Dynamics Attachments

In standard Microsoft Dynamics 365 for Finance and Operations document management (aka document handling/attachments) is a feature that enables users to attach documents or images to records they are working on. https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-document-management

Dynamics Attachments contains the following features to improve the usability of document management:

- Default value for the field Restriction
- Attach documents via Drag & Drop

Default value for the field Restriction

When a document attachment is added to a record it's the value of the field Restriction (Internal/External) is set by the system automatically and can be overridden manually.
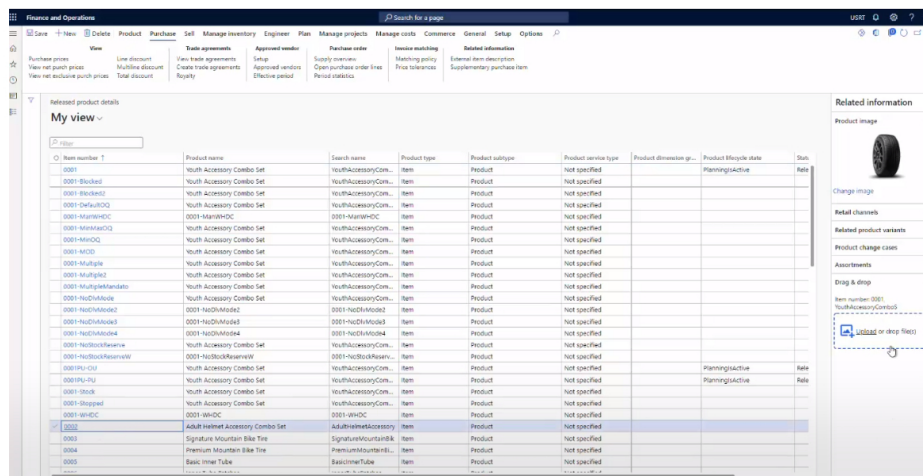
Within Dynamics Attachments it's possible to influence this behavior with the field *Use default restriction* on the document type. When enabled, the value (Internal/External) will always be taken from the field *Restriction* on the document type. The user is not able to override it on the document attachment unless the parameter *Restriction editable* is enabled.

Attach documents via Drag & Drop

In the right top corner there is a paperclip icon which indicates how many documents are attached to the selected record. The paperclip is also the menu entry to add those document. It opens the Attachments form where a document can be attached.

In total 5 clicks are needed in order to attach 1 document. If you want to attach 5 document it takes 25 clicks.

With Dynamics Attachments this number can be reduced to one action in which you can select 5 documents and drop them on the Drag & drop control in the right pane of the form (*Related information*).

When no default document type has been setup for Drag & Drop in the document parameters, the user gets the possibility to choose one from a dialog, which is shown to the user after the files have been dropped on the control. Per file the user gets the option to choose a different document type or just apply the document type that has been selected earlier.

> ⓘ **Note**
>
> When the upload of one or more files is started , the control will not accept additional uploads. This can be recognized by the grey borders of the control.

When is Drag & Drop available on a form?

Whether this control is visible depends on the following settings:

- Valid ALF Licence
- Configuration key DYS Drag & Drop is enabled
- Drag & Drop is enabled in the Document management parameters
- Enabled document handling has been setup in the preferences of the User options of the current user

- Use active document tables is enabled in the Document management parameters and the table is specified as an active document table, Or 'Use active document tables' is set to No
- It meets the criteria as specified in the *Add drag & drop to form* options, specified in the Drag & Drop tab of the Document parameters.

  For performance reasons the fact the user setup allows the drag & drop control to be added is cached. The entire cache is invalidated when the 'Add drag & drop for users' option is modified. If a specific user is added or deleted from the Specified users list, the cache for that user is deleted.
- It meets the criteria as specified in the *Add drag & drop for user* options, specified in the Drag & Drop tab of the Document parameters.

  For performance reasons the fact the form allows the drag & drop control to be added is cached. The entire cache is invalidated when the 'Add drag & drop to forms' option is modified.
  If a specific form is added or deleted from the Specified forms list, the cache for that form is deleted.
- The user has Add privileges to the table
- The form hosting the drag & drop control must comply the following conditions
  - It's not a temporary table
  - It's not DocuRef table itself
  - It's not a form part
  - It's not a fact box
  - It's not a pop-up window
  - It has a form name
- If a form contains more than one datasource and one datasource table support document handling and another does not, the drag & drop control will be hidden or made visible based on the active datasource.

Setup

The Dynamics Attachments features are linked to an HSO Innovation [ALF License](#).

Document management

Configure standard Microsoft Dynamics 365 for Finance and Operations document management:
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-document-management

Drag & Drop

Organization administration > Document management > Document management parameters > Drag & Drop

Field	Description	Remark
Drag & drop enabled	This wil enabled the drag & drop feature	When the control is not visible check these requirments
Show extended descriptions	If show extended description is set to false, the drag & drop control will display the name of the table the file will be dropped on, if set to true it will display additional information about the actual record.	
Drag & drop document type	The document type used to create document references when dragging & dropping	Type must be of class 'Attach file'
Add drag & drop to forms		These parameters are additional to the Active document tables feature of standard Microsoft Dynamics 365 for Finance and Operations. When activated and a table is not setup in the Active document tables the drag & drop control will not be visible even if it has been setup via this parameter.
Add drag & drop for users		These parameters are additional to the Active document tables feature of standard Microsoft Dynamics 365 for Finance and Operations. When activated and a table is not setup in the Active document tables the drag & drop control will

not be visible even if it
has been setup via this
parameter.

FAQ

Question:	Why is the Drag & Drop control not visible
Answer:	When the control is not visible check these requirments

Release notes

Feature	Introduced in version
• First official release of Dynamics Attachments	10029.53.111