

# Installation Manual



## Version Information

Dynamics NAV/BC version	2015: W1 8.00 Build 38457 (Cumulative Update 1) 2016: W1 9.00 Build 42815 2017: W1 10.0 Build 13682 2018: W1 11.0 Build 19394 BC13: W1 13.0 Build 24623 (Fall '18) BC14: W1 14.3 Build 34444 (Spring '19, CU2) BC15: W1 15.0 Build 36510 ('19 release Wave 2) BC16: W1 16.0 Build 12076 ('20 release Wave 1)
Document Creator Application version	DCR3.70
Document Creator Engine version	1.18.0.0

## Prerequisites

Before installing Document Creator in your Business Central database, please make sure the prerequisites listed in this section are met. The installation instructions in this manual are for an on-premise Dynamics NAV or Dynamics 365 Business Central installation; for the SaaS/Cloud version, please consult the online [Installation Manual](#). Also, please note that there is a “Demo” version (for evaluation purposes) and “Release” version (for production environments) of Document Creator.

## Demo Version

Before installing the “Demo” version, please check if the following prerequisites are met:

- The Business Central license should have access to the 70000..70020 and 71000..71010 object ID range.
- The latest available Demo product key should be used, which can be downloaded from the [Downloads](#) page on our website together with the Demo version.
- For the use of the Document Creator Report Templates, the Business Central license should have access to the 72100..72199 (W1) or 72200..72299 (NA) object ID range. However, please note that the source code of the report templates is also available.
- For a demo of all the possibilities of the Document Creator Designer, please check out the *Document Creator Designer Demo*. The Designer Demo can also be downloaded from the [Downloads](#) page on our website.

## Release Version

Before installing the “Release” version, please check if the following prerequisites are met:

- The Business Central/NAV license should have access to the Document Creator object ID range (i.e., 11249650..). If you encounter any issues with missing permissions, please ensure you have downloaded a new Business Central/NAV license *and* that you have restarted your server instance(s) after uploading your license to the database.
- A product key registered for your Business Central/NAV license’s Serial No./VOICE ID/PSBCID should be used.
- For installation and activation instructions of the Document Creator Stand-alone Designer for Dynamics 365 Business Central, please check the [Installing the Designer](#) documentation page.

For support, please check <https://www.idyn.nl/support> for information contacting our support desk.

# Installation Manual



## Installation

This document describes the installation procedure for the following NAV/BC target versions:

- [Dynamics NAV 2015 – 2018 and Dynamics 365 Business Central Fall '18 Release](#)
- [Dynamics 365 Business Central Spring '19 Release](#)
- [Dynamics 365 Business Central 2019 release Wave 2 and up](#)

## Dynamics NAV 2015 – 2018 and Dynamics 365 Business Central Fall '18 Release

### Installation Files

The installation files are grouped into a directory for each target version (e.g., NAV80W1 corresponds to Dynamics NAV2015). Make sure to use the files from the directory that matches your target.

The installation set for each target version contains the following directories:

APPLICATION OBJECTS	New and Merge NAV objects
TEMPLATE	Contains files for the import of Document Creator layouts

### Installation Steps

#### Import Dynamics NAV objects

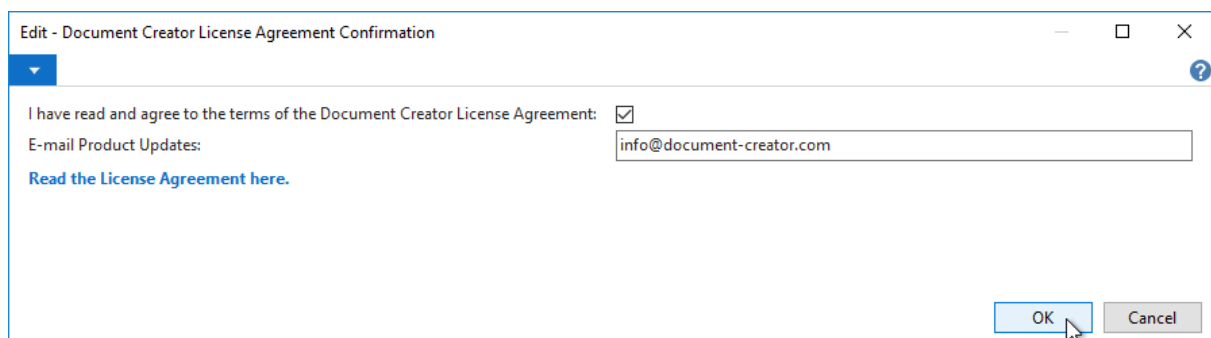
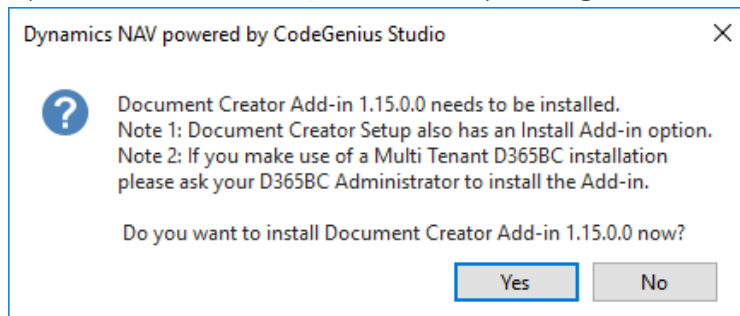
1. Start the development environment of Dynamics NAV and import the 'NAV<version> - New Objects.fob' file.
2. Merge NAV objects with file 'NAV<version> - Merge Objects.txt'.

Codeunit	40	LogInManagement	NAV2015
Table	9650	Custom Report Layout	NAV2015 / NAV2016 / NAV2017 / NAV2018 / BC13
Codeunit	9651	Document Report Mgt.	NAV2015 / NAV2016 / NAV2017 / NAV2018

3. Import menu-suite 'NAV<version> - MenuSuite - 1056.fob' or edit the menu-suite object ID in 'NAV<version> - MenuSuite - 1056.txt'.
4. Compile the merged objects.

#### Install the add-in, configure Document Creator and import report layouts and translations

5. Open the Windows Client, the first time you will get this message:



Choose “Yes”; Read and agree with the license agreement and enter your e-mail.  
You will get a message if the installation has completed successfully.

6. Navigate to 'Departments | Document Creator | Document Creator Setup'
  - a. Paste the productkey in field 'Productkey'
  - b. Click 'Check productkey' to validate the Productkey.
  - c. Choose 'License Information' for more information about the license.
7. Navigate to 'Departments | Document Creator | Custom Report Layouts'
  - a. Click 'Import Report Package...' and select 'ReportPackage - DCR\_Demo\_<version>.dcr' file in the TEMPLATE directory. This imports a default set of layouts including fob.
  - b. Compile Document Creator objects (filter on versionlist @\*DCR\*).
8. Navigate to 'Administration | Application Setup | RapidStart Services for Microsoft Dynamics NAV | Configuration Packages'
  - a. Click 'Import Package' and select the RapidStart package in the TEMPLATE directory.
  - b. Select the imported 'DCR' package and click 'Apply Package', Yes. This imports the default translations for the Document Creator layouts.

**Document Creator is ready for use!**

## Dynamics 365 Business Central Spring '19 Release

### Installation Files

The installation files can be found in the NAV140W1 directory, which corresponds to the Dynamics 365 Business Central Spring '19 Release.

The installation set contains the following directories:

DOCUMENT CREATOR	The Document Creator extension/app
DOCUMENT CREATOR UTILS	The Document Creator Utilities extension/app + C/AL version
TEMPLATE	<ul style="list-style-type: none"><li>* RapidStart package for translations</li><li>* Report extension with AL template report objects: Document Creator W1 Templates_&lt;version&gt;.app</li><li>* Report package including C/AL template report objects: ReportPackage - W1 - DCR_&lt;Release/Demo&gt;_&lt;version&gt;.dcr</li></ul>

- The *core* features of Document Creator are included in the “*Document Creator*” extension, i.e., creating/editing/importing/exporting/archiving/converting layouts, export profiles, etc.
- The *translation* features and *report utility* functions that can be used in report objects are provided within a separate “*Document Creator Utilities*” extension.  
A C/AL version of the objects from this extension are available as well, which you may prefer if you still want to be able to use these features in C/AL report objects again as well.
- The *template* report objects are provided with a “*Document Creator W1 Templates*” extension. You can use the source code of the report objects from this extension as a starting point for your own reports. A C/AL version of the template report objects are available as well.

### Installation Steps

#### Publishing and installing the “Document Creator” extension

1. Open the *Business Central Administration Shell* (as admin) and run the following command to publish the new extension to your database:

```
Publish-NAVApp -ServerInstance <Instance_Name> -Path '...\DOCUMENT CREATOR\WSB Solutions BV_Document Creator_<version>.app'
```

2. If you are *not* upgrading from a previous version of the extension, see 2.A.

If you are upgrading from a previous version of the extension, see 2.B.

- A. Install the extension either through the *Install* action on the *Extension Management* page, or run the following command:

```
Sync-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator'  
Install-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator'
```

- B. At this point you will have two versions published to the database at this point. In the *Extension Management* page you will see the old version is *Installed*, while the new version is only *Published/Not installed*.

(P.T.O.)

Run the following commands to sync the app and start the data upgrade:

```
Sync-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator' -Version <new_version>  
Start-NAVAppDataUpgrade -ServerInstance <Instance_Name> -Name 'Document Creator' -Version <new_version>
```

At this point, you will still have two versions of the extension published, but now the new version is installed and the old version only published.

## Publishing and installing the “Document Creator Utilities” extension

3. If you want to use translation features and report utility functions from AL only, see 3.A.  
If you want to use translation features and report utility functions also from C/AL, see 3.B.

- A. Open the *Business Central Administration Shell* (as admin) and run the following command to publish the extension to your database:

```
Publish-NAVApp -ServerInstance <Instance_Name> -Path '...\DOCUMENT CREATOR\WSB Solutions  
BV_Document Creator Utilities_<version>.app'
```

Then, install the extension either through the *Install* action on the *Extension Management* page, or run the following commands:

```
Sync-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator Utilities'  
Install-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator Utilities'
```

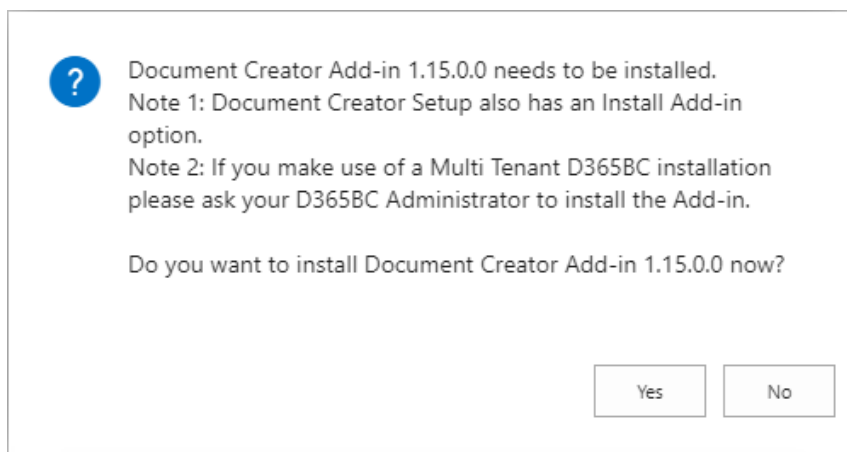
If you are upgrading from a previous version of the extension, follow the instructions as described in the previous step to run the data upgrade in the same way for this extension.

- B. Start the development environment of Dynamics NAV and import the  
'NAV<version>\_NewObjects.fob' file.

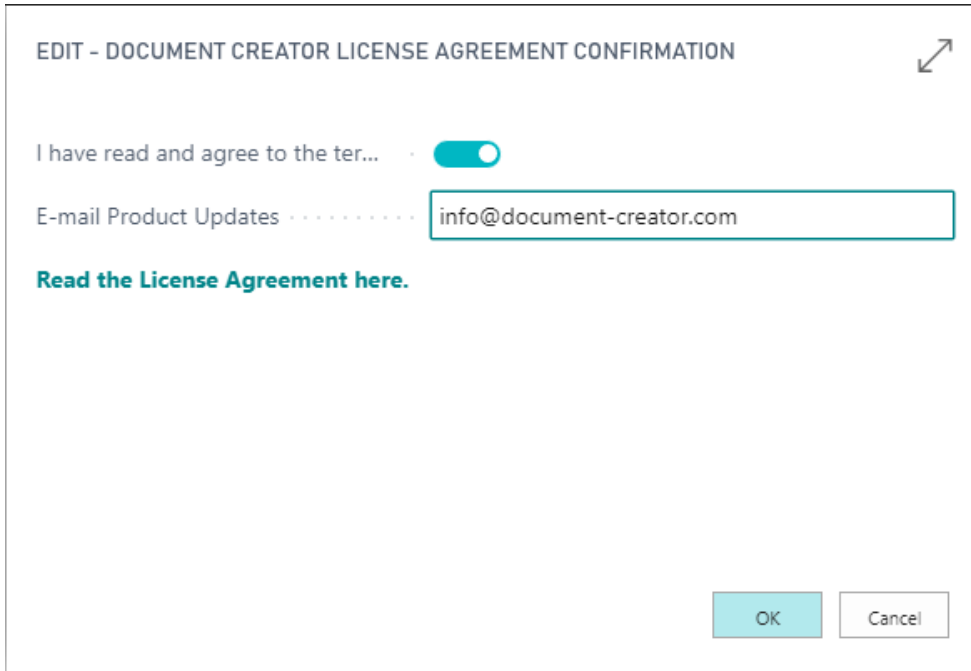
Import menu-suite 'NAV<version>\_MenuSuite1056.fob' or edit the menu-suite object ID  
in 'NAV<version>\_MenuSuite1056.txt'.

## Install the add-in and configure Document Creator

4. Open the client, the first time you will get this message:



Choose “Yes”; Read and agree with the license agreement and enter your e-mail.  
You will get a message if the installation has completed successfully.



EDIT - DOCUMENT CREATOR LICENSE AGREEMENT CONFIRMATION

I have read and agree to the ter... ☒

E-mail Product Updates ..... info@document-creator.com

[Read the License Agreement here.](#)

OK Cancel

5. Search for and open the *Document Creator Setup* page.
  1. Paste the product key in the *Product Key* field.
  2. Invoke the *Check Product Key* action to validate the product key.
  3. Invoke the *License Information* for more information about the license.

## Install W1 template reports and translations

6. If you want to use the AL version of the W1 template reports, see 6.A.  
If you want to use the C/AL version of the W1 template reports, see 6.B.

- A. First publish and then install the extension from the following file:  
'WSB Solutions BV\_Document Creator W1 Templates\_<version>.app'

Then, search for and open the *Custom Report Layouts* page, choose 'Import Report Package' and import the following file:

'LayoutPackage - W1 - DCR\_<Release/Demo>\_<version>.dcr'

- B. Search for and open the *Custom Report Layouts* page in the **Windows client**, choose 'Import Report Package' and import the following file:  
'ReportPackage - W1 - DCR\_<Release/Demo>\_<version>.dcr'

Then, compile the Document Creator objects (filter on versionlist @\*DCR\*).

7. Search for and open the *Configuration Packages* page (RapidStart)
  1. Choose 'Import Package' and select the RapidStart package in the TEMPLATE directory.
  2. Select the imported DCR package and choose 'Apply Package', then confirm. This imports a set of default translations for the Document Creator layouts.

**Document Creator is ready for use!**



# Installation Manual

## Dynamics 365 Business Central 2019 release Wave 2 and up

### Installation Files

The installation files are grouped into a directory for each target version (e.g., NAV150W1 corresponds to Dynamics 365 Business Central 2019 release Wave 2). Make sure to use the files from the directory that matches your target.

The installation set for each target version contains the following directories:

DOCUMENT CREATOR	The Document Creator extension/app
TEMPLATE	<ul style="list-style-type: none"><li>* RapidStart package for translations</li><li>* Report extension with AL template report objects (+ source): Document Creator W1 Templates_&lt;version&gt;.app</li><li>* Layout package for the W1 Template reports: ReportPackage - W1 - DCR_&lt;Release/Demo&gt;_&lt;version&gt;.dcr</li></ul>

- The *Document Creator* app contains all the features available for both On-Prem and SaaS installations, i.e., creating/editing/importing/exporting/archiving layouts, export profiles, etc.

The *Document Creator On-Premise* app is an extension on the *Document Creator* app which makes the add-on use an on-premise installation of the report engine. It also includes the features that are only available on-premise, e.g., the RDLC layout converter.

- The *template* report objects are provided with a “*Document Creator W1 Templates*” extension. You can use the source code of the report objects from this extension as a starting point for your own reports.

### Installation Steps

#### Publishing and installing the “Document Creator” extension

1. Open the *Business Central Administration Shell* (as admin) and run the following command to publish the new extension to your database:

```
Publish-NAVApp -ServerInstance <Instance_Name> -Path '...\DOCUMENT CREATOR\WSB Solutions BV_Document Creator_<version>.app'
```

2. If you are *not* upgrading from a previous version of the extension, see 2.A.  
If you are upgrading from a previous version of the extension, see 2.B.

- A. Install the extension either through the *Install* action on the *Extension Management* page, or run the following command:

```
Sync-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator'  
Install-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator'
```

- B. At this point you will have two versions published to the database. In the *Extension Management* page you will see the old version is *Installed*, while the new version is only *Published/Not installed*.

Please, first uninstall the *Document Creator On-Premise* app.

(P.T.O.)

Run the following commands to sync the app and start the data upgrade:

```
Sync-NAVApp -ServerInstance <Instance_Name> -Name 'Document Creator' -Version <new_version>  
Start-NAVAppDataUpgrade -ServerInstance <Instance_Name> -Name 'Document Creator' -Version  
<new_version>
```

At this point, you will still have two versions of the extension published, but now the new version is installed and the old version only published.

## Publishing and installing the “Document Creator On-Premise” extension

3. Please, follow the same instructions from step (1) and (2) to publish and install the *Document Creator On-Premise* app.

## Install the add-in and configure Document Creator


4. Open the client, search for, and open the *Document Creator Setup* page.
5. In the *Document Creator Setup* page:
  1. Invoke the *Install Add-in* action

## Document Creator Setup

☒ Check Product Key   ☐ License Information   ☒ Install Add-in

*Note:* “Allow HTTP Client Requests” should be enabled for the *Document Creator On-Premise* action for this action to work. You can change this setting on the *Extension Management* page via the *Configure* action.

2. Read and agree with the license agreement and enter your e-mail.

EDIT - DOCUMENT CREATOR LICENSE AGREEMENT CONFIRMATION 

I have read and agree to the ter... ☒

E-mail Product Updates .....

[Read the License Agreement here.](#)

3. You will get a message if the installation has completed successfully.

6. In the *Document Creator Setup* page:
  1. Paste the product key in the *Product Key* field.

## Authentication

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BC Serial No. ....  Product Key ....

2. Invoke the *Check Product Key* action to validate the product key.

*Note:* If the BC Serial No. of your BC license and the Document Creator product key do not match, then a warning will be displayed that informs you that the currently active and licensed BC license are not matching. If this message is shown, you can use Document Creator without any problems, *but* a watermark will be shown on generated reports.

## Install W1 template reports and translations

Please follow the installation instructions on the [Templates](#) page.