



Installation and Setup Guide

Installation

The e-ttach zip file contains the EULA and an additional deployable package (zip file) which needs to be loaded into your Microsoft Dynamics 365 Finance/ SCM environment by an environment administrator.

PLEASE DO NOT INSTALL E-TTACH OR ANY DEPLOYABLE PACKAGE INTO PRODUCTION UNTIL YOU HAVE PERFORMED SUFFICIENT UAT.

To install e-ttach into your sandbox and production environments you should use the LCS installation process.

[Apply updates to cloud environments.](#)

To install e-ttach into any development or cloud hosted environments you will need to perform a manual installation.

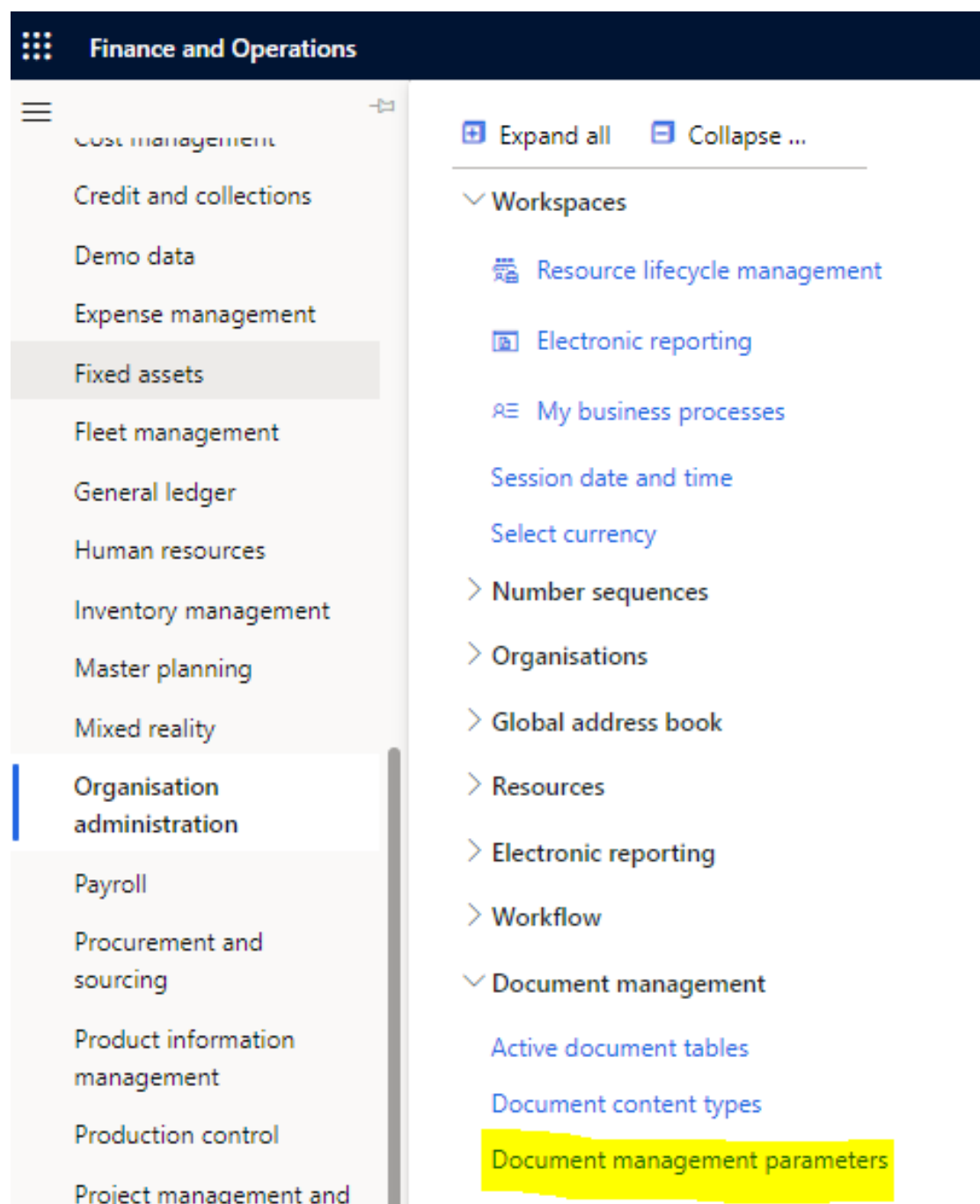
[Install deployable packages from the command line.](#)

Setup

Once you have successfully installed e-ttach you will have the Free version enabled by default and can start using it right away (yes it's that simple).

However to ensure you have a more stream-lined experience we recommend you tailor the configuration to your requirements.

Under Organisation Administration -> Document management -> Document management parameters there is an e-ttach tab page.



Document management parameters

General

Number sequences

File types

SharePoint

Migrate Files

e-ttach

e-ttach

LICENSE

License Key

Expiration date

Licensed Tenant

elysian2.com

License Type

Free

Drag Drop Functionality

Full

Check For License

DEFAULTS

Default Document Type

Auto Expand Form Part

Default

Generate Document Tags

License details:

To start your free “Full” 60 day trial click the “Check for License” button.

Note: this trial and assigned license is based on your Active Directory Tenant and you cannot claim more than 1 free trial. After the trial period functionality will revert back to “Free”.

The license key will be automatically fetched from our servers and is unique to your Azure Active Directory Tenant ID. If your tenant changes you will need to contact use to update our records to ensure you have a valid license.

The license type and expiry date will be updated accordingly.

e-ttach

LICENSE

License Key

Expiration date

26/08/2020

Licensed Tenant

elysian2.com

License Type

Trial

Drag Drop Functionality

Full

Check For License

DEFAULTS

Functionality setting:

This is to provide control over the functionality available in your environment, useful if you decide to disable e-ttach without having to uninstall the package.

The Drag Drop Functionality selection provides 3 options:

Extra	Enable all Extra functionality (If you do not have an “Extra” license, this will function the same as selecting the Full option).
Full	Enable Full e-ttach functionality (if you only have the free version – you will only get free functionality).
Disabled	Completely disable e-ttach

Defaults:

These are your defaulting values for e-ttach:

Field	Details
Default Document Type	<p>Specify the Document management file type you want the e-ttach documents stored as (if blank, this will default to “File”).</p> <p>The type selected here must be enabled for file storage – type of “note” will not work.</p>
Auto Expand Form Part	<p>When an e-ttach enabled form is opened, this setting is used to determine whether to expand the e-ttach form automatically.</p> <ul style="list-style-type: none">• Default (No for Free, Yes for all other licenses)• Yes (always expand the e-ttach form)• No (use default Dynamics logic to only show the form parts based on the user’s last state). <p>Note: this setting can be overridden at a user level – users go to their “User options” and on the Preferences tab the same setting is available.</p>

Generate Document Tags:

This button should be clicked when you first install e-ttach, it generates e-ttach specific document records to ensure your existing attachments are displayed against their associated records in the e-ttach forms.