

Attachments behind the scenes and tricks to improve them in D365FO



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Decrease Complexities,
Deliver Results.

The Largest Independent Gathering
of the Microsoft User Ecosystem



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Agenda

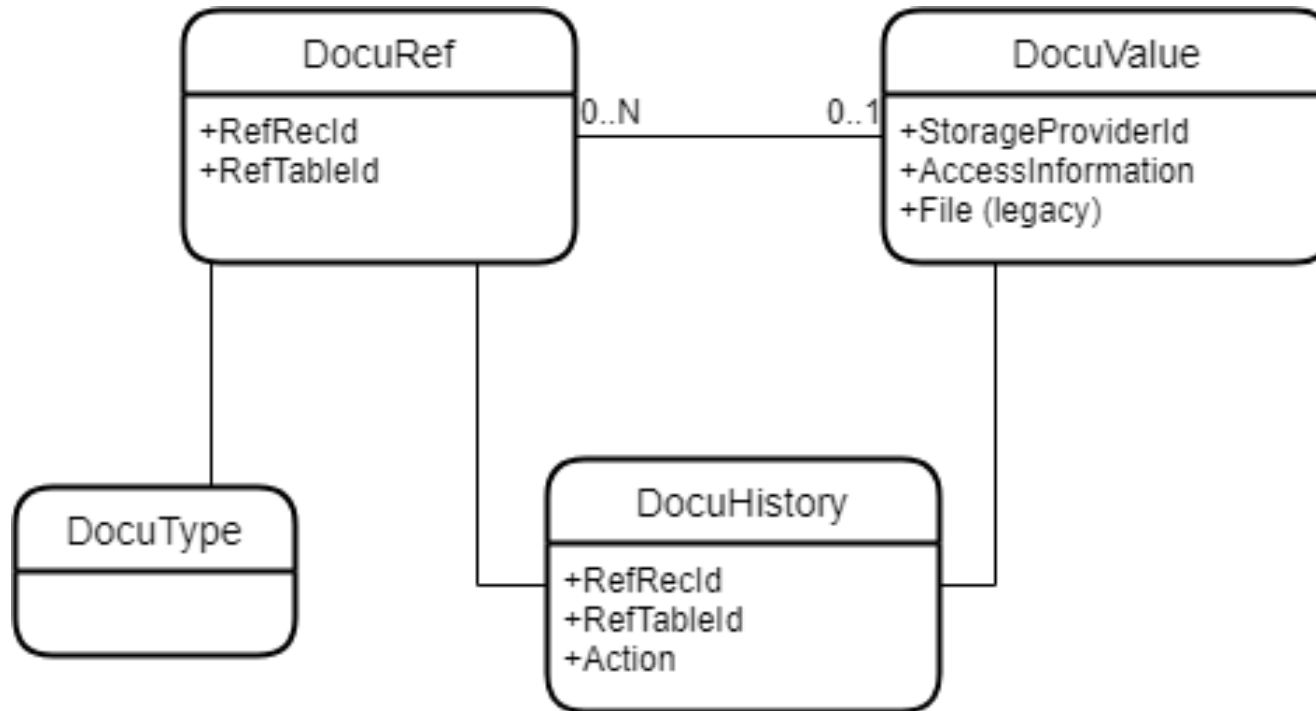
- Basic use and scenarios
- Document types
- Setup
- Deletion
- Metadata
- Where else attachments are used
- Migration

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- Add attachment
- Open attachment
- Copy attachment
- Delete attachment
- Add attachments to email (customization)
- Download multiple attachments (customization)
- All attachments (customization)

DEMO

Data model



| Document Types



For Users, By Users

DEMO

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| Document Types

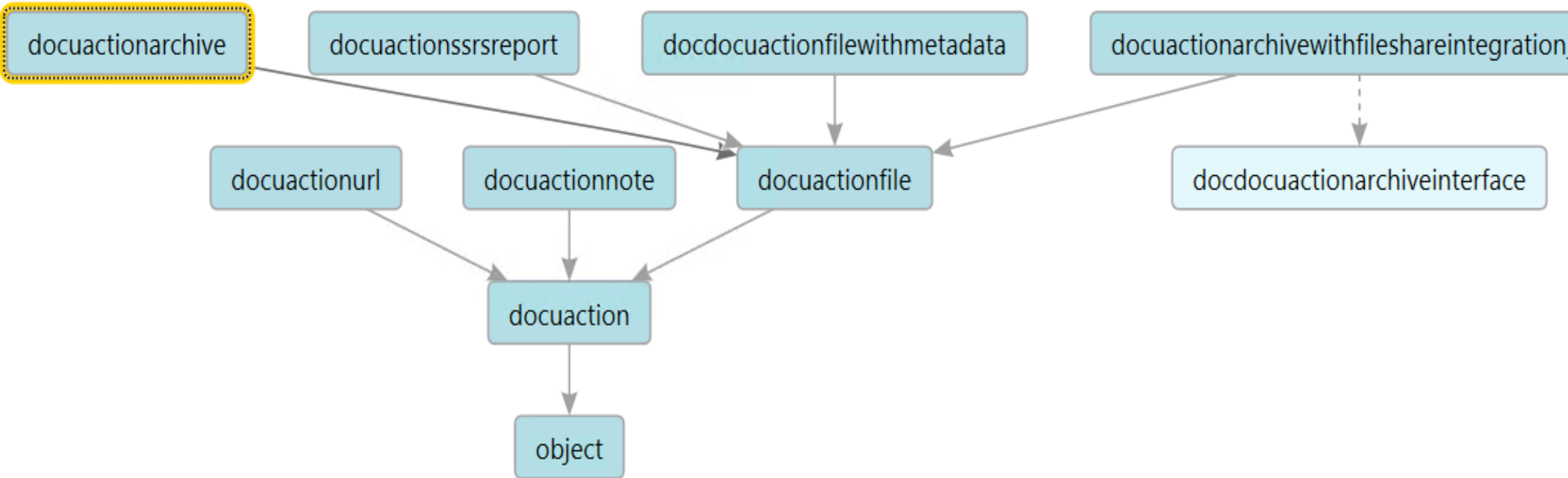


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DocuAction classes



| Document Types



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- Active document tables
- Open in new window,
- Document history
- Default document types (for eInvoices, .etc)

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Attachments Recycle Bin and Deferred Deletion



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Deferred Deletion Setting

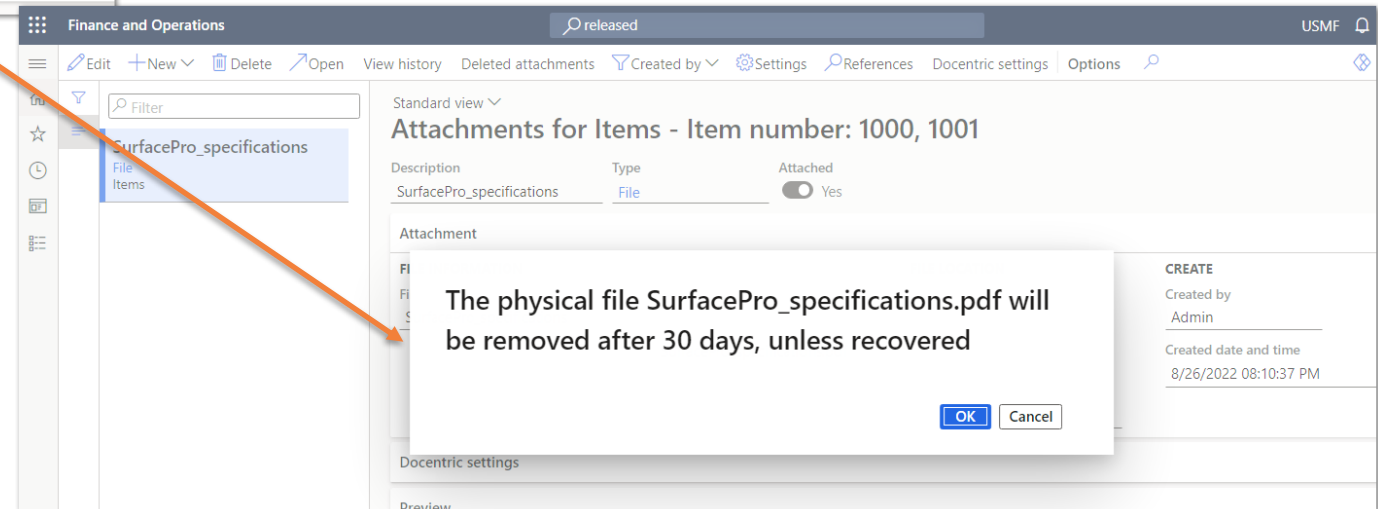
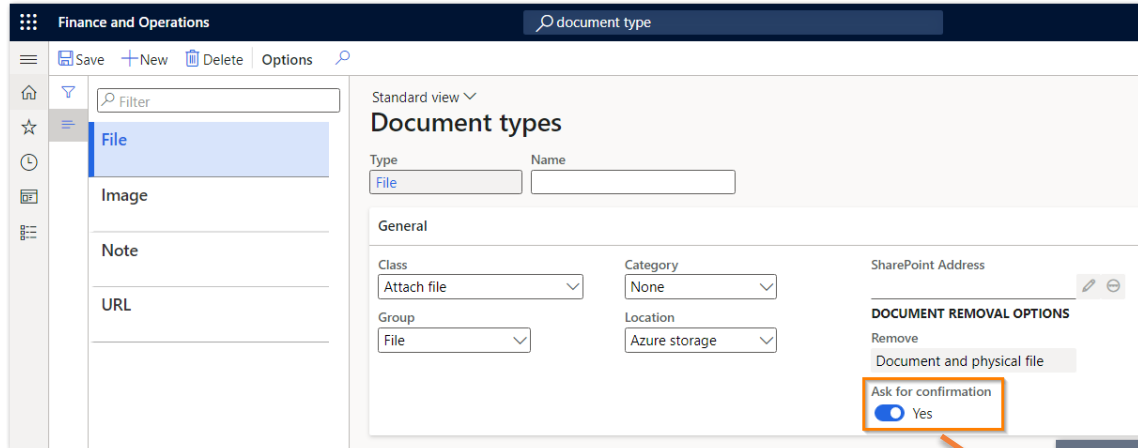
Organization Administration > Document management > Document management Parameters

The screenshot shows the Dynamics 365 interface for configuring document management parameters. The page title is "Document management parameters" under the "Set up document handling" section. The left sidebar contains navigation options: General, Number sequences, File types, SharePoint, Migrate files, and Default document types. The main content area is divided into three sections: General, History, and Deferred deletion. The "Deferred deletion" section is highlighted with an orange border and contains the following settings:

Section	Setting	Value	Action
General	Use active document tables	<input type="radio"/> No	
	Maximum file size in megabytes	50	
	Office Web Apps Server	https://onenote.officeapps.liv...	<input type="button" value="Refresh"/>
	Open attachments in new win...	<input type="radio"/> No	
History	Enable document history	<input checked="" type="radio"/> Yes	
	Number of days to maintain doc...	180	<input type="button" value="View document history"/>
	Deferred deletion		
Deferred deletion	Deferred deletion enabled	<input checked="" type="radio"/> Yes	
	Number of days to defer deletion	30	<input type="button" value="View deleted documents"/>

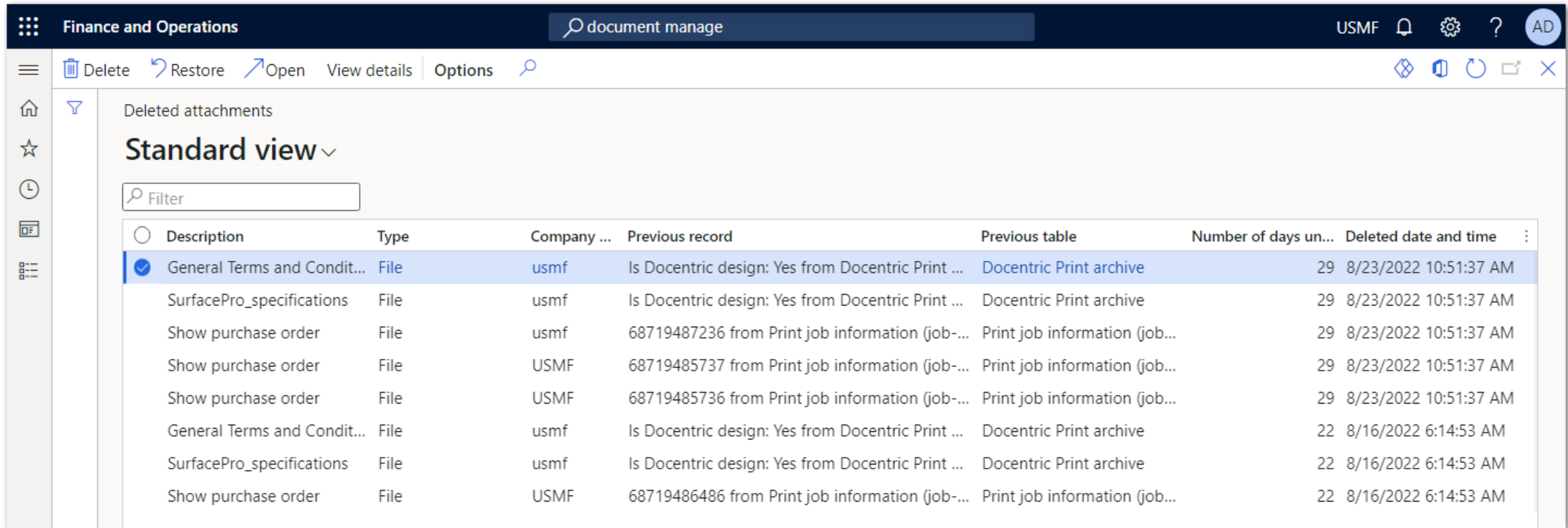
Show the Number of Deferred Days

Notify users how long the deleted attachment will be deferred for selected document type



View All Deleted Attachments

System Administration > Deleted attachments



The screenshot shows the Dynamics 365 interface for 'Deleted attachments'. The top navigation bar includes 'Finance and Operations', a search bar with 'document manage', and user information 'USMF'. The main area displays a table of deleted attachments with columns for Description, Type, Company, Previous record, Previous table, Number of days un..., and Deleted date and time. The first row is selected.

Description	Type	Company ...	Previous record	Previous table	Number of days un...	Deleted date and time
General Terms and Condit...	File	usmf	Is Docentric design: Yes from Docentric Print ...	Docentric Print archive	29	8/23/2022 10:51:37 AM
SurfacePro_specifications	File	usmf	Is Docentric design: Yes from Docentric Print ...	Docentric Print archive	29	8/23/2022 10:51:37 AM
Show purchase order	File	usmf	68719487236 from Print job information (job-...	Print job information (job...	29	8/23/2022 10:51:37 AM
Show purchase order	File	USMF	68719485737 from Print job information (job-...	Print job information (job...	29	8/23/2022 10:51:37 AM
Show purchase order	File	USMF	68719485736 from Print job information (job-...	Print job information (job...	29	8/23/2022 10:51:37 AM
General Terms and Condit...	File	usmf	Is Docentric design: Yes from Docentric Print ...	Docentric Print archive	22	8/16/2022 6:14:53 AM
SurfacePro_specifications	File	usmf	Is Docentric design: Yes from Docentric Print ...	Docentric Print archive	22	8/16/2022 6:14:53 AM
Show purchase order	File	USMF	68719486486 from Print job information (job-...	Print job information (job...	22	8/16/2022 6:14:53 AM

View Deleted Attachments From a Specific Record

You can also view deleted attachments from a specific record – a Released product in the case below

The screenshot shows the Dynamics 365 Finance and Operations interface. The top navigation bar includes 'Finance and Operations' and a search bar with 'released'. The main menu has 'Deleted attachments' highlighted with an orange box. An orange arrow points from this menu item to the 'Deleted attachments for Item number: 1000, 1001' view. In this view, the 'Delete' button is also highlighted with an orange box. The main content area displays details for a deleted attachment named 'SurfacePro_specifications'. The attachment is of type 'File' and is currently detached (toggle is off). The 'DELETED' section shows it was deleted by 'Admin' on '8/26/2022 07:42:23 PM' from company account 'usmf'. The 'ATTACHMENT' section shows the file name 'SurfacePro_specifications.pdf' and the original file name 'SurfacePro_specifications.pdf'.

DESCRIPTION	TYPE	ATTACHED
SurfacePro_specifications	File	<input type="checkbox"/> Yes

DETAILS	DELETE	IDENTIFICATION
Notes	Deleted by Admin	Type File
	Deleted date and time 8/26/2022 07:42:23 PM	Company account usmf

FILE INFORMATION	FILE TYPE	FILE LOCATION
File name SurfacePro_specifications	pdf	File location
Original file name SurfacePro_specifications.pdf		

View Attachment History

Another useful feature is the possibility to view the history of individual attachment

The screenshot illustrates the process of viewing attachment history in Dynamics 365. The top window shows the 'Attachments for Items - Item number: 1000,' page with the 'View history' button highlighted. The bottom window shows the 'Document history for Item number: 1000, 1001' page, which includes a summary table and a detailed history table.

Description	Type	Current state	Link status
SurfacePro_specifications	File	Restored	Linked

Description	Type	User	State	Date and time
SurfacePro_specifications	File	Admin	Created	5/17/2022 5:18:45 AM
SurfacePro_specifications	File	Admin	File Attached	5/17/2022 5:18:54 AM
SurfacePro_specifications	File	Admin	Pending Delete	8/26/2022 7:42:23 PM
SurfacePro_specifications	File	Admin	Restored	8/26/2022 8:10:37 PM

Batch Job for Removal of Obsolete Attachments

A batch job is monitoring deferred attachments and remove those which exceed deferred time limit

The screenshot displays the Dynamics 365 interface for a batch job. The top navigation bar includes 'Finance and Operations' and a search bar containing 'batch jobs'. The user is identified as 'USMF'. The main content area shows a 'Batch job' section with a 'Standard view' dropdown and a search filter 'Scans for deleted refere...'. Below this is a table with the following data:

Job ID	Status	Job description	Scheduled start date/time	Active period	Created by	Run by
68720009809	Waiting	Scans for deleted references which have reached the end of their retention period.	8/27/2022 8:55:34 PM		Admin	Admin

Attachments Recycle Bin and Deferred Deletion

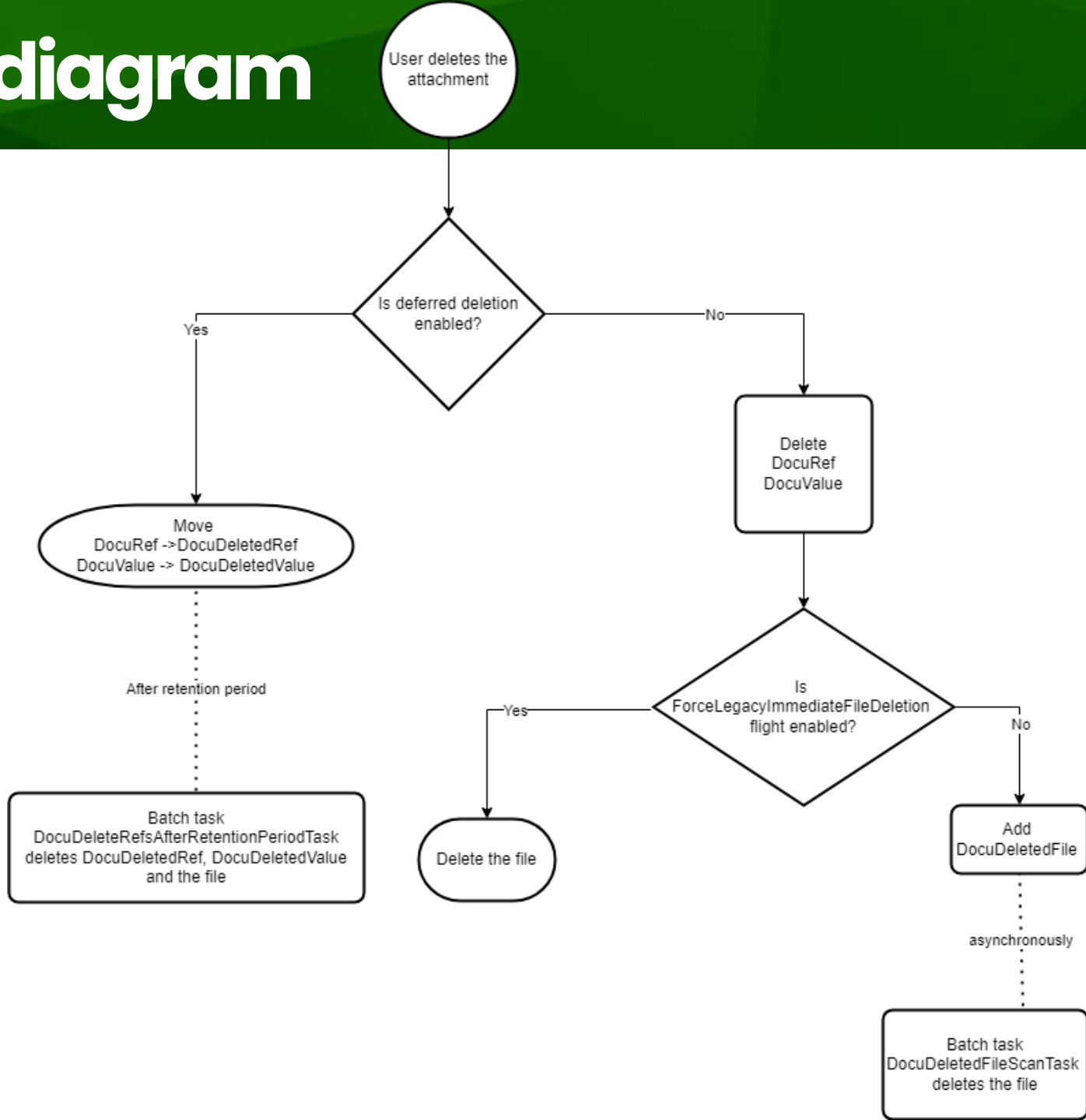


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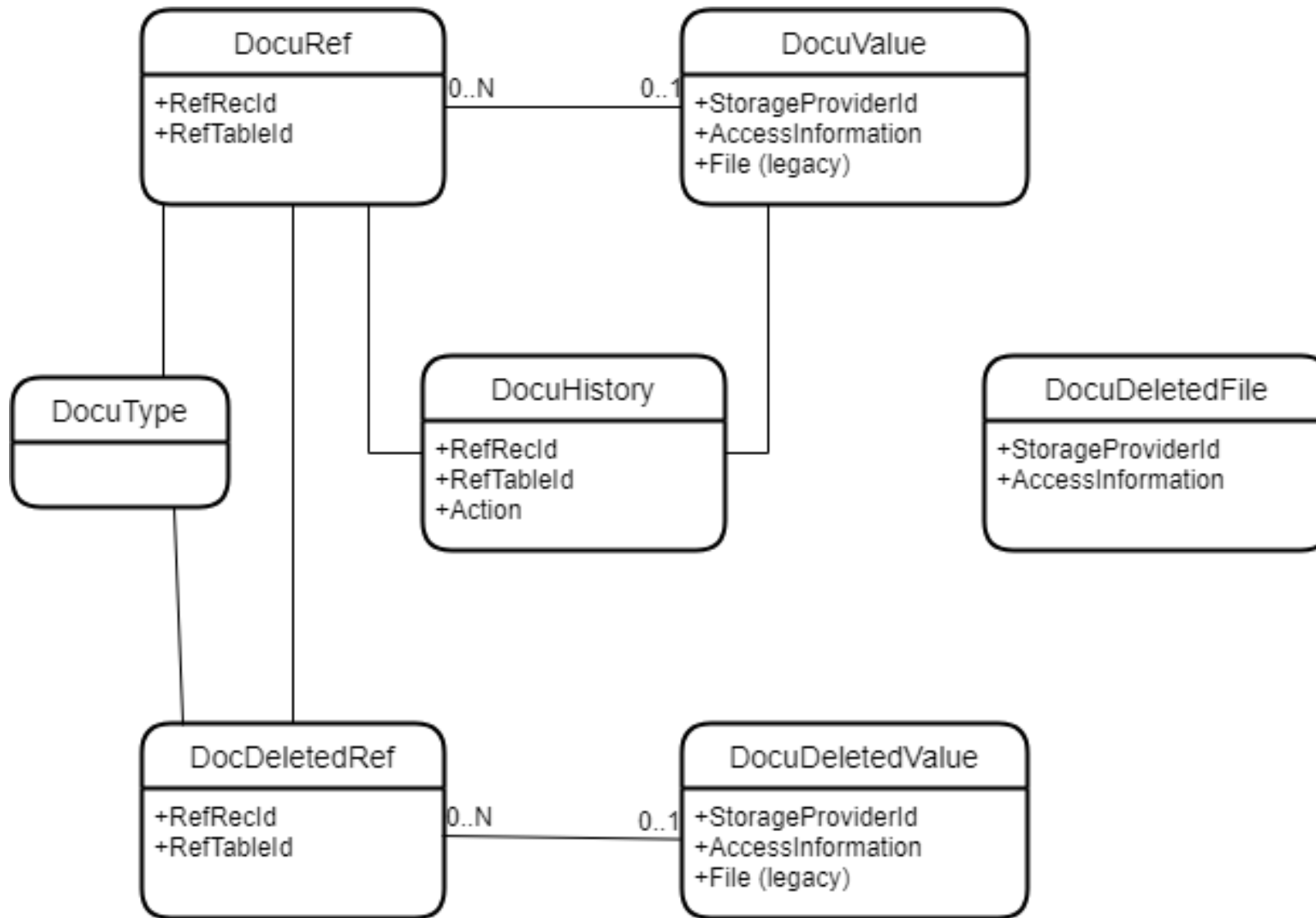
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Deletion diagram



Deleted data model



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Attachment Language, Category, Tags, Active Period



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Add Language, Category, Tags, and Active Period

With Docentric Free Edition you can add these attributes to the attachments

Finance and Operations

Search for a page

Save +New Delete Open View history Deleted attachments Created by Settings References Docentric settings Options

Filter

Standard view

Attachments for Items - Item number: 1000, 1001

Description: SurfacePro_specifications Type: File Attached: Yes

General

DETAILS

Notes

Created by: Admin

Created date and time: 8/26/2022 08:10:37 PM

Restriction: External

Attachment

FILE INFORMATION

File name: SurfacePro_specifications

File type: pdf

Original file name: SurfacePro_specifications.pdf

FILE LOCATION

File location

CREATE

Created by: Admin

Created date and time: 8/26/2022 08:10:37 PM

Docentric settings

REPORT ATTACHMENTS

Language: en-us

Category ID: ProductSpecs

Tags: Specifications; Products, Atta...

ACTIVE PERIOD

Active from: 1/1/2022

Active to: 11/15/2022

Active: Yes

ATTACHMENT INFO

Attached to table: Items

Preview

| Attachment Language, Category, Tags, Active Period



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| Where else attachments are used

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- From AX 2012 (files in database)
- With data entity from other ERP
- Migrate storage files after database copy

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Standard

- Where attachments are used
- Document types, storage options, customizations
- Active document tables
- Document history
- Recycle bin (Deferred deletion)
- Document notes
- Migration

Custom

- Download multiple attachments
- All attachments form
- Additional metadata
- Add attachments to email
- Migration after database copy

- Use Docentric Free Edition or ask your developer



Questions, Ideas, Discussion



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