# DYNAVISION

Documentation:
# Drag & Drop

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# 1  Introduction

Welcome to the official manual of the Dynavision Advanced Drag & Drop module.
Improve the user experience when working with attachments on master data and documents with intuitive Drag & Drop functionality.
The easy-to-use factboxes reduce the amount of mouse clicks and the hierarchical representation of the files make it easy to retrieve the files.
The files can be downloaded again with 1 simple double mouse click on the file in the factbox, eliminating the need to navigate to the attachments first.

# 2  Installation

## 2.1 Extension

The Dynavision Advanced Drag & Drop module is a separate Business Central extension.
1.  Choose the search icon, enter **Extension Management**, and then choose the related link.
2.  Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3.  In the search bar, enter **Dynavision Advanced Drag & Drop** and install this app.

# 3  Document Attachment Setup

In Standard Business Central, attachments are saved on a separate table, Document Attachment. When a lot of attachments are saved however, this database grows fast, causing Business Central to be out of memory and no more files can be saved unless more storage Capacity is bought for the environment.
Dynavision Connect added the functionality to configure a separate, external document system (SharePoint or Azure BLOB Storage) and connect this system to Business Central. The result of this coupling is that the attachments will be stored on this external storage instead of in the table of Business Central.
Information on how the Document Attachment Setup can be configured and used can be found in the **Dynavision Connect Manual**.

## 3.1 Drag & Drop

In the **Document Attachment Setup Page**, an option is added **Auto Refresh Drag Drop**. This functionality makes sure that the drag&drop factbox will auto-refresh its contents based on the selected storage. If there are files added on this storage, it will be displayed in the factbox, under the category where it belongs, if this Category is added in the Setup.
**Remark**: *a refresh of the card or list is necessary to fetch the newly uploaded files.*

The **Auto Refresh Drag Drop** functionality can be configured per Document Structure.
Navigate to the **Document Structure** card, and go to the **Drag & Drop** Tab.
The options are
- **Default:** the setting from the **Document Attachment Setup** page is taken into account,
- **Yes**: auto refresh is enabled for the document structure, and
- **No:** auto refresh is disabled for the document structure.

# 4  Usage

The drag & drop functionality has been added on certain pages that currently support attachments. *Examples of these pages are: Vendor, customer list pages and cards, orders, etc.*

The functionality can be found in the fact box pane in the **Drag & Drop Factbox**.
In this fact box, there are three possibilities to add new files.
1. The files can be imported by dragging a file from a current folder in the zone **Drag file(s) here**. The file can also be uploaded by selecting the zone and then select the file in the folder page that opens. This will upload the file on the configured external storage
2.  The files can be imported by dragging a file from a current folder in the zone **Use document category**. The file can also be uploaded by selecting the zone and then select the file in the folder page that opens. When this option is chosen, the file category will have to be selected in which the file needs to be uploaded.
   The file will be uploaded in the category, and if the category was added in the

Document Structures, the folder will be created for the category if this folder did not exist yet.

3. Drag the files in the zone in which the files are displayed that are already uploaded to the external file system.
   If a file was already uploaded in a category, it is possible to immediately drag the file in the correct category folder in the fact box. This option will only be possible if files have already been uploaded, and the zone has been filled with these files and/or categories.

4. Once the files are uploaded, it is possible to download the files, or open the file in the external storage if the external storage provides this functionality, *e.g. sharepoint makes it possible to open the file in the external storage from BC.*
   This is possible by right clicking on the document and selecting the action displayed for the selected document.
   The files can also be downloaded by double clicking on the files that are displayed.

5. In case the option **Auto Refresh Drag Drop** is disabled, the fact box information can be manually refreshed, in order to fetch the newly uploaded files on the external file system.
   This action is available by choosing the **Drag & Drop** title of the factbox.

## 4.1 Change of Document Attachment Setup Type

It is possible to change the storage type that is used by the Document Attachment functionality.
This will result in the **deletion** of the existing set up Document Structures.
This changing also has the effect that the already uploaded documents, on the other document system, will not be accessible in Business Central anymore.
When changing the Storage type back to the previous set up, the documents on the other storage type will be accessible again.