

# e-ttach 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 need to follow the Microsoft All-in-One package process as outlined here:

[All-in-one deployable packages - Finance & Operations | Dynamics 365 | Microsoft Learn](#)

To install e-ttach into any development or cloud hosted environments you will need to perform a manual installation (Note: if you bypass the installation process and just pull the code from source control the resource files will not be deployed to the appropriate location and e-ttach will not work).

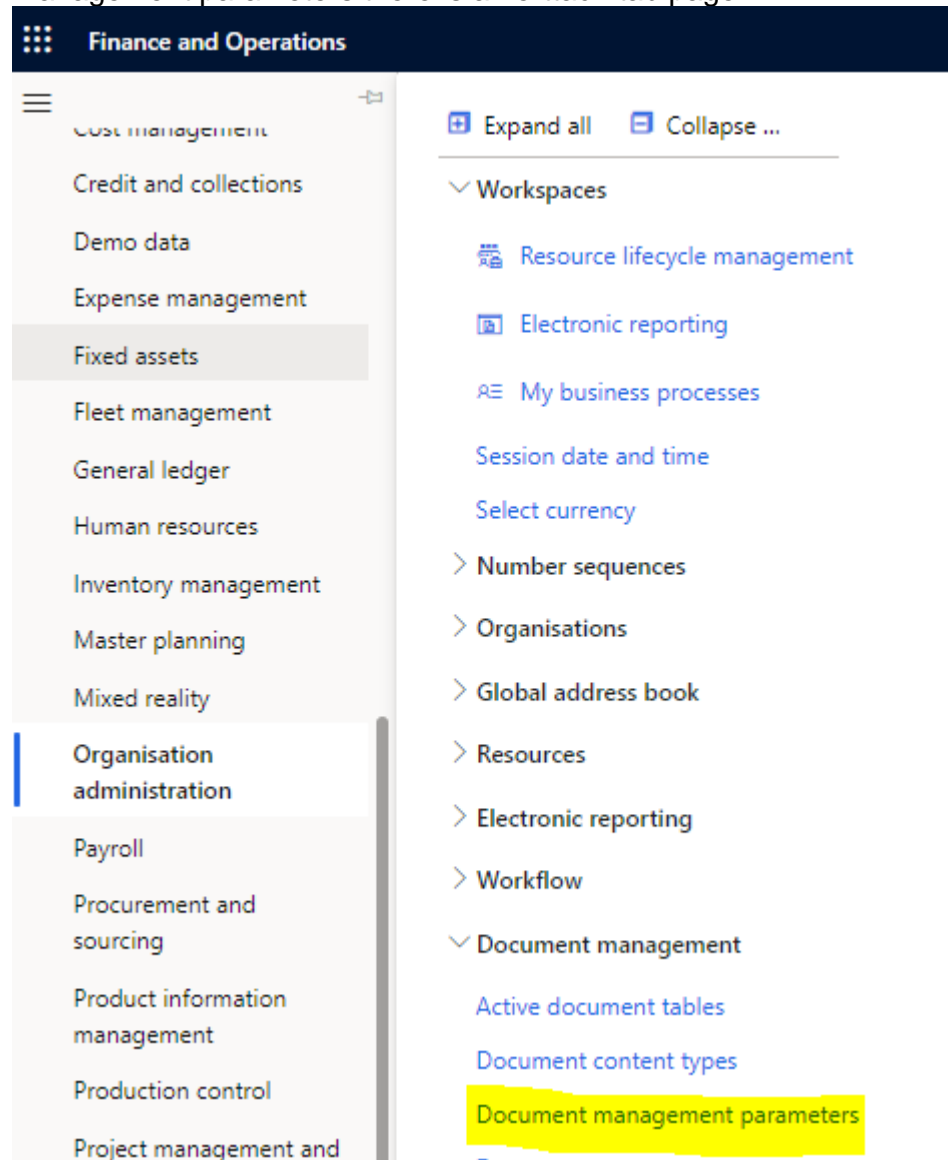
[Install deployable packages from the command line.](#)

## 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.



← Save Options 🔍

My view ▾

Document management parameters

General

Number sequences

File types

SharePoint

Migrate files

Default document types

**e-ttach**

**e-ttach**

**LICENSE**

License Key

Expiration date

8/26/2050

Licensed Tenant

elysian2.com

License Type

Extra

Drag Drop Functionality

Extra (Only available with Extr... ▾)

Check For License

**DEFAULTS**

Default Document Type

File ▾

Show Document Type

Yes

Dynamic Tag Generation

Yes

Enable Tag Creation

Yes

Auto Expand Form Part

Default ▾

Record Notes

Enable ▾

Auto Expand Record Notes

Default ▾

Advanced Document Setup

Generate Document Tags

Form Exclusion Setup

## 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 us to update our records to ensure you have a valid license.

**e-ttach**

**LICENSE**

License Key  
[Redacted]

Expiration date  
26/08/2020

Licensed Tenant  
elysian2.com

License Type  
Trial

Drag Drop Functionality  
Full

[Check For License](#)

**DEFAULTS**

The license type and expiry date will be updated accordingly.

## 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.


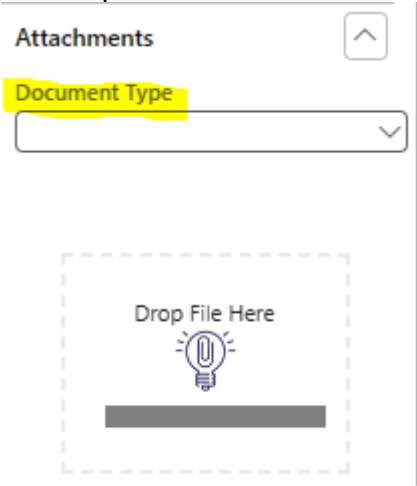
The Drag Drop Functionality selection provides 3 options:

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 (Enterprise License) 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	Specify the Document management file type you want the e-ttach documents stored as (if blank, this will default to “File”). The type selected here <b>must</b> be enabled for file storage – type of “note” will not work.
Dynamic Tag Generation	This should be left <b>on</b> by default, it will automatically generate tags when a record is selected on a form for any attachments related to that record. The only reason to disable this is if you are using e-ttach exclusively and/or want to use a batch job to update the tags.

<p>Enable Tag Creation</p>	<p>Turn this off if you do not want to be able to create or assign record tags to documents on the Attachment viewer screen.</p> 
<p>Auto Expand Form Part</p>	<p>When an e-attach enabled form is opened, this setting is used to determine whether to expand the e-attach form automatically.</p> <ul style="list-style-type: none"> <li>• Default (No for Free, Yes for all other licenses)</li> <li>• Yes (always expand the e-attach form)</li> <li>• No (use default Dynamics logic to only show the form parts based on the user's last state).</li> </ul> <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>
<p>Extra Only Features</p>	
<p>Show Document Type</p>	<p>Turn this on to display the File type selector on the Drag and Drop form part.</p> <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> 
<p>Record Notes</p>	<p>Enable or Disable Record notes functionality.</p>

Auto Expand Record Notes	<p>When a record notes enabled form is opened, this setting is used to determine whether to expand the record notes form automatically.</p> <ul style="list-style-type: none"> <li>• Default (Yes)</li> <li>• Yes (always expand the record notes form)</li> <li>• No (Never expand the record notes form).</li> </ul> <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>
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## 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.







## Advanced Document Setup

This allows you to configure document types based on the specific table or module of the system you are dragging attachments to (E.g All tables in the Accounts Payable module can be assigned an “AP Files” type, or all attachments being added to Vendor Invoices can be assigned “AP Invoice” type).

Advanced Document Setup

My view 

 Filter

<input type="radio"/>		Relation Type	Type	Module 	Table
<input checked="" type="radio"/>		Module 	AP Files 	Accounts payable 	
<input type="radio"/>		Module	Cust Invoice	Accounts receivable	CustInvoiceJour
<input type="radio"/>		Table	AP Invoice	Accounts payable	VendInvoiceInfoTable

## Form Exclusion Setup

This allows you to exclude the e-ttach form part from being added to specific forms inside dynamics.

## Form Exclusion Setup

### Standard view ▼

<input type="radio"/>	<input type="radio"/>	Form name
<input checked="" type="radio"/>		<div>GeneralLedgerJournal <span>▼</span></div>
		ProdTable