

# How to set up shared folder for Docentric template storage

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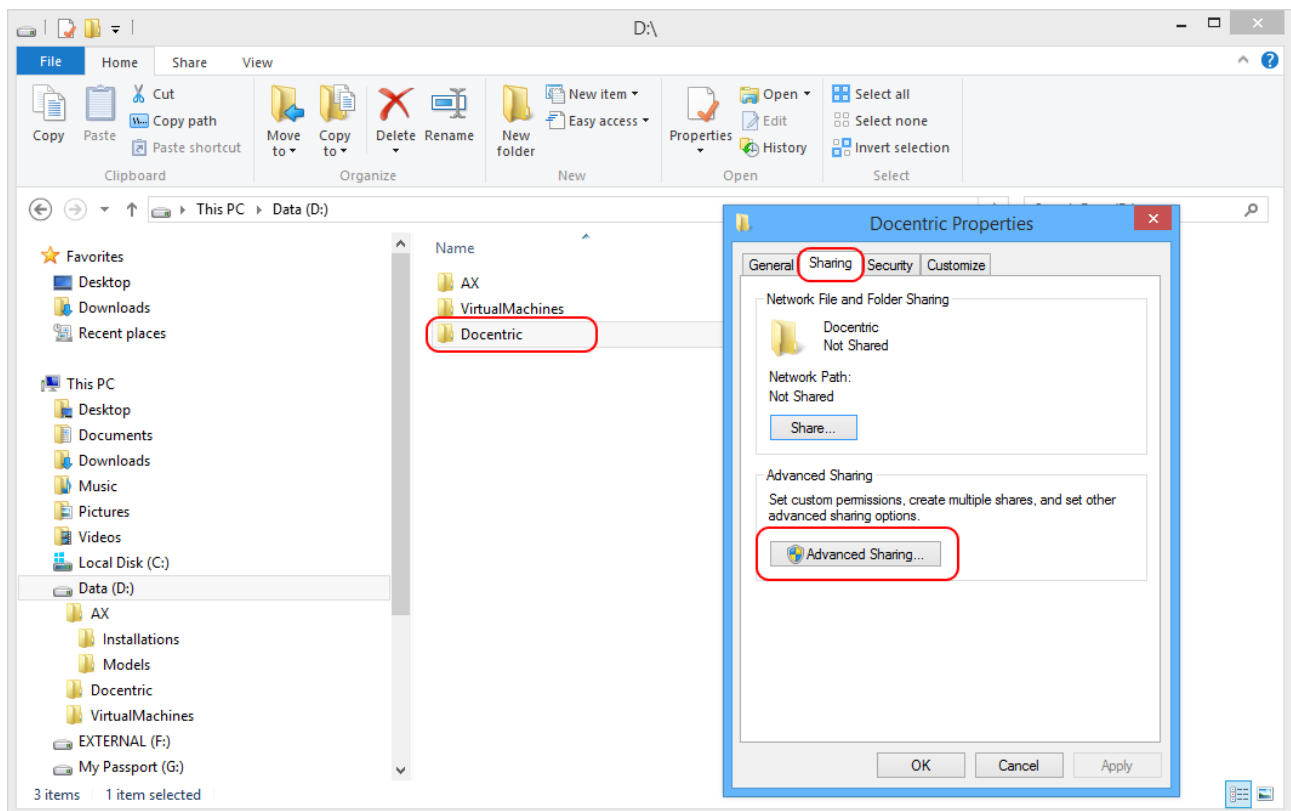
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Let's say that we want to set up a folder **D:\Docentric** on a computer in the Network as a location for storing templates of Docentric reports. We have to ensure that:

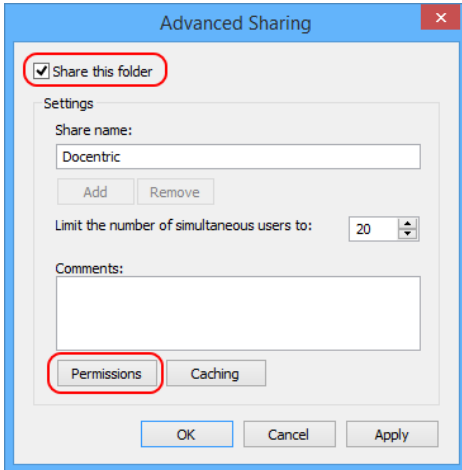
1. AOS has READ access to this location and every file in this location, and
2. Each of users, that are going to design and manage Docentric templates, has WRITE access.

## Share the folder

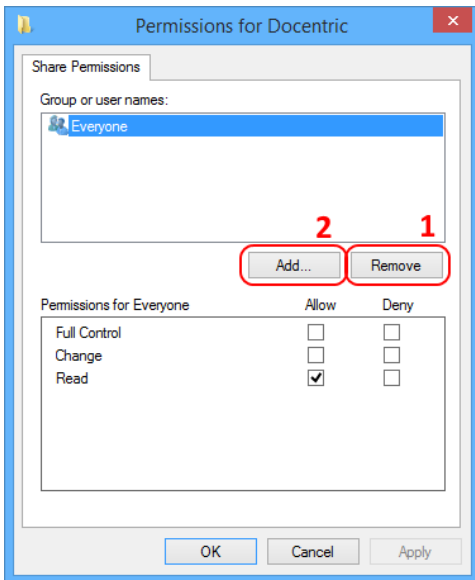
Position on the **D:\Docentric** folder and open the **Properties** window in **Windows Explorer**:



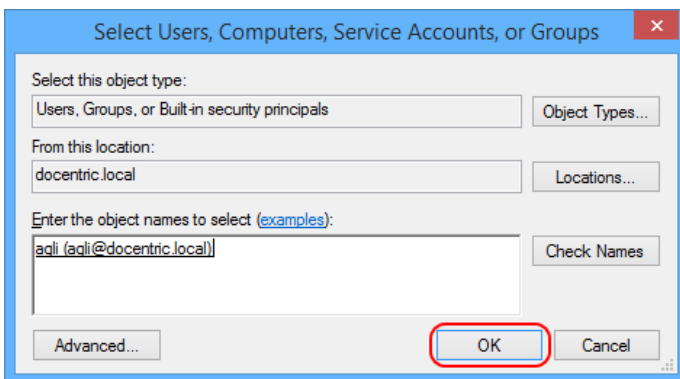
Press the **Advance Sharing** button on the **Sharing** tab:



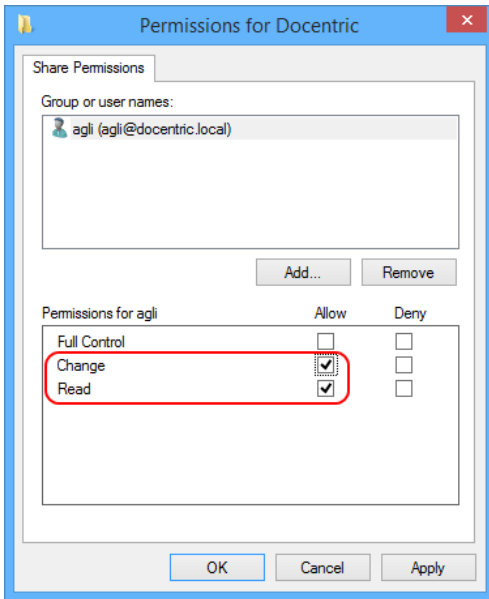
Click the **Permissions** button and remove **Everyone** user:



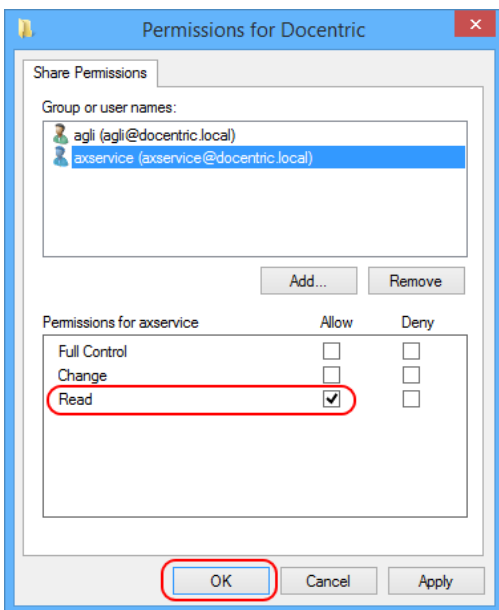
Then add a user (or a user group) that will design Docentric templates:



Give to this user (or user group) the **Change** and **Read** permissions:

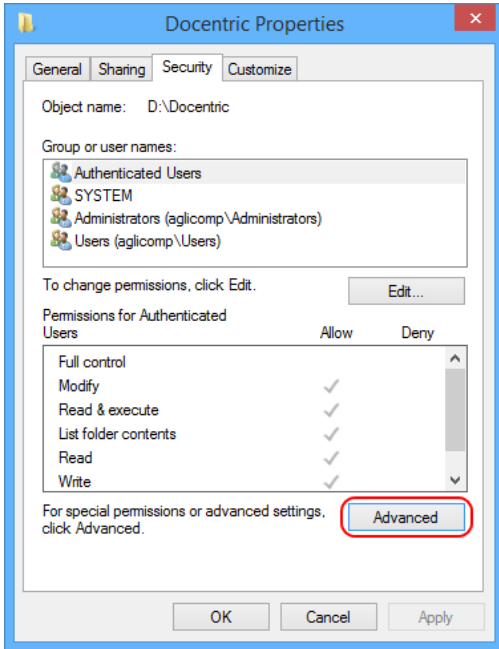


Repeat the process for the user account of AOS service. AOS service should have at least READ permission.

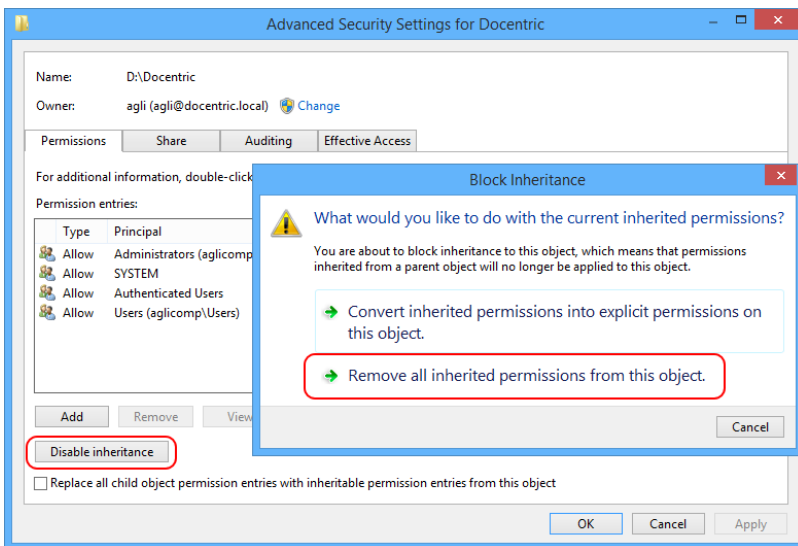


## Set Security settings of the shared folder

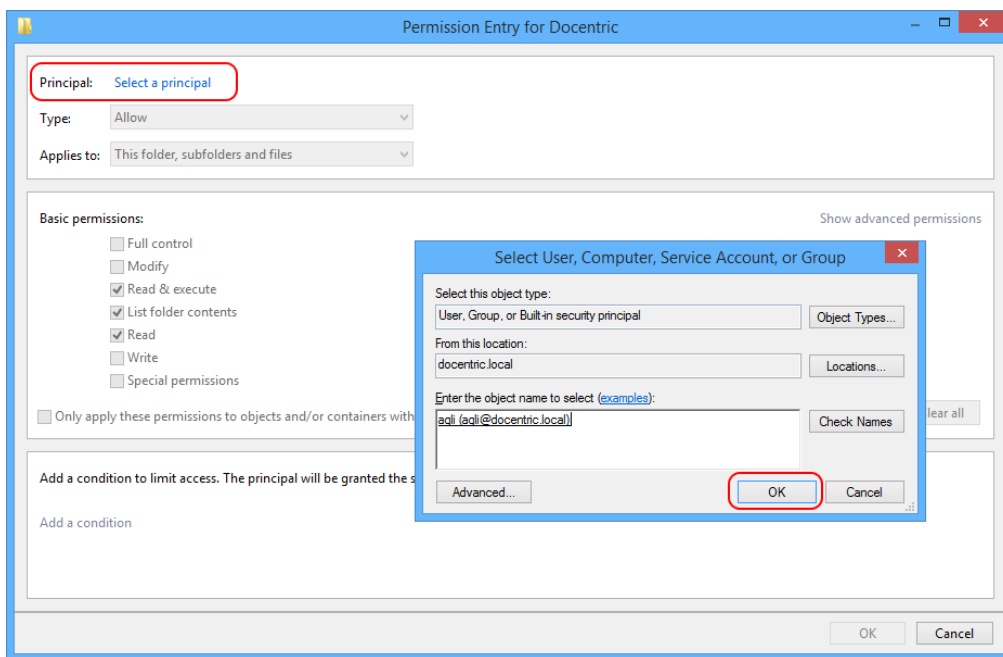
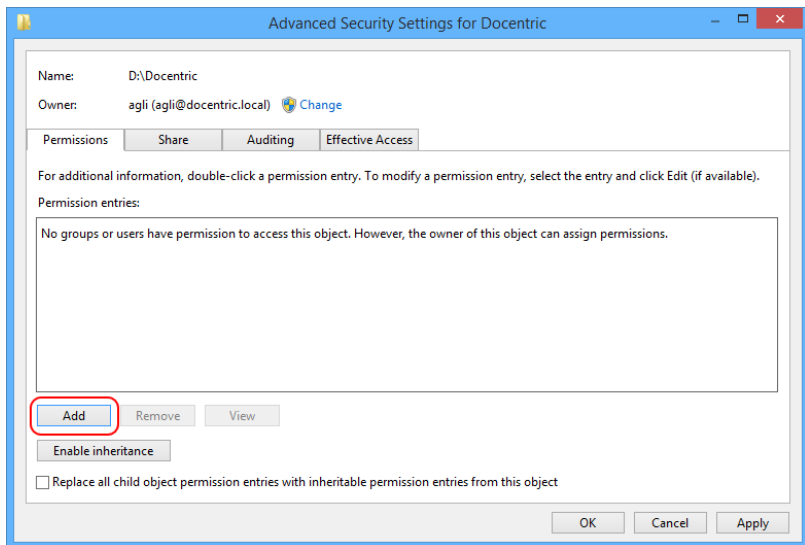
Then switch to the **Security** tab of the same **Properties** window and click the **Advanced** button:



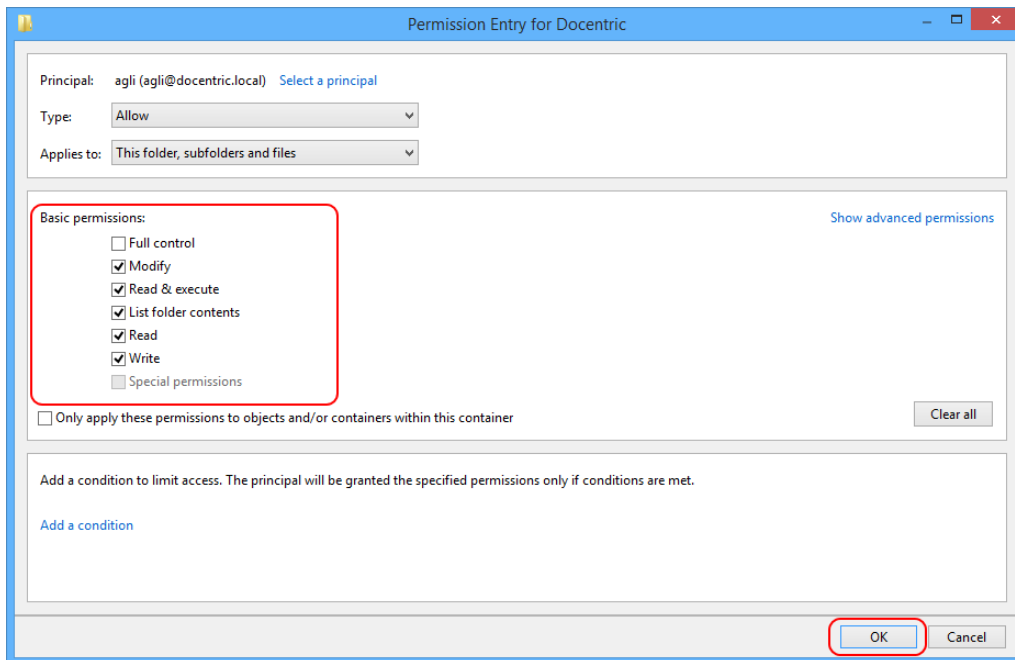
Remove all inherited permissions:



Add a user (or a user group) that will design Docentric templates:

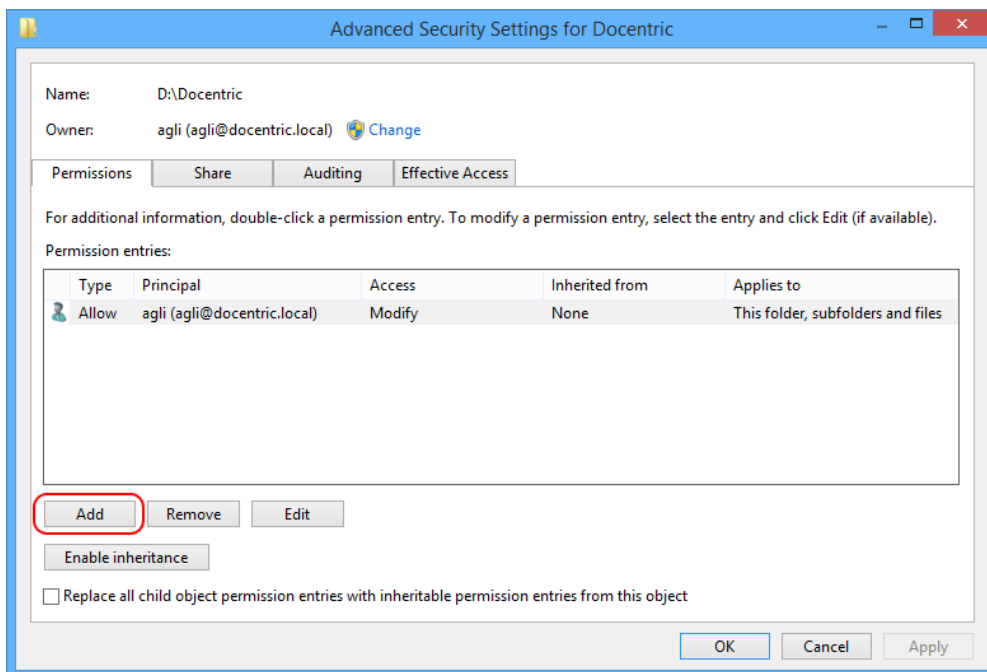


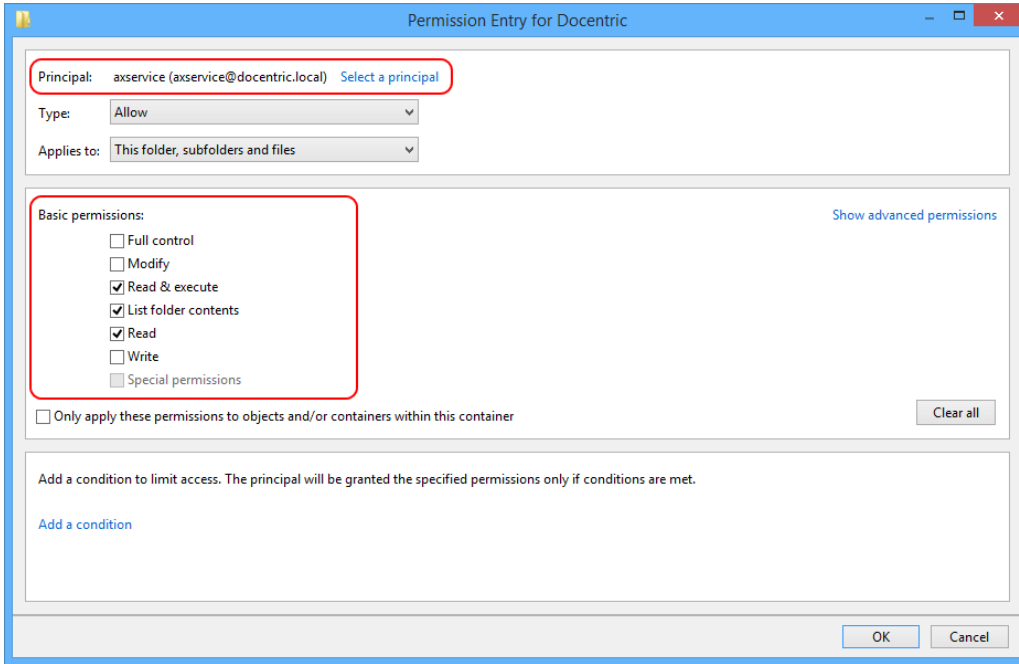
Select the **Modify** and **Write** permissions in addition to **Read, Read & Execute** and **List folder contents**:



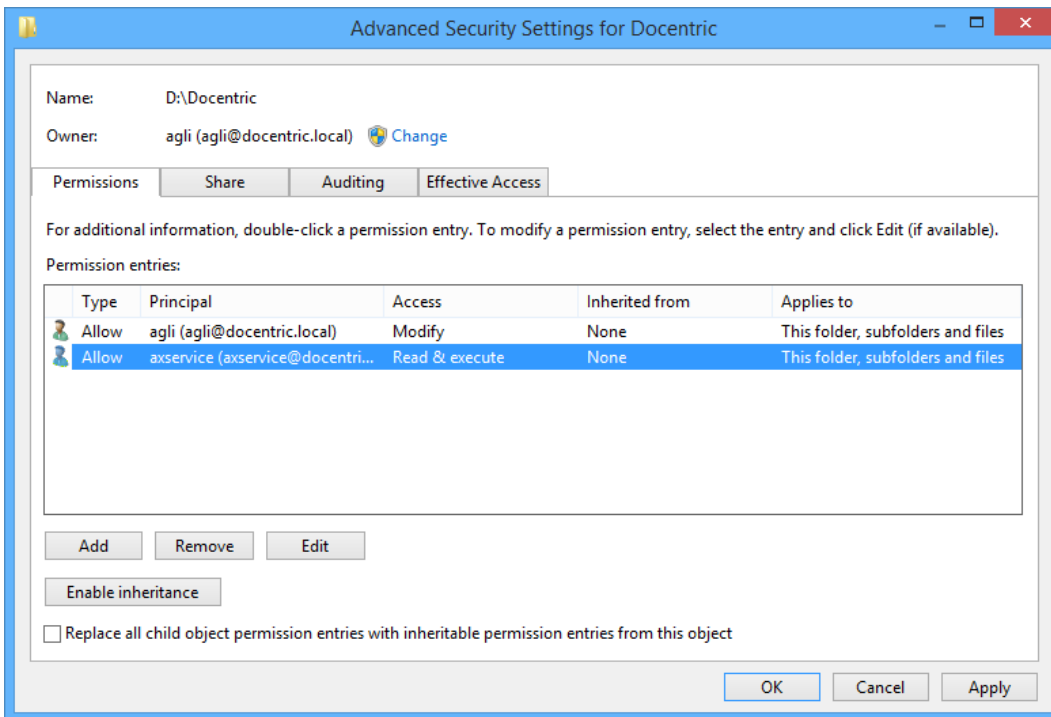
**NOTE:** The **Modify** permission is necessary because it includes file deletion, and since MS Word works with temporary files, deletion has to be allowed as well.

Repeat the process for AOS user account and ensure that it gets at least READ permissions:

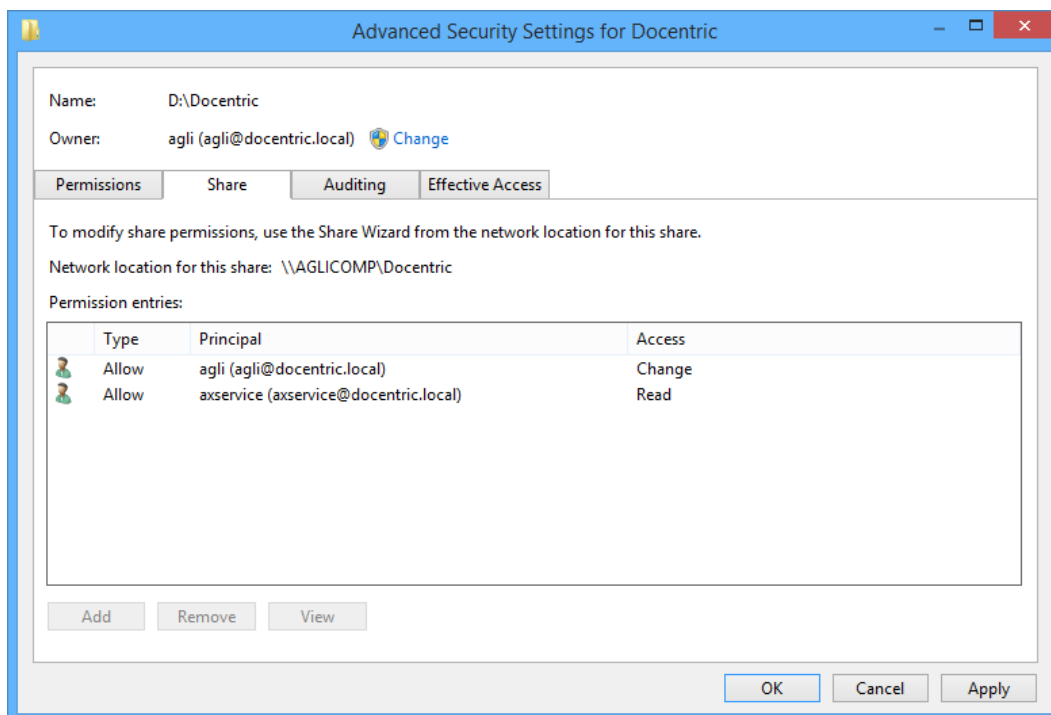




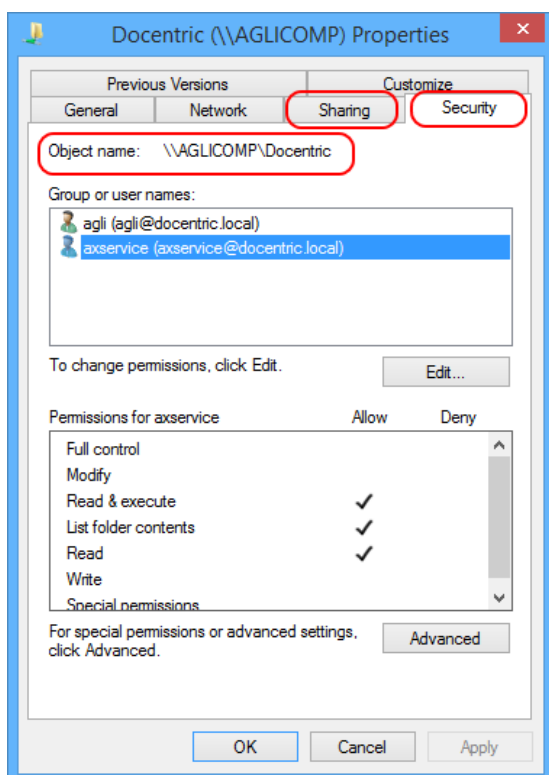
The final result:





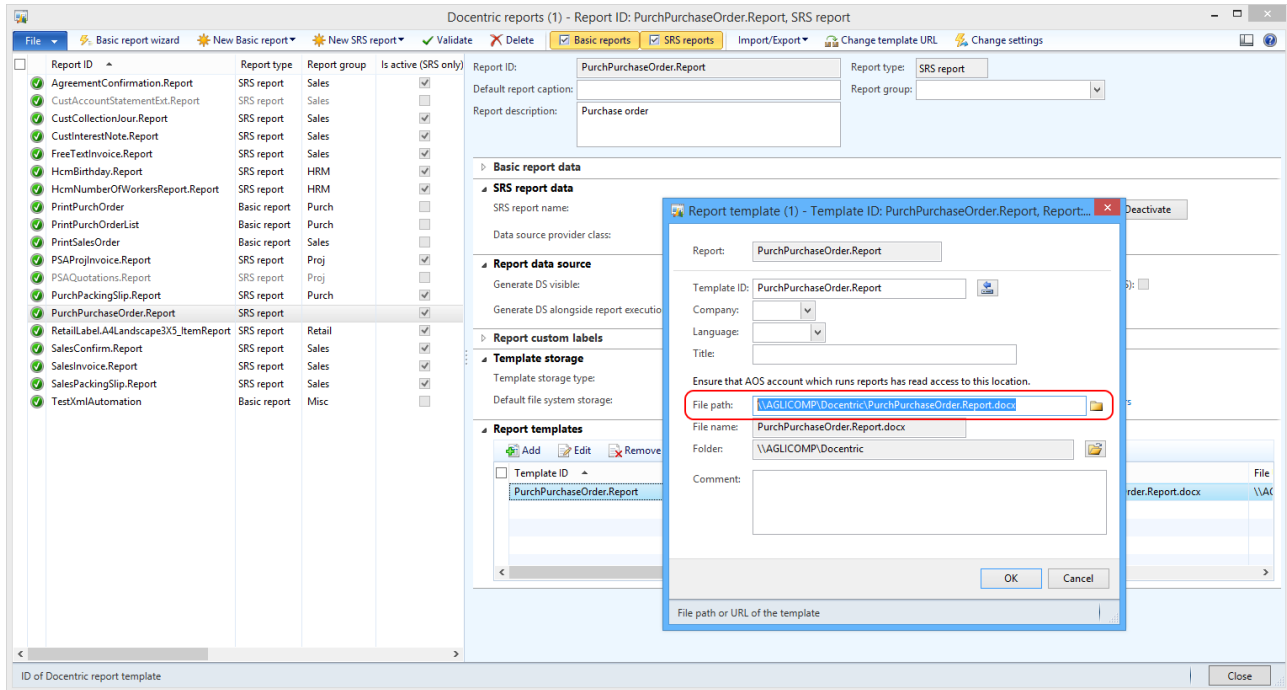


After we shared the folder, we can locate it in **Windows Explorer** through its **shared name**. If we opened the **Properties** window we would see the same **Sharing** and **Security** settings:



## Using shared folder name in report setup

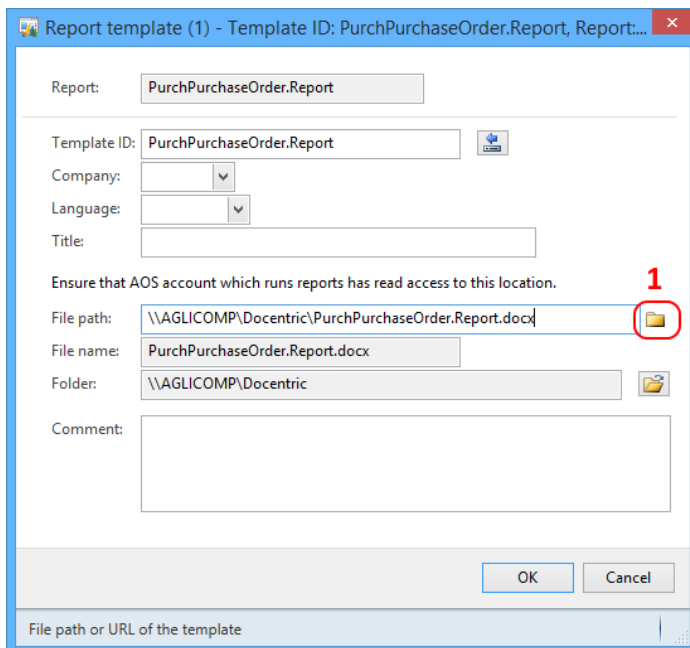
In report setup we need to use **shared folder name** as a part of a report template file path (e.g. **\\AGLICOMP\Docentric\PurchPurchaseOrder.Report.docx** instead of **D:\Docentric\PurchPurchaseOrder.Report.docx**) for all report templates:



## Validating access in AX

### 1. Test end-user READ permissions

In the **Report template** form click the **folder** button (1) and locate the template. If you don't see the template despite that the template exists, this means that your windows account does not have READ permissions for the shared folder where templates are stored:

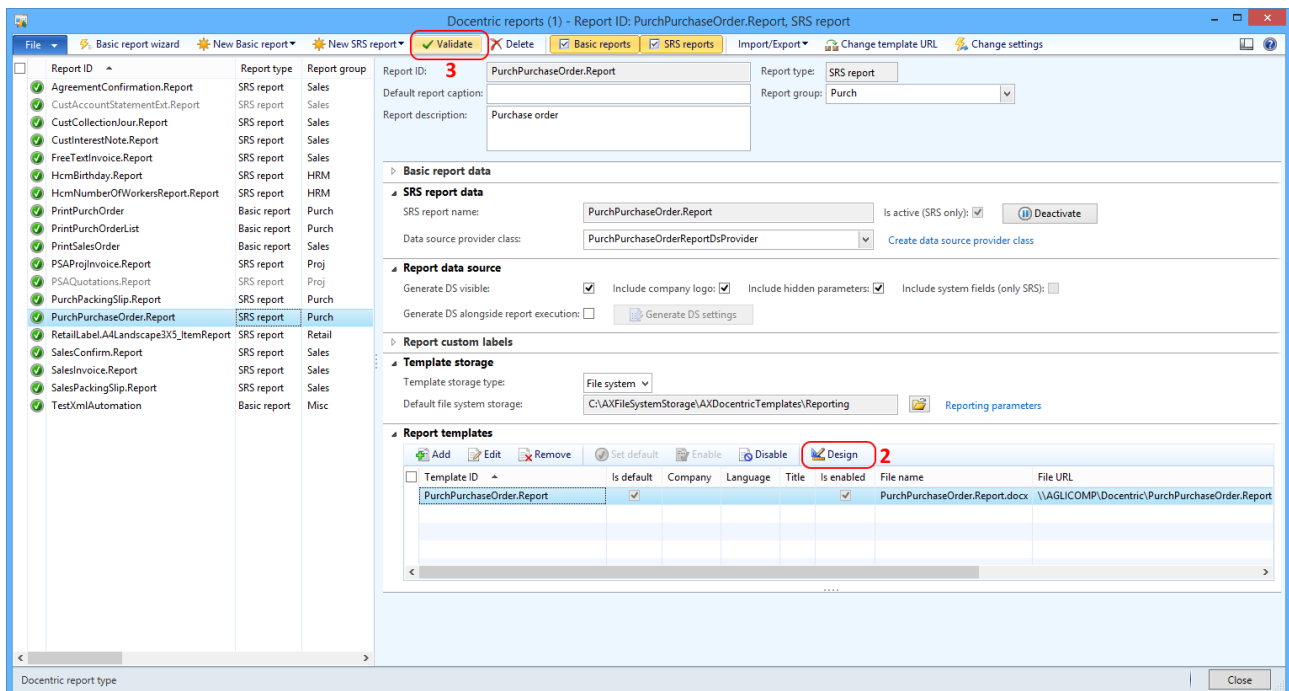


## 2. Test end-user WRITE permissions

If you click the **Design** button (2), a Docentric template is open. This is actually an ordinary Word document that you can edit. If your changes in the Word document can be saved, then your windows account has sufficient permissions (MODIFY, WRITE, READ) to design Docentric templates.

## 3. Test AOS READ permissions

And if you click on the **Validate** button (3), the report gets validated including the check if AOS can fetch all of the report templates (READ access). If you get the message: “Template (PurchPurchaseOrder.Report) with the path (\\AGLICOMP\Docentric\PurchPurchaseOrder.Report.docx) does not exist”, and the template actually exists, then this means that AOS doesn’t have sufficient permissions to read the template.



- 1 – Test AX Client READ Access for the currently logged user.
- 2 – Test AX Client WRITE Access for the currently logged user. Open the template, modify it, and try to save it.
- 3 – Test AOS Server READ Access

If the validation message appears that template does not exist on the existing file location after the report is validated, this means that AOS does not have required permission to read the template file.

## Updating Reporting parameters

Don't forget to update the **Default template storage on file system** field in the System Administration -> Setup -> Docentric AX -> Reporting -> **Reporting parameters** setup form.

The screenshot shows a web-based configuration window titled "Docentric reporting parameters (1)". The window has a blue header and a sidebar on the left with a "File" menu and a list of navigation items: "Default template storage" (selected), "Default report DS storage", "SharePoint authentication", "Print archive", "Report viewer", "SRS reports", and "Exceptions log".

The main content area is titled "Set up default template storage" and contains the following text: "Templates for Docentric reports can be stored on a file system or on SharePoint. Locations specified here are going to be used in Docentric report setup as a default root template locations. Ensure that AOS account has read access to these locations."

There are two main sections for configuration:

- Default template storage on file system:** Includes a "Folder:" label and a text input field containing the path "\\AGLICOMP\Docentric\" with a folder icon to its right.
- Default template storage on SharePoint:** Includes a "Site:" label and a text input field containing "http://aglicomp:8089/sites/DocentricDMS" with a globe icon to its right. Below this is a "Document library:" label and a dropdown menu currently showing "Documents".

At the bottom of the window, there is a status bar with the text "Default report template storage on a file location, e.g. network drive" and a "Close" button on the right.