Global 3000
Service Pack Note

Attachment Files

Author	DCP
Project	ZM60_000565.docx
Version	1.0

INTRODUCTION

This service pack provides the ability to store multiple documents and images relating to items within General Ledger, Debtors Ledger, Creditors Ledger, Cash Manager, SOP, POP and Asset Register.

The changes introduce a new button (labelled 'Attachments') throughout the software. When pressed the user is offered the ability to store a file (of any type) against the item/transaction and to view, email or delete previously stored files.

Attachments can be stored against the following items.

- General Ledger journals.

- Cash Manager transactions.

- Cash Manager reconciliations.

- Debtors Ledger customer accounts.

- Debtors Ledger transactions.

- Creditors Ledger supplier accounts.

- Creditors Ledger transactions.

- Sales Order Processing transactions.

- Purchase Orders.

- Asset Register assets.

- Manufacturer Works Orders.

Documents are stored on the server in folder G3000\MM\DOC_Attachments\YYYY\mm where 'MM' is the module id. 'YYYY' and 'mm' denote the year and month the file was stored.

The attachment files can be stored in a folder other than the GSM folder, this can be defined using the 'G3000AttachmentFolder' registry setting under the 'Customisations' key. However, this must always be a folder on the server. For further details see Appendix A.
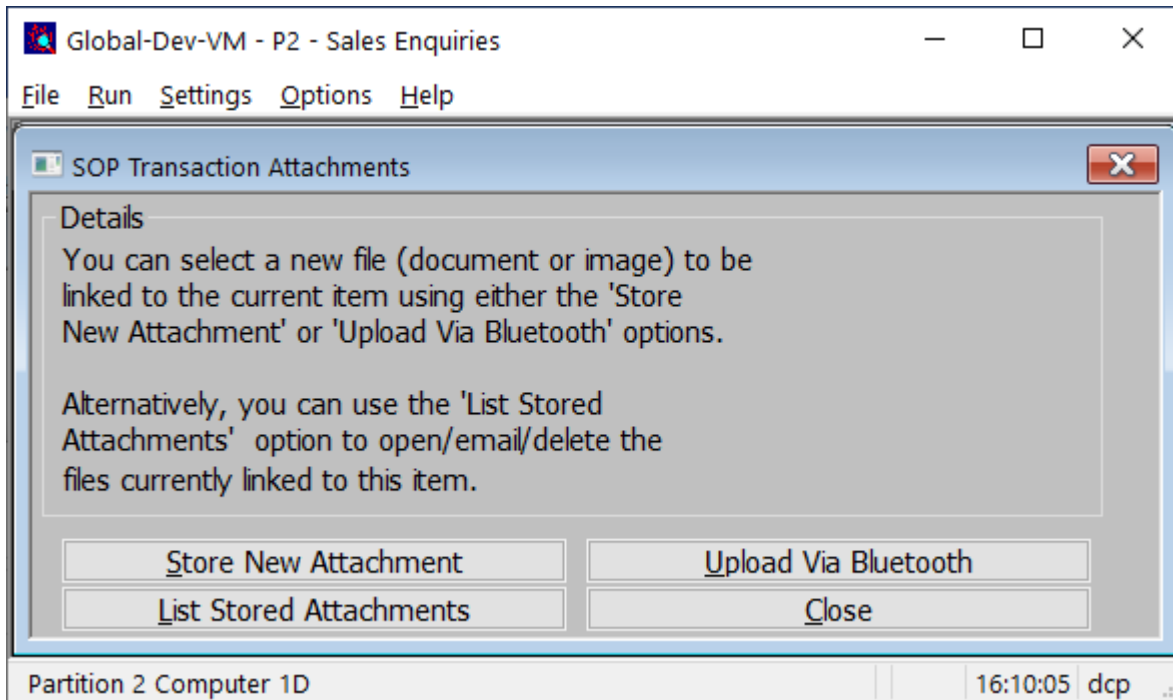
Note, SOP documents, POP documents and DL customer statements produced in PDF format are automatically stored as attachments to their related G3000 items. For example, if a SOP delivery note is produced in PDF format it will be stored as an attachment to the Sales Order it relates to.

Technical requirements. If you wish to make use of the 'Upload Via Bluetooth' feature the following requirements must be met. See Appendix B for further information regarding uploading files via Bluetooth.

- The underlying operating system must be Microsoft Windows and at least Edition 7.

- GSM Service Pack 37 is required.

- The version of GX must be at least V4.8k

- Ideally, the version of GLOBAL.EXE should be V5.6D, or later (see Appendix A)

DOCUMENTATION CHANGES

Attachments Window

Purpose	This window enables you to specify or process files (documents, images etc.) that relate to the current item.

The buttons are:

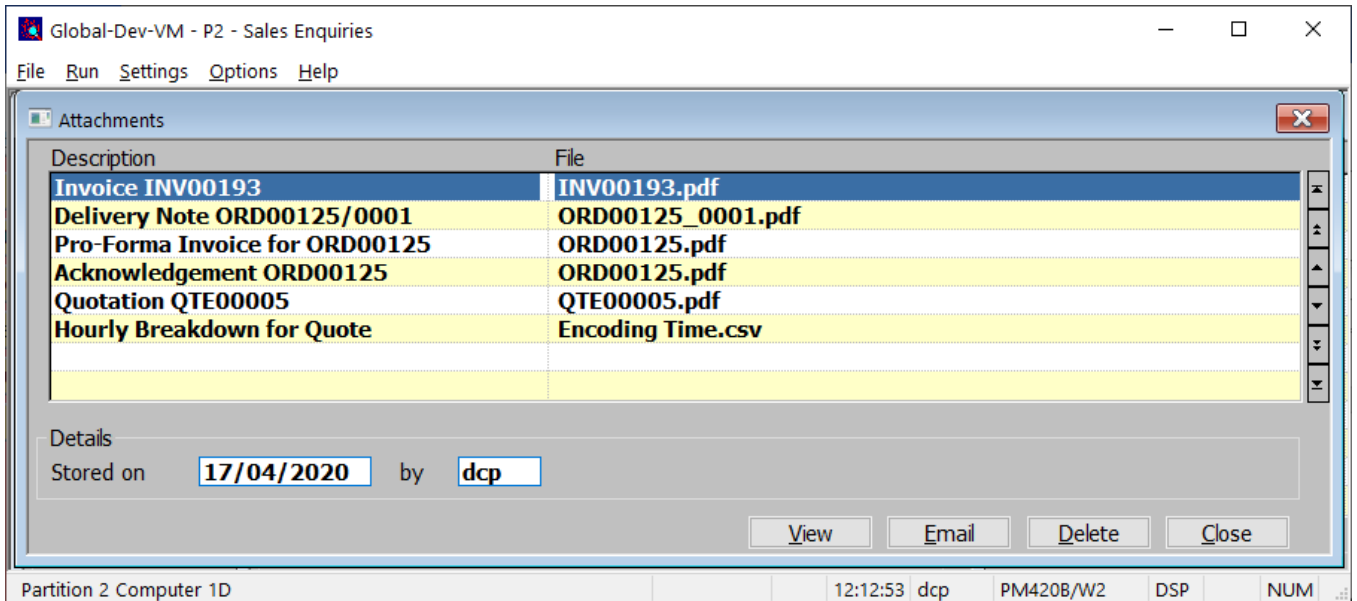|	
Store New Attachment	Press this to select a new file (document or image) to be linked to the current item. You will be asked for a description of the attachment file before selecting the file itself.
Technical Note	A copy of the attachment file is stored in the GSM folder (on the server) in sub-folder G3000\MM\DOC_Attachments\YYYY\mm where 'MM' is the module id. 'YYYY' and 'mm' denote the year and month the file was stored. If you wish to store the attachment files in a folder other than the GSM folder then you can define it using the 'G3000AttachmentFolder' registry setting under the 'Customisations' key. However, this must be a folder on the server.
Upload Via Bluetooth	*(Not available for Unix operating systems)* Press this to trigger the standard Windows processing that receives a file via Bluetooth (simply follow the onscreen prompts). Once you have transferred the file from your external device you will be asked for a description of the attachment file which is then automatically linked to the current item.
Technical Note	When uploading files via Bluetooth: • If the operating system is Windows Edition 7 or 8 you must choose to save the file in the folder specified within configuration file GX.INI. • If the operating system is Windows Edition 10 onwards the software can determine the folder the uploaded file was saved in itself and the setting within configuration file GX.INI is ignored/not required.
List Stored Attachments	Press this to view a list of attachment files currently linked to the item. This then gives the options to open, email or delete the attachment files.

List Attachments Window

| **Purpose** | This window lists attachment files (documents, images etc.) that have been linked to the current item. |

The buttons are:

Open	Press this to view the (currently highlighted) attachment file.
Email	Press this to email the (currently highlighted) attachment file.
Delete	Press this to delete the (currently highlighted) attachment file.
Note	The 'Email' and 'Delete' options can be protected by an authorisation point (ATTACH_100).

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Appendix A - G3000AttachmentFolder registry setting

GLOBAL.EXE V5.6D, and later, create the "G3000AttachmentFolder" registry setting in the GLMACH.TLT template file that is used by GLREGED.EXE thus allowing the setting to be added and modified using the standard GLREGED.EXE utility.

If the "G3000AttachmentFolder" is not included in the GLMACH.TLT then the setting must be added using the Windows REGEDIT.EXE command using the following procedure.

Create a text file using Notepad or a Windows text editor of your choosing, that contains:

Windows Registry Editor Version 5.00

[HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Global\Client\Customisations]
"G3000AttachmentFolder"="c:\\xxx\\"

Where c:\xxx is the path/folder name you wish to use. You can also specify a server name and folder. For example:

"G3000AttachmentFolder"="\\\\server-name\\folder\\"

If the server is running 32 bit Windows, then omit the "WOW6432Node" in the registry key. For example:

[HKEY_LOCAL_MACHINE\SOFTWARE\Global\Client\Customisations]
"G3000AttachmentFolder"="c:\\xxx\\"

Save the text file as a .REG file (e.g. ZM565.REG). If you have Administrator Privileges navigate to the .REG file in Windows Explorer and double click on it to import the contents of the file into the registry. Otherwise, run a command prompt (CMD) in Admin Mode and from the Command Prompt run:
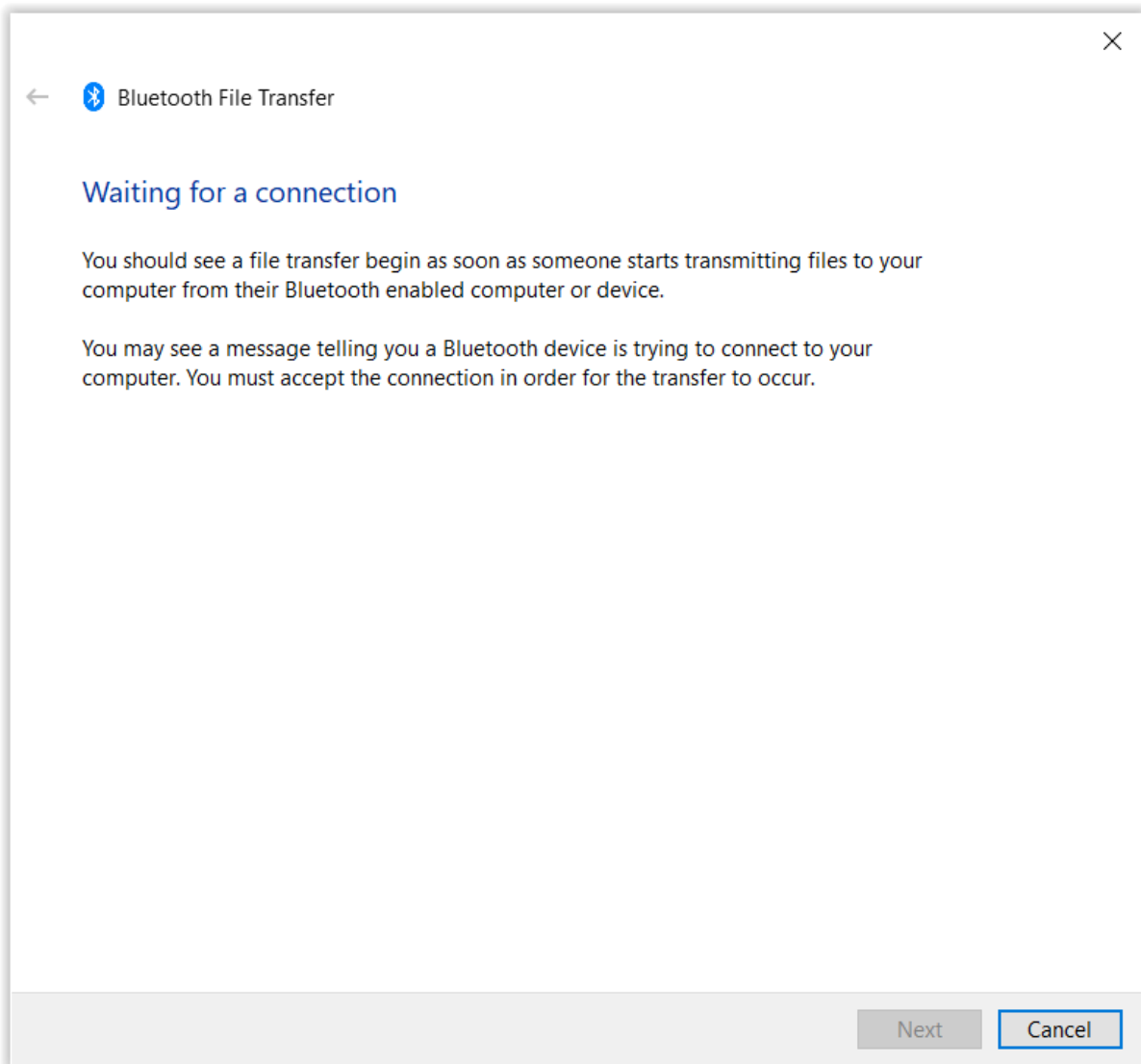
REGEDIT ZM565.REG

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Appendix B – Bluetooth Attachment Upload

Global 3000 can make use of Bluetooth to upload files from a mobile device for use as attachments. The Bluetooth file transfer is carried out using a standard Microsoft utility program which is run on a client machine running GX. The file transfer utility functions differ according to the version of Windows and some GX customisations are required to adjust for these differences.
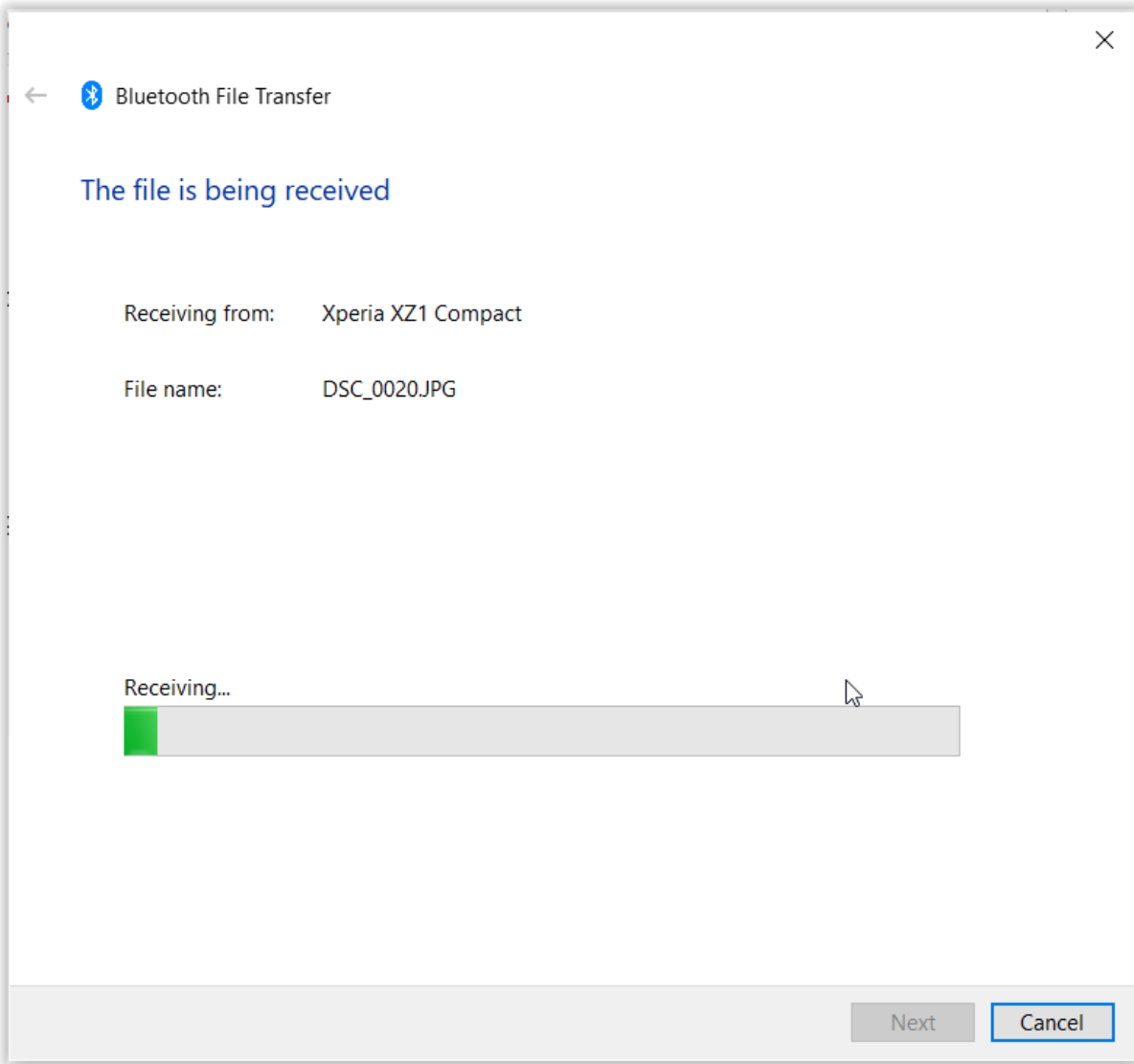
Windows 10

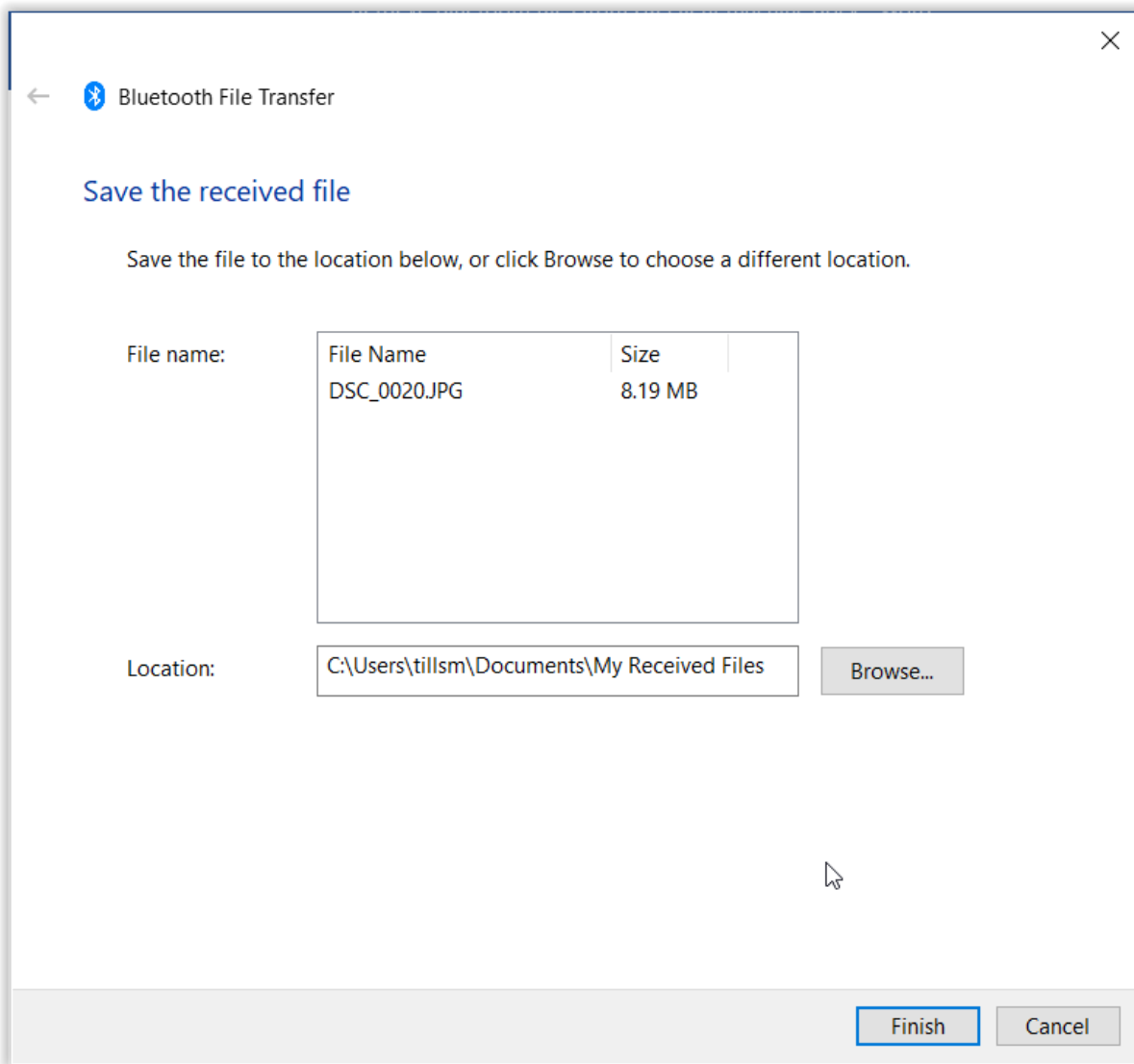When the Bluetooth file transfer program is run the following window will appear.

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Mobile devices have methods of sharing files (e.g. photos) using a variety of methods including Bluetooth. Once such a transfer is initiated from the mobile device the "Bluetooth File Transfer" window changes to show the file being uploaded. For example:

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When the file transfer completes, the user is prompted for a folder to save it to. For example:
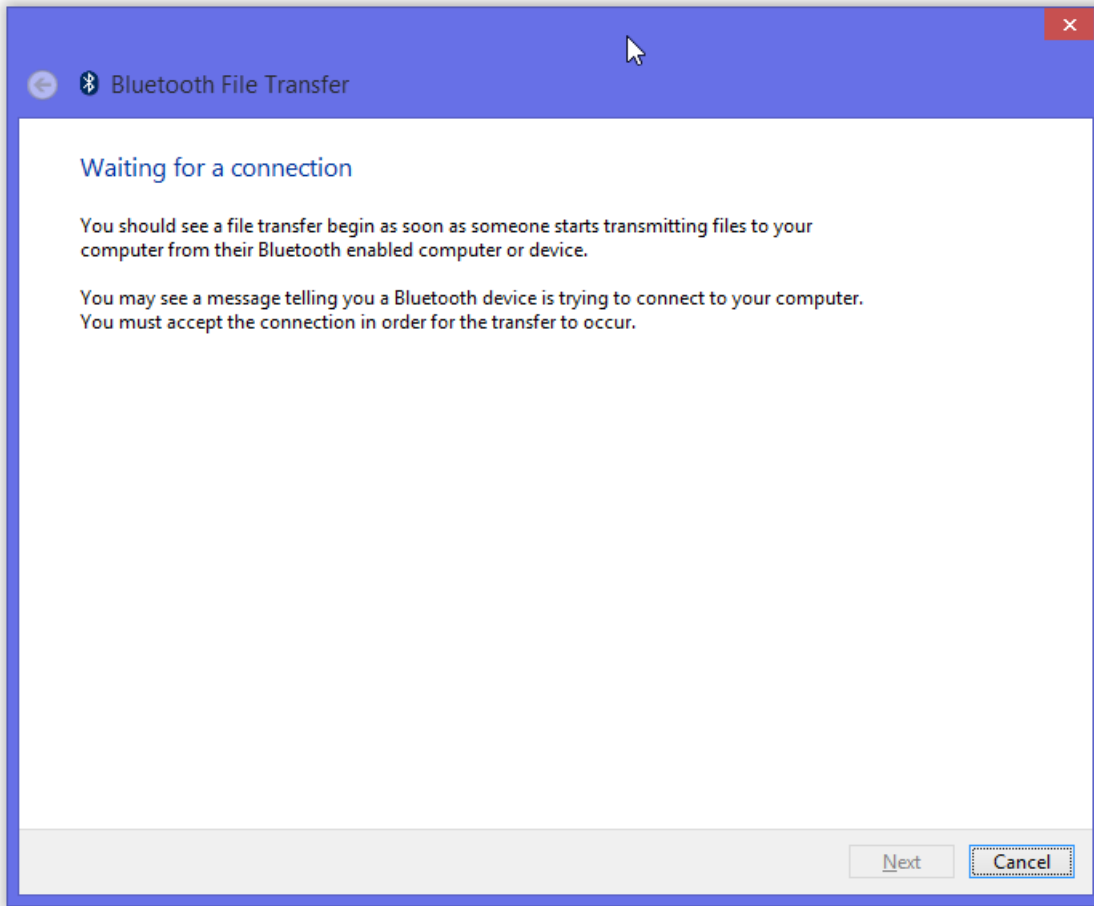

Clicking the Finish button will save the file and terminate the program.

For Windows 10, GX (and therefore Global 3000) can determine the folder where the file has been stored so no customisations are required.
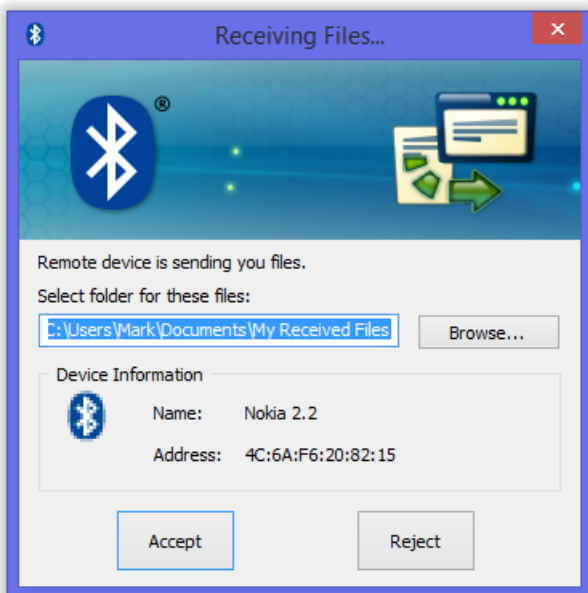
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Windows 7

When the Bluetooth file transfer program is run the following window will appear.

Mobile devices have methods of sharing files (e.g. photos) using a variety of methods including Bluetooth. Once such a transfer from the mobile device is initiated the following "Receiving Files…" dialogue window appears.

For Windows 7, GX (and therefore Global 3000) is unable to determine where the file has been stored. To overcome this restriction in Windows 7, a new setting in the GX.INI file setting has been included which will be used for this purpose. This registry setting is only recognised by GX V4.8k, or later.

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It is important the setting matches the folder specified. This is typically the user's "Documents" folder or a special sub-folder called "My Received Files" as shown in the example above.
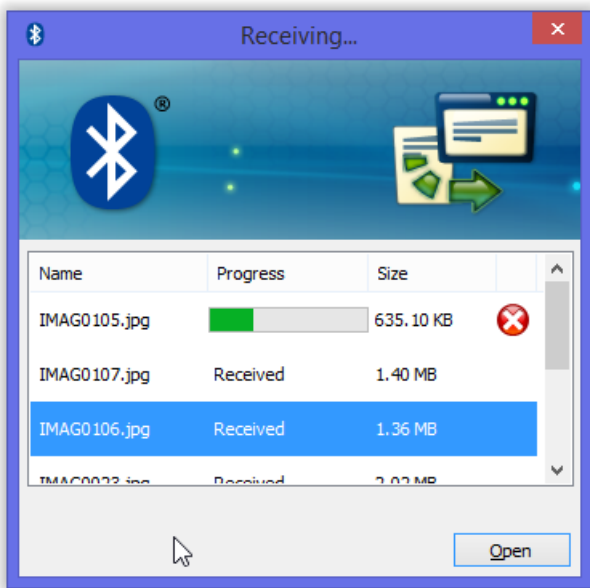
The new GX INI file "BluetoothReceiveFolder" setting is specified in the [general] section. For example:

> BluetoothReceiveFolder=My Documents\My Received Files

The "Documents" folder is held as a folder path related to the user's Windows login ID (e.g. C:\Users*username*\Documents). This would require a unique setting for each user's GX.INI file so the "My Documents" prefix is translated into the user related path reducing the amount of configuration required. Sub-folders can also be referenced so the INI file setting shown above works for the path in the "Received Files…" dialogue shown above.

It is possible to specify a special path (e.g. C:\GX\Bluetooth) as the GX.INI file setting but that would require the user to change the folder name in the "Received Files…" dialogue every time it's used.

Once the connection has been accepted the "Receiving…" dialogue is shown, confirming the name of the file being uploaded.

After the file transfer has completed the "Receiving…" dialogue remains on screen and must be closed manually. The original "Bluetooth File Transfer" window will still be on screen and this will also have to be closed before continuing.

Windows 8

The Bluetooth file transfer utility supplied with Windows 8 behaves in exactly the same way as on Window 7 described above and so the "BluetoothReceiveFile" setting will have to be configured in GX.INI.

The only difference between Windows 8 and Windows 7 is, it appears that the FSQUIRT.EXE utility program cannot be run from its installed location in the Windows folder. To work around this restriction in Windows 8, the program file, FSQUIRT.EXE, has to be copied from:

> C:\Windows\System32

to the GX installation folder.