



Continia

# Document Output

## Continia Document Output

Setup Quick Guide – Objects (FOB)

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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 2013 or later. Continia Document Output will work with the following application versions:

**RTC (Role Tailored Clients):**

- 2013 (7.0)
- 2013 R2 (7.1)
- 2015 (8.0)
- 2016 (9.0)
- 2017 (10.0)
- 2018 (11.0)
- Business Central (13.0)
- Business Central (14.0)










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 2013-2018 and Business Central (OnPremise)

Importing Objects:

In the Folder Objects\Country Code you can find the objects for the different NAV versions.

Name	Date modified	Type
 BC (13.x)	24-10-2019 12:39	File folder
 BC (14.x)	24-10-2019 12:39	File folder
 NAV 5.x	24-10-2019 13:36	File folder
 NAV 2009 (6.x)	24-10-2019 13:37	File folder
 NAV 2013 (7.x)	24-10-2019 12:38	File folder
 NAV 2015 (8.x)	24-10-2019 12:38	File folder
 NAV 2016 (9.x)	24-10-2019 12:38	File folder
 NAV 2017 (10.x)	24-10-2019 12:38	File folder
 NAV 2018 (11.x)	24-10-2019 12:39	File folder

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

You can use “Doc. Output Page Setup” to merge the conflicting pages.

This codeunit can only be compiled when the PDF driver is installed:

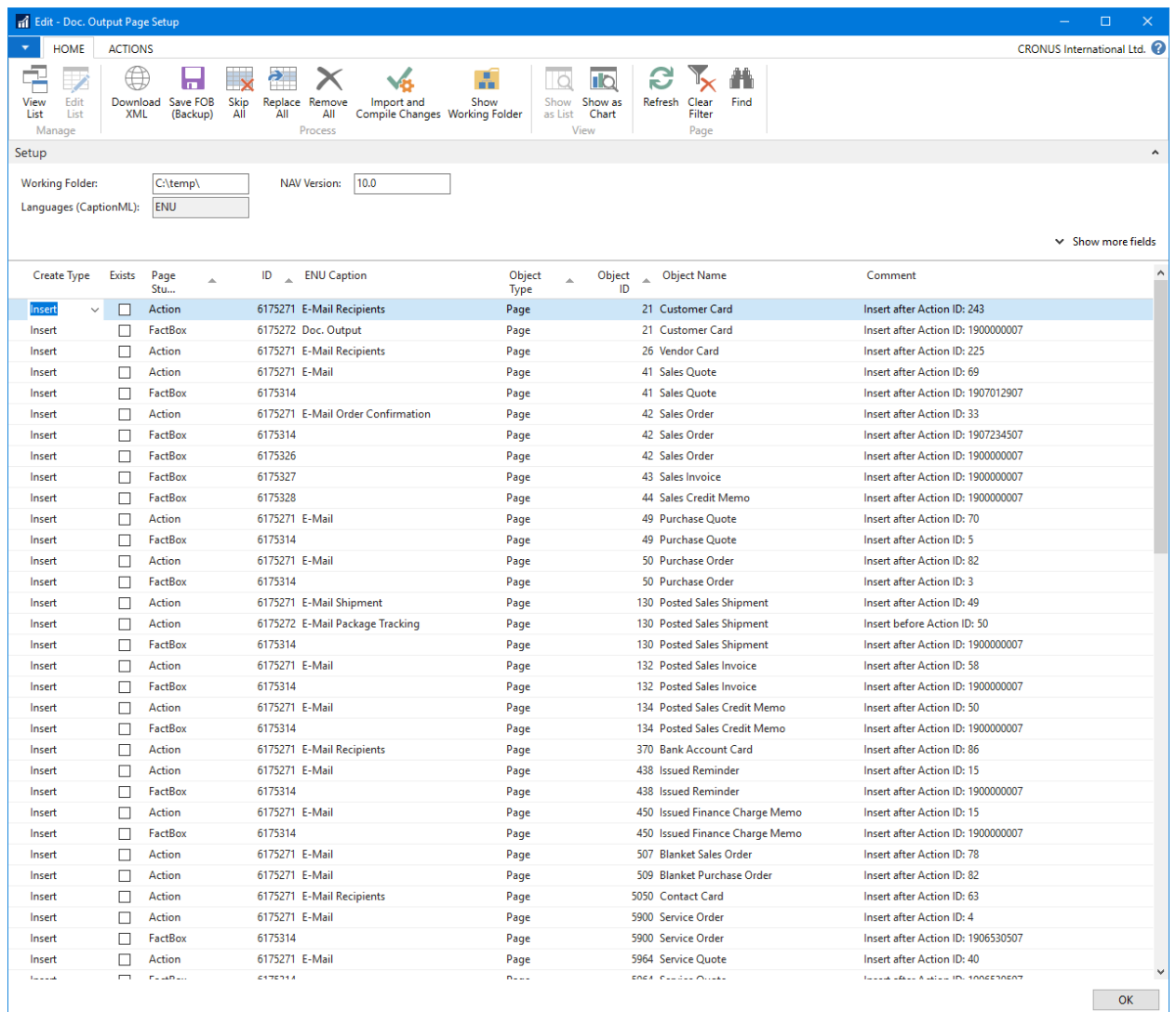
- 6175287 ContiniaPDF Management - Can only compile when “Continia PDF Writer” is installed.

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 need access to both RTC (Role Tailored Client) and Dev. Environment (finsql.exe) on the same PC
- 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.

**Install dll files within NAV.**

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 can install the dll’s on clients and service tiers by using the “Doc. Output Files (dll)” (/Departments/Administration/Application Setup/Document Output). Or Copy the files [manually](#).

After you click download you can see if the files are already installed on your client PC and on the Services Tier, you are using.

If the dll files is installed on the Client PC the path to the file will be shown in “Client Paths found”.

If the dll files is installed on the Service Tier the path to the file will be shown in “Server Paths found”

File name	File Version	Product Version	Use on ...	Use on ...	Client Paths found	Client File Ver.	Client Product Ver.	Server Paths found
Continia.DocumentOutput.Outlo...	1.0.0.0	1.0.0.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C:\Program Files (x86)\Microsoft ...	1.0.0.0	1.0.0.0	C:\Program Files\Microsoft Dyna...
Continia.DocumentOutput.PDF.dll	1.0.0.0	1.0.0.0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C:\Program Files (x86)\Microsoft ...	1.0.0.0	1.0.0.0	C:\Program Files\Microsoft Dyna...
GdPicture.NET.9.dll	9.4.0.14	9.4.0.14	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C:\Program Files (x86)\Microsoft ...	9.4.0.14	9.4.0.14	C:\Program Files\Microsoft Dyna...
GdPicture.NET.9.image.gdimgplu...	9.0.0.28	9.0.0.28	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C:\Program Files (x86)\Microsoft ...	9.0.0.28	9.0.0.28	C:\Program Files\Microsoft Dyna...
GdPicture.NET.9.image.gdimgplu...	9.0.0.28	9.0.0.28	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C:\Program Files (x86)\Microsoft ...	9.0.0.28	9.0.0.28	C:\Program Files\Microsoft Dyna...
GdPicture.NET.9.PDF.dll	2.2.0.30	2.2.0.30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C:\Program Files (x86)\Microsoft ...	2.2.0.30	2.2.0.30	C:\Program Files\Microsoft Dyna...
Microsoft.Office.Interop.Outlook...	14.0.4760.1000	14.0.4760.1000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The file exists in multiple (2) paths.			C:\Program Files\Microsoft Dyna...
Microsoft.Office.Interop.Outlook...	14.0.4760.1000	14.0.4760.1000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C:\Program Files (x86)\Microsoft ...	14.0.4760.1000	14.0.4760.1000	C:\Program Files\Microsoft Dyna...

You can click “Install Client Files” to install dll’s on the client PC.

If the user running the Service Tier Service (“Log On As”) has rights to write to the add-in folder (“C:\Program Files\Microsoft Dynamics NAV\110\Service\Add-ins”) you can install the dll by clicking “Install Server Files”. If this fails copy the [files manually](#).

Name	Description	Status	Startup Type	Log On As
Microsoft Dynamics NAV Server [DynamicsNAV110]	Service handling requests to ...		Manual	Network Service

Manually copy dll files.

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 they are install in Control add-ins, this is done for you when you run the [setup wizard Downloads and installs Client 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.**

The **clients** are typically installed in the folder: C:\Program Files (x86)\Microsoft Dynamics NAV\110\RoleTailored Client\Add-ins

The **servers** are typically installed in the folder: C:\Program Files\Microsoft Dynamics NAV\110\Service\Add-ins

Help files (F1 Help)

Help files from NAV 2013 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 ..\DynamicsNAV110Help\help\en\ on the IIS server.

### 3. 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.

#### Document Output

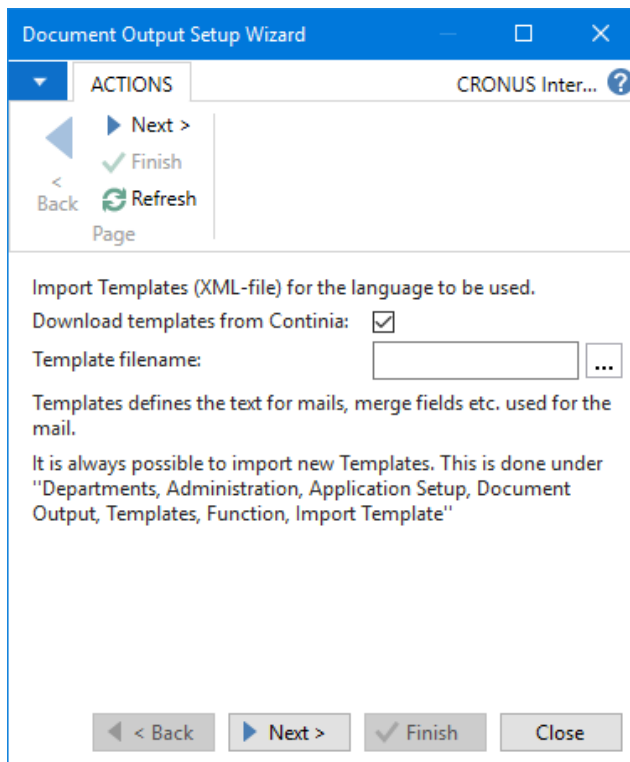
##### Lists

- Templates
- Template Groups
- E-Mail Recipient Templates
- Send Customer Statements
- Document Output Customer Setup List
- E-Mail Jobs
- Document Output Queue
- Log

##### Administration

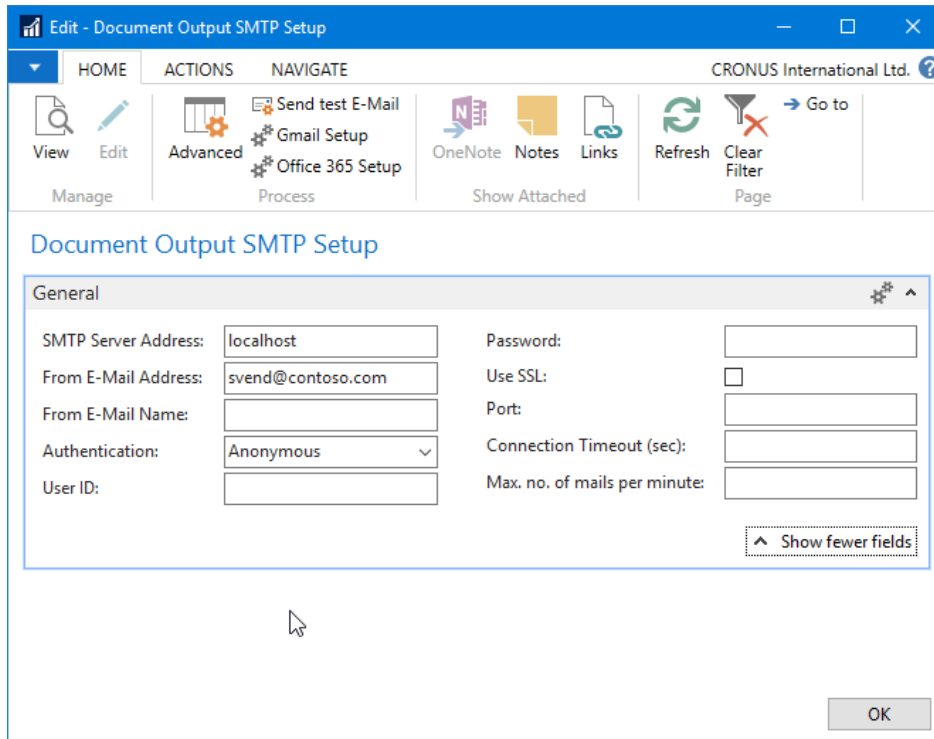
- Document Output Setup Wizard
- Document Output Setup
- SMTP Mail Setup
- Doc. Output Files (dll)
- Doc. Output Page Setup
- Create Customer E-Mail recipients
- Create Vendor E-Mail recipients
- About Continia Document Output

Choose a template file or leave the checkmark in “Download templates from Continia” to download/import, and then click next.

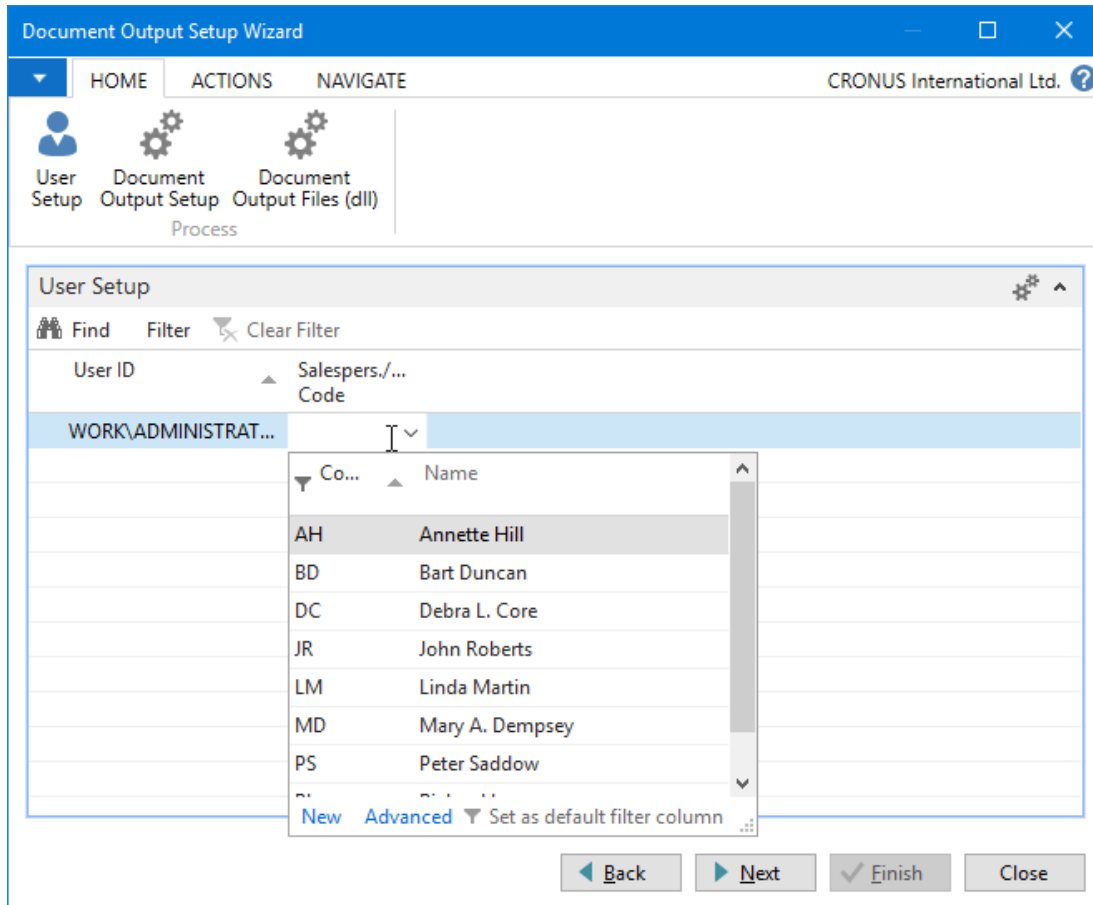




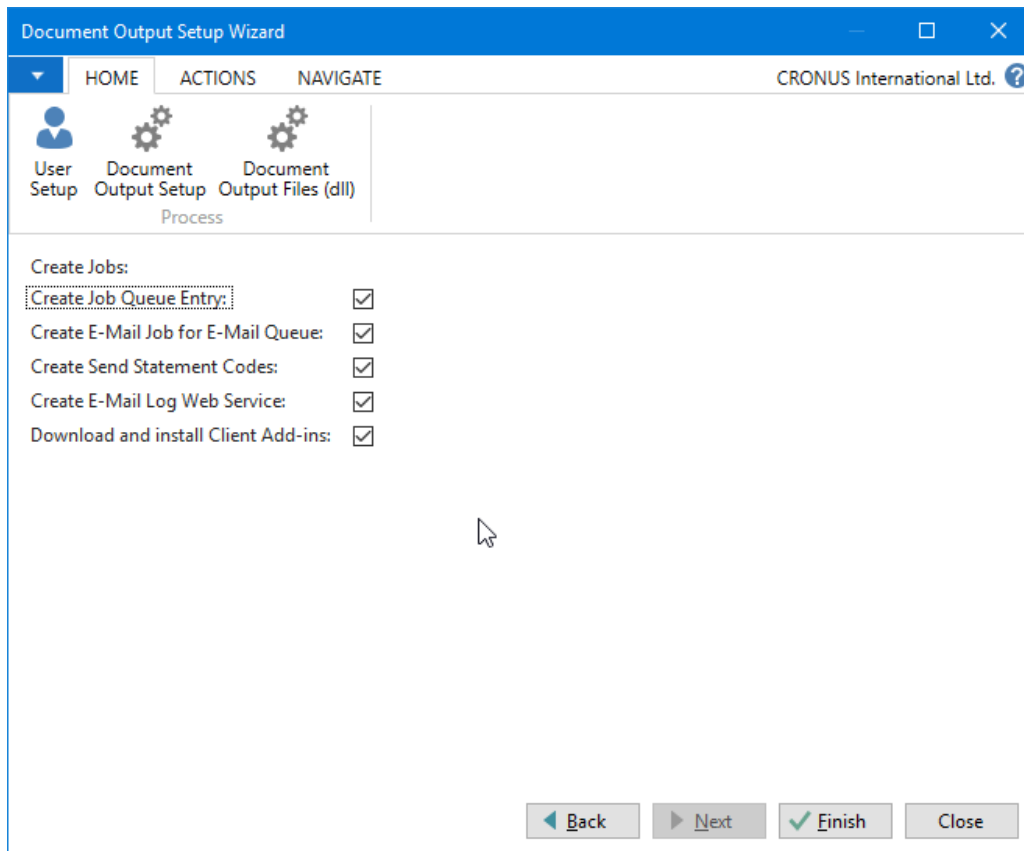
Enter your SMTP information. If you do not have this information, you can contact your internet/e-mail provider.



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)

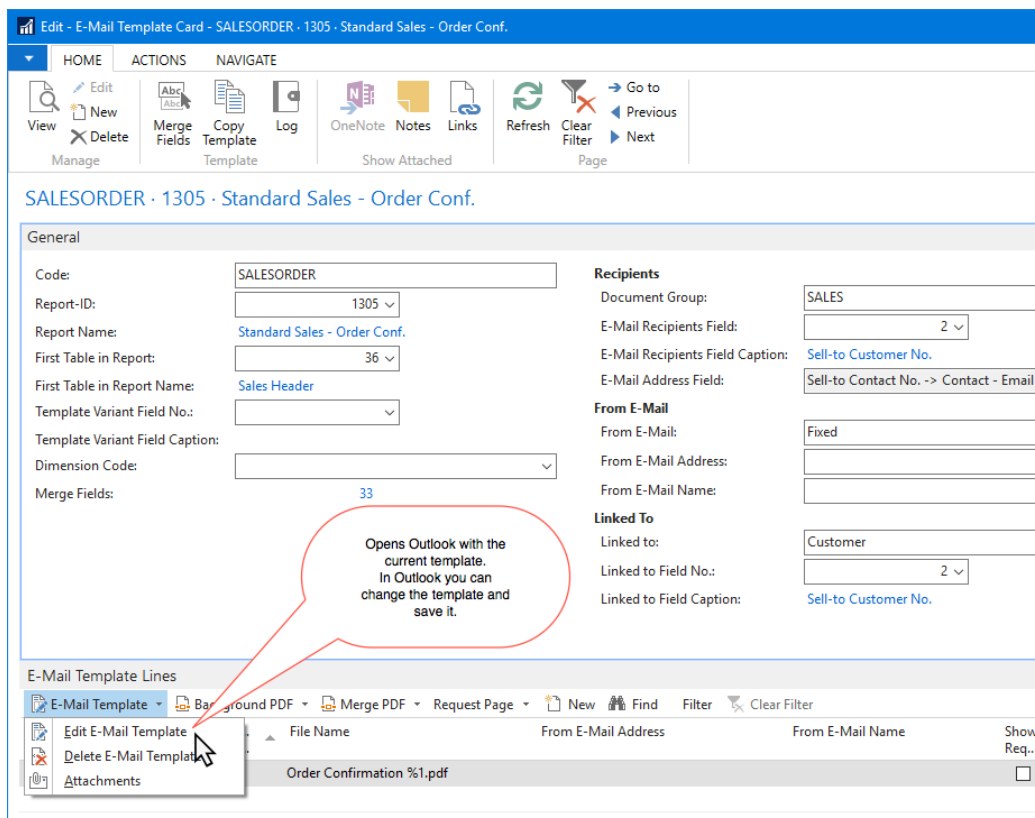
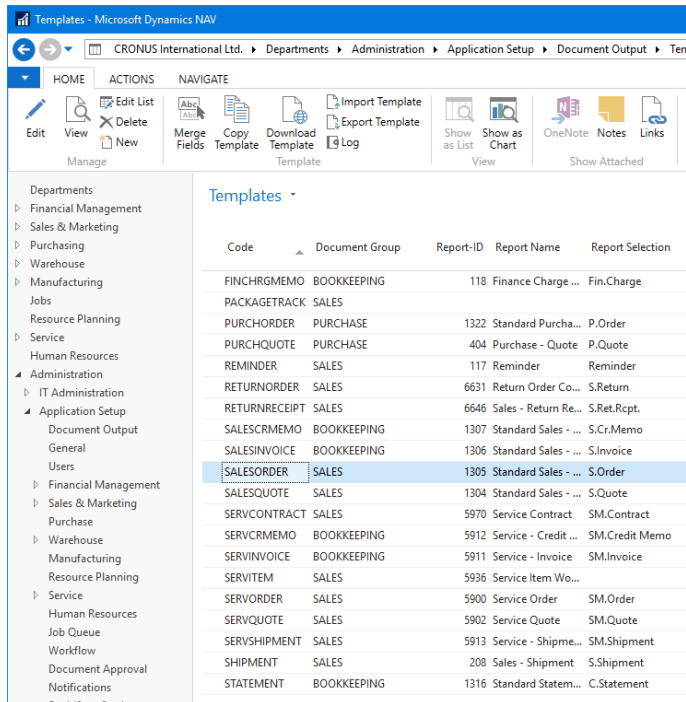
When you click Finish, all your changes are saved.

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()**.

### 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.



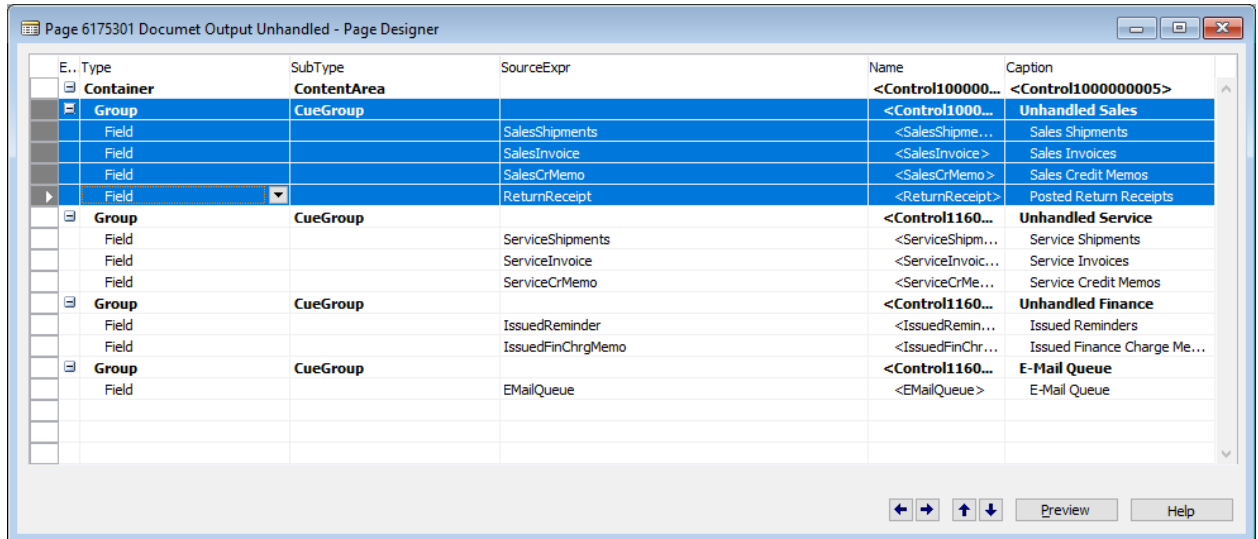
### Job Queue

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".

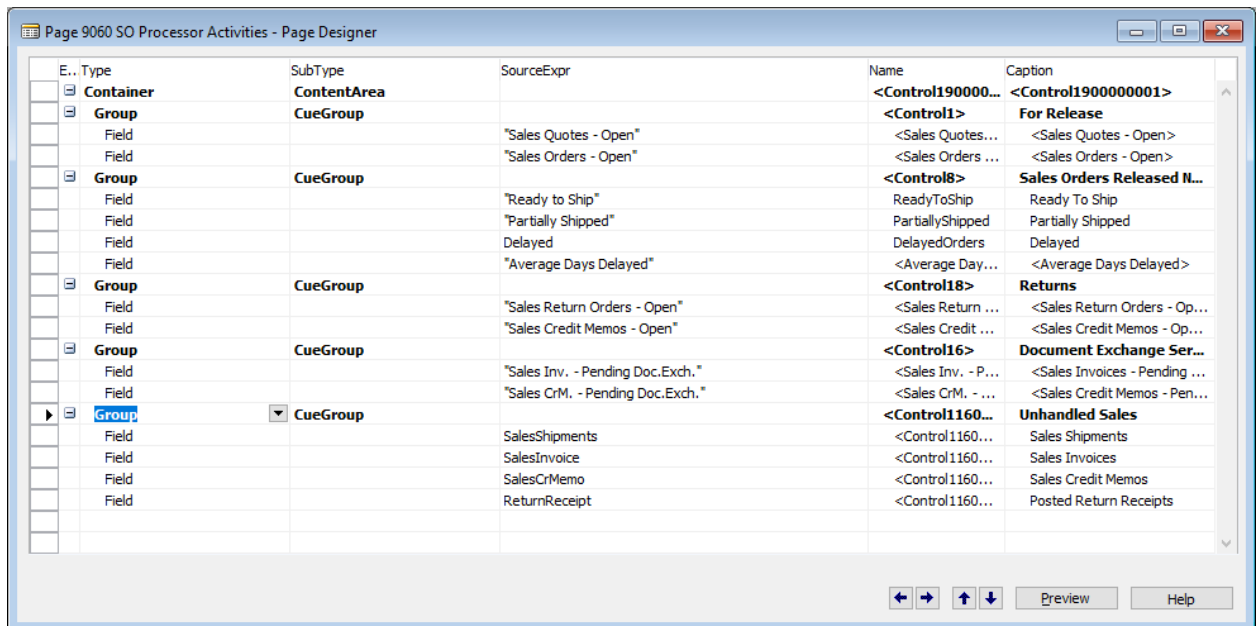
To setup Job Queue to create Automatic Statements. The Job Queue Entry should run Codeunit: 6175297 "Send Customer Statement Mgt.".

### 4. 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".



## 5. 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"`

