Continia Document Output

Setup Quick Guide

June 2017 - CDO 2.04

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1. Introduction

About the installation guide for Continia Document Output

The purpose of this installation guide is to give the resellers and consultants a full understanding of the architecture and installation procedures for the Document Output application.

Installation Requirements

To use Continia Document Output, you must be running Microsoft Dynamics NAV Classic 5 SP1 Client or later. RTC Clients are supported from NAV 2013 and later. Continia Document Output will work with the following application versions:

- 5.00
- 5.0 SP1 (5.00.01)
- 2009 (6.00) (Not RTC)
- 2009 SP1 (6.00.01) (Not RTC)
- 2009 R2 (6.00.10) (Not RTC)
- 2013 (7.00)
- 2013 R2 (7.10)
- 2015 (8.00)
- 2016 (9.00)
- 2017 (10.00)

You also need Microsoft Outlook and Word version 2010 or later.

Remember to use Antivirus recognized by Windows/Outlook. If Windows/Outlook does not recognize Antivirus it will ask for permission every time you open an e-mail in Outlook.

2. Installation (NAV Ver 5.0 – NAV 2009 R2)

SMTP and Outlook component

To support SMTP and Outlook from Dynamic NAV you must install the included component.

install the dll's from the folder "CDO library (dll) (For NAV Ver. 5.0 - 2009 R2)".

Run Setup.exe from this folder.

PDF Printer Driver ("Continia PDF Writer", Bullzip or bioPDF is required):

Classic client support 3 different PDF drivers, "Continia PDF Writer", bioPDF and Bullzip. Continia PDF is included with Continia Document Output. If you already have bioPDF or Bullzip on you clients you can use those, otherwise we recommend "Continia PDF writer".

With RTC clients Document Output supports NAV's own PDF driver and "Continia PDF Writer", bioPDF , Bullzip. Dynamic NAV's own PDF driver runs on the service tier. If you need to use a background PDF on your templates you cannot use Dynamic NAV's own PDF driver.

If you want to use the Continia PDF Writer you must run the "Continia PDF Writer x_x_x_x.exe" or "Continia PDF Writer x_x_x_x.msi" from the folder "Continia PDF Writer".

Exe installation is the easy way to install the PDF Writer.

Msi installation requires ghostscript to be installed first. Ghostscript is under a GPL license and we can not distribute this with our package.
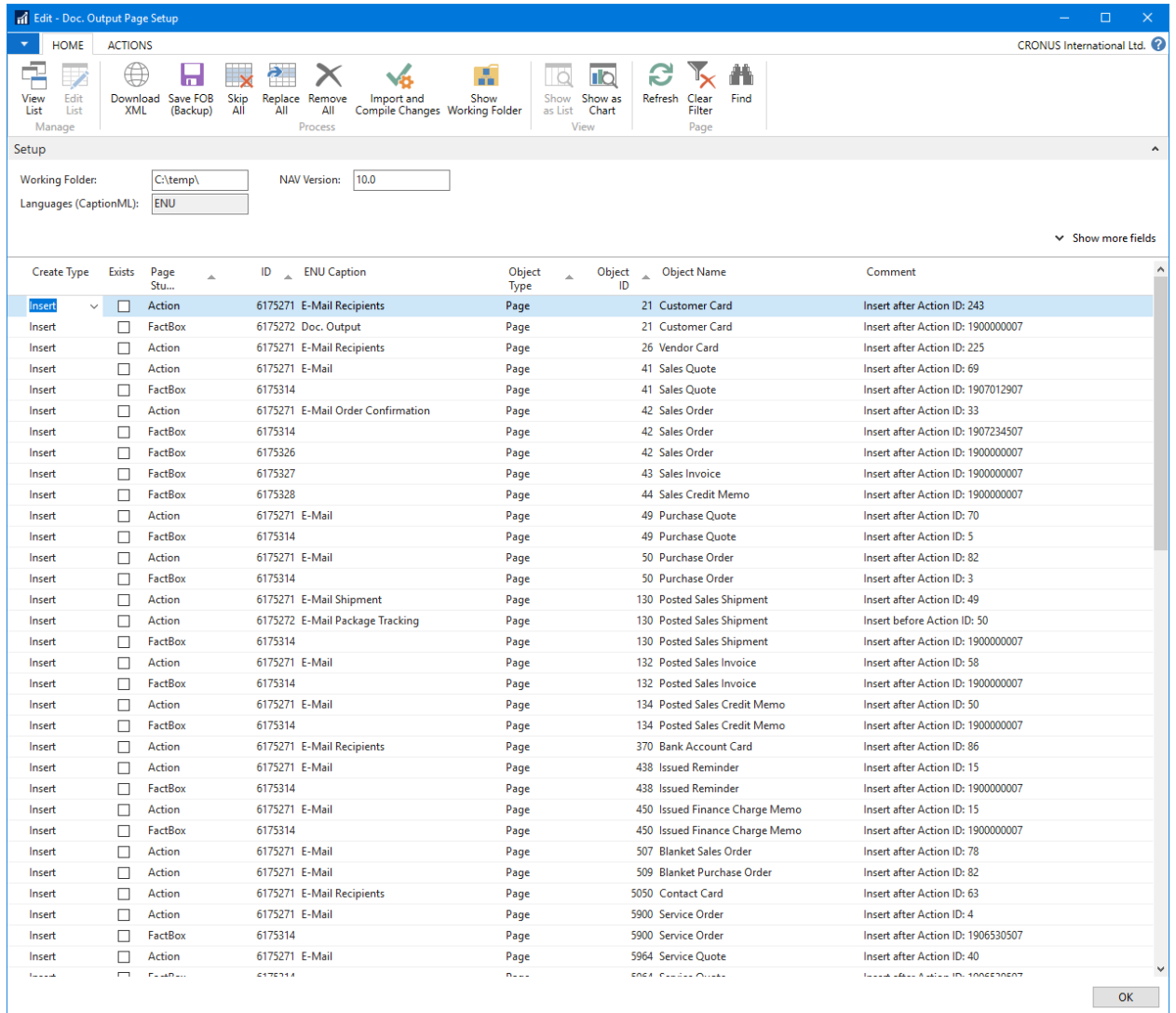
3. Installation NAV 2013 or later.

Doc. Output Page Setup (Merge Actions and FactBoxes on standard pages)

If some of the standard pages are modified before installation of CDO you can use the Doc. Output Page Setup tool to merge the Actions and Fact Boxes to all Standard NAV pages.

Requirements:

You must do this in a developer or test database with a developer license.

Make sure you have the "working folder" c:\temp\ or change the working folder.

Then click "Download XML" (this will download the Actions and Fact Boxes for CDO, and analyze the database for existing Actions and FactBoxes)

If you want a backup of the involved objects click "Save FOB (Backup)", this will save a fob file to the working folder.

Next click "Import and Compile Changes" (this will import the objects with the new Actions and FactBoxes and compile the objects)

After the merge, you can export the standard Pages from your developer database into a FOB file and import in your Live Database. All Pages have a new Version List that ends with CDOx.xx.

Outlook E-Mail Log and Background/Merge PDF (dll's)

If you want to be able to log your e-mail when sending them from Outlook, and add Background PDF or Merge PDF you have to install the Continia.DocumentOutput.Outlook.dll files from the folder: "CDO library (dll) (For NAV 2013 or later)"

You need to copy all the files to the Add-ins folder on the clients and servers.

If you run NAV 2016 or later you do not need to copy the dll's to all clients if you import them into the database. See Adding "Control" Add-ins you still need to copy the dll's to the client add-ins folder on your development computer (So you are able to compile Doc. Output objects).

Before you copy the files makes sure they are not blocked. Right click the file, click properties. If there is a button called Unblock, the file is blocked by Windows.

In NAV 2016 you can import zip files with the dll's on the Control Add-ins page. This can be done with the Setup Wizard **Downloads and installs Client Add-Ins**.

The **clients** are typically installed in the folder: C:\Program Files (x86)\Microsoft Dynamics NAV\100\RoleTailored Client\Add-ins

The **servers** are typically installed in the folder: C:\Program Files\Microsoft Dynamics NAV\100\Service\Add-ins

Help files (F1 Help)

Help files from NAV 1023 R2 and forward is stored on an IIS (Internet Information Server) server.
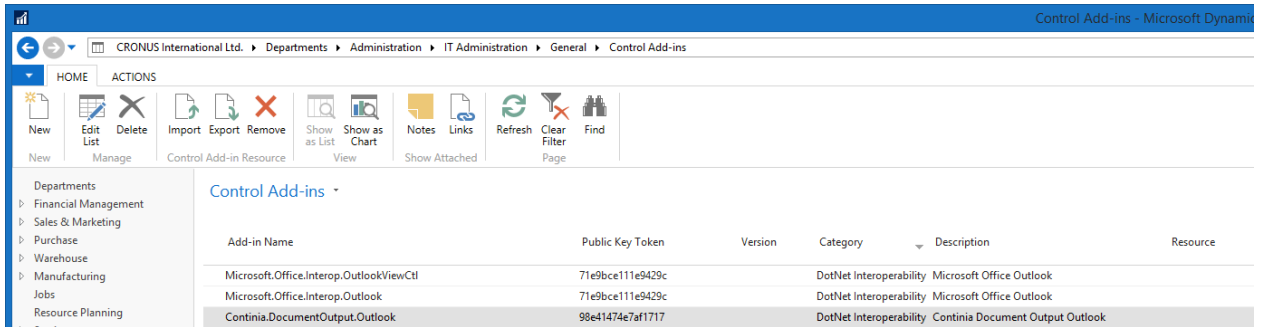
You must copy the help files from the Product Package located in the Help folder to ..\DynamicsNAV100Help\help\en\ on the IIS server.

4. Installation NAV 2016 and later

Adding "Control" Add-ins

Attention: This can also be done with the Setup Wizard "Downloads and installs Client Add-Ins"

Open Departments, Administration, IT Administration, General, Control Add-ins

Insert these 3 records with Category "DotNet Interoperability":

Add-in Name	Public Key Token	Description
Continia.DocumentOutput.Outlook	98e41474e7af1717	Continia Document Output Outlook
Microsoft.Office.Interop.Outlook	71e9bce111e9429c	Microsoft Office Outlook
Microsoft.Office.Interop.OutlookViewCtl	71e9bce111e9429c	Microsoft Office Outlook

For each record Import the zip file from the folder: CDO library (zip) (For NAV 2016 Add-ins).

When you have done this you do not need to install (dll's) in add-ins folders on client machines.

5. Installation all versions

Importing Objects:

In the Folder Ver 2.00 you can find the objects for the different NAV versions.

If any of the objects has conflicts they must be merged with the customer code.

If you have NAV 2013 or later, you can use "Doc. Output Page Setup" to merge the conflicting pages.

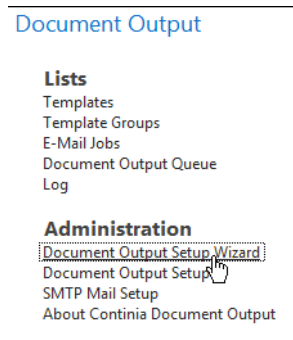These 3 codeunits can only be compiled when the PDF driver is installed:

- 6175274 Bullzip Management - Can only compile when Bullzip is installed.
- 6175275 BioPDF Management - Can only compile when bioPDF is installed
- 6175287 ContiniaPDF Management - Can only compile when "Continia PDF Writer" is installed.
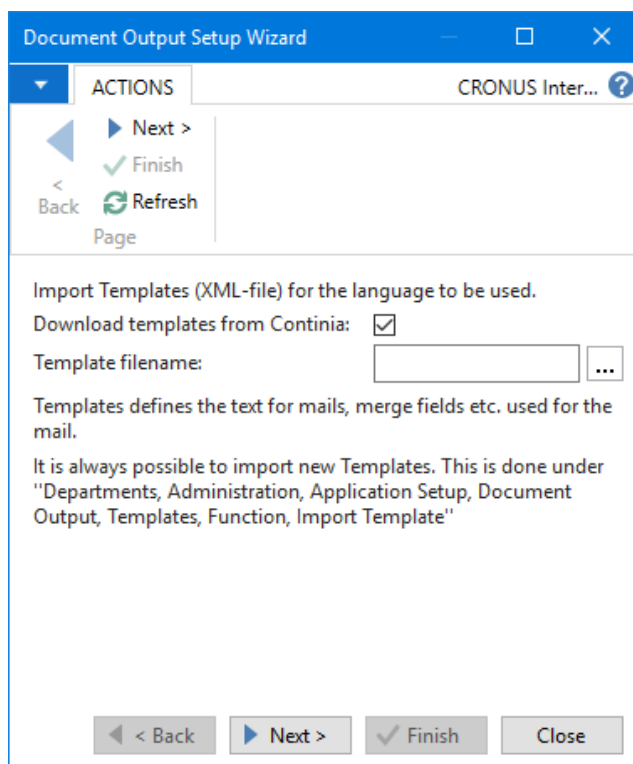
6. NAV Setup:

After installing the objects, you should open Administration, Application Setup, Document Output.

Run the Setup Wizard

Click Document Output Setup Wizard, and then click next.

Choose a template file or leave the checkmark in "Download templates from Continia" to download/import, and then click next.
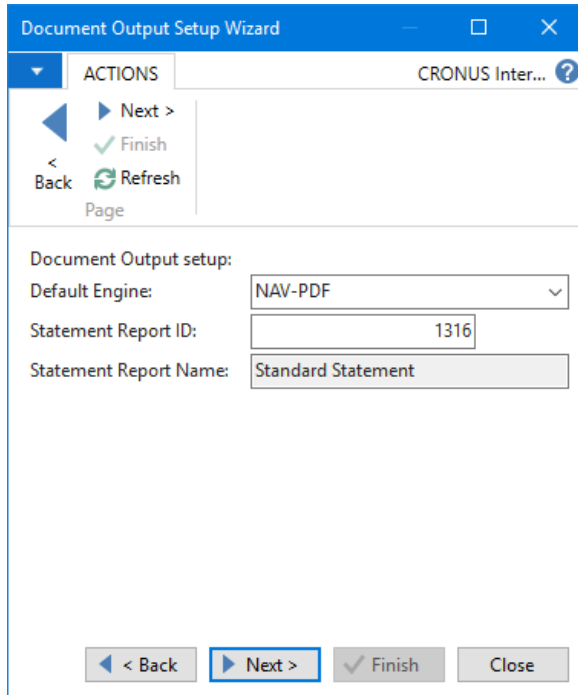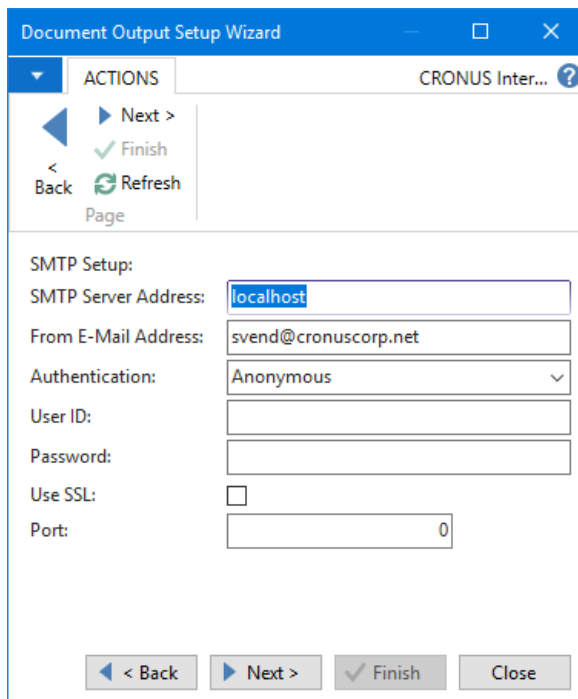
Choose how the PDF's are created.

If the Statement report is different then 116 (Standard NAV) choose the report to use.
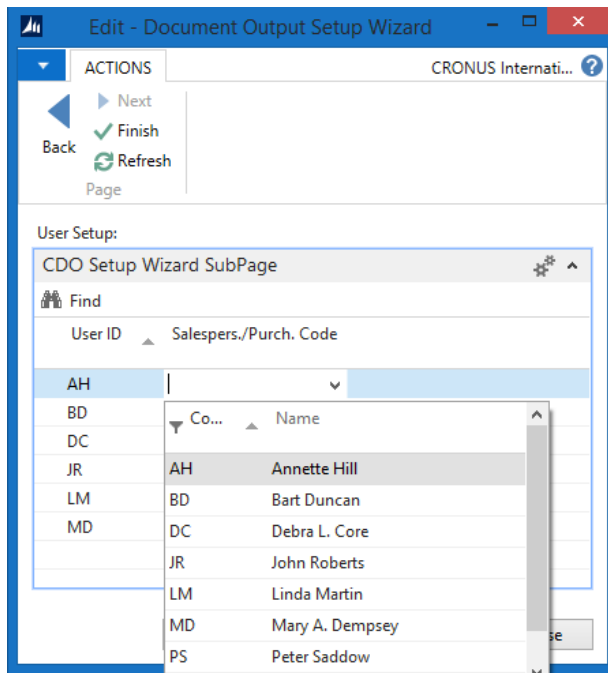
If you use Version **2013 R2**, you need a NAV developer to change Table 6175280 "Statement Request Page Setup". The Report ID on the variable StatementReport need to be changed in the function **RunStatementReport()**.
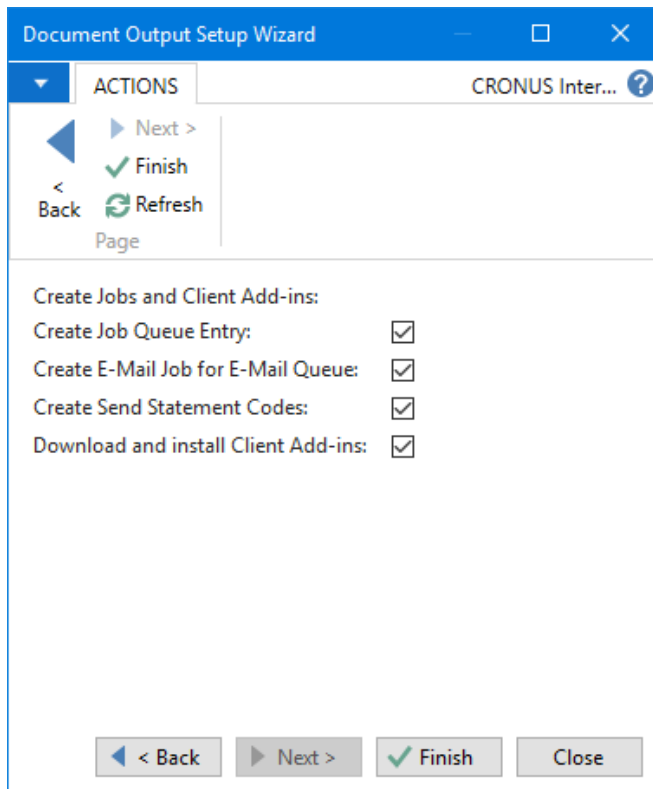

Enter your SMTP information. If you do not have this information, you can contact your internet/e-mail provider.

On the "User Setup" you can link the users with the corresponding Salespeople.

Finally, you can create Jobs and Install Client Add-Ins.

Create Job Que Entry: Creates a Job Que Entry for the Codeunit 6175283 NAV App. Server E-Mail Job Mgt.

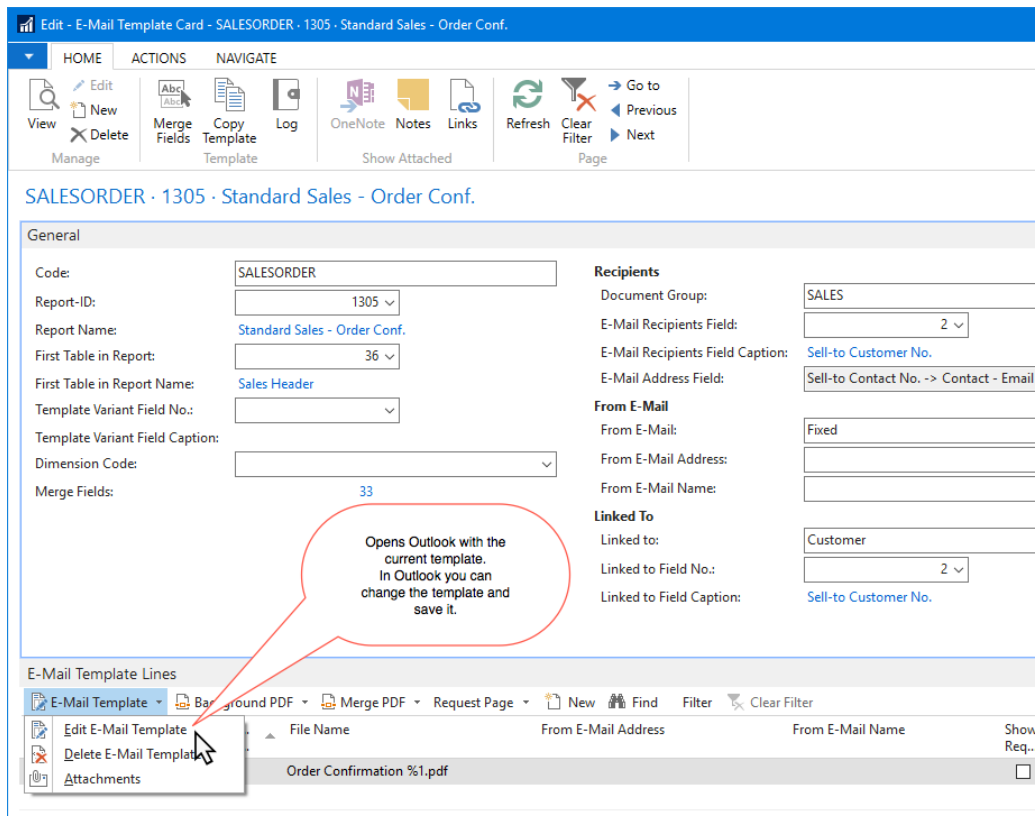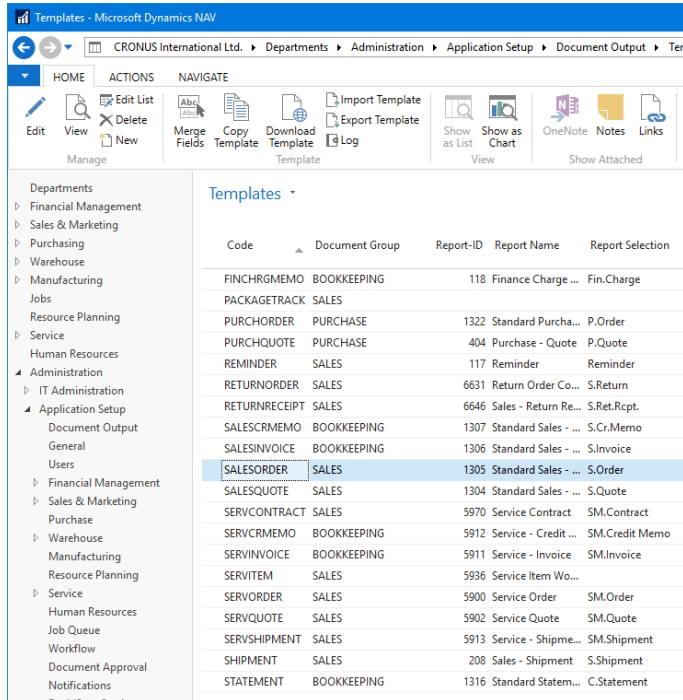**Create E-Mail Job for E-Mail Queue:** Creates E-Mail job to empty the E-Mail queue.

(Only NAV 2016 and later) Downloads and installs Client Add-Ins: Downloads zip files with dll's for NAV clients and creates the records in the Control Add-Ins page. After you have done this you do not need to install (dll's) in add-ins folders on client machines. (in our experience, it does not always work)

When you click Finish, all your changes are saved.

Edit Outlook templates

You can now edit the templates provided with Document Output.

For each template Choose "Edit E-Mail Template" this will open Outlook where you can change your template (Make sure Outlook is open first). After you have changed the template in Outlook make sure you close the Window (Not Send), and press yes to save.
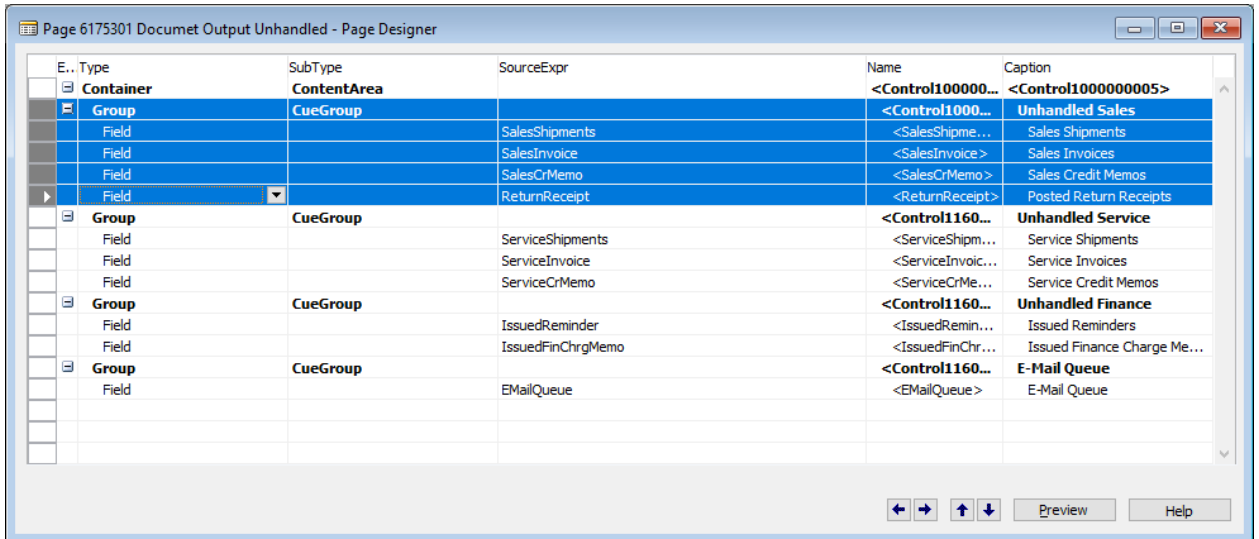
Job Queue

To setup Job Queue to run the "E-Mail Jobs". The Job Queue Entry should run Codeunit: 6175283 "NAV App. Server E-Mail Job Mgt".
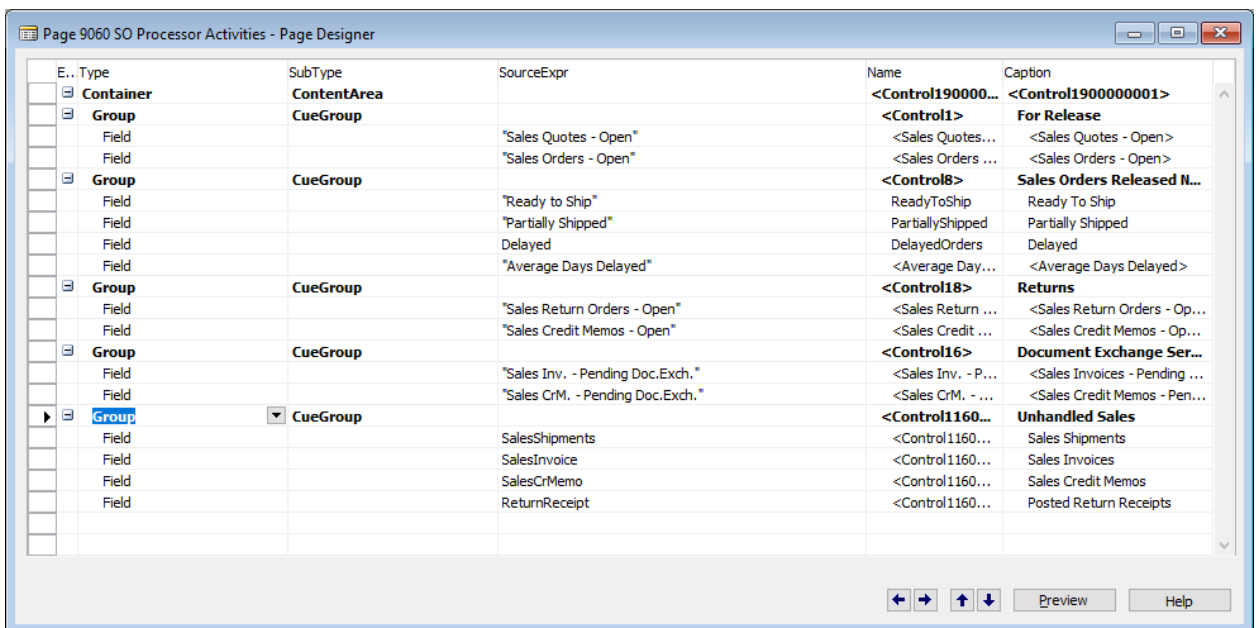
To setup Job Queue to create Automatic Statements. The Job Queue Entry should run Codeunit: 6175297 "Send Customer Statement Mgt.".

7. Edit Role Centers

If you want Cue's on your role center you have to copy/paste them from Page 6175301 "Document Output Unhandled" to the role center you want to add them to.

Here is sample where we copied "Unhandled Sales" to page 9060 "SO Processor Activities".

8. Appendix - Common errors

a) Terminal Server

If you use Terminal server, Internet Explorer Enhanced Security (IE ESC) must be turned off in order to use SMTP.

b) Continia PDF Writer – Tool to see the used paths

Gui.exe can normally be found in this folder: C:\Program Files\Continia\Continia PDF Writer\

Run gui.exe with these parameters: `gui info printer="Continia PDF Writer"`