

Document Capture for Microsoft Dynamics NAV

Change Log - Version 6.00, 6.00.01, 6.00.02, 6.00.03, 6.00.04

CHANGES 6.00.04

New Features

Area	Description
Business Central	<ul style="list-style-type: none"> • The NAV login Type field on Continia Users was not updated to match the correct login type in Business Central after migration.
Continia Web Approval Portal	<ul style="list-style-type: none"> • The Continia Web Approval Portal has been updated to version 1.14.1.0.
Document Analysis and Recognition	<ul style="list-style-type: none"> • We have added support for capturing the full content of QR barcodes, which can be longer than the normal limit of 250 characters. The value is available for custom processing codeunits using the GetFullText on the "CDC Document Value" table. You must update the on-premises Document Capture service to utilize the new functionality.
Events	<ul style="list-style-type: none"> • The following events are added to the solution: <ul style="list-style-type: none"> ○ Table 6085580 CDC Template Field <ul style="list-style-type: none"> ▪ OnBeforeClone ○ Table 6085767 CDC Purchase Header Info. <ul style="list-style-type: none"> ▪ OnBeforeUpdateApprvlFlowCode ○ Codeunit 6085702 CDC Purch. Doc. - Identificat. <ul style="list-style-type: none"> ▪ OnAfterFindVendorBeforeModify ○ Codeunit 6085706 - CDC Purch. - Register <ul style="list-style-type: none"> ▪ OnAfterCreateWithoutMatchLineTrans ▪ OnAfterCreatePurchLineLineTrans ○ Codeunit 6085716 CDC Purch./Sales - Line Capt. <ul style="list-style-type: none"> ▪ OnBeforeCaptureTablePageFind ▪ OnAfterCaptureTableCell

Events - continued	<ul style="list-style-type: none"> ○ Codeunit 6085722 CDC Approval Management <ul style="list-style-type: none"> ▪ OnAfterCreateFlowApprovalEntriesMakeApprovalEntry ▪ OnBeforeCreatePurchApprovalRequest ▪ OnBeforeOnAfterApprovalRequest ▪ OnBeforeGetDelegateToAndMethod ▪ OnBeforeAddApproverAfter ▪ OnBeforeForceApproval ▪ OnBeforeBuildApprvlEntryFindSharedApprvlEntry ▪ OnBeforeUpdateApprvlEntryByApproverFindApprvlEntry ▪ OnBeforeUpdateApprovalEntry ▪ OnBeforeUpdateApprvlEntryIfCanAppEntry ▪ OnBeforePurchDocSubmittingForApproval ▪ OnBeforeCheckPurchApprovalRequest ▪ OnBeforeAutoApproveOrdersNotFullyApproved ▪ OnBeforeCheckCanChangeImportedAmount ○ Codeunit 6085762 CDC Purch.-Get Order <ul style="list-style-type: none"> ▪ OnAfterInsertInvLineFromOrderLineValidateQuantity ○ Codeunit 6086001 CDC Approval Functions (WS) <ul style="list-style-type: none"> ▪ OnBeforeCopyDocumentLine ▪ OnBeforeReject ▪ OnBeforeForward ○ Page 6085593 CDC Doc. Capture Client Addin <ul style="list-style-type: none"> ▪ OnAfterLineUpdateFieldValue ○ Page 6085725 CDC Purchase Invoices <ul style="list-style-type: none"> ▪ OnAfterGetCurrRecordSetStyleCode ○ Page 6085726 CDC Purchase Credit Memos <ul style="list-style-type: none"> ▪ OnAfterGetCurrRecordSetStyleCode <p>All events in Document Capture 6.00 are documented in the following article: https://continia.zendesk.com/hc/en-us/articles/360011491120-Document-Capture-Event-Publishers</p>
Installation and Setup	<ul style="list-style-type: none"> • We have changed the folder structure in the Product Package.

Technology	<ul style="list-style-type: none">• With DC6.00.04, we have released objects for Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) on-premises CU10.• With Document Capture 6.00 service pack 4 (SP4), we have released a tool for migrating Microsoft Dynamics 365 Business Central 2020 release wave 1 (BC16) on-premises (extensions) to BC16 in Microsoft Business Central cloud using the Cloud Migration from Microsoft. You can read more about the tool here: https://continia.zendesk.com/hc/en-us/articles/360014053519• We have updated the version for Chilkat.net in the on-prem Service, which should add support for newer security standards when authenticating against IMAP servers.• We are now using the Application property in app.json to support partners using a customized base app.
XML Import	<ul style="list-style-type: none">• We have added support for the Spanish XML format Facturae.• We have added the possibility to split any XML document containing multiple invoices, as this is required by the Spanish XML format. To split an XML document, you fill in the field "Split at XML Path" on the template.

Bug Fixes

Area	Description
Business Central	<ul style="list-style-type: none"> When using an older version of the Document Capture OCR Service, the PNG files of a document was not created. Therefore, when the document was split, merged, or move to another company, a corrupted/empty PNG file was created. When viewing the document using the Web Client, a blank document was shown.
Documents and Templates	<ul style="list-style-type: none"> When activating the function "Add template fields," the template fields shown in the list included line fields, even though the template was set to recognize header fields only (not line fields). When the "Status Code" field in table CDC Document is changed, an overflow can be shown, with the next error: <ul style="list-style-type: none"> <i>The length of the string is <String length>, but it must be less than or equal to 80 characters. Value: Status Code changed from <Old Status Code> to <New Status Code> by <User Id>.</i> When the recognized lines of a document were missing translations, the Document was marked as OK (Valid) even though it had error comments. In Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) and new versions, when exporting templates using the Document Capture Setup Wizard, the following error occurred if the template belonged to a Vendor or Customer with a name longer than 50 characters: <ul style="list-style-type: none"> <i>The length of the string is <length string>, but it must be less than or equal to 50 characters. Value: <Vendor/Customer name></i> The PurchHeader variable sent to the Event Publisher OnAfterTransferPurchHeader was an older version of the Purchase Header, thus not containing values from the Template fields set in the function TransferTableFields of Codeunit 6085576 CDC Capture Management. When having two documents (D000001 and D000002) that both had an attached file with the same filename, the wrong file was opened in the following situation: <ol style="list-style-type: none"> The attached file from document D000001 was opened after being attached The attached file from document D000002 was corrupted or had been deleted directly from the storage and still shown in NAV <p>When trying to open the attached file for document D000002, the attached file from document D000001 was opened instead.</p> The maximum number of templates for each vendor was 100. Now, this is extended to 500. When a user tried to create template number 101 for the same vendor, the following error occurred: <ul style="list-style-type: none"> <i>Index out of bounds.</i> In the Document page in the Comment area, the following incomplete error was shown (the field the error related to was missing): <ul style="list-style-type: none"> <i>You must specify .</i> When registering sales documents where the salesperson code was longer than 10 characters, the following error was shown: <ul style="list-style-type: none"> <i>The length of the string is <string length>, but it must be less than or equal to 10 characters. Value: <string></i>

<p>Documents and Templates - continued</p>	<ul style="list-style-type: none"> When using the UIC (Unidentified Company) functionality, the following error occurred: <ul style="list-style-type: none"> <i>The following fields must have the same type:</i> <ul style="list-style-type: none"> <i>Field: Move to Company <-- XML Identification Points</i> <i>Table: Document (Unidentified Company) <-- Document</i> <i>Type: Text <-- Integer</i> For documents in the Sales Category when the External Document No. was duplicated, the error comment was not clear. The new error comment explains the issue better and points to the duplicated invoice/credit memo. Old error comment: <ul style="list-style-type: none"> <i>Invoice <Invoice No.> already exists.</i> <p>The new error comment refers to the existing document (invoice, credit memo, order, posted document, etc.) already posted using the same Document No.</p> We have temporarily disabled the option to use colors when running Document Capture in Business Central Cloud due to performance issues. The performance issues are currently under investigation with Microsoft. In Classic versions of NAV, when having only one line translation for the No. or Description field, the lines were always translated to the same translation.
<p>Installation and Setup</p>	<ul style="list-style-type: none"> In the Document Capture Setup Wizard, the field "Document File Path" is now shown when "Use Cloud OCR" is unchecked. Before this change, the file path was only shown if "File System" was selected as the "Document Storage type" <p>Now the file path is only hidden if both "Database" is selected as storage type, and "Use Cloud OCR" is checked.</p>
<p>Matching</p>	<ul style="list-style-type: none"> In the web client and when the error comment "You must specify G/L Account No.." was shown on a document before lines where matched, the error was still visible in the comment section when returning to the document after matching lines. Now the web page is updated correctly after matching lines. When doing a partial match between a credit memo and a return shipment with item tracking, the full tracking quantity was transferred to the credit memo. This caused incorrect quantity on the resulting item ledger entries.
<p>Purchase Approval</p>	<ul style="list-style-type: none"> If EM is enabled (but not DC), and when the user tries to create a new Approval Sharing, the following error occurred: <p>This function requires the following module to be activated: Continia Document Capture, Advanced Capture.</p> When opening the Purchase Approval Entries page, the following error could occur: <ul style="list-style-type: none"> <i>The length of the string is <string length>, but it must be less than or equal to 50 characters. Value <Vendor Name></i>

Purchase Documents

- When using ""Allow Register w/o Amounts"" and ""Prices incl. VAT"" (Template settings), the allocation amount was wrong. When the purchase account was set up to calculate VAT, the VAT amount was posted twice.

To get the correct allocation posting when using ""Allow Register w/o Amounts"" and ""Prices incl. VAT"", it is essential to set up the amount fields on the template according to the guidelines described in the following article: <https://continia.zendesk.com/hc/en-us/articles/360010610879-How-to-upgrade-templates-with-Prices-Incl-VAT-when-upgrading-to-DC6-00>

- When changing imported amounts on documents with a negative VAT amount, the following error occurred:
 - *Amount Incl. VAT and Amount Excl. VAT must be different from zero and Amount Incl. VAT must be higher than Amount Excl. VAT.*

This has been corrected. When changing negative VAT amounts now, the user must confirm the change.

- Previously, the status for the field ""G/L Account No."" could be OK even when validating documents and getting the Error ""You must specify G/L Account No.."".

Now, when the error message is created on the document, the status for the field ""G/L Account No."" is changed to not OK.

- On the Approval Comments FactBox (page 6085722), the Name column was never populated.
- When a Posted Purch. Invoice had incoming documents, the standard Incoming Document FactBox was not shown.
- The amount fields on the ""Change Imported Amounts"" page were formatted as LCY. They are now formatted as FCY when required.

The LCY formatting caused an error for users having fewer decimals on LCY than compared to FCY.

In this case, the following error occurred:

- *Your entry of <amount with wrong decimals> is not an acceptable value for ""New Amount Excl. VAT."" The field can have a maximum of <LCY rounding precision> decimals.*

Technology	<ul style="list-style-type: none"> • In Business Central Cloud, when splitting PDF documents, the PDF documents were split wrongly. <ul style="list-style-type: none"> ◦ e.g., if a 10 page PDF document was split into a document containing the first page and a document containing the remaining 9 pages, the results of splitting were a blank PDF document and another PDF document with all the 10 pages. ◦ e.g., if a 10 page PDF document was split into a document containing the first two pages and a document containing the remaining 8 pages, the results of splitting were a PDF document containing the first page and another PDF document with the remaining 9 pages. <p>In the Continia Web Approval Portal, the (wrongly) split PDF document is used for displaying the document, whereas, in the Business Central web client, the tiff or png file is displayed. This meant, that when viewing a purchase document from the Continia Web Approval Portal that had been split wrongly, the first page on the document shown was from the other split document, and it thereby looked like the Continia Web Approval Portal displayed the wrong document.</p> <p>When viewing the same purchase document in the Business Central web client, the right image was shown.</p> <p>We are working on releasing a tool that can be used to correct wrongly split PDF files.</p> <ul style="list-style-type: none"> • The Version No. in Continia Module Setup is now showing the same format (x.xx.x.x) as in AppSource.
Translations	<ul style="list-style-type: none"> • Corrected Spanish caption on the Document Categories list page.
Upgrade	<ul style="list-style-type: none"> • Minor changes to the upgrade documentation. <ol style="list-style-type: none"> 1) Emphasizing that the upgrade must be performed using a developer license. 2) When installing add-ins (both client-and server-side), we use the standard installation path. E.g., "C:\Program Files (x86)\Microsoft Dynamics 365 Business Central\150\RoleTailored Client\Add-ins". If the end-user employs an alternative path (e.g. "F:\RTC\150\Add-ins"), it is a manual task to copy the add-ins between the two locations. 3) Highlighting that deletion of the upgrade objects also deletes the "Prices Incl. VAT"-conversion tool. • The CSC BASIC permission set was not added when upgrading to DC6.00. • After upgrading Document Capture to version 6.00, Document Capture appeared as not activated until the company was reopened even though it was activated. <p>This resulted in activation issues if Document Capture was manually reactivated after the upgrade.</p> <ul style="list-style-type: none"> • Corrected an issue with the upgrade were client credentials in the "Continia Company Setup" table was not present in the "Continia Client ID" table.

<p>Users and Permissions</p>	<ul style="list-style-type: none"> • Web approvers running on a Team Member license experienced the following error: <ul style="list-style-type: none"> – <i>You do not have the following permissions on TableData Record Link: Insert</i> <p>The Team Member permission set includes Read, but not Insert on the Record Link Table. The missing permission in the CDC-ALL permission set is now added.</p> <p>In BC15 and newer versions, both on-premises and cloud, the permissions are auto-updated when re-installing (updating) the extension/app.</p> <p>For other BC/NAV versions, you must run codeunit 6086005 CDC Create Doc. Capture Roles to update the CDC-ALL role.</p> • When using Document Capture without Expense Management, the following error occurred when opening the Continia User Setup page: <ul style="list-style-type: none"> – <i>You do not have the following permissions on Table CEM Expense Management Setup: Execute</i> <i>Page Continia User Setup must close.</i> • We have corrected a security filter issue. When the user opened a Document from the Approval Entries page with security filters applied, the following error occurred: <ul style="list-style-type: none"> – <i>A security filter has been applied to table. You cannot access records that are outside of this filter.</i>
<p>XML Import</p>	<ul style="list-style-type: none"> • When adding a Charge or a Discount using the Add Template Fields function for an XML file that did not have an identification for the Charges or Discounts (XMLNode: Reason, ReasonCode, Comment), the following error occurred: <ul style="list-style-type: none"> – <i>A call to System.Xml.XmlDocument.SelectNodes failed with this message: '/Invoice/AllowanceCharge[ChargeIndicator='true']/Amount' has an invalid token.</i> <p>When running Document Capture using Business Central on-premises or the cloud version, the client crashed instead of throwing the above error.</p> <p>When using the Add Template Fields function on an XML document where the master template did not have the Discounts Main Location (Code: DISCOUNTS) or Charges Main Location (Code: CHARGES), the following error occurred: <ul style="list-style-type: none"> – <i>The Template does not exist. Identification fields and values: No. = "</i> </p> • For Business Central versions, when using an OR operator (" ") in the XML Path of a Line Template Field, the second part of the XML Path was not found in the XML Document. • When pressing the Download button in the Continia Web Approval Portal for XML documents, you will now download the XML Styled-view (HTML) instead of the raw XML file.

CHANGES 6.00.03

New Features

Area	Description
Technology	<ul style="list-style-type: none"> • With DC6.00.03, we have released Document Capture for Microsoft Dynamics 365 Business Central 2020 release wave 1 (BC16). • The French language (FRA) has been added to the Swiss localization. Note when running the application in FRS, NAV defaults to FRA for missing FRS captions. • The following events are added to the solution: <ul style="list-style-type: none"> ○ Codeunit 6085602 - CDC Document Attachment Mgt. <ul style="list-style-type: none"> ▪ OnBeforeCreateTempDocumentList ▪ OnAfterCreateTempDocumentList ▪ OnBeforeCreateTempDocListFromNavigate ▪ OnAfterCreateTempDocListFromNavigate ▪ OnBeforeEditDocumentFile ▪ OnAfterEditDocumentFile ▪ OnBeforeDeleteDocumentFile ▪ OnAfterDeleteDocumentFile ▪ OnBeforeModifyDocumentFile ▪ OnAfterModifyDocumentFile ▪ OnBeforeShowDocumentCard ▪ OnAfterShowDocumentCard ▪ OnBeforeCreateDocument ▪ OnAfterCreateDocument ○ Codeunit 6085703 - CDC Purch. - Full Capture <ul style="list-style-type: none"> ▪ OnAfterFullCapture ▪ OnBeforeAdjustMissingQty ▪ OnBeforeCalculateDueDate ○ Codeunit 6085705 - CDC Purch. - Validation <ul style="list-style-type: none"> ▪ OnBeforeGetDocumentDate ○ Codeunit 6085706 - CDC Purch. - Register <ul style="list-style-type: none"> ▪ OnAfterRegister ▪ OnAfterPerformStep1 ○ Codeunit 6085709 - CDC Purch. Doc. - Management <ul style="list-style-type: none"> ▪ OnBeforeGetLineAmount ○ Codeunit 6085730 - CDC Purch. - Val. Purch. Ord. <ul style="list-style-type: none"> ▪ OnAfterValidatePurchaseOrder

Area	Description
Technology - continued	All events in Document Capture 6.00 are documented in the following article: https://continia.zendesk.com/hc/en-us/articles/360011491120-Document-Capture-Event-Publishers

Bug Fixes

Area	Description
Technology	<ul style="list-style-type: none"> Having imported DC objects in a database but not having DC in the customer license could result in an error when deleting/posting Gen. Journal Lines. When a PDF document was split, the PDF file for the first document was created wrong. This was caused by the fact that the BLOB field that holds the PDF file was not cleared before writing the new PDF file to the BLOB field. In the Classic versions of NAV, a BLOB field must be cleared before writing larger data. Otherwise, it will keep the last bits of the previous data. This only applied for the Classic versions of NAV and only when the Storage Type was Database in Document Capture Setup. This caused an issue when trying to merge the split documents, where the merged PDF did not contain the pages of the PDF that was created wrong under splitting. <p>In some cases, when opening the wrongly created PDF file, you got an empty PDF, or the following error occurred:</p> <ul style="list-style-type: none"> <i>– There was an error opening this document. There was a problem reading this document.</i>
General	<ul style="list-style-type: none"> Line translation did not correctly remove old translations when creating new ones. If a number was translated to a G/L Account, and the translation was changed (indirectly from a document line) to an item, the G/L translation was not deleted, and would still overrule the new (cross-reference) translation. Now, when a non-item translation is changed to an item, the translation record is removed, and a cross-reference record is created. If an item translation is changed to another item, the existing translation line will be updated. If no translation line exists, an equivalent record is created/updated in the cross reference table. It was not possible to create a new Document Category from the Document Category Card because the General tab wasn't editable. Under certain circumstances, the search result could contain duplicate references to the same document. In the Document Journal, when the user opened the Document Card from the Document No. column, the card was opened in non-editable mode. Now the Document Card is opens in editable mode. When using line recognition and a line raised one or more errors/comments, deleting the line now also removes the related errors/comments. When a user imported configurations using the Document Capture Setup Wizard, and when new templates were imported, the template number series was not updated. This resulted in the following error when templates were created manually: <ul style="list-style-type: none"> <i>– The record in table Template already exists. Identification fields and value: No.='<Template No.>'</i> Fixed wrong layout in form Continia User Setup (classic version). When capturing a value that had more than 200 characters, the following error was thrown: <ul style="list-style-type: none"> <i>– The length of the string is <string length>, but it must be less than or equal to 200 characters. Value: <Captured Value></i>
Layout	<ul style="list-style-type: none"> Document category headings are now shown in the "Document Files Factbox" on open purchase documents as on posted purchase documents. A German caption has been corrected in the Approval Setup Wizard page.

Area	Description
Layout - continued	<ul style="list-style-type: none"> In SE14.00.00, some Swedish captions were missing from page 6085707 CDC Purch. Cr. Memo With Image.
Matching	<ul style="list-style-type: none"> After auto-match, the match message was not aggregated in numerical order, which resulted in a message such as: <ul style="list-style-type: none"> - <i>Completely Match (Purchase Receipt 107058, 107056, 107057)</i> The code has been restructured, so the above match now results in the following message: <ul style="list-style-type: none"> - <i>Completely Match (Purchase Receipt 107056, 107057, 107058)</i>
Approval	<ul style="list-style-type: none"> When rejecting a purchase invoice from BC/NAV, it is mandatory to enter a comment. The Swedish caption for the error message shown when no comment was entered has been corrected. Old caption: "Du måste ange orsakskod och kommentar när du avisar ett dokument." Updated Caption: "Du måste ange en kommentar när du avisar ett dokument." In certain NAV/BC versions (9.00.00, 10.00.00) on page 6085706 CDC Purch. Invoice With Image, the approval button opened the related DC-Document, whereas it should have opened a list of approval entries related to the Purchase Invoice. Wrong Code: Approvals OnAction: PurchDocMgt.ShowDocumentFromPurchDoc(Rec); Correct Code: Approvals OnAction: PurchDocMgt.DrillDownApprovalEntries(Rec);
Continia Web Approval Portal	<ul style="list-style-type: none"> The Continia Web Approval Portal has been updated to version 1.13.7.0. When users were exported, and when one company was not activated, the following error was shown: <ul style="list-style-type: none"> - <i>There is something wrong with the Continia setup.</i> <i>Please reactivate your Continia product before you can continue.</i> We now inform the user about what company the error is in. In the Continia Web Portal List page, the "Web Site Url" field is now cleared and not editable if the Continia Online Web Approval Portal is used.
Web Client	<ul style="list-style-type: none"> The shortcuts Ctrl+S and Ctrl+T previously used in DC are reserved for other uses in most browsers in the Modern Client (web client for BC15.00.00 and forward). These shortcuts have, therefore, been replaced by Shift+Ctrl+Alt+T and Shift+Ctrl+Alt+S in the following places: <p>Ctrl+S -> Shift+Ctrl+Alt+S:</p> <ul style="list-style-type: none"> - Page 6085607 CDC Document Split and Merge (Split action) - Page 6085702 CDC Purch. Invoice Match (Show Template) - Page 6085704 CDC Purch. Credit Memo Match (Send Approval Request) - Page 6085725 CDC Purchase Invoices (Send Approval Request) - Page 6085726 CDC Purchase Credit Memos (Send Approval Request) <p>Ctrl+T -> Shift+Ctrl+Alt+T</p> <ul style="list-style-type: none"> - Page 6085584 CDC Template Card (Translations - Accounts for Amounts) - Page 6085704 CDC Purch. Credit Memo Match (Translations)

Area	Description
XML Import	<ul style="list-style-type: none"><li data-bbox="597 289 1427 346">▪ XML document lines were created even though no data was recognized in the required Template Fields.<li data-bbox="597 359 1427 472">▪ Payment ID (FIK) was not transferred to the Purchase Header when registering an XML Document. This was caused by the fact the code was expecting a "+" in front of the Payment ID. For XML documents, we do not have the "+" in front. The system now adds the "+" if it is missing.
Upgrade	<ul style="list-style-type: none"><li data-bbox="597 533 1427 558">▪ We have added a new section for XML Import in the Upgrade Guide Documentation.

CHANGES 6.00.02 Hotfix 3

Bug Fixes

Document Capture 6.00 service pack 2 hotfix 3 has only been released in Microsoft Business Central cloud. Document Capture 6.00 service pack 2 hotfix 3 will be included in service pack 3 for both cloud and on-premises.

Area	Description
General	<ul style="list-style-type: none">When creating a new template field, the Code and Type fields were not visible on the Template Field Card.
Approval	<ul style="list-style-type: none">In hotfix 1, we fixed an issue related to the Salesperson/Purchaser field in the Continia User Setup page. In hotfix 3, we have corrected the same problem in the User Setup by Company page.

CHANGES 6.00.02 Hotfix 2

Document Capture 6.00 service pack 2 hotfix 2 will not be released.

CHANGES 6.00.02 Hotfix 1

Bug Fixes

Document Capture 6.00 service pack 2 hotfix 1 has only been released in Microsoft Business Central cloud. Document Capture 6.00 service pack 2 hotfix 1 will be included in service pack 3 for both cloud and on-premises.

Area	Description
Approval	<ul style="list-style-type: none">When populating Salesperson/Purchaser in the Continia User Setup page and when the code field of the Salesperson/Purchaser was longer than 10 characters, the following error occurred:<ul style="list-style-type: none"><i>The length of the string is <string length>, but it must be less than or equal to 10 characters. Value: <Salesperson/Purchaser Code></i>Page Edit - Continia User Setup must close. After the error was shown, the page closed. When trying to open the page again, the above error was shown again.If Expense Management was installed, the standard approval buttons were disabled on the Purch. Invoice Card and Purch. Credit Memo pages if Document Capture was not used.

CHANGES 6.00.02

New Features

Area	Description
Technology	<ul style="list-style-type: none">• The following events are added to the solution:<ul style="list-style-type: none">○ Codeunit 6085575 - CDC Capture Engine<ul style="list-style-type: none">▪ OnBeforeRunLineCaptureCodeunit○ Codeunit 6085706 - CDC Purch. – Register<ul style="list-style-type: none">▪ OnBeforePurchHeaderInsert○ Codeunit 6085715 - CDC Purch. Doc- Pmt.-Id(DK PM)<ul style="list-style-type: none">▪ OnBeforeRun <p>All events in Document Capture 6.00 are documented in the following article: https://continia.zendesk.com/hc/en-us/articles/360011491120-Document-Capture-Event-Publishers</p>
Upgrade	<ul style="list-style-type: none">▪ With Document Capture 6.00 service pack 2 (SP2), we have released a tool for upgrading Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) fob based with DC6.00 to Microsoft Dynamics 365 Business Central 2019 release wave 2 (BC15) on-premises (extensions) You can read more about the tool here: https://continia.zendesk.com/hc/da/articles/360011969399-How-to-upgrade-Document-Capture-and-Expense-Management-to-Micro

Bug Fixes

Area	Description
Technology	<ul style="list-style-type: none"> • When we released Document Capture 5.50, we wrote: <ul style="list-style-type: none"> - Office 365 logins are now supported in the Continia Web Approval Portal. Both for the Continia cloud and on-premises versions. Unfortunately, we forgot to specify that Office 365 logins only are supported in the Continia Web Approval Portal when using NAV 2018 or a newer version of NAV/BC. The reason for this is that Office 365 logins are implemented differently in earlier versions of NAV and that it will require a significant effort to support Office 365 logins in NAV 2017 and earlier versions of NAV. • As Document Capture 6.00 does not integrate with Continia e-Documents import, we have removed the CEDO tag from the Version List in the following objects: <ul style="list-style-type: none"> ○ Table 6085636 CDC Show Doc. & Files Arg Tmp ○ Codeunit 6085633 CDC Doc. Importer Dialog Mgt. • We have also removed e-Documents related code from the following objects <ul style="list-style-type: none"> ○ Codeunit 6085583 CDC Navigate Document Capture ○ Codeunit 6085709 CDC Purch. Doc. – Management ○ Codeunit 6085722 CDC Approval Management ○ Codeunit 6085800 CDC CEDO Proxy (codeunit deleted) ○ Page 6085596 CDC Client Addin - Purch. ○ Page 6086002 CDC Purch. Doc. (WS) ○ Page 6086019 CDC Purch. Posted Inv. (WS) ○ Page 6086021 CDC Purch. Posted Cr.Memo (WS) ○ Page 6086048 CDC Client Addin - Appr. Entry
General	<ul style="list-style-type: none"> • The configuration files have been updated with XML setup and field captions. • For NAV 2015 and newer versions, we have added a shortcut on the Document Capture Activities page on the DC Rolecenter to the "Cue Setup". Note in NAV 2018 RTM to CU6, a bug exists in standard NAV for the Cue Setup functionality. • We have added the .xml-file extension to the Save-As file dialogue when exporting DC configuration using the Document Capture Setup Wizard. • Disabling auto-split could result in the following error, depending on the values of some of the sub-options: <ul style="list-style-type: none"> - <i>Split on Source ID must be populated when Source Field No. has a value and Split on Separator Fields is also populated.</i> Now all the sub-options are deactivated, when auto-split is deactivated. • On the Template Field page, the formula field was always in uppercase. This is now fixed, and when the user populates a lowercase fixed value, it will be saved as lowercase. Note, existing data must be changed manually. • The document import failed if the length of the filename was above 100 characters. The functionality has now been updated to handled filenames with lengths up to 199 characters. Note, when storing the filename in the CDC Document table, the filename is now stored in two fields. The first 100 characters of the filename are stored in the "Filename" field, and the rest (up to 99) are stored in the "Filename 2" field. The helper functions GetFilename, SplitFilename, and SetFilename have been added to the CDC Document table.

Area	Description
General - continued	<ul style="list-style-type: none"> • When opening an empty Purchase Invoice List in NAV 2013, the following error occurred: <ul style="list-style-type: none"> - <i>You must provide a filter on Find Document Using. Page Documents must close.</i> • In the cases where the captured Invoice Date could not be directly evaluated to a date using the EVALUATE function, the Due Date was not calculated based on the Invoice Date. • We have corrected an issue in Codeunits 6085767 and 6085768 (PM integration CUs used in Norway and Sweden). The field name for the document reference "Created Doc. No." was incorrect (old name for the field was used). • When opening the Template Card or Template List pages, the following errors were shown: <ul style="list-style-type: none"> - <i>The identifier 'IsSourceNoNameVisible' could not be found</i> - <i>The identifier 'StrongColumn' could not be found</i> • When recognizing lines and when the value captured in the Number or Description field contained one of the following characters (<>=, the following error occurred: <ul style="list-style-type: none"> - <i>The filter "xx(xx" is not valid for the Translate From field on the Data Translation table. Did not expect '('.</i> • In some situations, the following overflow error occurred when a user performed lookup or drilldown in the "Docs. Pending OCR" field. This was caused by the download link being held in the "File Path" field on the "CDC Temp. Display Document" table. Now, the field is no longer used for this purpose when using Cloud OCR. <ul style="list-style-type: none"> - <i>The length of the string is <string length>, but it must be less than or equal to 250 characters. Value: <string></i> • When a document was imported, Document Capture chose the default template, even if there was a better template for this document. We now have the same template selection behavior when importing the document as when recognizing fields.
Layout	<ul style="list-style-type: none"> • Spelling mistakes have been corrected. • When exporting users, the messages displayed when the process finished has been updated as the previous message was incorrect when using both Document Capture and Expense Management. • The "Stop Lines Recognition" field was not visible on the "Template Card" page. • Tooltips have been added for the "OCR Language" field on the "Document Category Card" page. • We have updated the Norwegian translation for tooltip on the "Translate to Type" field on page 6085597 "CDC Document Lines ListPart". • We have updated the German caption for the Document Capture Setup Wizard page and the link on the Menu Suite. • We have updated Spanish tooltips and captions on page 6085600 CDC Document List With Image. • The obsolete page Activation Wizard has been removed from the Menu Suite. • The Continia User Setup field "Can Edit Posting Lines" and "Document Search" are now always shown when approval is in use.

Matching	<ul style="list-style-type: none"> Auto-match for lines requiring LOT/SN tracking is no longer carried out. Previously, auto-match would match lines that required item tracking, but the following error occurred when attempting to register the document: <ul style="list-style-type: none"> <i>Match to Order is not supported for items with purchase inbound tracking enabled or for order lines where tracking lines exist.</i> <p>The lines are now skipped in the matching process, and the manual matching process has also been changed to give errors when attempting to match lines requiring LOT/SN tracking.</p> Auto-match against an order (using Register option = "Match and create invoice" or Register option = Create invoice) could lead to erroneous matching if several DC document lines were matched against the same order line.
Continia Web Approval Portal	<ul style="list-style-type: none"> The Continia Web Approval Portal has been updated to version 1.13.3.0. When we released Document Capture 5.50, we wrote: <ul style="list-style-type: none"> Office 365 logins are now supported in the Continia Web Approval Portal. Both for the Continia cloud and on-premises versions. <p>Unfortunately, we forgot to specify that Office 365 logins only are supported in the Continia Web Approval Portal when using NAV 2018 or a newer version of NAV/BC. The reason for this is that Office 365 logins are implemented differently in earlier versions of NAV and that it will require a significant effort to support Office 365 logins in NAV 2017 and earlier versions of NAV.</p> The issue below was corrected in DC6.00.01 but not mentioned in the Document Capture changelog. <p>In an installation without Expense Management, the following error occurred when exporting users:</p> <ul style="list-style-type: none"> <i>You do not have the following permissions on CodeUnit CEM Usage Subscribers: Execute.</i> When using Office 365 to log in, the Export Users function could fail with the following error: <ul style="list-style-type: none"> <i>A DotNet variable has not been instantiated. Attempting to call System.Xml.XmlNode.OwnerDocument - in CodeUnit CDC Continia XML Node: GetOwnerDocument.</i>
Web Client	<ul style="list-style-type: none"> When modifying a header field and subsequently modifying a line field on a DC Document using DC 6.00 SP1 in the Web Client, the following error occurred: <ul style="list-style-type: none"> <i>The changes to the Document record cannot be saved because some information on the page is not up-to-date. Close the page, reopen it, and try again. Identification fields and values: No.= <Document No.></i> In the Web Client, when viewing the purchase approval entries, the approval comments could not be seen at the bottom of the page. Only the header (caption=Approval Comments) of the section was visible. The following error occurred when using math operators for the formula of a Template Field in the Web Client: <ul style="list-style-type: none"> <i>The value <value entered> can't be evaluated into type Decimal.</i>
BC Cloud	<ul style="list-style-type: none"> If the user had created a blank record in the Document Capture Setup table before running the Setup Wizard, the setup from the configuration files was not loaded. The shortcut 'Toggle Match' for Order Lines on the Invoice Matching page is changed from F9 to Shift+F9 in BC15.

BC Cloud - continued	<ul style="list-style-type: none"> In BC 15, the table 'Batch Processing Parameter Map' has been replaced with 'Batch Processing Session Map'. Document Capture has been updated to support this.
Permissions	<ul style="list-style-type: none"> We have changed the object used for the Document Capture license permission check from Codeunit 6085575 to Table 6085573 to ensure the permission check returns the right value in an installation where only Expense Management is used. Limited users were getting the following error when attaching a document via the Drag and Drop functionality: <ul style="list-style-type: none"> <i>You do not have the following permissions on TableData Document Value: Delete</i> A permission error occurred when opening page 27 - "Vendor List" if Document Capture wasn't included in the license file.
XML Import	<ul style="list-style-type: none"> We have fixed an issue in the XML test files where the base64 value of the embedded file had unnecessary blank spaces. We have fixed some minor issues in the XML test files. When selecting the Show File action on the Purchase Invoice or Credit Memo card for an XML document, the Styled XML will be opened now instead of the raw XML file. The "XML Viewer", "XML Attachment", and "Open Styled XML" actions on the Document Journal page are now only enabled when the document in focus originates from an XML file. The Unit of Measure functionality has been rewritten and improved as described below: Previously the Unit of Measure field was identified during purchase line creation by setting "Transfer Value to" -> "Field in Purchase Line" to field 5407 (Unit of Measure Code). Transfer Value to fields are validated on the created purchase line after validation of the hardcoded fields (Type, No., Description, Variance, Quantity, Line Discount %, and Direct Unit Cost). When validating the Unit of Measure field after the hardcoded fields, the Direct Unit Cost field was wrongly updated based on standard costs set up in NAV/BC. To prevent this, we have now removed the value in "Transfer Value to" -> "Field in Purchase Line" for all XML Templates, and handling of the Unit of Measure field is now hardcoded to enable a validation sequence that doesn't change the Direct Unit Cost value. When implementing SP2, you must clear the value in "Transfer Value to" -> "Field in Purchase Line" (Destination Line Field No.) for the Unit of Measure field to prevent that validation of the Unit of Measure field changes the Direct Unit Cost on the created purchase lines. <p>When using Unit of Measure Translations, previously, the system displayed the translated value in the Unit of Measure field on the document line instead of the captured value. Now the captured value is displayed in the Unit of Measure field on the document line, and if a wrong value is captured, it can be changed directly on the document line. When registering the Document, the captured Unit of Measure value will be translated and used on the created purchase line.</p> <p>In SP2, we have developed two new codeunits we use when validating the Unit of Measure field and when using lookup on document lines. The Unit of Measure field on XML Templates included with SP2 has been updated to use these two codeunits as described below.</p> <p>"Codeunit ID: Is OK" has been set to 6085807 - "CDC Is Valid - UOM" "Codeunit ID: Lookup" has been set to 6085809 - "CDC Lookup - Item UOM" To use this new functionality, you must manually update the Unit of Measure field to use these codeunits.</p>

XML Import - continued

- The Master Template for the EHF XML format had the wrong Template Field Code for the Unit of Measure field. The Field Code was LINEUOM, but it should have been QTYUOM as on all the other XML templates. As described above, the processing of the Unit of Measure field (QTYUOM) is now hardcoded in the system. Therefore, you must rename all XML Template Fields with the Field Code LINEUOM. The template fields must be renamed from LINEUOM to QTYUOM. If no vendor-specific templates have been created from the EHF Master Template, alternatively, the EHF Master Template can be replaced with the new one from Continia Online or the product package.
 - The "XML Import Path" field in the "Document Capture Setup" page is now hidden when using Business Central Cloud.
 - When changing a complex XML Path (when the XML Path contained operators, e.g., SUM, COUNT, EXISTS, "[or]") of a Template Field by using Assist Edit (opening up the XML Viewer), the below error occurred when using the Web Client:
 - *The Template Field does not exist. Identification fields and values: Template No.=<Template number>,Type='Template type',Code='XMLPATH'*
-

CHANGES 6.00.01

New Features

In this Service Pack, we have added new functionality. This is an exception from our normal procedures when releasing service packs. We have done this to allow future easy migration from Continia e-Documents to Document Capture XML Import.

Area	Description
Technology	<ul style="list-style-type: none"> • With DC6.00.01, we have released objects for Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) on-premises CU7. • The following events are added to the solution: <ul style="list-style-type: none"> ○ Table 6085590 CDC Document <ul style="list-style-type: none"> ▪ OnBeforeRegisterHideErrors ○ Codeunit 6085705 CDC Purch. – Validation <ul style="list-style-type: none"> ▪ OnBeforeBuildTempLinesTable ▪ OnBeforeMatchValidation ○ Codeunit 6085706 CDC Purch. – Register <ul style="list-style-type: none"> ▪ OnBeforeGetOrderNoUpdateOrderWithMatch ▪ OnBeforeCreatePurchHeaderCopyHeaderDim ▪ OnAfterCreateWithoutMatchModifyPurchLine ▪ OnBeforeCreateWithMatchCreatePurchLine ▪ OnAfterModifyPurchLineCreatePurchLine ▪ OnAfterModifyPurchLineCreatePurchLineAmountDistribution ▪ OnAfterTransferPurchHeader ○ Codeunit 6085709 CDC Purch. Doc. – Management <ul style="list-style-type: none"> ▪ OnBeforeAutoMatchSetDocumentMatchStatus ▪ OnBeforeAutoMatchNoLinesTryMatchAmounts ▪ OnBeforeIsDocMatched ▪ OnBeforeGetDocMatchedAmount ○ Codeunit 6085722 CDC Approval Management <ul style="list-style-type: none"> ▪ OnAfterCreateFlowApprovalEntriesMakeApprovalEntry ○ Codeunit 6085579 CDC Doc. - Search Word Ident. <ul style="list-style-type: none"> ▪ OnBeforeOnRun

<p>General</p>	<ul style="list-style-type: none"> • We have improved and redesigned translations. Previously, there was one Translations button on the Document Journal and Document Card both opening up a dialog showing the following options: <ul style="list-style-type: none"> - Show Accounts for Amounts - Show Line Translations - Show Purchase/Salesperson Translations <p>We have now added individual actions for Accounts for Amounts and Purchase/Salesperson to the Document Journal and Document Card in a new Translations group. The Line Translations action has been renamed to No. and placed in a new Translations group in the lines section on the Document Card.</p> <p>We have added the following two new translation methods to the Translations group in the lines section on the Document Card: <ul style="list-style-type: none"> - Description - Unit of Measure. UoM translations can either be global, vendor-specific and/or item-specific. <p>The No. and new Description translations now support the wildcard character (*) to allow for more flexible and dynamics translations.</p> <p>We have also added a link "Cross References" to Item Cross References from the new Translations group in the lines section on the Document Card.</p> <p>On the Template Card, a similar changed has been implemented. All 6 translations methods have been added to a new Translations group in the ribbon.</p> <p>On the Match screen, a similar changed has been implemented. The Translations button has been removed from the ribbon in the header area and a new Translations group have been added to the Document lines section with the following translations methods: <ul style="list-style-type: none"> - No. - Description - Unit of Measure - Cross Reference </p></p> • The Header Amount Posting page used for setting up the Accounts for Amounts translations is now opening non-modal like the other translation pages.
<p>Layout</p>	<ul style="list-style-type: none"> • When adding or removing a line template field on the Document Lines subform, the system will automatically adjust the visibility of the columns, so that all the line template fields are visible.
<p>XML Import</p>	<ul style="list-style-type: none"> ▪ You can now select multiple template fields when using the Add Template Field button. ▪ We have added a new button "Open Styled XML" on Document List with Image and Document Card pages, that opens the HTML file in a browser using the related XML stylesheet. ▪ The "XML Master Template No." and "XML Ident. Template No." fields have been added to page 6085600 Document List With Image. The new fields are default hidden.

Bug Fixes

Area	Description
Technology	<ul style="list-style-type: none"> • In the changelog for DC6.00, we wrote: <ul style="list-style-type: none"> - With DC6.00, we have released objects for Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) CU4 on-premises. Unfortunately, the objects for Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) CU4 on-premises were not included in the product package zip files available for download from the download area on PartnerZone even though it was mentioned in the changelog. In DC6.00 SP1, we have included the objects for BC14 CU4. • We have changed IDs on controls for Document Capture customizations on page 140.
General	<ul style="list-style-type: none"> • The field "Identified By" on the "Document Journal" is now cleared when the Source-ID (Vendor/Customer) is changed. • The following error occurred when opening the Purchase Credit Memo page in some version of Dynamics NAV: <ul style="list-style-type: none"> - The filter "<><>" on the Source Subtype Filter field in the Document table has no possible values. Page Documents must close. • When using the "Next" or "Previous" buttons on the Template Card, the following error occurred: <ul style="list-style-type: none"> - The Template Field already exists. Identification fields and values: Template No.='<No.>',Type='Header',Code='#%&HEADERTYPE#%&'" • When registering a purchase document in a Danish database, the following error occurred: <ul style="list-style-type: none"> - Field Giro Acc. No. (13650) of table Purchase Header (38) is obsolete, reason: Moved to Payment and Reconciliation Formats (DK) extension to field name: GiroAccNo • When using lookup in the Source Field on the Template Card, the BC15 client crashed, showing the following error: <ul style="list-style-type: none"> - Microsoft.Dynamics.Nav.Types.NavMetadataNotFoundException: Metadataobject Page 6218 was not found- ---> System.Reflection.TargetInvocationException: Exception has been thrown by the target of an invocation..... • The error comments regarding the Document Line No. translations are now refreshed when manually setting values in the "Translate to Type" and "Translate to No." fields. • We have fixed an issue where unregistered document files had no filename in the File List page. • When saving a file linked to an unregistered or rejected document from the Document Files FactBox, the filename used was only the extension of the file (e.g., filename=.pdf or filename=.xml). • When using the "Move to company" function, the following error occurred: <ul style="list-style-type: none"> - The Document Page does not exist. Identification fields and values: Document No.='<Document No.>', Page No.='1' • When using split and merge with Storage Type equal "File System", the operation would break, resulting in the documents to be corrupted and no longer visible in the capture screen.

Area	Description
General – continued	<ul style="list-style-type: none"> • When you selected a document on the Split and Merge pages and attempted to move it up or down, nothing happened when you pressed the “Move Up” or “Move Down” functions. Now the following message is shown: <ul style="list-style-type: none"> – <i>You cannot move documents up and down, only pages within a document can move up and down.</i> • The configuration files have been updated in regard to XML setup.
Layout	<ul style="list-style-type: none"> • The Attachments field on the Posted Purchase Invoices and Posted Purchase Cr. Memo pages is now locked. • The ToolTip for the “Formula Text” field has been added back on the Template Field Card page. • Errors in some NO captions on the Template and the Purchase Invoice pages have been corrected. • Button “Add Template Field” is now hidden on master templates. • The obsolete pages Continia Web Portal and Continia Online Company Activations have been removed from the Menu Suite. • We have added and updated the Norway/France translations in DC Setup.
Matching	<ul style="list-style-type: none"> • For the classic client only: If a non-existent order no. was entered on the DC Document, the match form would generate an error the following error: <ul style="list-style-type: none"> – <i>Purchase Header does not exist. Identification fields</i> • When using order match in the web client, the document was not re-validated automatically; thus the error message “No account has been configured for “Amount Excl. VAT” would not disappear automatically. • Capturing a value longer than 20 characters in “Our Order No.” resulted in an error similar to the one shown below if the template was configured to perform “Auto Match”. <ul style="list-style-type: none"> – <i>The filter <long value captured> is not valid for the No. field on the Purchase Header table. The length of the string is <string length>, but it must be less than or equal to 20 characters. Value: <long value captured></i>
Approval	<ul style="list-style-type: none"> • When using approval flow codes (e.g., a code set up with User A and User B) and 4-eyes approval disabled, it was possible for User A to approve his/her approval entry and subsequently go to the “Approval Request Entries” screen and forward the approval entry for User B back to User A and then approve it. • In an environment running SAAS/extension and using approval without the Continia Web Approval Portal, the “Web Approval” fast tab was empty on the Continia User Setup Card. The “Web Approval” fast tab is now hidden when there are no fields to show.

Advanced Approval	<ul style="list-style-type: none"> We have corrected issues when setting the Purchase Header Filter on a number field for an Advanced Approval Group. The code will now format the number field filter to the standard format for the SETVIEW function (No thousand separator and the decimal separator is always a period (“.”)) E.g. 12,345.50 -> 12345.50 12.345,50 -> 12345.50 This will create the right filter on the Purchase Header record and prevent the following error that occurred when performing submit for approval on an invoice: <ul style="list-style-type: none"> <i>The value <Value> can't be evaluate into type Decimal. Any subsequent steps will have to be performed manually.</i>
Continia Web Approval Portal	<ul style="list-style-type: none"> The Continia Web Approval Portal has been updated to version 1.12.0.0. When rejecting a purchase document or placing a purchase document on hold in the Continia Web Approval Portal, it was not possible to select a reason code. The sorting order has been updated in the Continia Web Approval Portal for Posted Approval Entries. Now the latest processed documents are shown first, not the earliest. When trying to log in to the Continia Web Approval Portal and when the company's display name was different from the company name, you got the following error <ul style="list-style-type: none"> <i>Company <Company Display Name> does not exist.</i>
Web Client	<ul style="list-style-type: none"> In BC15, the standard Attachment FactBox was wrongly hidden on the Posted Purch. Invoice and Posted Purch. Cr. Memo pages. In BC15, when exporting a configuration file from the Document Capture Setup Wizard, users got the following error message: <ul style="list-style-type: none"> <i>The length of the string is <string length> characters, but it must be less than or equal to 1024 characters. Value: <long string></i>
Permissions	<ul style="list-style-type: none"> In the changelog for DC6.00, we wrote: <ul style="list-style-type: none"> <i>When Document Capture 6.00 is installed, the CDC-ALL role is automatically added to all users in the database.</i> Above is only applicate for extensions and thereby for BC15. The text in the changelog should, therefore, have been: <ul style="list-style-type: none"> <i>For BC15, when Document Capture 6.00 is installed, the CDC-ALL role is automatically added to all users in the database.</i> The CDC-ALL role has been updated with read permission to table 6086015 CDC Notification. In BC15, both on-premises and cloud, the permissions will be auto-updated when re-installing the app. For other BC/NAV versions, you must run codeunit 6086005 CDC Create Doc. Capture Roles to update the CDC-ALL role.
XML Import	<ul style="list-style-type: none"> When a value was found for the "Item GTIN No." field, the following error occurred: <ul style="list-style-type: none"> <i>The length of the string is <string length>, but it must be less than or equal to 14 characters. Value: <string></i> When opening the Template Card from the Document Card, Document List With Image, Purch. Invoice Match or Purch. Credit Memo Match page, the assist edit for the XML Path will now open the actual Document data in the XML Viewer instead of the last Document with that Template.

XML Import - continued	<ul style="list-style-type: none"> ▪ The field "Identified By" on documents of File Type XML is now being filled in with the right value. ▪ The "Merge from same E-mail" and "First Table Line Has Captions" fields on the Template Card Page are now hidden if the Template is of Type XML. ▪ The Document Search page is now also searching in XML Documents. ▪ When pressing Open File for an XML Document in the Display Document List, the XML file opened was created wrongly. This only occurred in the Classic Client versions of NAV. In the Classic Client versions of NAV, we now show the "Filename with Extension" field in the Display Document List. In newer versions of NAV, the field "Filename with Extension" can now be chosen from "Choose Columns..." This will help distinguishing between XML Files (extension .xml or .cxml) and PDF files (extension .pdf). In the Classic Client versions of NAV, the new XML File Path field is now editable when using Cloud OCR. ▪ We have changed the visibility of all the fields that do not apply to XML Template fields on the Template Field Card. ▪ We have fixed an issue in Classic Client versions of NAV, where the XML Path Lookup on an XML Document did not select the right XML element. ▪ In some situations, the following comment was kept on the Document event after the fields were added to the template: <ul style="list-style-type: none"> – <i>WARNING: The XML Document contains discounts and charges elements that are not created as fields for this Template. Please use Add Template Field to add them.</i> ▪ We have improved the algorithm of finding the XML format and the vendor based on the identification templates. In some situations, a template was not found when recognising fields on multiple documents at the same time. ▪ We have fixed an issue where the property Temporary of the global DocumentXmlBuffer variable was not set to TRUE in the Document (UIC) table, thus saving unnecessary records in the database. The unnecessary records do not affect system operation and will be deleted when Document Capture is upgraded to the next major version. ▪ In BC15 or the web client, it was not possible to edit the captured value in the Document Journal or Document Card for XML documents. ▪ In the situation that the value captured in the Attachments field in an XML document is not in base64 format, the following errors can occur: <ul style="list-style-type: none"> – <i>The call to member nodeTypedValue failed. msxml6.dll returned the following message: The parameter is incorrect. A call to System.Convert.FromBase64String failed with this message: The input is not a valid Base-64 string as it contains a non-base 64 character, more than two padding characters, or an illegal character among the padding characters</i> ▪ Fixed XML paths in the OIOUBL format for the template fields that are used to build the value in the FIK Template field. Now the FIK Template field is recognising the right value.
Upgrade	<ul style="list-style-type: none"> ▪ We have made minor changes to the upgrade document and removed the reference to the Template upgrade tool (codeunit CDC Notification Template Upg.) from codeunit 6086016 CDC Role Center Notifications.

CHANGES 6.00

New Features

Area	Description
Technology	<ul style="list-style-type: none"> • With DC6.00, we have released objects for Microsoft Dynamics 365 Business Central 2019 release wave 2 (BC15) on Microsoft Business Central Cloud and on-premises (extensions). • With DC6.00, we have released objects for Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) CU4 on-premises. • The Document Capture service has been updated to support XML files.
General	<ul style="list-style-type: none"> • We have added a new field "Identified By" to the Document Journal. The field shows which of the following methods were used to identify the source: <ul style="list-style-type: none"> ○ Search text ○ Identification template ○ Identification fields • When exporting users, the messages shown now include the number of companies from where users were exported. • The field "Decimal Places" on the Field Card has been enhanced with a drill-down option making it easier for the end-user to specify the property correct. Pasting expressions with the usual notation (min:max) is still supported. • On the Template Field page, the "Formula" and "Fixed Value" fields have been merged into one field named "Formula". If the user populates a formula, it works like the old "Formula" field, and if the user fills in a fixed value, it works like the old "Fixed Value" field. • The error message shown in the document comment section has been improved in regards to missing G/L Account (Template Field) or translation. • The following pages and fields have been changed to display name and accept input as both written name and "code" (primary key) of the related table: <ul style="list-style-type: none"> ○ Continia User Setup Card and CDC Continia User Setup List ("Purchaser Code", "Approver ID" and "4-eyes, 2nd Approver" changed) ○ CDC Approval Flow Lines (Name changed) ○ CDC Advanced Approval Users (Name changed) • We have added a new field GLN on the Vendor Card for the Dynamics NAV versions older than 2016 where this field is not part of the standard Vendor fields. • The configuration files have been updated.

Layout	<ul style="list-style-type: none"> • Informational, confirmation, and error messages have been improved. • Captions have been updated and improved. • We have changed the template field "Recognize Lines" from an option field (yes/no) to a standard CheckBox. • In NAV 2013 to 2017 on the DC Purchase Invoice and Credit Memo pages, we have added the following fields: <ul style="list-style-type: none"> ○ Approval by (or Approved by, depending on the status) ○ Approval Comments ○ Attachments • In NAV 2013 to 2017 on the DC Purchase Invoice and Credit Memo pages, we have removed the Attachments subpage. • In the Set-up Out of Office screen, the fields "Forward-To User-ID" and "Forward-To User Name" have been combined into one field "Forward To User". "Forward To User" displays the name of the user. Input can be done by lookup or by pasting of User-ID (e.g. <domain>\<user>). • The email setup section has been moved to the Navigate group on the Purchase Approval Setup page. • In the Continia Users table, the caption on field 6 has been changed from "NAV Login Type" to "Login Type". • On the Vendor List page, the FactBox for Documents is only shown if Document Capture is active in the company. • On the Posted Purchase Invoices and Credit Memos pages in NAV 2013 to Dynamics 365 Business Central (13.00.00), we have now added the following fields: "Approved by", "Approval Comments" and "Attachments" (the fields are already available in BC14 and BC15). • The actions Reopen and Navigate on the Document Card and Document List are now disabled (not hidden) when a document is open. • In Microsoft Dynamics 365 Business Central 2019 release wave 2 (BC15), we have added FactBoxes to show Approval Log and Approval Comments on the Posted Purchase Invoices and Credit Memos list pages.
Continia Web Approval Portal	<ul style="list-style-type: none"> • The Continia Web Approval Portal has been updated to version 1.10.0. • In the welcome emails, if the user domain is the same as the local domain set up on the Continia Web Portal page, we now exclude the domain from the username displayed in the email.
Web Client	<ul style="list-style-type: none"> • In Microsoft Dynamics 365 Business Central 2019 release wave 2 (BC15), we have added support for scanning documents in the web client when using Twain drivers. Note, scanning from the web client is not supported by other NAV clients or with other drivers. • In Microsoft Dynamics 365 Business Central 2019 release wave 2 (BC15) on the Document Card and Document List pages, we have changed the shortcut for "Translations" from "Ctrl+T" -> "Alt+Shift+Ctrl+T". • The app version is now shown on the About Document Capture screen when running DC as an Extension.

Permissions	<ul style="list-style-type: none"> ▪ When Document Capture 6.00 is installed, the CDC-ALL role is automatically added to all users in the database.
XML Import	<ul style="list-style-type: none"> • We have developed a new module in Document Capture 6.00 that handles XML documents. The new XML Import module brings the possibility of handling electronic purchase invoices and credit memos while still using all the functionality of Document Capture. The module can show an HTML view created from standard stylesheets as well as the raw electronic document (XML) in a user-friendly presentation in a standard NAV/BC page. The XML module can be fully customized to allow the handling of other types of electronic documents (catalogues, price lists, etc.). Out of the box and without any additional setup, the module supports the following electronic formats for purchase invoices and credit memos: <ul style="list-style-type: none"> ○ PEPPOL BIS 3 (International) ○ UBL (International) ○ OIOUBL (Denmark) ○ OIOXML (Denmark) ○ EHF (Norway) ○ SVEFAKTURAN (Sweden) ○ XRECHNUNG (Germany) ○ EBINTERFACE (Austria) ▪ Configuration files have been updated with XML Import templates.
Upgrade	<ul style="list-style-type: none"> ▪ With the release of Document Capture 6.00, the upgrade toolkit has been released for the upgrade from Document Capture 5.50 including any Service Pack for DC5.50 on the NAV version used with DC5.50. The upgrade toolkit will also upgrade Expense Management if Expense Management is used. ▪ If you are upgrading from an earlier version of Document Capture such as version 3.50 or 4.0x, you must upgrade Document Capture to version 4.50 first, then upgrade to Document Capture 5.00, then upgrade to Document Capture 5.50 and finally to Document Capture 6.00. The upgrade to Document Capture 4.50 can be done using one upgrade toolkit, and this upgrade toolkit can be found in the Document Capture 4.50 product package. ▪ With the release of Document Capture 6.00, we have released upgrade objects that can be used with the new Data Upgrade Tools from Microsoft. If you want to use new Data Upgrade Tools from Microsoft, you must follow the steps described in "4.1b - Data Upgrade Guide from DC5.50 and or EM3.50 to DC6.00 and or EM4.00". If you want to use the old pre and post upgrade tools, you must follow the steps described in "4.1a - Upgrade Guide from DC5.50 and or EM3.50 to DC6.00 and or EM4.00". ▪ If you are using Document Capture in Microsoft Business Central Cloud, the main upgrade will be performed automatically when you install Document Capture 6.00 (after uninstallation of Document Capture 5.50). ▪ After upgrade of Document Capture 5.50 to Document Capture 6.00, you must run the "Template Upgrade Tool" and manually upgrade templates that have Prices Including VAT populated. For details, see Zendesk article "How to upgrade templates with Prices Incl. VAT when upgrading to DC6.00". https://continia.zendesk.com/hc/en-us/articles/360010610879-How-to-upgrade-templates-with-Prices-Incl-VAT-when-upgrading-to-DC6-00

Upgrade – continued

- In a future service pack, we are planning to release two more upgrade toolkits that can be used to upgrade DC6.00/EM4.00 to Microsoft Dynamics 365 Business Central 2019 release wave 2 (BC15).
The first upgrade toolkit can be used to upgrade DC6.00/EM4.00 on Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14) on-premises (fob) to BC15 on-premises (extensions).
The second upgrade toolkit can be used to upgrade DC6.00/EM4.00 on BC15 on-premises (extensions) to BC15 on Microsoft Business Central Cloud.
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Bug Fixes

All relevant bugfixes released in Service pack 1 to 5 for DC5.50, Service Pack 1 to 9 for DC5.00 and Service 1 to 11 for DC4.50 are also included in DC6.00. The description of these bugfixes is not repeated in this document.

Area	Description
	<ul style="list-style-type: none"> Many fields have been increased in length in standard objects in Microsoft Dynamics 365 Business Central Spring 2019 Update (BC14). Document Capture has been updated to support this.
General	<ul style="list-style-type: none"> When using the "Register Batch" process for Document Capture documents, the message displayed after completion was wrong. The "About Document Capture" page is added back to the Document Capture Menu, and it is again possible to find the page via search. Copying a template (created from a Master Template that does not exist in the current company) from another company could cause the following behaviour: When using the Add Template Field on the copied template, the list was empty. The system now checks if the Master Template exists in the current company, and if not, it will ask the user if the Master Template should be copied as well to the current company. Setup files for the BE localisations are updated to avoid the same "Sort Order" on the DOCTYPE and APPROVALFLOW fields. The import of new documents was very slow for document categories set up with "Split on Barcode" = yes. Reversal of purchase allocations could result in a rounding error when using VAT % with decimals (e.g. 11,1111 or 9,0909). When this occurred, the following error message was displayed: <ul style="list-style-type: none"> <i>"Amount must be equal to <Amount in allocation> in purchase allocation line: Document No.=<Document Number>, Line No.=<Line number> Current value is <Wrong amount></i> When opening page 138 Posted Purchase Invoice or page 140 Posted Purchase Credit Memo, the following error occurred in some version of NAV: <ul style="list-style-type: none"> <i>You do not have the following permissions on CodeUnit CDC Approvals Bridge: Execute. To view details about your permissions, see the Effective Permissions page. To report a problem, refer to the following server session ID: 'Session ID'. Page View - Posted Purchase Invoice must close / Page View - Posted Purchase Credit Memo must close.</i> When entering a Sales/Purchaser name longer than the code field (PK) in the Salesperson/Purchaser table, the system would ignore the entered value. When performing a lookup in the Sales/Purchaser name, the following error occurred if the current value in the name field was longer than the code field (PK) in the Salesperson/Purchaser table: <ul style="list-style-type: none"> <i>The length of the string is <string length>, but it must be less than or equal to 10 characters. Value: <value entered></i> On the Template Card and List pages, the "New" button has been removed. The "Create/Select Template" function must be used instead.

Layout	<ul style="list-style-type: none"> • Corrected English spelling mistake on Document Capture Setup page: “Checks and Validation” changed to “Checks and Validation”. • Corrected ToolTip on Attachment action on page 6085707 – “Purch. Cr. Memo With Image”. • In Dynamics NAV 2009 R2 on the About Document Capture page, wrong captions were shown. • On the Purchase Lines subpage on the Approval Entries page, we have made the lookup fields non-editable. Before, when we only had Editable=No on the page, it looked like the lookup fields were editable. • We have corrected German spelling on the Document Categories and Fields pages. • Translation issues have been corrected in the French version of the Template field. • German captions have been updated on the “Document Categories” page. • Corrected spelling mistake when deleting a template that is used on one or more documents. • Page 140 Posted Purchase Credit Memo in the NL localisation was missing NL captions.
Approval	<ul style="list-style-type: none"> • The last approval comment is shown on the Purchase Invoice and Credit Memo pages in NAV. When an approval comment is created from the Continia Web Approval Portal, the comment is split into several lines when created in NAV if the length of the comment is longer than 80 characters. Previously, the last part of the comment was shown on the pages in NAV. We now show the first part of the comment. • The functionality associated with the “Prices Incl. VAT” setting on the Template Card has been reworked and improved. It is important to note that templates created in Document Capture versions before DC6.00 with “Prices Incl. VAT” = yes will not work after an upgrade if amounts are checked. Modifications to posting setup (Template -> Translations -> Show Accounts for Amounts) and formulas are required. For details, see Zendesk article “How to upgrade templates with Prices Incl. VAT when upgrading to DC6.00”.
Continia Web Approval Portal	<ul style="list-style-type: none"> • We have corrected an issue in the Continia Web Approval Portal where the Approve buttons were not shown if there were multiple open Approval Entries. • We have corrected an issue where a windows user was exported to Continia Web Portal as a database user if the Web Service Access Key was filled on the user setup.
BC Cloud	<ul style="list-style-type: none"> • In Business Central Cloud, we have moved the “Get Order Line” function from the ribbon on the Purchase Invoice header to the lines. • We now show Display Name instead of Company Name in Company selector on the Continia Web Approval Portal.