

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).

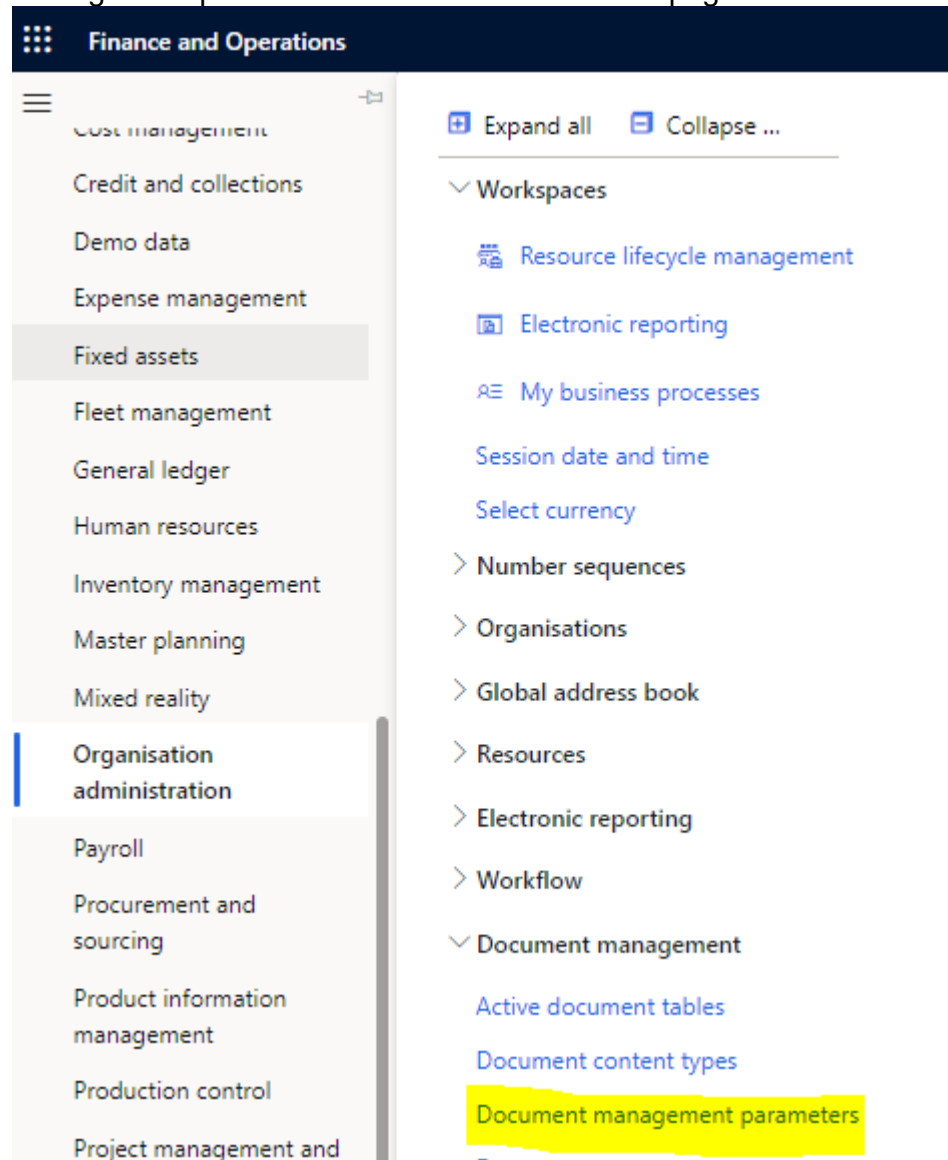
[Install deployable packages from the command line.](#)

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.



Document management parameters

General

Number sequences

File types

SharePoint

Migrate files

Default document types

e-ttach

e-ttach

License

License Key

Expiration date

10/5/2050

Licensed Tenant

elysian2.com

e-ttach Version

2025.10.20.1

License Type

Extra

Drag Drop Functionality

Extra (Only available with E...

Check For License

Download Latest Version

Config

DEFAULTS

Default Document Type

Test files

Show Document Type

Yes

Auto Expand Form Part

Default

Record Notes

Enable

Auto Expand Record Notes

Default

ADDITIONAL

Standard Document Security

No

Hide Help Link

No

Generate Image Thumbnails

Yes

Copy Purch Req Tags

No

Copy Sales Quote Tags

No

Tags

TAGGING

Disable Document Tags

No

Enable Tag Creation

Yes

Dynamic Tag Generation

Yes

Create Tags Asynchronously

Yes

Generate Missing Document Tags

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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.

The screenshot shows the 'e-ttach' configuration window. It includes a 'LICENSE' section with the following fields: 'License Key' (redacted), 'Expiration date' (26/08/2020), 'Licensed Tenant' (elysian2.com), 'License Type' (Trial), and 'Drag Drop Functionality' (Full). A 'Check For License' button is also visible.

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
Config Section	
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 must be enabled for file storage – type of “note” will not work.
Standard Document Security	Follow standard Document Handling record security (disable the ability to add attachments to non editable records)
Hide Help Link	Hide the Help link on the e-ttach Form part:

	<div> <div>Attachments </div> <div>Document Type </div> <div> <div>Drop File Here</div>  </div> <div> <div>File</div> <div>  CINV123 6/25/2025 05:51:49 pm </div> </div> <div> View Attachments Help </div> </div>
Auto Expand Form Part	<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"> • Default (No for Free, Yes for all other licenses) • Yes (always expand the e-attach 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>
Copy Purch Req Tags	Display Purchase Requisition Attachments against Generated Purchase Orders
Copy Sales Quote Tags	Display Sales Quotation Attachments against related Sales Orders
Tag Section	
Disable Document Tags	<p>Follow Standard Document Handling (linked to current record only – using the standard DocuRef link on the record).</p> <p>Related documents will not be shown.</p>
Enable Tag Creation	Turn this off if you do not want to be able to create or assign record tags to documents on the Attachment viewer screen.

	<div> <div>My view ▾</div> <h2>Attachment Viewer</h2> <div> <div>▸ TAGS</div> <div> <div>▾ ASSIGN</div> <div>NEW</div> <div>EXISTING</div> </div> </div> <div> <div>Table name</div> <div>Record</div> <div>Tags</div> </div> <div> <div> <input type="text"/> </div> <div> <input type="text"/> </div> <div> <input type="text"/> </div> </div> <div> <div>Add</div> <div>Add</div> </div> </div>
Dynamic Tag Generation	<p>This will automatically generate tags when a record is selected on a form for any attachments related to that record.</p>
Create Tags Asynchronously	<p>Generate related tags asynchronously when an attachment is created.</p> <p>This reduces wait time for users when an attachment is added.</p> <p>Note: We do not recommend enabling this flag in a high transaction volume environment where multiple documents are inserted simultaneously as it can cause database locking</p>
Extra Only Features	
Show Document Type	<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> <div> <div>Attachments</div> <div> <div>Document Type</div> <div> <input type="text"/> </div> </div> <div> <div>Drop File Here</div> <div>  </div> </div> </div>
Record Notes	<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">• Default (Yes)• Yes (always expand the record notes form)• No (Never expand the record notes form). <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 Image Thumbnails	<p>Display a thumbnail of attached images in the e-ttach form part</p> <p>On:</p> <div data-bbox="547 667 944 965"><p>Drop File Here</p></div> <div data-bbox="461 1120 1011 1357"><div></div><div><p>File</p><hr/><p>CINV123</p><p>6/25/2025 05:51:49 pm</p></div></div> <p>Off:</p>

	<div data-bbox="533 288 924 582"> <div>Drop File Here</div>  </div> <div data-bbox="459 730 987 963"> <div>File</div> <div>  <div>CINV123</div> <div>6/25/2025 05:51:49 pm</div> </div> </div> <p>Note: If you are using Sharepoint as your document storage location and receiving Sharepoint authentication errors or time-outs please disable this functionality. (This can be due to the new Microsoft interactive Sharepoint authentication dialog).</p>

Generate Missing 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.

Tag Creation Setup

This button opens a new form which allows you to enable tagging for specific tables. Initially this form will be blank – click “Generate Defaults” to populate with the standard e-ttach table relations

Save
New
Delete
Generate Defaults
Options

Tag Creation Setup

Standard view

	Table	Use Tags	Copy To Related tables	Copy From Related tables
<input type="radio"/>	CustInvoiceJour	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	CustTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	CustTrans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	EcoResProduct	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	InventTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	LedgerJournalTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	LedgerJournalTrans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	ProjTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	PurchLine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	PurchReqLine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	PurchReqTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	PurchTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	SalesLine	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	SalesTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	VendInvoiceJour	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	VendPackingSlipJour	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	VendPackingSlipTrans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	VendTable	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="radio"/>	VendTrans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Column	Purpose
Table	This is the table the setup relates to, e.g VendTable is the vendor master table.
Use Tags	<p>Enabled = Yes - Tagging is enabled for this table and tags will be created and used to display attachments and related attachments.</p> <p>Enabled = No - Tagging is disabled for this table and e-attach will only show documents attached directly against this record (same as the “Disable document tags” parameter but for this specific table only.)</p>
Copy To Related tables	When enabled any attachments added to this table will also copy to the related tables. (E.g Purchase Order Line

	attachments will be visible on the Purchase Order Header).
Copy From Related tables	When enabled attachments added to related tables will be copied to this table (e.g If this is Purchtable then documents from PurchLine are copied here)

The standard e-attach related document tag copy rules are:

From	To
Purchase Process	
PurchLine	PurchTable VendInvoiceInfoLine (when creating invoice)
PurchTable	VendTable (both order and invoice accounts) VendInvoiceInfoTable (when creating invoice)
VendInvoiceInfoLine	VendInvoiceInfoTable
VendInvoiceJour	VendTrans
Optional (when Copy Purch Req Tags parameter is enabled)	
PurchReqLine	PurchLine PurchReqTable
PurchReqTable	PurchTable
Sales Process	
SalesLine	SalesTable CustInvoiceTrans (when posting invoice)
SalesTable	CustTable (both order and invoice accounts) CustInvoiceJour (when posting invoice)
CustInvoiceTrans	CustInvoiceJour
CustInvoiceJour	CustTrans
Optional (when Copy Sales Quote Tags parameter is enabled)	
SalesQuotationLine	SalesLine SalesQuotationTable
SalesQuotationTable	SalesTable

Ledger Journal Process	
LedgerJournalTrans	LedgerJournalTable (shows all line attachments against the header) CustTable (related customer master when a line has a customer account or offset account) VendTable (related vendor master when a line has a vendor account or offset account) ProjTable (related project when a line has a project account or offset account)
ProjTable	ProjTable (parent project)

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 ▼

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

Form Exclusion Setup

This allows you to exclude and include the e-attach form on specific forms inside dynamics.

Form Exclusion Setup

Standard view ▾

Filter

<input type="radio"/>	<input type="checkbox"/>	Form name	Action
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	WMSShipment ▾	Enable ▾
<input type="radio"/>	<input type="checkbox"/>	VendInvoice	Disable

Advanced tab:

[←](#)
[Save](#)
[+ New](#)
[Delete](#)
[Rebuild Form Names](#)
[Advanced](#)
[Options](#)
[🔍](#)

Document Tag Generator - Periodic Task

Periodic Cleanup - Orphaned Tags

Email Body Cache cleanup - DocuMDTable_E2

Document Tag Generator – Periodic Task:

- This will periodically check and generate missing Document tags to ensure they display against the appropriate records. (Used when “**Dynamic Tag Generation**” parameter is disabled)

Periodic Cleanup – Orphaned Tags:

- Performs a periodic cleanup task to remove orphaned tags (works similarly to the “Scan for orphaned document references” batch job.)

Email Body Cache cleanup – DocuMDTable_E2:

- Clears out a cache table with any email body data older than a certain number of days.