

## INSTALLATION GUIDE

Common questions about installing Infotech Document Management

### How do I configure Document Management to work with Azure File Share?

If you do not yet have an Azure File Share created, there are quick starts available on learn.microsoft.com, for instance: <https://learn.microsoft.com/en-us/azure/storage/files/storage-how-to-use-files-portal?tabs=azure-portal>. Once you have the Azure File Share created, follow the steps in the following document to configure the File Share to work with your Business Central installation:

<https://www.infotech-inc.com/wp-content/uploads/2023/04/Infotech-Documant-Management-Create-Azure-Files-Access.pdf>

### How do I configure Document Management to work with SharePoint?

If you do not yet have a SharePoint site and document library created, there are quick starts available on support.microsoft.com, for instance: <https://support.microsoft.com/en-us/office/create-a-site-in-sharepoint-4d1e11bf-8ddc-499d-b889-2b48d10b1ce8>. Once you have the SharePoint site created, follow the steps in the following document to configure the SharePoint library to work with your Business Central installation:

<https://www.infotech-inc.com/wp-content/uploads/2023/04/Infotech-Documant-Management-Create-Sharepoint-Access.pdf>

### How do I add Document Management to my own pages?

Adding Document Management to your pages is easy to do with an extension. If you are not familiar with this, please contact your service provider for assistance. The steps are below.

1. Create a new pageextension for your custom page in VSCode. Don't forget to add a dependency to your AL extension project to the Infotech Document Management extension. This will look like something like this:

```
"dependencies": [  
  {  
    "id": "dfd0f6ae-c770-4954-8023-91d89ec523f3",  
    "name": "Infotech Document Management",  
    "publisher": "Infotech Consulting Group",  
    "version": "21.0.0.0"  
  }  
],
```

2. Below is a template that you can use for your own pageextension. Most of the time you will only need to change the <pageextension number>, the <pageextension name>, and the <base page>:

```
pageextension <pageextension number> <pageextension name> extends <base page>  
{  
  layout  
  {  
    addfirst(FactBoxes)  
    {  
      part("ICG Doc. Mgmt. Factbox"; "ICG.IDM.DocMgmtFactbox")
```

```

        {
            ApplicationArea = All;
            Visible = Enabled;
        }
    }
}

var
    Enabled: Boolean;

trigger OnOpenPage()
var
    ICGIDMEnabledPage: Record "ICG.IDM.EnabledPage";
    PageId: Integer;
begin
    Evaluate(PageId, CopyStr(CurrPage.ObjectId(false), 6));
    if ICGIDMEnabledPage.Get(PageId) then
        Enabled := ICGIDMEnabledPage.Enabled;
end;

trigger OnInsertRecord(BelowxRec: Boolean): Boolean
var
    CurrentRecordRef: RecordRef;
begin
    CurrentRecordRef.GetTable(Rec);
    CurrPage."ICG Doc. Mgmt. Factbox".Page.SetParentInfo(CurrentRecordRef,
CurrPage.ObjectId(false));
end;

trigger OnAfterGetCurrRecord()
var
    CurrentRecordRef: RecordRef;
begin
    CurrentRecordRef.GetTable(Rec);
    CurrPage."ICG Doc. Mgmt. Factbox".Page.SetParentInfo(CurrentRecordRef,
CurrPage.ObjectId(false));
end;
}

```

3. Once you have published your pageextension, don't forget to add your page to the Infotech Document Management – Enabled Pages.

#### How do I prevent a user from deleting attachments from some pages?

Search for Infotech Document Management - Table/Page Editable Modes. Here you can specify "View Only" and "Upload Only" permission for users, tables and/or pages. To prevent a user from deleting an attachment, you enter a new record for the user and page, and choose "Upload Only" for the Editable Mode.

### How do I prevent a user from uploading attachments from some pages?

Search for Infotech Document Management - Table/Page Editable Modes. Here you can specify “View Only” and “Upload Only” permission for users, tables and/or pages. To prevent a user from uploading attachments, you enter a new record for the user and page, and choose “View Only” for the Editable Mode.

### Can I upload pictures or videos directly from my device camera?

Yes, if you tap on the Factbox Area cloud, you can select a photo or video from “Photo Library”, or “Take Photo or Video”. Photos and videos you record are uploaded directly into your Business Central documents.

### I added the Document Management to my own pages, but the attachments don't show up on my posted page. How do I fix that?

Search for Infotech Document Management – Enabled Pages, and verify that your page is in the list, and that the Enabled flag is checked. If the Factbox shows up on the page, but the attachments are not there, you might need to add **CopyLinks** functionality to the posting process. If you are not familiar with this, please contact your service provider for assistance.

### I'm not seeing the Document Management on a page where I expected it. How do I fix that?

Search for Infotech Document Management – Enabled Pages, and verify that your page is in the list, and that the Enabled flag is checked. You can also turn on/off entire module by Searching for Infotech Document Management – Setup, and then scrolling down to the Modules section.