

Infotech Document Management - Create Azure Files Access

This configuration document assumes that you have already created an Azure Storage account and a File Share for your document storage. If you do not yet have an Azure File Share created, there are quick starts available on learn.microsoft.com, for instance: learn.microsoft.com/en-us/azure/storage/files/s...

- 1 Navigate to portal.azure.com and log into your Azure Subscription. If you do not know your Azure Subscription credentials, please contact your System Administrator.

2 Open Storage accounts

| Type | |
|----------------------|--|
| Storage account | |
| Storage account | |
| Subscription | |
| Resource group | |
| Resource group | |
| Application Insights | |
| entInsights | |
| Function App | |
| Storage account | |
| Computer vision | |



Tip! You will be saving three values to enter in Business Central later. Open a notepad file to save your values.

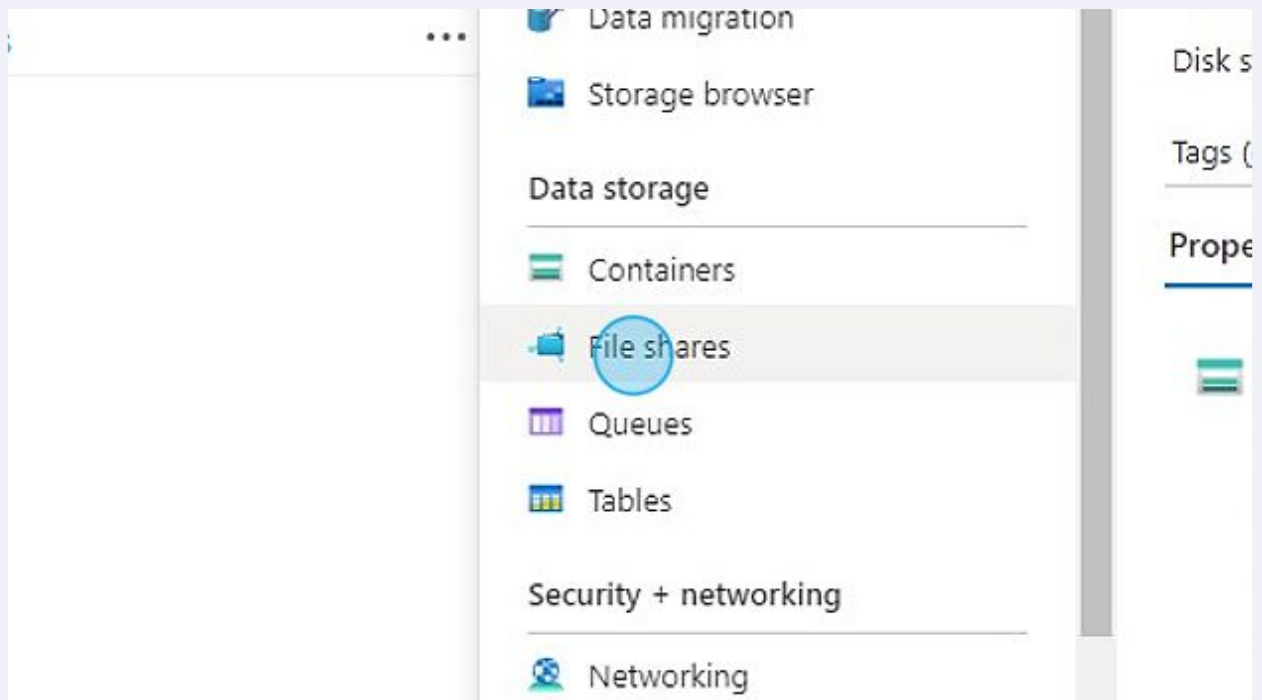
3

Select the name of the storage account that has been created for document storage. Copy the name of the account, save it for later, for instance in a notepad file, and then click the name of the account.

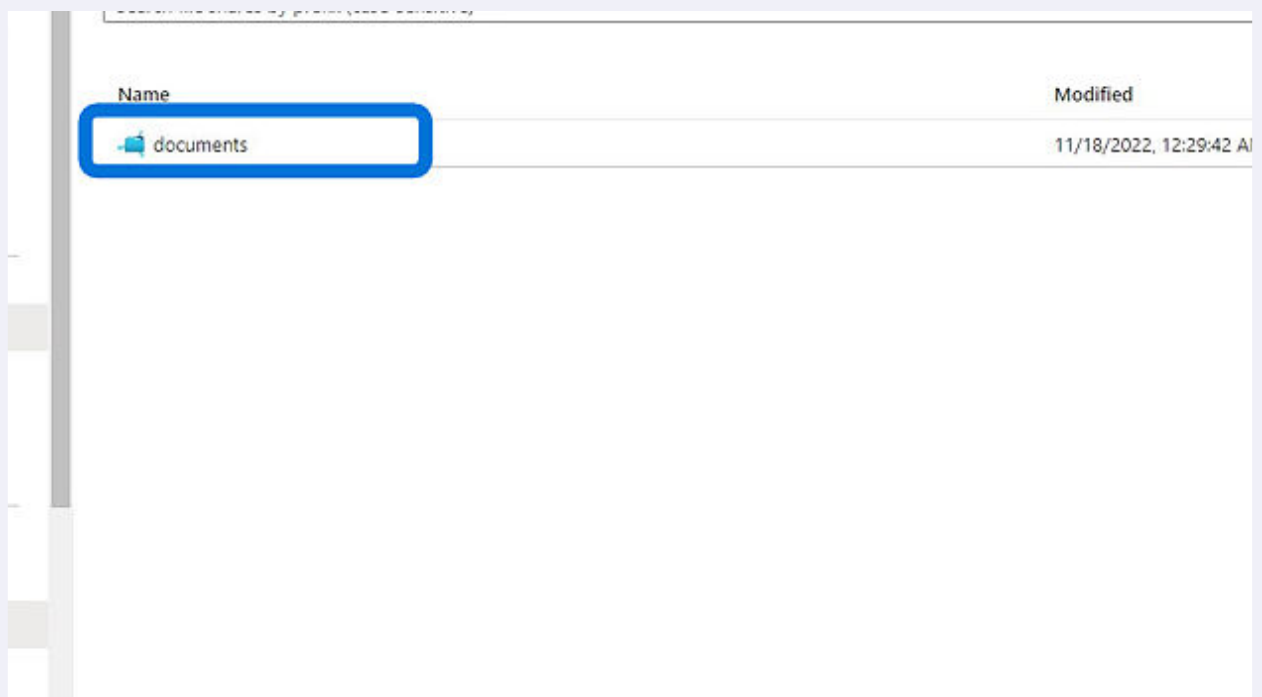
The screenshot shows the Azure portal interface for the 'Infotech Consulting Group (infotech-inc.com)'. The top navigation bar includes options like '+ Create', 'Restore', 'Manage view', 'Refresh', 'Export to CSV', 'Open query', 'Assign tags', and 'Delete'. Below the navigation bar, there are filter buttons: 'Subscription equals Action Plan 2022', 'Resource group equals all', and 'Location equals all'. A search box is labeled 'Filter for any field...'. The main content area displays a table with 4 records, showing columns for 'Name', 'Type', and 'Kind'. The third record, 'infotech', is highlighted, and its name is circled in blue.

| Name | Type | Kind |
|------------|-----------------|-----------|
| [Redacted] | Storage account | StorageV2 |
| [Redacted] | Storage account | Storage |
| infotech | Storage account | Storage |
| [Redacted] | Storage account | Storage |

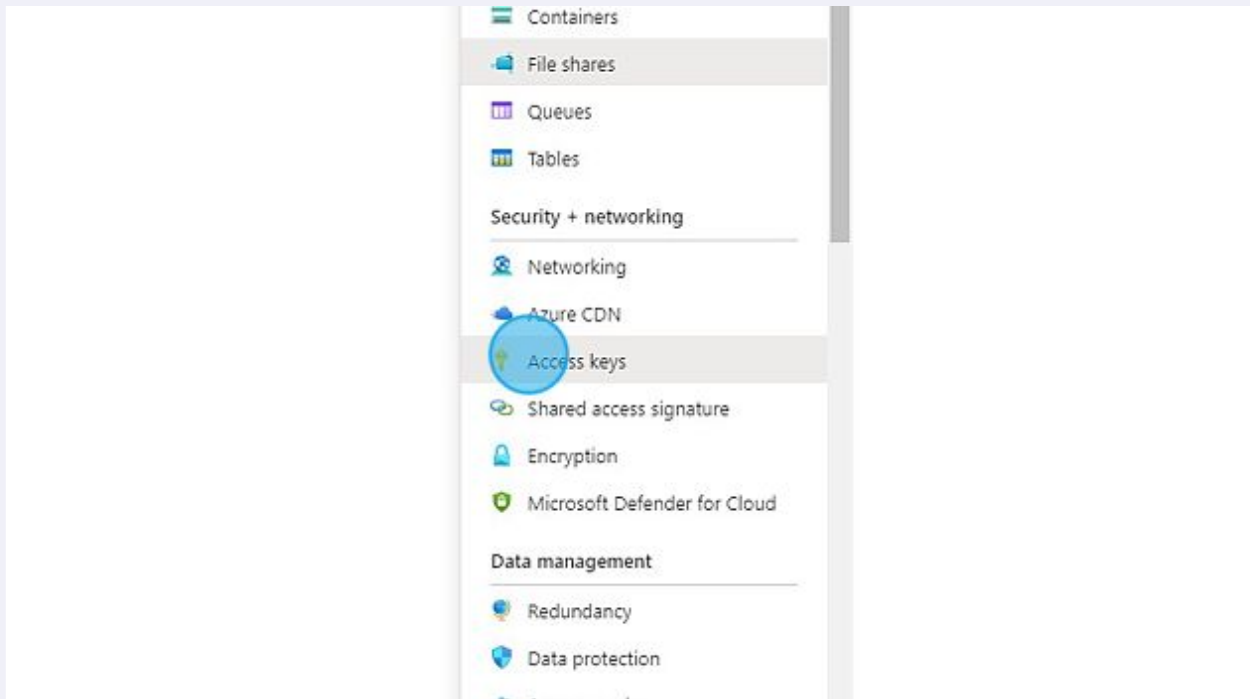
4 Click "File shares"



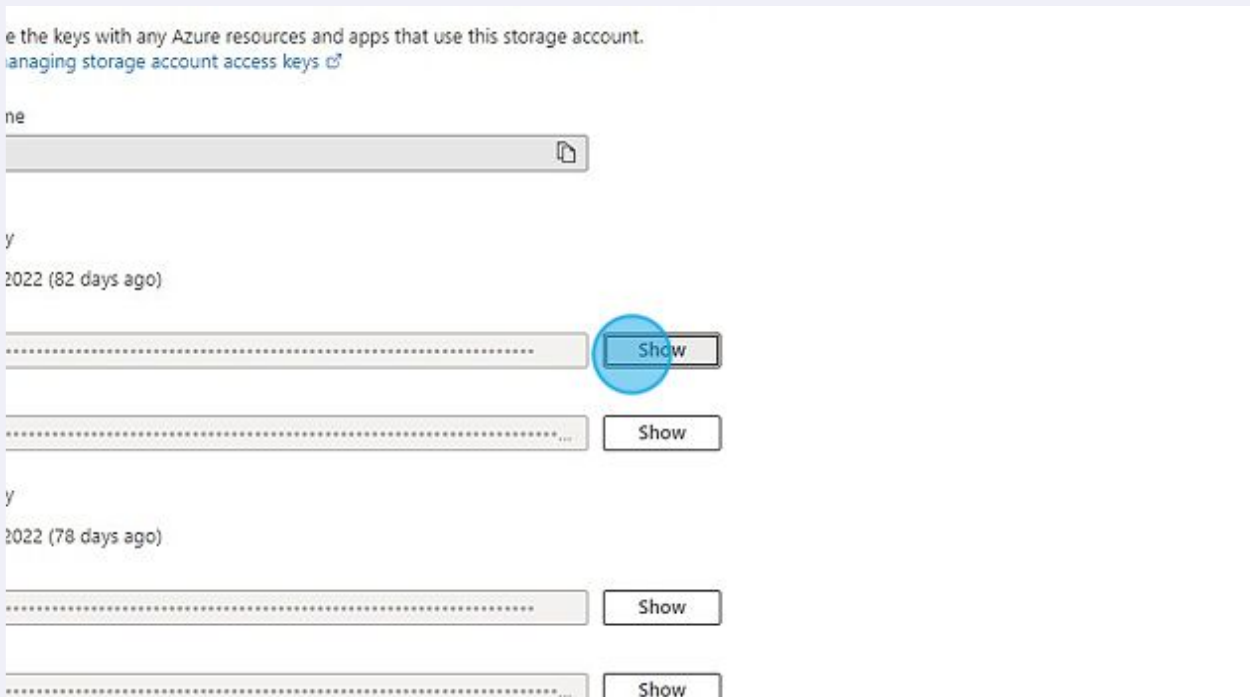
5 Write down the name of your root directory and save it for later.



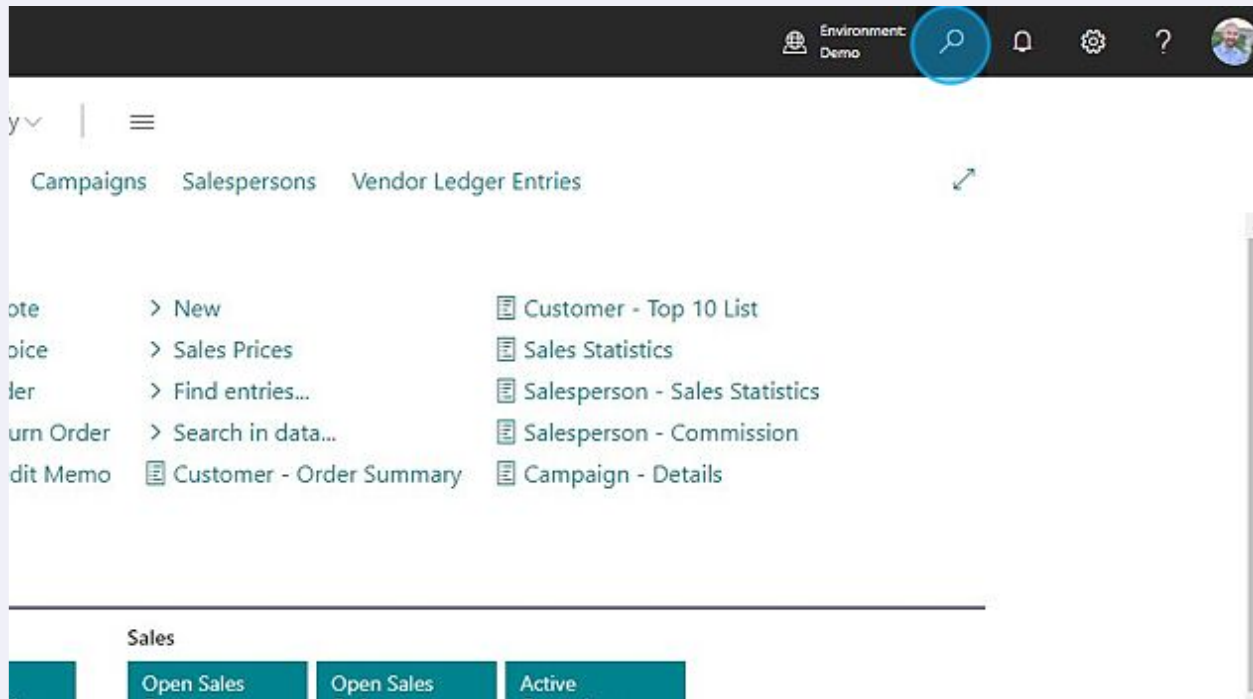
6 Click "Access keys"



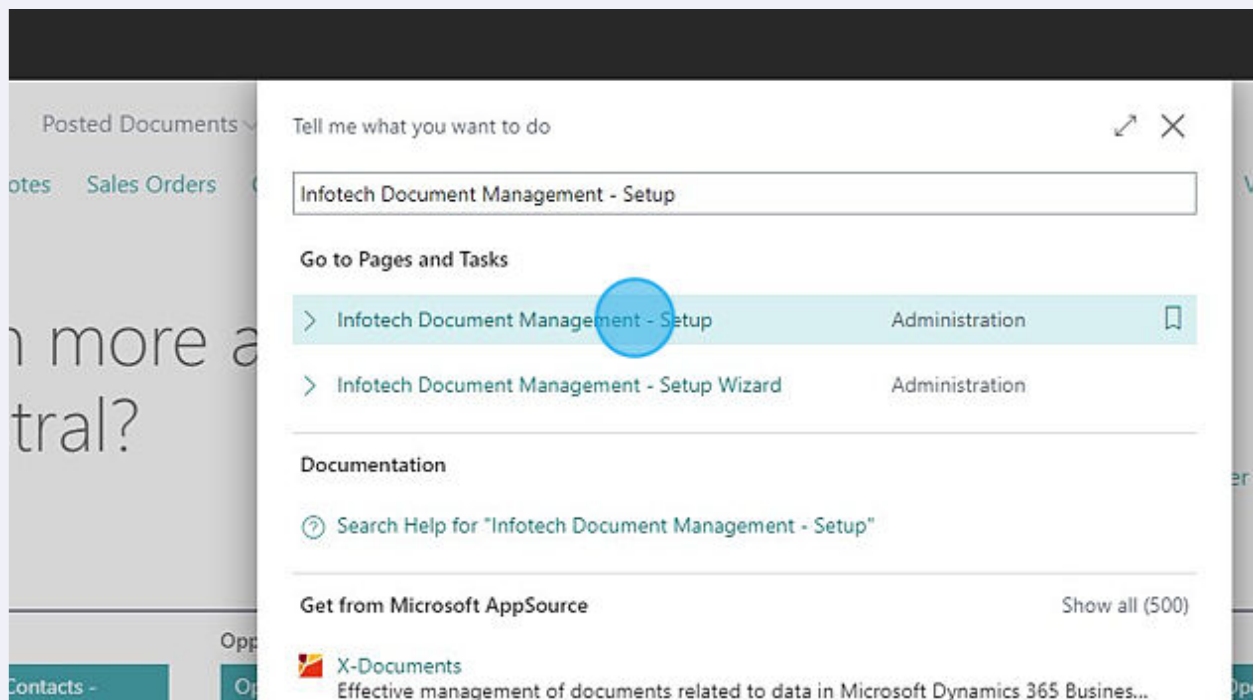
7 Click "Show" on one of the Keys.



10 Click on the Search button or press Alt+Q.



11 Open the Infotech Document Management - Setup page.



12 In the Cloud Storage tab, switch the Cloud Storage Provider to Azure Files.

The screenshot shows a configuration interface with the following sections:

- Process** | Tables/Pages | More options
- License Information**
 - Demo License:
 - License Expiration Date: 2/24/2023
- Cloud Storage**
 - Cloud Storage Provider: **Azure Files** (highlighted with a blue circle)
 - Azure Information**
 - Configuration Instructions
 - Azure Account Name:
 - Azure Share Name:
 - Azure Shared Key:
 - Folder Structure >

! Tip! This is where your saved values will be entered. You can copy/paste them from your notepad file.

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Enter the Azure Account Name, Azure Share Name and Azure Shared Key into the fields under Azure Information. You can copy the values from your notepad file.

The screenshot displays a configuration interface with the following sections:

- License Information**: Includes a "Demo License" toggle switch (turned off) and a "License Expiration Date" field set to "2/24/2023".
- Cloud Storage**: Includes a "Cloud Storage Provider" dropdown menu set to "Azure Files".
- Azure Information**: A sub-section titled "Configuration Instructions" containing three text input fields:
 - "Azure Account Name" with the value "infotech".
 - "Azure Share Name" with the value "documents".
 - "Azure Shared Key" with a masked value represented by seven asterisks "*****".
- Folder Structure**: A section with a right-pointing chevron icon (>).

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Close the page. You have successfully configured the Azure File Integration. See the User Guide for further information and instructions on how to use Infotech Document Management.