities

A list page to view and edit the entities for which a category is available.

Name	Value
ApplicationArea	#All
Caption	Category Entities
DataCaptionFields	1
DeleteAllowed	True
InsertAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	70257116
UsageCategory	None



Page WSB_DCACategoryFactBox

A factbox to view or upload new files for the source record displayed on the page to which this factbox is added. This factbox shows all categories and the number of files uploaded per category for the source record.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Archive Files
ContextSensitiveHelpPage	Files-FactBox.html
DeleteAllowed	False
InsertAllowed	False
LinksAllowed	False
ModifyAllowed	False
PageType	ListPart
ShowFilter	True
SourceTable	70257101
UsageCategory	None

Methods

wgFncGetRecordId:RecordId

Gets the record ID of the record to which new DCA files should be attached to.

wgFncSetDragDropVisible(Boolean)

Sets whether or not the Drag and Drop control add-in should be shown.

Parameters

Туре	Name	Description
Boolean	pDragDropCtrlVisible	Whether the control add-in should be visible.

wgFncSetRecordId(RecordId)

Sets the record ID of the record to which new DCA files should be attached to.

Parameters

Туре	Name	Description
RecordId	pRecordId	The record ID of the record to attach new DCA files to.

wgFncShowFactBox:Boolean

Retrieves whether or not this factbox should be shown.

Returns

Туре	Description
Boolean	true if the factbox should be shown



Page WSB_DCACategoryLookup

A page to lookup Document Archive file categories for only those that the user has permissions for.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Archive Categories
ContextSensitiveHelpPage	Categories.html
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	70257101
UsageCategory	None

Methods

wgFncSetRecordId(RecordId)

Sets the record ID of the record to which new DCA files should be attached to.

Parameters

Туре	Name	Description
RecordId	pRecordId	The record ID of the record to attach new DCA files to.



wgFncSetRecordId(RecordId)



Page WSB_DCACopyFolderStructDialog

A dialog page to specify a code and description for a new folder structure configuration to create a copy of an existing folder structure configuration to.

Properties

Name	Value
ApplicationArea	#All
Caption	Copy Folder Structure
ContextSensitiveHelpPage	Folder-Structure.html
PageType	StandardDialog
SourceTable	70257110
UsageCategory	None

Methods

wgFncGetNewFolderStructureCode:Code[30]

Retrieves the new folder structure code entered by the user in the dialog page.

Returns

Туре	Description
Code[30]	New folder structure code.

wg Fnc Get New Folder Structure Description: Text [100]

Retrieves the code of the new folder structure entered by the user in the dialog page.

Installation and User Manual wgFncGetNewFolderStructureDescription:Text[100]

Returns

Туре	Description	
Text[100]	New folder structure description.	



Page WSB_DCAEmailSettings

A page to configuring settings per category related to attaching files to emails sent from Business Central.

Properties

Name	Value
AdditionalSearchTerms	document archive mail attachments, document archive e-mail setup
ApplicationArea	#AII
Caption	Document Archive Email Settings
ContextSensitiveHelpPage	Email-Settings.html
DataCaptionFields	1
PageType	List
SourceTable	70257109
UsageCategory	Administration

Fields

	ID	ID Type Name		Description	
<pre>CategoryCode[20] FilesAvailableAsAttachment</pre>		CategoryCode[20]	The code of the category that the settings apply to.		
		FilesAvailableAsAttachment	Whether the Document Archive files of this file category should be available as email attachments to select.		

Page WSB_DCAEntityDefinitions

A list page to view or edit entity definitions.

Name	Value
ApplicationArea	#All
Caption	Entity Definitions
PageType	List
SourceTable	70257111
UsageCategory	None

Page WSB_DCAEntityIDFields

A list page to view and edit the fields that should be used as the identifier fields for an entity.

Name	Value
ApplicationArea	#All
Caption	Entity ID Fields
DataCaptionExpression	wgPageCaption
PageType	List
SourceTable	70257115
UsageCategory	None

Page WSB_DCAEntityTranslations

A list page to view or edit entity translations.

Name	Value
ApplicationArea	#All
Caption	Entity Translations
DataCaptionExpression	wgPageCaption
PageType	List
SourceTable	70257114
UsageCategory	None



Page WSB_DCAFileFactBox

A factbox to view or upload new files for the source record displayed on the page to which this factbox is added. This factbox shows all files for the selected source record.

Name	Value
ApplicationArea	#All
Caption	Document Archive Files
ContextSensitiveHelpPage	Files-FactBox.html
DeleteAllowed	True
InsertAllowed	False
LinksAllowed	False
ModifyAllowed	False
PageType	ListPart
ShowFilter	True
SourceTable	70257100
SourceTableView	sorting(CreatedDateTime)
order(descending)	
UsageCategory	None

Methods

wgFncGetRecordId:RecordId

Gets the record ID of the record to which new DCA files should be attached to.

wgFncSetDragDropVisible(Boolean)

Sets whether or not the Drag and Drop control add-in should be shown.

Parameters

Туре	Name	Description	
Boolean	pDragDropCtrlVisible	Whether the control add-in should be visible.	

wgFncSetRecordId(RecordId)

Sets the record ID of the record to which new DCA files should be attached to.

Parameters

Туре	Name	Description
RecordId	pRecordId	The record ID of the record to attach new DCA files to.

wgFncShowFactBox:Boolean

Retrieves whether or not this factbox should be shown.

Returns

Туре	Description	
Boolean	true if the factbox should be shown	

Page WSB_DCAFiles

A page to view file records for files stored on a remote storage location (e.g., a SharePoint drive).

Name	Value
ApplicationArea	#All
Caption	Document Archive Files
DeleteAllowed	True
InsertAllowed	False
LinksAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	70257100
SourceTableView	sorting(CreatedDateTime) order(descending)
UsageCategory	None

Page WSB_DCAFolderPathStructurePart

A listpart page which can be used to view or edit folder path structure entries.

Name	Value
ApplicationArea	#All
Caption	Folder Path Entries
ContextSensitiveHelpPage	Folder-Structure.html
РадеТуре	ListPart
SourceTable	70257113

Page WSB_DCAFolderStructureCard

A card page to view or edit a folder structure.

Name	Value
ApplicationArea	#All
Caption	Folder Structure
ContextSensitiveHelpPage	Folder-Structure.html
PageType	Card
SourceTable	70257110
UsageCategory	None

Page WSB_DCAFolderStructures

A list page to view or edit folder structures.

Name	Value
ApplicationArea	#All
Caption	Folder Structures
CardPageId	WSB_DCAFolderStructureCard
ContextSensitiveHelpPage	Folder-Structure.html
PageType	List
SourceTable	70257110
UsageCategory	None

Page WSB_DCAPDFArchScenarioListPart

A listpart-page to view or edit the scenarios in which PDF documents should be archived automatically.

Name	Value
ApplicationArea	#All
Caption	PDF Archive Scenarios
PageType	ListPart
SourceTable	70257103
UsageCategory	None

Page WSB_DCAPermissionGroups

A list page to view or edit the Document Archive permission groups.

Name	Value
ApplicationArea	#All
Caption	Document Archive Permission Groups
ContextSensitiveHelpPage	Permission-Groups.html
DataCaptionFields	70257100
DelayedInsert	True
PageType	List
SourceTable	70257252
SourceTableView	sorting(Type, No) where(Type = const(WSB_DocumentArchive))
UsageCategory	Administration

Page WSB_DCAPreviewRemoteFolderPath

A page to preview a remote folder path for a selected record specifically.

Properties

Name	Value
ApplicationArea	#All
Caption	Preview Remote Folder Path
ContextSensitiveHelpPage	Folder-Structure.html
DeleteAllowed	False
InsertAllowed	False
PageType	StandardDialog
SourceTable	70257110
UsageCategory	None

Methods

wgFncSetTable(Integer)

Sets the table that should be used to select a record.

Туре	Name	Description
Integer	pTableNo	The ID of the table



Page WSB_DCASetupWizard

A setup wizard page that helps to easily set up the Document Archive app.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Archive Setup Wizard
ContextSensitiveHelpPage	Setup.html
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
PageType	NavigatePage
SourceTable	70257104
UsageCategory	Administration

Methods

wlEvpOnAfterSetUpAuthenticationStep(WSB_DCASetup@, Code[20])

Allows one to perform additional actions after leaving the "Set up Authentication" step.

Туре	Name	Description
Record "WSB_DCASetup"	vRecWSB_DCASetup	The setup record.

Installation and User MrdEupDnAfterSetUpFileHandlerSettings(WSB_DCASetup@)

Туре	Name	Description
Code[20]	pOAuth2AppCode	The code of the OAuth 2.0 Configuration.

wlEvpOnAfterSetUpFileHandlerSettings(WSB_DCASetup@)

Allows one to perform additional actions after leaving the "Set up File Handler Settings" step.

Parameters

Туре	Name	Description
Record "WSB_DCASetup"	vRecWSB_DCASetup	The setup record.

wlEvpOnBeforeFinish(WSB_DCASetup@)

Allows one to perform additional actions when a user clicks on Finish in the setup wizard page.

Parameters

Туре	Name	Description
Record "WSB_DCASetup"	vRecWSB_DCASetup	The setup record.

wlEvpOnBeforeSetUpFileHandlerSettings(WSB_DCASetup@)

Allows one to perform additional actions before entering the "Set up File Handler Settings" step.

Туре	Name	Description
Record "WSB_DCASetup"	vRecWSB_DCASetup	The setup record.





Page WSB_DCASharePointSetup

Page to configure settings for the SharePoint file handler.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Archive SharePoint Setup
DeleteAllowed	False
InsertAllowed	False
ModifyAllowed	True
PageType	Card
SourceTable	70257105
UsageCategory	None

Fields

ID	Туре	Name	Description
		PrimaryKey[10]	A setup primary key field.
	**	OAuth2AppCode[20]	The code of the OAuth 2.0 configuration used for authenticating with the Graph API.
	**	SiteID[255]	The ID of the site that is used by default.
	**	SiteDisplayName[255]	The display name of the site that is used by default.

ID	Туре	Name	Description
	**	DriveID[255]	The ID of the drive that is used by default.
		DriveName[255]	The name of the drive that is used by default.

Page WSB_DCATableStructureCard

A card page to view or edit a table-specific folder structure.

Name	Value
ApplicationArea	#All
Caption	Table-Specific Folder Structure
ContextSensitiveHelpPage	Folder-Structure.html
PageType	Card
SourceTable	70257112
UsageCategory	None

Page WSB_DCATableStructurePart

A listpart page to view or edit table-specific folder structures for a (main) folder structure.

Name	Value
ApplicationArea	#All
Caption	Table-Specific Folder Structures
CardPageId	WSB_DCATableStructureCard
ContextSensitiveHelpPage	Folder-Structure.html
PageType	ListPart
SourceTable	70257112

Page WSB_DCATransferFileSettingPart

A listpart-page to view and edit the transfer file settings for a category.

Name	Value
ApplicationArea	#All
Caption	Transfer File Settings
ContextSensitiveHelpPage	Transfer-Files.html
PageType	ListPart
SourceTable	70257107
UsageCategory	None



Page WSB_DCATransferFileSettings

A list-page to view and edit the transfer file settings for a category.

Properties

Name	Value
ApplicationArea	#All
Caption	Document Archive Transfer File Settings
ContextSensitiveHelpPage	Transfer-Files.html
DataCaptionFields	1
PageType	List
SourceTable	70257107
UsageCategory	Administration

Fields

ID	Туре	Name	Description
	**	CategoryCode[20]	The code of the category to which the transfer file settings record applies.
	**	Source	The source type to transfer from.
	**	Target	The target type to transfer to.
	**	CopyRecordsInsteadOfRef	Specifies whether the files are copied instead of just referenced.
	**	SourceFilterView	A BLOB which saves the table filter view for the source type.

ID	Туре	Name	Description
	**	TargetFilterView	A BLOB which saves the table filter view for the source type.



Page WSB_DCATransferTargetLookup

A page to lookup a target for a new transfer file setting.

Properties

Name	Value
ApplicationArea	#All
Caption	Transfer Setting Target Selection
DataCaptionExpression	wgSource
DeleteAllowed	False
Editable	False
InsertAllowed	False
ModifyAllowed	False
PageType	List
SourceTable	70257117
SourceTableTemporary	True
UsageCategory	None

Methods

 $wgFncGetSelectedRecord(WSB_DCATransferTargetLookup@)$

Get the record that the user selected on the page.

Installation and Useg MarGuatSelectedRecords(WSB_DCATransferTargetLookup@)

Parameters

Туре	Name	Description
Record "WSB_DCATransferTargetLookup"	vRecSelectedTarget	The selected target.

$wgFncGetSelectedRecords(WSB_DCATransferTargetLookup@)$

Get the records (plural) that the user selected on the page (if multi-select is used).

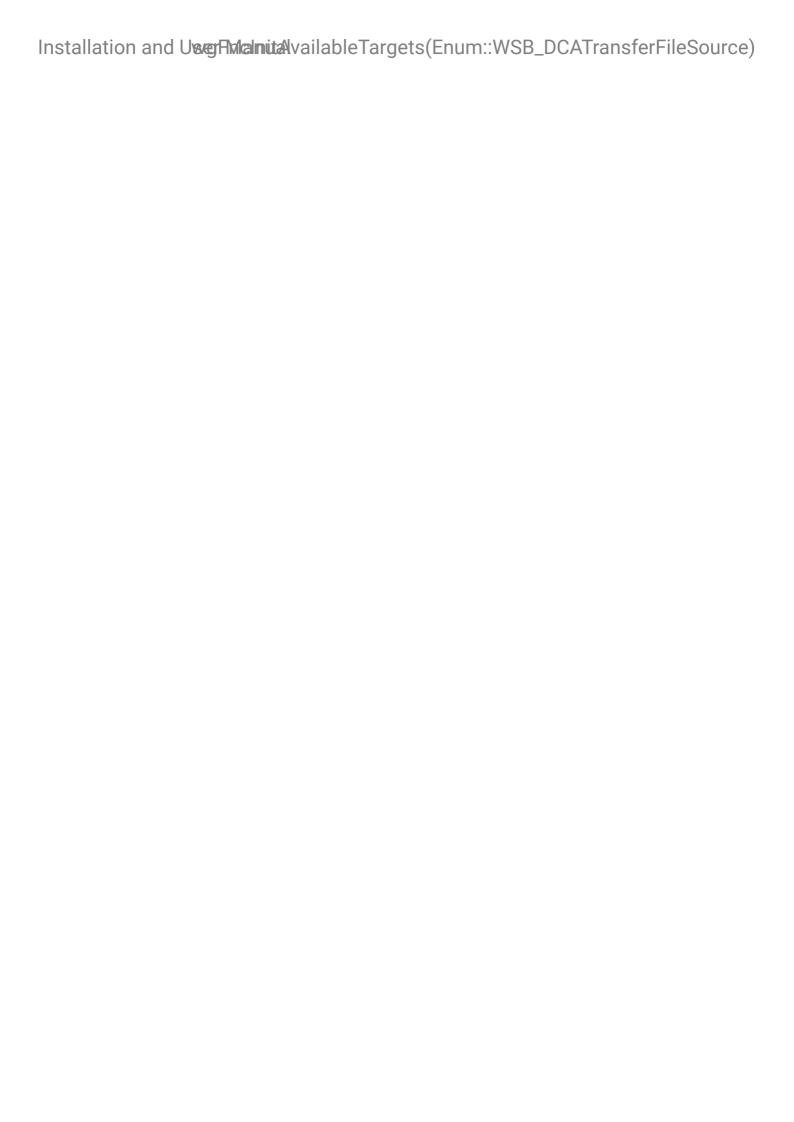
Parameters

Ty	уре	Name	Description
**		vRecSelectedTarget	The selected targets.

wgFncInitAvailableTargets(Enum::WSB_DCATransferFileSource)

Initializes the records to show on the page to only show the targets allowed for the specified source.

Туре	Name	Description
Enum "WSB_DCATransferFileSource"	pSource	The source to perform the page initialization for.



PermissionSet WSB_DCAM

A permission set for Document Archive managers/administrators.

Properties

Name	Value
Access	Public
Assignable	1
Caption	Apportunix Doc. Arch. Manager
IncludedPermissionSets	WSB_DCAU

PermissionSet WSB_DCAU

A permission set for Document Archive users with restricted permissions.

Properties

Name	Value
Access	Public
Assignable	1
Caption	Apportunix Doc. Arch. User
IncludedPermissionSets	WSB_MON



Table WSB_DCACategory

Stores the Document Archive file categories that are available.

Properties

Name	Value
Access	Public
Caption	Document Archive Category
DataClassification	CustomerContent
DataPerCompany	True
DrillDownPageId	WSB_DCACategories
LookupPageId	WSB_DCACategoryLookup

ID	Туре	Name	Description
	**	Code[20]	The code of the file category.
	**	Description[50]	A description of the file category.
20	Integer	FileCount	Number of files in the file category.
30	Integer	TableNoFilter	A field which can be used to set a link for the category factbox on the Table No. field.
31	Integer	SourceTypeFilter	A field which can be used to set a link for the category factbox on the Source Type field.

ID	Туре	Name	Description
	**	SourceNoFilter[20]	A field which can be used to set a link for the category factbox on the Source No. field.
		SourceSubNoFilter[20]	A field which can be used to set a link for the category factbox on the Source Sub No. field.
34	Integer	SourceLineNoFilter	A field which can be used to set a link for the category factbox on the Source Line No. field.
40	Integer	SourceNoOccurrenceFilter	A field which can be used to set a link for the category factbox on the Source No. Occurrence field.
41	Integer	SourceVersionNoFilter	A field which can be used to set a link for the category factbox on the Source Version No. field.
50	Boolean	EntitySpecific	Specifies whether the category can only be selected for specific entity definitions.

Table WSB_DCACategoryEntity

Stores entities for which categories are specifically available.

Properties

Name	Value
Access	Public
Caption	Category Entity
DataClassification	CustomerContent
DataPerCompany	True
DrillDownPageId	WSB_DCACategoryEntities
LookupPageId	WSB_DCACategoryEntities

ID	Туре	Name	Description
	**	CategoryCode[20]	The code of the file category.
10	Integer	EntityTableNo	The ID of the table of the entity definition.
	**	EntityTableCaption[80]	The caption of the table of the entity definition.
12	Integer	EntityEntryNo	The entry no. of the entity definition.
		EntityDescription[200]	The description of the entity definition.

Table WSB_DCAEntityIDField

Stores the fields that should be used as the identifier fields for an entity.

Properties

Name	Value
Access	Public
Caption	Entity ID Field
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	WSB_DCAEntityIDFields
LookupPageld	WSB_DCAEntityIDFields

ID	Туре	Name	Description
1	Integer	EntityTableNo	The ID of the table that this entity ID field applies to.
	**	EntityTableCaption[80]	The caption of the table that this entity ID field applies to.
3	Integer	EntityEntryNo	Entry no. of the entity definition this entity ID field applies to.
4	Integer	FieldNo	The no. of the field that identifies the entity.
		FieldCaption[250]	The caption of the field that identifies the entity.



Table WSB_DCAEntityTranslation

Stores the translations for entity definitions.

Properties

Name	Value
Access	Public
Caption	Entity Translation
DataClassification	CustomerContent
DataPerCompany	False
DrillDownPageId	WSB_DCAEntityTranslations
LookupPageId	WSB_DCAEntityTranslations

ID	Туре	Name	Description
1	Integer	EntityTableNo	The ID of the table that this entity translation applies to.
		EntityTableCaption[80]	The caption of the table that this entity translation applies to.
3	Integer	EntityEntryNo	Entry no. of the entity definition this entity translation applies to.
	**	LanguageCode[10]	The code of the language that this entry translation stores a translation for.
	**	LanguageName[80]	The name of the language that this entry translation stores a translation for.

ID	Туре	Name	Description
	**	TranslationSingular[200]	The text for the translation in singular form for the entity definition and language combination.
		TranslationPlural[200]	The text for the translation in plural form for the entity definition and language combination.



Table WSB_DCAFile

Stores information about the files which are stored at remote file locations (e.g. a SharePoint drive).

Properties

Name	Value
Access	Public
Caption	Document Archive File
DataClassification	EndUserIdentifiableInformation
DataPerCompany	True
DrillDownPageId	WSB_DCAFiles
LookupPageId	WSB_DCAFiles

ID	Туре	Name	Description
1	Integer	TableNo	The ID of the source table record that the file record is linked to.
2	Integer	SourceType	If applicable, the type of the source table record that the file record is linked to.
		SourceNo[20]	The no. of the source table record that the file record is linked to.
		SourceSubNo[20]	If applicable, the sub no. of the source table record that the file record is linked to.

ID	Туре	Name	Description
5	Integer	SourceLineNo	If applicable, the line no. of the source table record that the file record is linked to.
6	Integer	LineNo	The line no. of the file record. This line no. is incremented for each file that is linked to the same source record.
7	RecordId	SourceRecID	The record ID of the source table record that the file record is linked to.
8	Guid	SourceSystemID	The system ID of the source table record that the file record is linked to.
10	Integer	SourceNoOccurrence	If applicable, the ID occurrence of the source table record that the file record is linked to.
11	Integer	SourceVersionNo	If applicable, the version no. of the source table record that the file record is linked to.
		NoSeries[20]	The code of the No. Series used to give the file a No.
		RemoteFileName[255]	The file name on the remote storage.
	**	No[20]	The No. assigned to the file record.
		CategoryCode[20]	The code of the Document Archive file category that the file record belongs to.
	**	CreatedBy[50]	The user that originally created the file record.
41	DateTime	CreatedDateTime	The date and time at which the file was originally created.
	``	FileName[255]	The file name as shown in Business Central for this file record.
	**	FileExt[10]	The file extension of the file of this file record.

ID	Туре	Name	Description
52	DateTime	FileCreatedDateTime	The date and time at which the file was originally created.
		MessageFrom[100]	If the file is an .msg file uploaded via drag and drop, then this field contains who the email message was from.
61	DateTime	MessageDateTime	If the file is an .msg file uploaded via drag and drop, then this field contains the date and time of the email message.
70	Enum	FileSourceType	Specifies where the file record originates from.
71	Enum	PDFArchiveScenario	If applicable, specifies the PDF archive scenario through which the file record was created.
80	Enum	RemoteFolderStructure	Specifies the built-in remote folder structure used for this file.
81	Enum	RemoteFolderOrder	Specifies the built-in remote folder order used for this file.
82	Enum	FileHandler	Specifies the name of the file handler used to store the file remotely.
		RemoteFolderStructureCode[30]	Specifies the code of the folder structure used to store the file remotely.
	**	EnvironmentName[128]	Specifies the name of the Business Central environment in which the file record was originally created.
		CompanyName[30]	Specifies the name of the Business Central company in which the file record was originally created.
		SiteID[255]	If applicable, specifies the ID of the SharePoint site at which the remote file is stored.

ID	Туре	Name	Description
		DriveID[255]	If applicable, specifies the ID of the SharePoint drive at which the remote file is stored.
	**	ABSStorageAccountName[24]	If applicable, specifies the name of the Azure Blob Storage account at which the remote file is stored.
	**	ABSContainerName[64]	If applicable, specifies the name of the Azure Blob Storage container at which the remote file is stored.
150	Integer	InitialTableNo	The ID of the source table record that the file record was originally linked to.
151	Integer	InitialSourceType	If applicable, the type of the source table record that the file record was originally linked to.
	**	InitialSourceNo[20]	The no. of the source table record that the file record was originally linked to.
	**	InitialSourceSubNo[20]	If applicable, the sub no. of the source table record that the file record was originally linked to.
154	Integer	InitialSourceLineNo	If applicable, the line no. of the source table record that the file record was originally linked to.
156	RecordId	InitialSourceRecID	The record ID of the source table record that the file record was originally linked to.
157	Guid	InitialSourceSystemID	The system ID of the source table record that the file record was originally linked to.
159	Integer	InitialSourceNoOccurrence	If applicable, the ID occurrence of the source table record that the file record was originally linked to.
160	Integer	InitialSourceVersionNo	If applicable, the version no. of the source table record that the file record was originally linked to.



Table WSB_DCAFolderPathStructure

A folder path structure entry which combined make up the complete remote folder path.

Properties

Name	Value
Access	Public
Caption	Folder Path Structure Entry
DataClassification	CustomerContent
DataPerCompany	False

ID	Туре	Name	Description
	**	FolderStructureCode[30]	The code of the (main) folder structure that this folder path structure entry is linked to.
2	Enum	FolderPathStructureType	The type of folder path structure entry (Root, Default, Table).
3	Integer	TableNo	The ID of the table that this entry applies to specifically, if any.
4	Integer	TableEntryNo	The entry no. of the table-specific folder structure that this entry belongs to, if any.
5	Integer	EntryNo	An entry no. for this folder path structure entry.
10	Enum	EntryType	An entry type for this folder path structure entry, which specifies which type of data this entry should contribute to the path.

ID	Туре	Name	Description
20	Boolean	NewSubfolder	Specifies whether this entry starts/appends a new subfolder.
	**	Prefix[100]	A prefix that is pasted before this entry's text value.
		FixedText[250]	A fixed text that is used as this entry's text value if the entry type = Fixed Text.
	**	Suffix[100]	A suffix that is pasted after this entry's text value.
30	Integer	FieldNo	The no. of the table field that should be used for field-related entry types.
	**	FieldCaption[250]	The caption of the table field that should be used for field-related entry types.

Table WSB_DCASharePointDrive

Stores information about the available SharePoint drives.

Properties

Name	Value
Access	Public
Caption	SharePoint Drive
DataClassification	OrganizationIdentifiableInformation
DataPerCompany	True

ID	Туре	Name	Description
	**	ID[255]	The drive ID.
	**	Name[255]	Name of the drive.
	**	Description[255]	Description of the drive.
	**	DriveType[80]	Type of drive.
5	DateTime	CreatedDateTime	Date and time at which the drive was created.
6	DateTime	LastModifiedDateTime	Date and time at which the drive was last modified.
	**	WebURL[255]	URL for the drive.

Table WSB_DCASharePointSite

Stores the available SharePoint sites.

Properties

N	lame	Value
A	ccess	Public
С	Caption	SharePoint Site
D	ataClassification	OrganizationIdentifiableInformation
D	ataPerCompany	True



Table WSB_DCATableFolderStructure

Stores the configurations for a table-specific folder structure.

Properties

Name	Value
Access	Public
Caption	Table-Specific Folder Structure
DataClassification	CustomerContent
DataPerCompany	False

ID	Туре	Name	Description
	**	FolderStructureCode[30]	The code of the main folder structure that this table- specific folder structure is linked to.
2	Integer	TableNo	The ID of the table that this table-specific folder structure applies to.
	**	TableCaption[80]	The caption of the table that this table-specific folder structure applies to.
4	Integer	EntryNo	An entry no. for this table-specific folder structure applies to (if there are multiple with different tables).
10	Blob	TableFilterView	A BLOB which saves the table filter view for this table- specific folder structure.
20	Boolean	Enabled	Specifies whether this table-specific folder structure is enabled and should be used.

ID	Туре	Name	Description
		Description[200]	An optional description that can be used to describe in more detail what this table-specific folder structure is used for.



Changelog

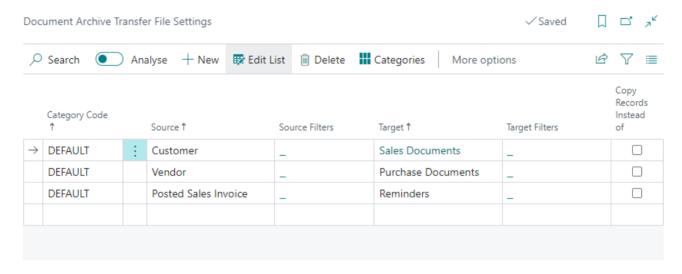
1.38.0.0 (2024-01-22)

- Added support for Reminders and Finance Charge Memos:
 - The Document Archive file factboxes have been added to the Reminder, Reminder List, Issued Reminder, Issued Reminder List, Finance Charge Memo, Finance Charge Memo List, Issued Finance Charge Memo and Issued Fin. Charge Memo List pages.
 - The PDF Archive feature now supports reminders and finance charge memos.
- Added support for transferring Document Archive files from Posted Sales Invoices to Reminders in the Transfer File Settings.

This can be particularly useful in combination with the PDF Archive feature.

For this, first enable the **PDF Archive** feature for Posted Sales Invoices to get the .pdf files archived and attached to the posted sales invoices under the PDF Archive File Category. Then set up the files from this category to be transferred from **Posted Sales Invoices** to **Reminders**.

Now, when you sent out reminders to your customers, the .pdf files of all the relevant posted sales invoices can also be included as attachments.



- Added support for transferring Document Archive files:
 - From Customer to Sales Documents.

Files will be transferred from both the Sell-to and Bill-to customers.

· From Vendor to Purchase Documents

Files will be transferred from both the Buy-from and Pay-to vendors.

1.36.0.0 (2024-01-03)

- Allow upload of files where the name contains the characters # and/or %.
- Disable the Edit Category action if there are no files on the Document Archive Files page.

1.34.0.0 (2023-12-14)

· New feature: Azure Blob Storage as File Handler

See File Handler: Azure Blob

1.32.4.0 (2023-12-07)

· Fix: Do not overwrite preset category code

1.32.2.0 (2023-11-24)

 Reverted change "Applied change which URL-encodes the request path for uploading/downloading/deleting files." from 1.32.0.0 which could lead to unexpected file paths.

1.32.0.0 (2023-11-22)

• New feature: Document Archive Category Entity-Specific

See Document Archive Category Entity-Specific

- The Transfer File Settings page has been updated so that you can now only select source-target combinations that are supported/possible (instead of throwing an error for unsupported combinations).
- · Added Extensions Permission Sets tab/step to the Document Archive Setup Wizard page.
- · Applied change which URL-encodes the request path for uploading/downloading/deleting files.
- Miscellaneuous maintenance from the development team (e.g., resolve info diagnostics from code analyzers).

1.30.0.0 (2023-09-11)

· New feature: Custom Folder Structure

See Custom Folder Structure

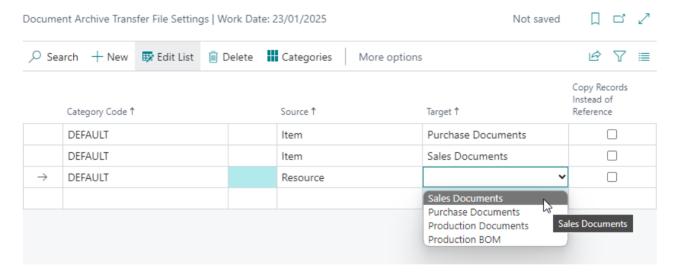
- Added events when uploading PDF files to Document Archive:
 - wlEvpOnAfterAttachDocumentAsPdfToDocumentArchive Raised after the document PDF file has been uploaded to the remote via the PDF Archive feature of Document Archive.

- wlEvpOnAfterUploadDMQEmailAttachmentPdfToDocumentArchive Raised after the document PDF file from an email sent from Document Mail Queue has been uploaded to the remote via the PDF Archive feature of Document Archive.
- Updates to the support for transferring files from Production BOM to Production Docs.
- Added integration event wlEvpOnAfterTransferFiles to the procedure wgFncTransferFiles in codeunit WSB_DCATransferFileMgt.

This event allows one to hook into the moment right after files are transferred from a source to target record.

1.28.0.0 (2023-07-19)

- Include FileHandler as field on Document Archive File records
- Strip unsupported characters from filenames suggested by BC for the PDF Archive feature
- Include the site ID and drive ID in error messages when a file upload/download/deletion fails
- Added Production BOM and Production Docs as new options in the Transfer File Settings



· Misc. maintenance

1.26.0.0 (2023-06-27)

- · Include EnvironmentName and CompanyName as field on Document Archive File records
- Fall back on application/octet-stream to prevent storing files with 0 kB file size after BC switched over to .NET Core in BC22
- Updated XML documentation of public objects and procedures.

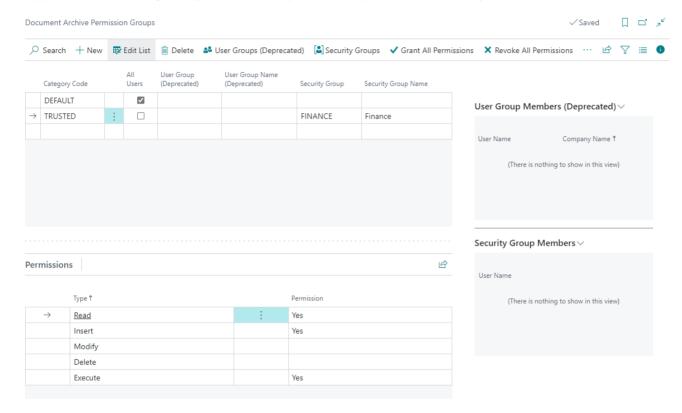
See API Reference Docs

• Fix for initializing SourceSubNo in (internal procedure) wgFncGetPrimaryValues (unused for standard integrations at the moment though)

• Fix for accessing files of records that reference another drive than the one configured in the **Document**Archive Setup

1.24.0.0 (2023-05-12)

• Support use of Security Groups which will replace the deprecated User Groups



• Fixed Dutch translation of the Target field from the Document Archive Transfer File Settings table.

1.22.0.0 (2023-04-21)

- Added PDF Archive settings to Apportunix Report Selection page
- Fix in SharePoint Setup: Do not fetch drives if "Site ID" is empty
- · Skip uploading as Document Mail Queue e-mail attachment if the e-mail does not have an attachment
- · Added index/key to "Document Archive File" table on the "Category Code" field

1.20.0.0 (2023-02-22)

- Implemented major/minor update release fixes:
 - Changed Edit Category action to use a category lookup page
 - If "All Users" and "User Group" are both not set, then the Permissions part is not editable
 - If Read permission is set to " ", then this category is not included in read-filters

1.18.0.0 (2023-02-22)

- Add Document Archive files that are marked to be available for e-mail (via Document Archive Email Settings)
 when an e-mail is sent via Document Mail Queue (Document Mail Queue 1.24.0.0 required for this feature)
- Archive the document report PDF attachment when sent via **Document Mail Queue** (Document Mail Queue 1.24.0.0 required for this feature) (if **PDF Archive** features are enabled)
- Extensibility and performance enhancement:
 - Only read the DocumentStream when the PDF Archive features are enabled.
 - Use events from the Apportunix "System Library" for getting the PDF documents

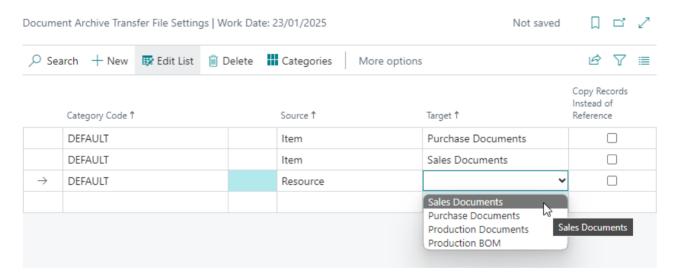
1.16.0.0 (2022-06-27)

• Fixed bug in PDF Archive for archiving Production Order report PDF outputs.

1.14.0.0 (2022-06-01)

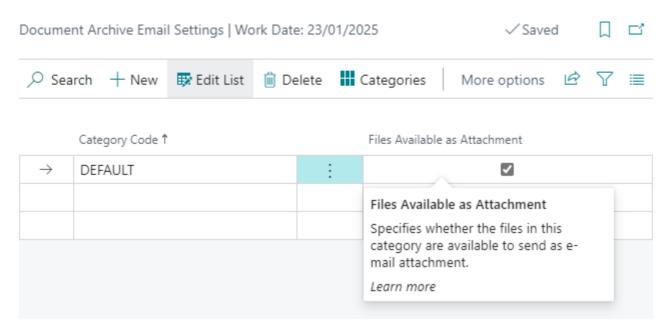
• New feature: Transfer Document Archive files from Item / Resource to Purchase / Sales Documents.

See Transfer Files



• New feature: Allow Document Archive files to be manually added to mails via the **Email Editor** page.

See Email Settings



• Extended maximum upload size to 60 MB

1.12.0.0 (2022-04-29)

- New feature: Transfer Document Archive files from Opportunity to Sales Quote
- New feature PDF Archive Scenarios



1.10.0.0 (2022-03-07)

New feature: Added additional built-in folder structure based on category, documents and entities.
 See Folder Structure.

1.8.0.0 (2021-11-26)

New feature: PDF Archive

Document Archive Setup Wizard

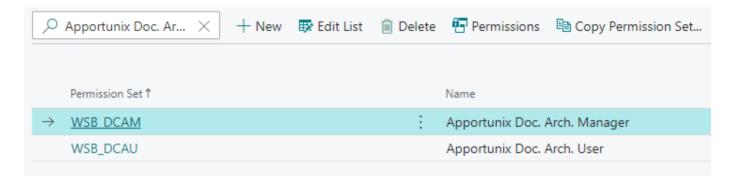
Automatically archive your printed and/or emailed PDF documents to your remote file storage (e.g., Microsoft SharePoint).

£03 **PDF** Archive You can have your printed reports, automatically archived as PDF files to your document archive. With the settings below you can enable this and further configure how the PDF files should be archived. Archive Method (Default) Overwrite existing Use Category **Default Category** PDF Archive Scenarios > Scenario 1 \rightarrow Print E-mail Next Finish Back

1.6.0.0 (2021-11-26)

Added separate manager and user permission set

Permission Sets | Work Date: 23/01/2025



1.4.0.0 (2021-11-26)

Fixed issue with refreshing access token when new files are added

1.2.0.0 (2021-11-26)

Fixed loading drag & drop control add-in resources

1.0.0.0 (2021-11-26)

Initial version

Last update: January 25, 2024