



Office Automation Suite V 5.1

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1. Introduction

Addovation's Office Automation Suite (OAS) enables user friendly and process specific tools while maintaining the benefit of keeping all data in IFS' well integrated system. OAS is a proper add-in for Microsoft Office that connects to IFS through the IFS Extended server.

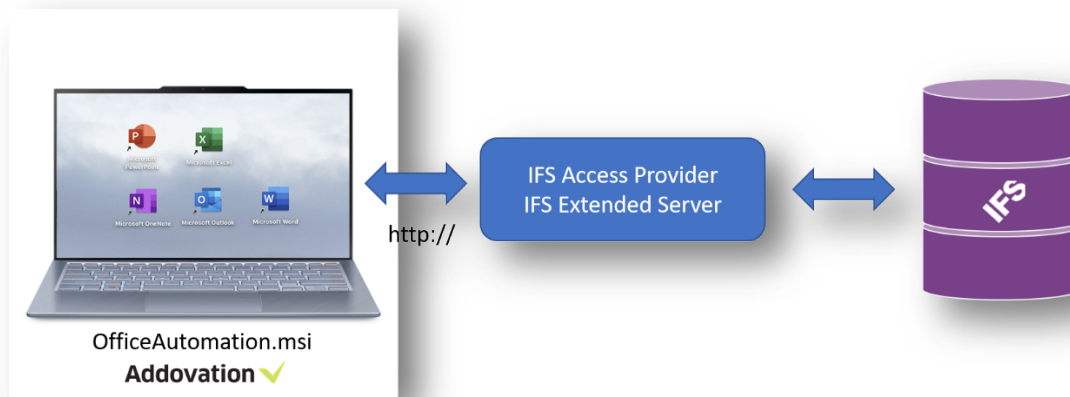


Figure 1 Conceptual illustration

1.1. General features and technical info

The Office Automation Suite consists of multiple modules like Document Management, Information Merger, File Control, Power Tools, Signature etc. They all have the following features:

- ✓ Proper add-ins for Microsoft Office
- ✓ Deployable on multiple platforms and supports multiple IFS/Office versions
- ✓ Available in several languages
- ✓ Installed through a distributable MSI package

1.2. Compatibility matrix

Office Automation Suite is compatible with/requires the following operating systems, frameworks and applications. Please use the link to see the matrix:

<https://www.addovation.com/technical-info-oas/>

2. Installation Guide

This section will take you through a manual installation of OAS. The application may also be deployed using a deploy tool, of which there are many available. For that reason, we will not cover any of these in this guide.

The Office Automation Suite is installed through an MSI package. Run the .msi file and follow the installation wizard.

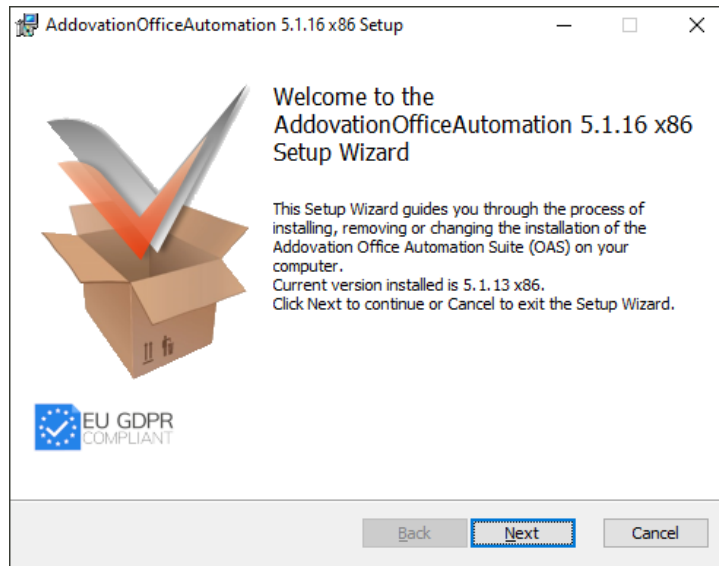


Figure 3 Installation Wizard first page

2.1. Environment Configuration

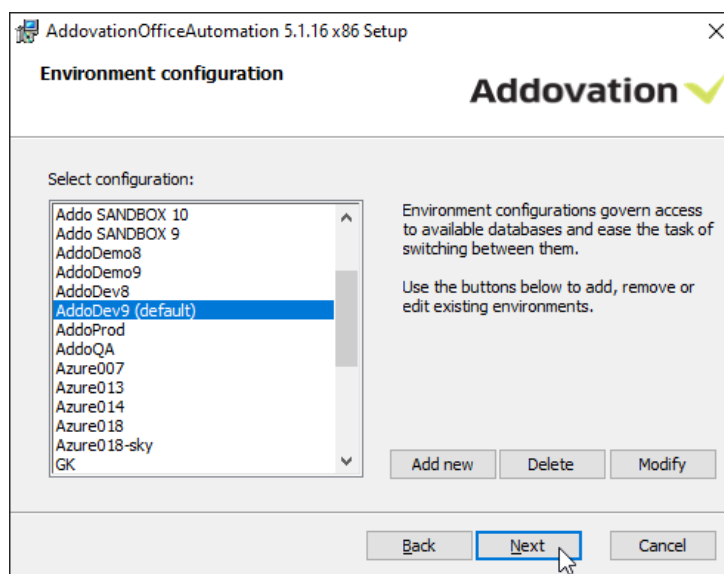


Figure 4 Environment configuration

When installing the software for the first time, you will need to specify which environment(s) you wish to be able to connect to (see screenshot below, and chapter 2.2). You do this by clicking the Add new button. When upgrading to a new version, or modifying an existing installation, you may choose to retain the current settings and simply click Next or make changes to the environment configuration by clicking Modify.

You will be able to choose between the environments in the OAS login dialog, from any of the supported MS Office applications.

2.2. Configuration Settings

The configuration settings allow you to customize your installation.

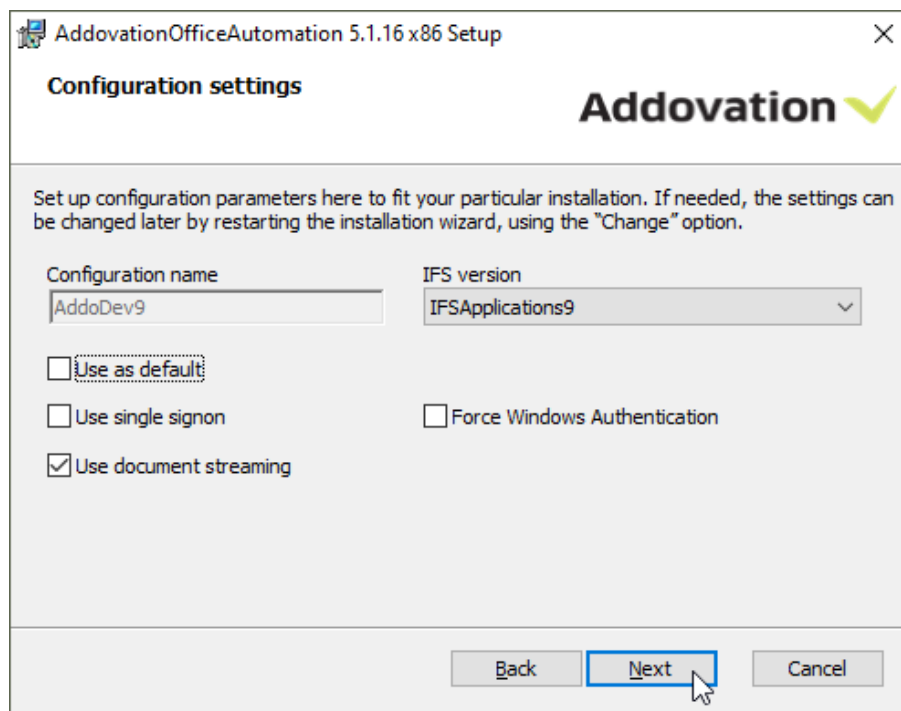


Figure 5 Configuration settings

Configuration name: Choose a name that describes the configuration (e.g. Race 8 demo), if it should be the default logon choice, and whether IFS is configured for single sign-on.

Server URLs: Select the server URL of your choice

IFS Version: Choose your IFS version

If you are not sure what options to check, leave the default values. You can change the values from within the application at any time.

To add a new environment, you need to specify the address to IFS Extended Server (e.g. server1:58080), the Application owner (e.g. IFSAPP) and the IFS portal (e.g. http://race8demo:58080).

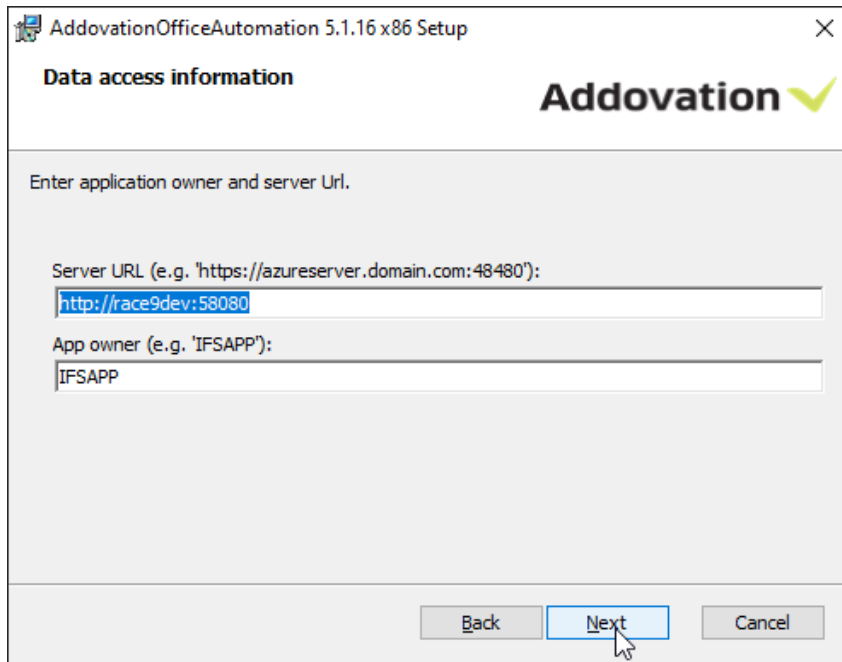


Figure 6 Data access information

2.3. Additional Settings

In the Additional Settings dialog, you can define which classes and formats will be excluded. The field defaults to the asterisk symbol. You can also define the Document Search URL in this dialog.

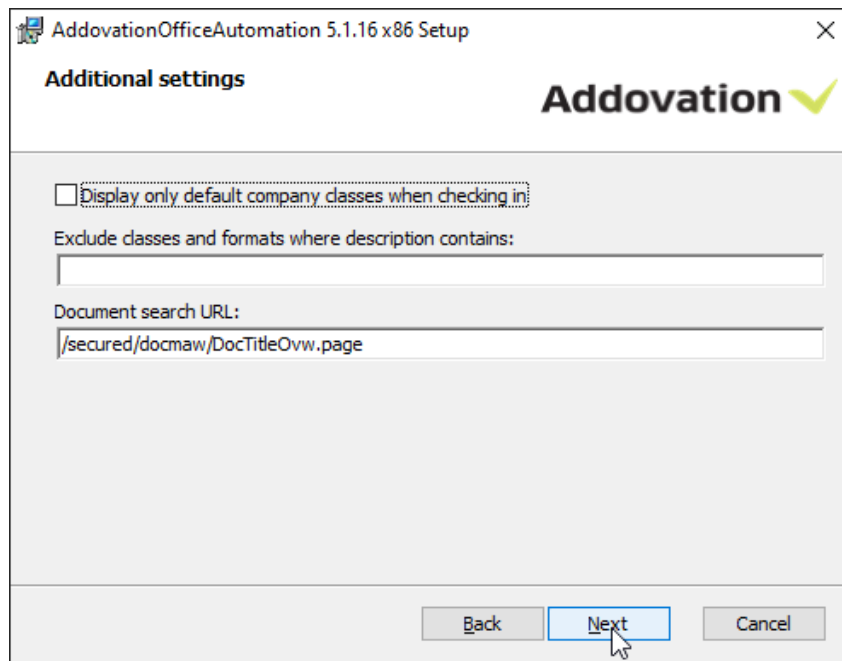


Figure 7 Additional settings

2.4. License Key

You will have received a license key from Addovation upon purchase of the OAS. Please enter the license key during the configuration of the software.

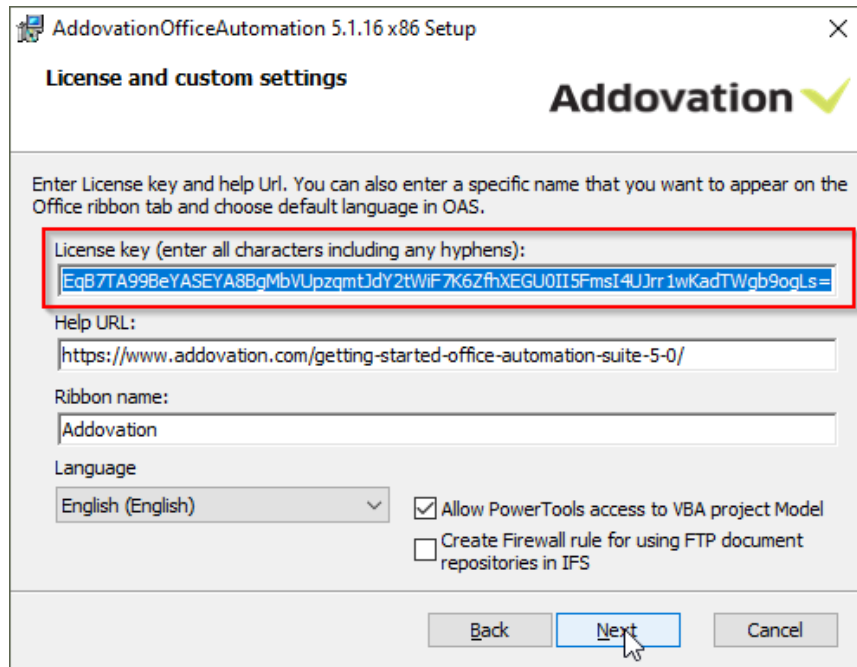


Figure 8 Installation settings, license key

In the **Help URL** field, you can specify what the help symbol in the OAS will point to. Included in the OAS is an online user documentation. If you do not want to provide your own information, leave the link as is already filled in.

The **Ribbon name** field allows the customer to customize the name that appears in the Microsoft Office application's ribbon.

The **Language** dropdown list determines the language used by the add-in in the Microsoft Office application.

The Checkbox Options

The **Allow PowerTools access to VBA project model** is required to use PowerTools project files. This setting changes a configuration value in Microsoft Office.

The **Create Firewall rule for using FTP document repositories in IFS** checkbox ticked opens a port in the firewall on the computer which allows communication with the FTP server used by IFS Applications.

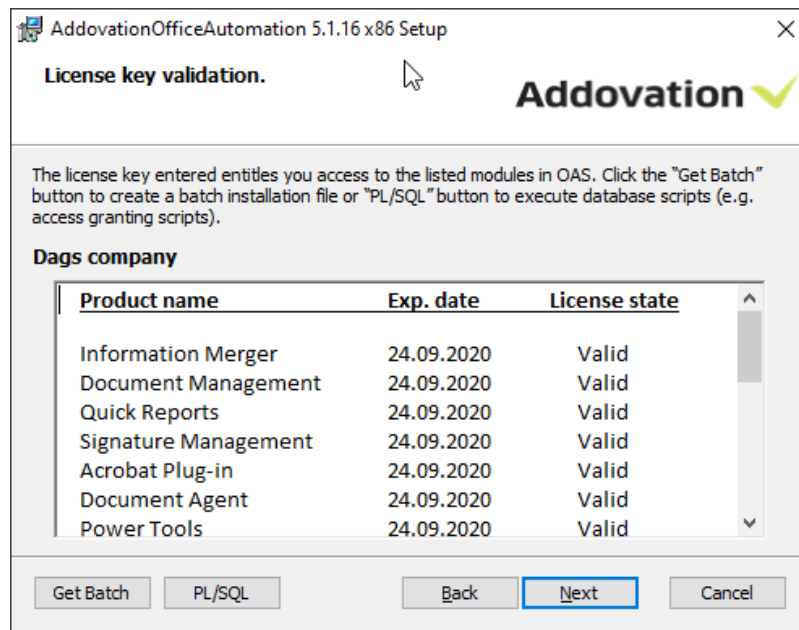


Figure 9 License validation

When you have entered the right license key, you will receive a validation listing the products and their date of expiry.

2.5. Simple distribution – Get batch

The 'Get batch' option allows you to install the software on several machines, without having to enter your settings multiple times.

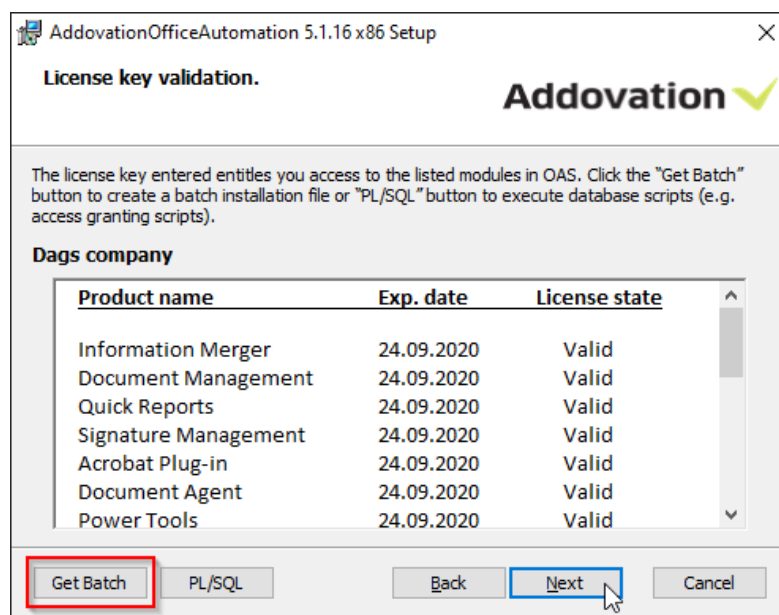


Figure 10 The 'Get Batch' button

If you click the button **Get Batch**, a .bat (batch) file will be created which can be used to launch the .msi using the settings you defined in the current installation.

Observe the following with generating the batch file:

- The batch file must be executed by a user having administrator rights
- If you experience problems running from a network drive, try to copy the installation file to a local drive
- The batch file created can only be used to install 32-bit or 64-bit version, depending on the bitness of the installation file used to create it.

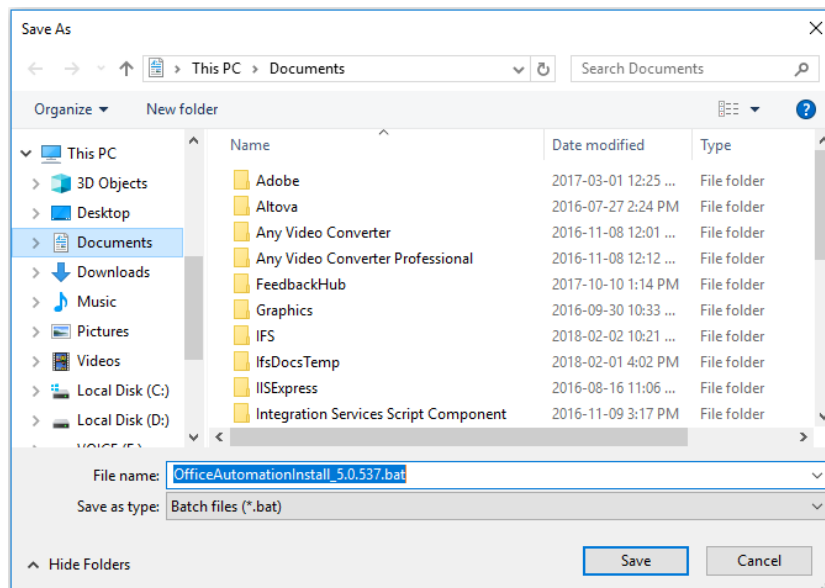


Figure 11 Save the .bat file on a local drive

A .bat file and a .PS1 file is generated at your chosen location.

When you want to distribute the software to other computers, download the .msi, the.bat and the .PS1 file to the chosen computer. Open the .bat file and right click 'run as administrator'. The installation file will then run with your chosen parameters, installing OAS on the computer.

2.6. Automatic installation of scripts – PL*SQL

If this is the first time you run the OAS installation in the company, your administrator needs to run the PL*SQL function and execute all the scripts that follows the installation.

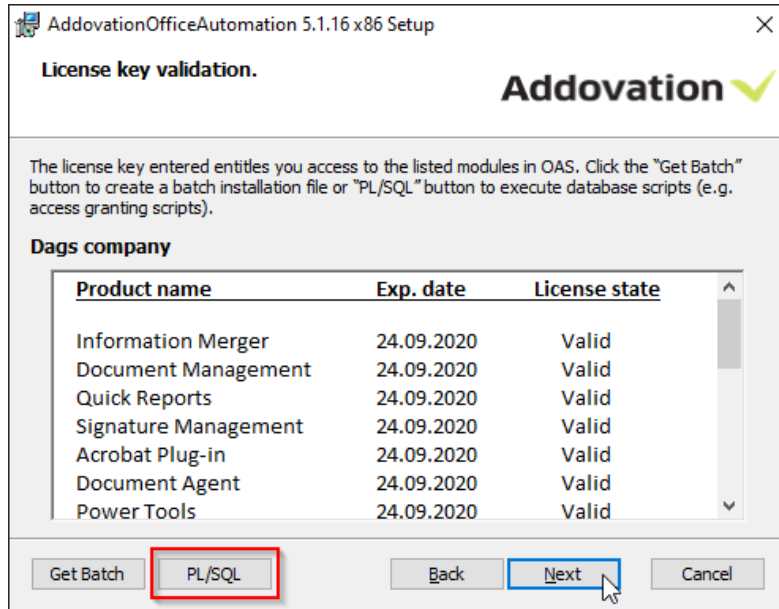


Figure 12 Automatic installation of scripts

Click on the PL*SQL button and type in your username and password (Usually IFSAPP or IFSADM) and the environment where you would like to install the scripts.

If you have scripts saved to your harddrive, you can browse for these using the 'browse' button. Click 'Execute' to run the scripts and to give the necessary access and grants. The wizard will confirm that the scripts were run successfully. You may have to enter parameters for some of the scripts

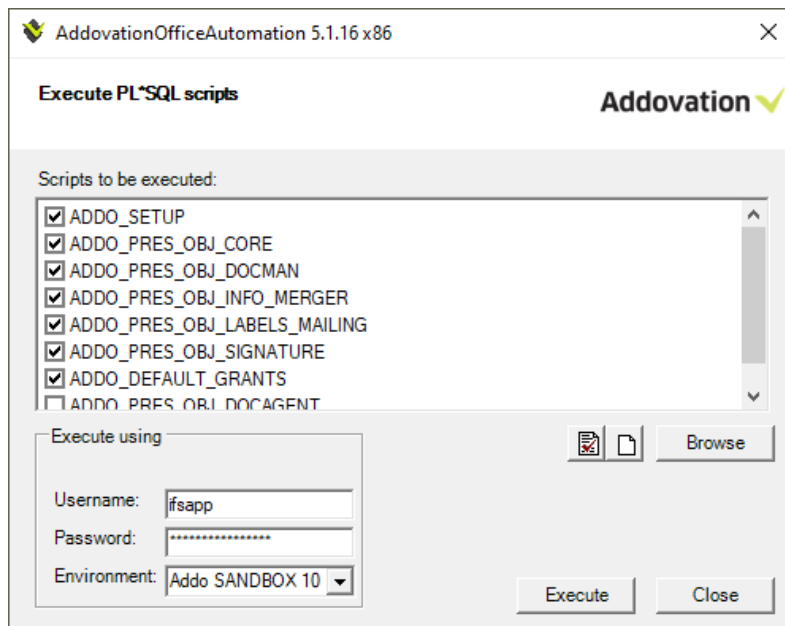


Figure 13 Execute PL*SQL scripts

2.7. Ribbon name and language

You are free to call the ribbon name to whatever suits your organization, in the ribbon name field. This step also allows you to select the language you prefer.

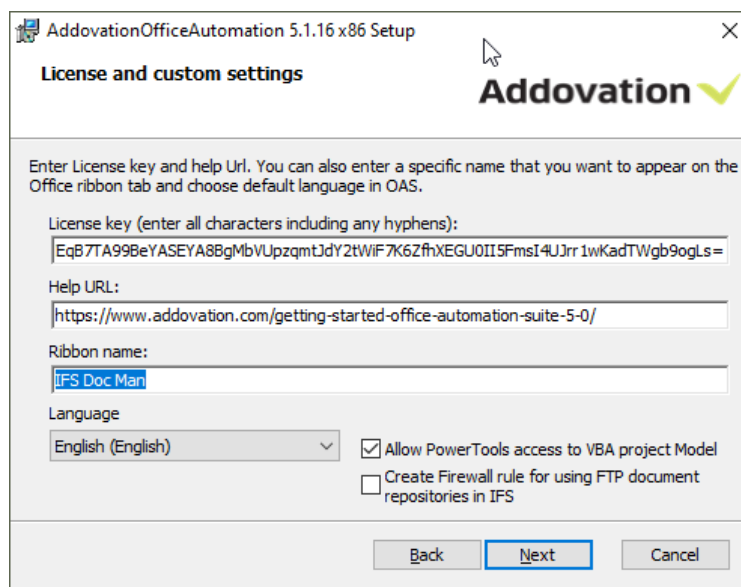


Figure 14 Installation settings, Ribbon Name and Language

The setting ‘Allow Power Tools...’ modifies a macro related setting within MS Office, which is necessary for Power Tools based solutions to function. Make sure that the ‘Allow PowerTools...’ is ticked if you use Addovation’s customized Excel solutions.

2.8. Customized setup

Under ‘customized setup’ you can select the way the features are to be installed for the various MS Office components. Click on the icons in the tree list to adjust the installation for the components.

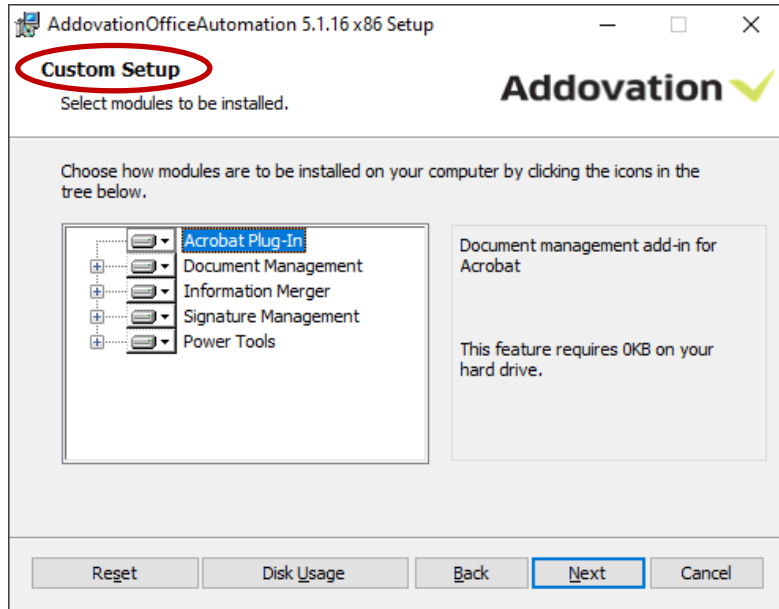


Figure 15 Customized set up

2.9. Install setup

Now you are ready to install OAS 5.0. Click install button to complete setup.

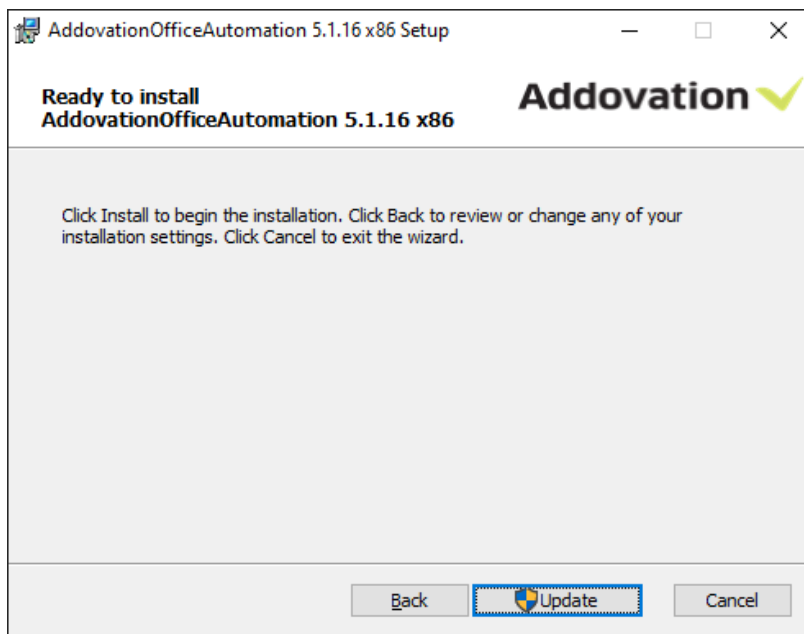


Figure 16 Install Setup

2.10. Complete setup

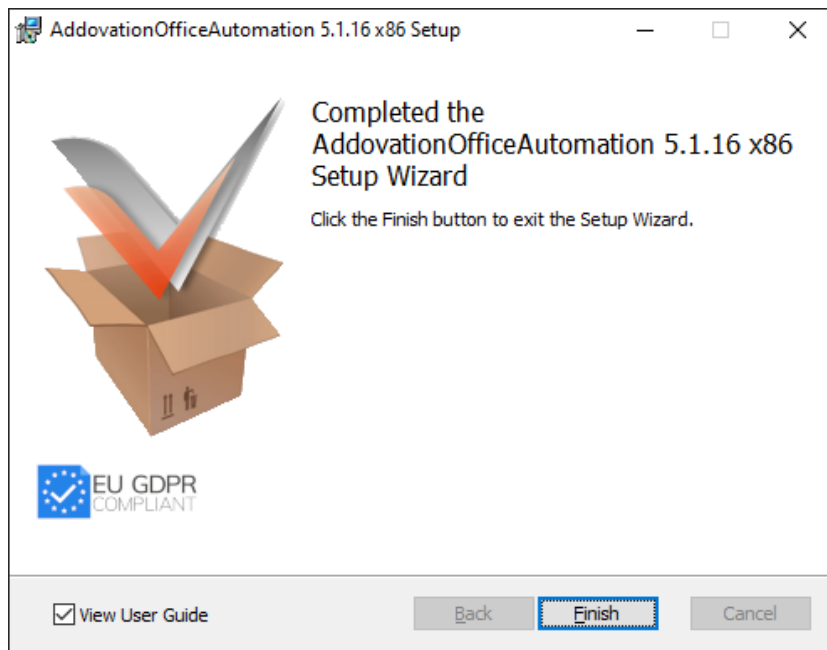


Figure 17 Complete Setup

3. Presentation Objects

OAS is a client-side application that communicates with IFS through the IFS Extended Server. When using OAS, a user must log on using their own user credentials. All business logic and access control mechanisms that exists in IFS is fully obeyed by OAS.

To make it easy to grant access, OAS comes with predefined presentation objects.

3.1. Allowance to use the IFS Access provider

The easiest way to do this is to use the standard permission set FND_PLSQLAP. Users must have this (or equivalent) to run anything through IFS Access Provider.

3.2. Presentation objects for OAS

To make it easy to set up OAS, we have defined a set of presentation objects that are required to run the various modules within OAS.

For each of the modules there are Database Objects and for some modules there are also presentation objects that correspond to a particular button in the ribbon.

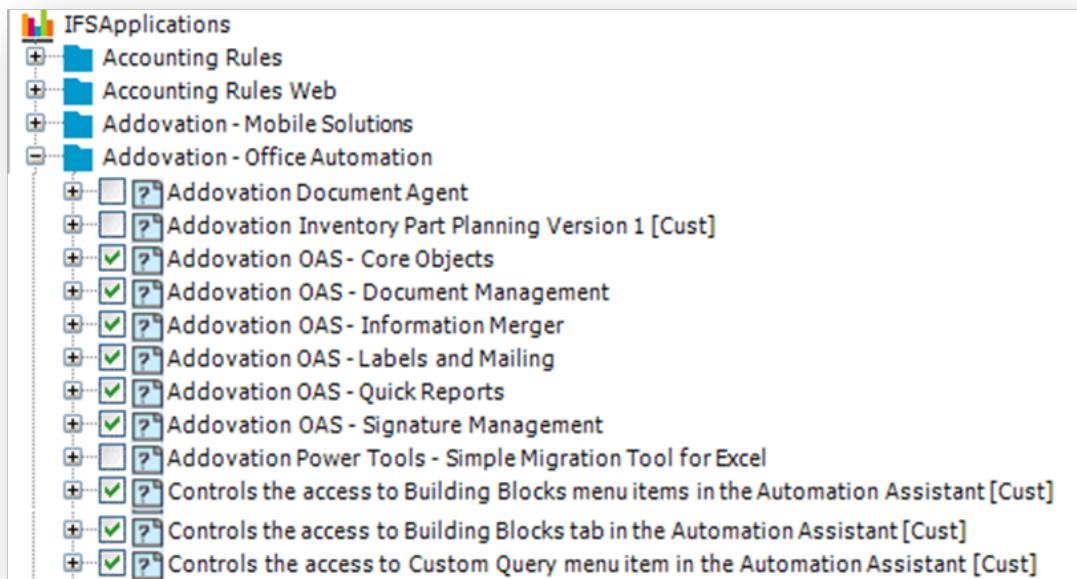


Figure 18 Examples of presentation objects by component

3.3. Ribbon

There are three mechanisms in the ribbon that governs button visibility.

- If user has license to run the module or not
- If user has permission set granted to specific button(s) or not
- And if user is logged on to the database or not.

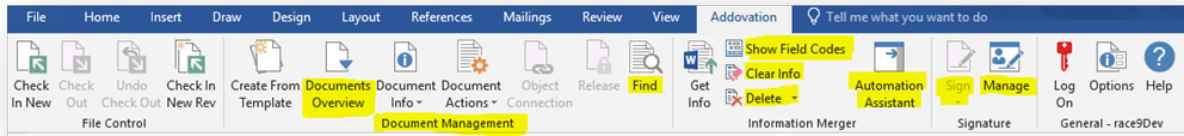


Figure 19 Addovation Ribbon

The highlighted buttons are governed by the presentation objects that are listed below. E.g. Automation Assistant button is governed by presentation object displayed below.

Note that until the user has logged on, it is not possible to know if the user has grants or not. That means some buttons will be invisible until the user is logged on.

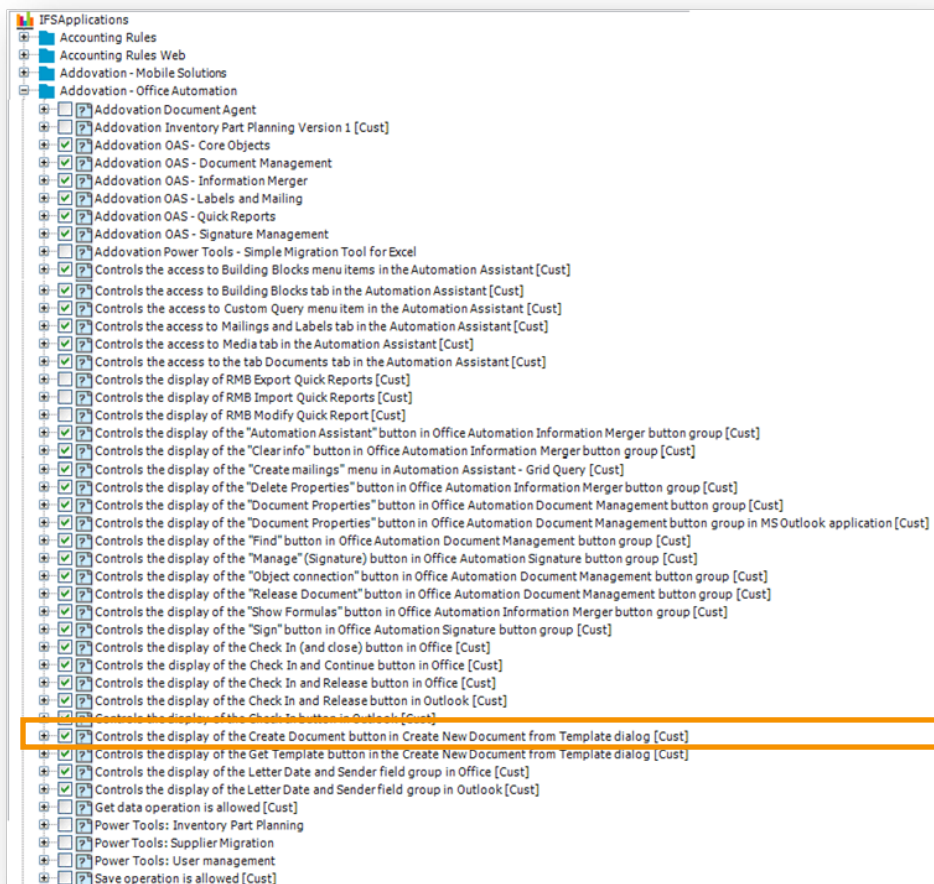


Figure 20 Examples of presentation objects by component

3.4. Information Merger - considerations

Note that for Information Merger we have created presentation objects for the “core operations”. However, there are no presentation objects for objects like Project and WorkOrder that may be connected to an object.

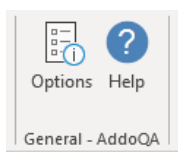
3.5. Presentation Object Definitions

The presentation object definition files are located under the Program Files folder e.g.

C:\Program Files (x86)\Addovation\Office Automation\SQL_SCRIPTS

*Note that every new version of OAS may come with new or modified functionality that may require access to new database objects, which means that the presentation objects scripted in these script files may have been modified or new added. So, whenever a new version of OAS is installed, the scripts should always be re-executed. Go to the **OAS Options | Tools | PL*SQL** dialog to do this. You need the application owner password to perform this operation.*

4. Configuration options post installation



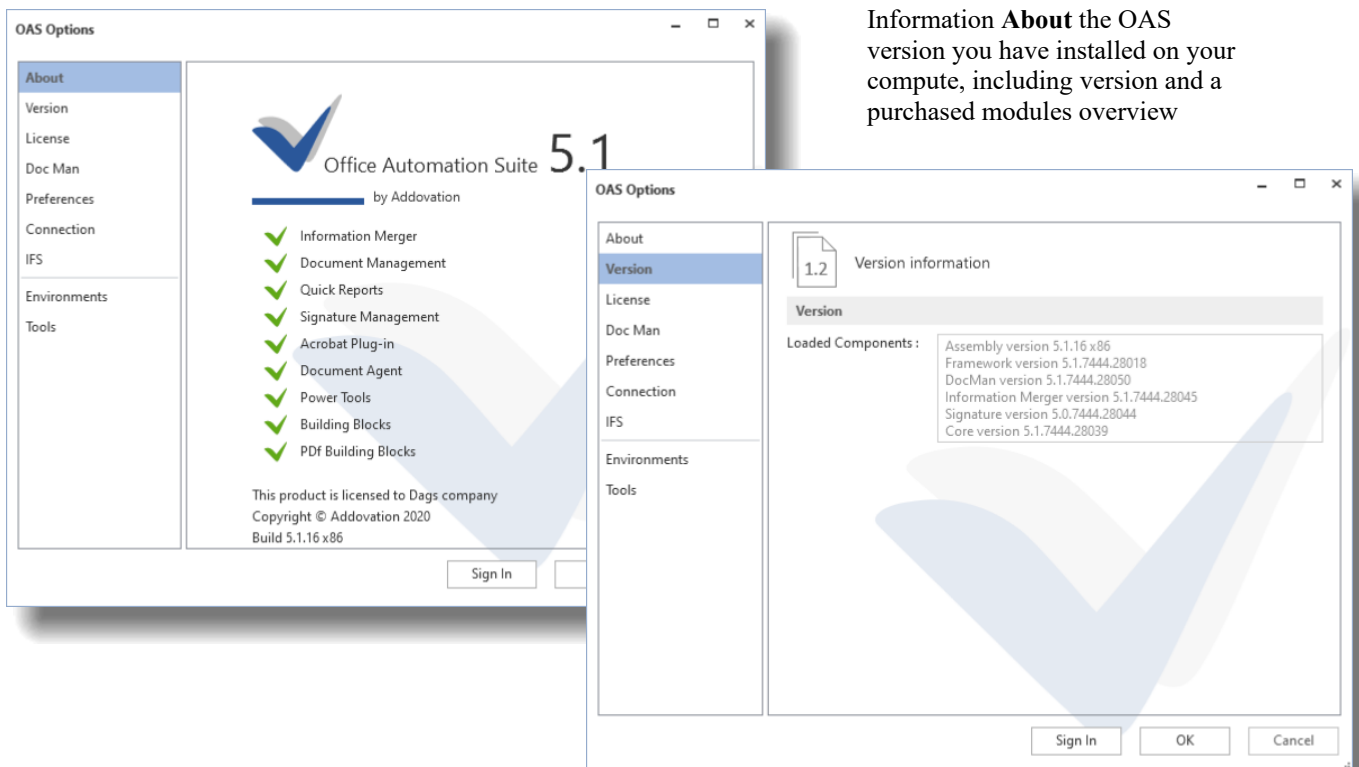
When you have installed the OAS, you will have the opportunity to obtain information from, and change/ reconfigure the software. This can be done by clicking on the **Options** button in the Addovation ribbon.

Not all pages in this dialog is included in this document. Please see the *Assistance OAS 5.0 User Guide* for the complete coverage of all pages in this dialog.

Figure 21 Options button

4.1. Information about the software

In the Options dialog you'll find information about the OAS version you have installed.



Information **About** the OAS version you have installed on your compute, including version and a purchased modules overview

Figure 22 Version info page

4.2. License Information

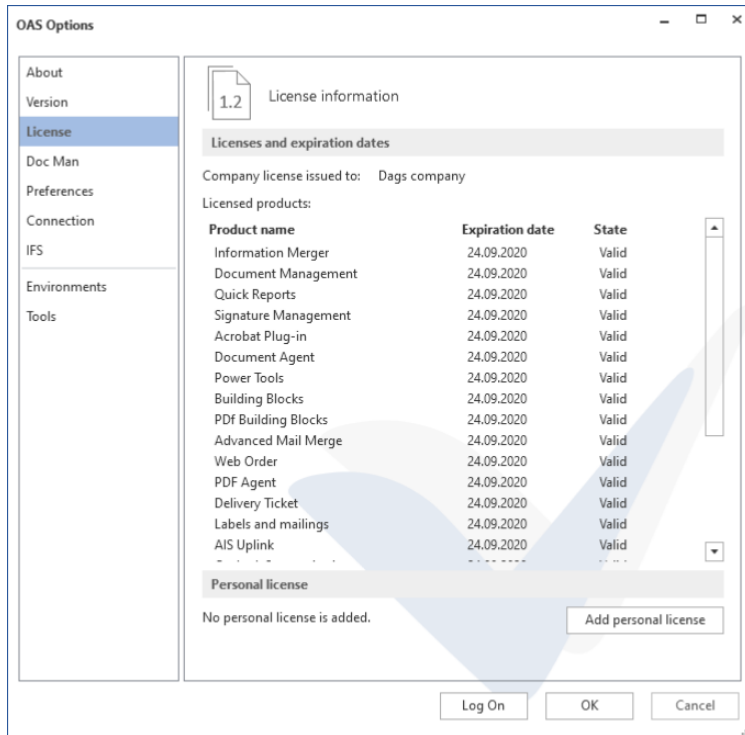
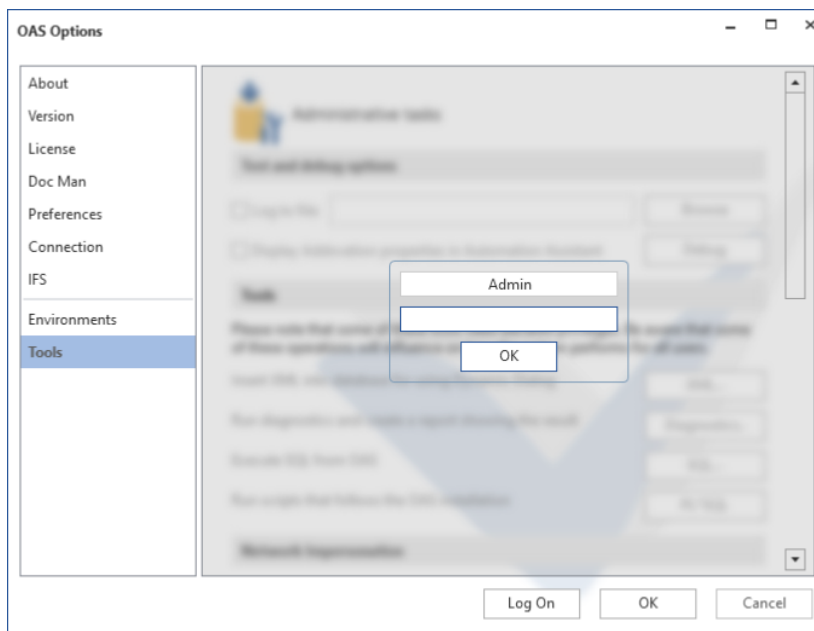


Figure 23 License page

The License page shows you all your currently purchased product licenses.

You can also add and update your personal license from this page. You will also see a list of the products you have registered for, the license state and the expiry date.

4.3. Advanced options

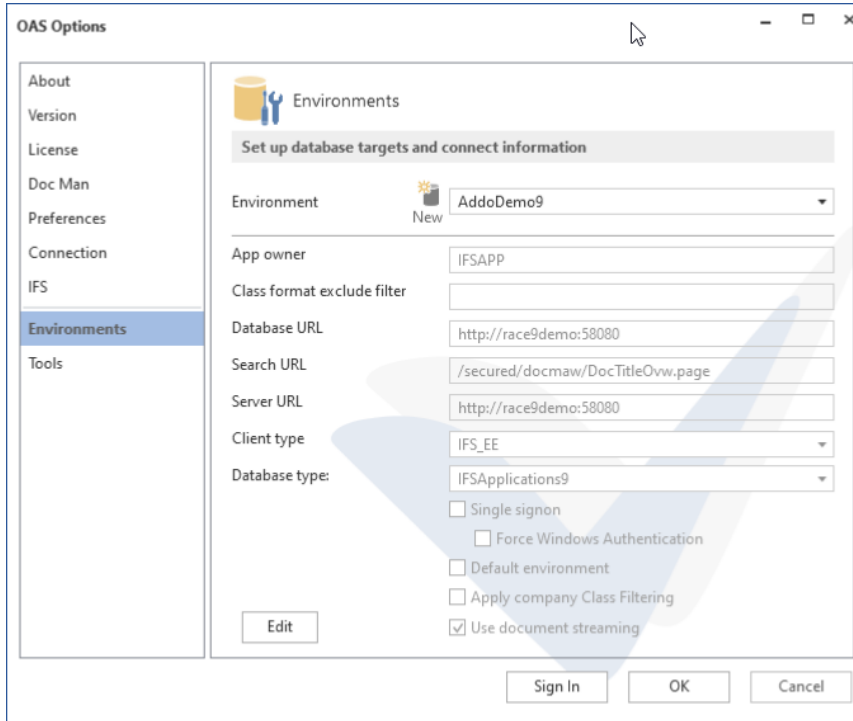


The two last Options pages, Environments and Tools requires a password to be entered to, to be able to edit the pages.

Click one of the page selectors and enter the password when asked for.

Figure 25 Tools requires a password to be entered

4.4. Environments



From the Environments page, you can view and edit existing environment definitions and create new (requires application is run as administrator).

Figure 26 Environment page

4.5. Tools

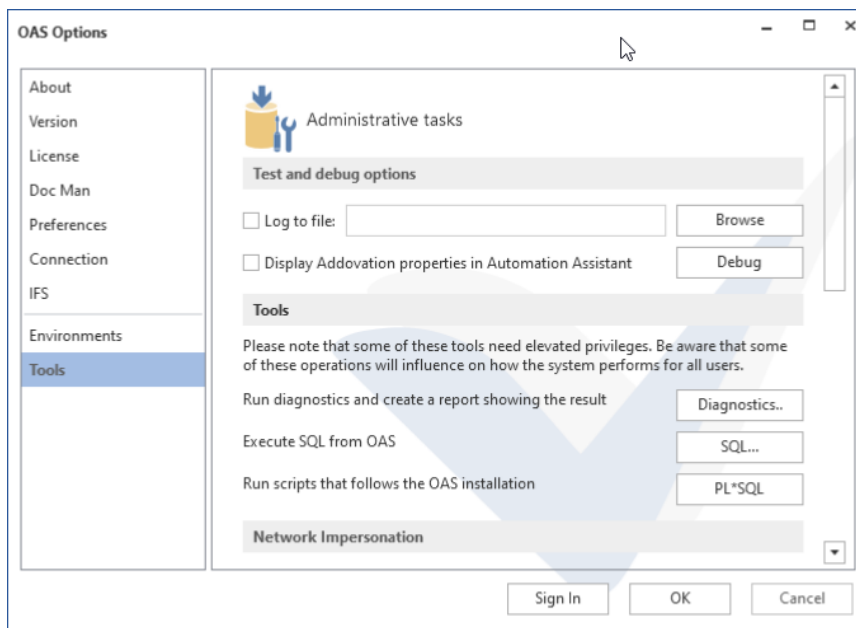


Figure 27 Tools page

From the **Tools** page, several powerful tools and configuration options can be reached. From the *Tools* section you have the following additional options

- Diagnostics – Runs and create a diagnostic report for the OAS installation
- SQL – Opens SQL dialog for executing simple SQL queries from within OAS
- PL*SQL – Opens a dialog for executing PL*SQL scripts

These are not to be described in detail here, please refer to the OAS User Guide for a closer description on usage. However, we'd like to draw your attention to the PL*SQL script execution option, which makes it possible to execute the mandatory installation scripts like under the installation wizard.

5. Test connection

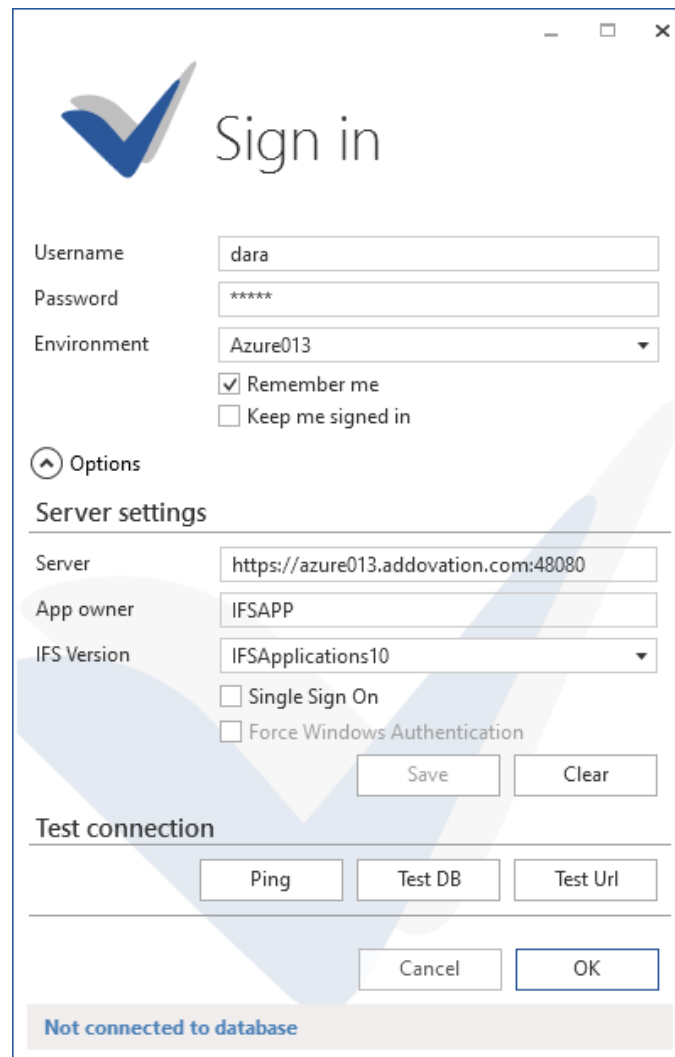
From the expanded Log on dialog, the following options can be used to test your settings:

Ping: This allows you to verify the server connectivity (Note: Some network configurations block the ping command). Even if ping is not successful it might be possible to communicate with IFS Extended server.

Test DB: This verifies whether the extended server is reachable via the access provider.

Test URL: This option will open the web browser and navigate to the URL you specified in the configuration settings.

You can also temporarily change the environment configuration directly from the OAS, under the **Option** button. This will be saved as a custom environment.



The screenshot shows a 'Sign in' dialog box with the following fields and options:

- Username:** Text input field containing 'dara'.
- Password:** Password input field containing '*****'.
- Environment:** Dropdown menu set to 'Azure013'.
- Remember me
- Keep me signed in
- Options:** Collapsible section header.
- Server settings:**
 - Server:** Text input field containing 'https://azure013.addovation.com:48080'.
 - App owner:** Text input field containing 'IFSAPP'.
 - IFS Version:** Dropdown menu set to 'IFSApplications10'.
 - Single Sign On
 - Force Windows Authentication
 - Save** and **Clear** buttons.
- Test connection:**
 - Ping**, **Test DB**, and **Test Url** buttons.
 - Cancel** and **OK** buttons.
- Not connected to database** status bar at the bottom.

Figure 28 Test connection

6. Certificate considerations

6.1. Introduction

Office Automation Suite (OAS) is a digitally signed application, which means that you know that the software you are running is the original software and that no-one has tampered it.

The Trusted *Publishers certificate store* contains information about the Authenticode (signing) certificates of trusted publishers that are installed on a computer. A publisher is any developer or software company that has created and distributed a digitally signed add-in. The certificate associated with the digital signature must be issued by a reputable certificate authority (CA).

If the verifier is offline or blocked (disconnected from the Internet) it is impossible to check certificate-revocation data, or to verify time stamps if they are present (expiry). The root certificate authority who issued the certificate must be trusted by the user. If any of these scenarios occur, the verification of the add-in may be delayed or impossible, in which case the add-in may be deactivated by the Office Application.

For OAS to work optimally, *it is strongly recommended to install the Addovation Certificate on your computer(s)*.

There are several ways to this, in this guide we provide you with

- Manual installation with a step by step instructions to how this can be done in an easy way.
- Tips on how one can deploy the certificate from the IT department

6.2. Manual Installation

There are two starting points for installing the certificate manually:

- If you are provided with the certificate file itself, you can skip part 1 of the installation steps and go directly to part 2.
- If you have access to the msi file (Addovation installation package), you can install the certificate using this file, as described in part 1 and complete the installation by doing steps 3 through 5 in part 2.

In the following section, all step to install the Certificate and place it in the Trusted Publishers location is provided

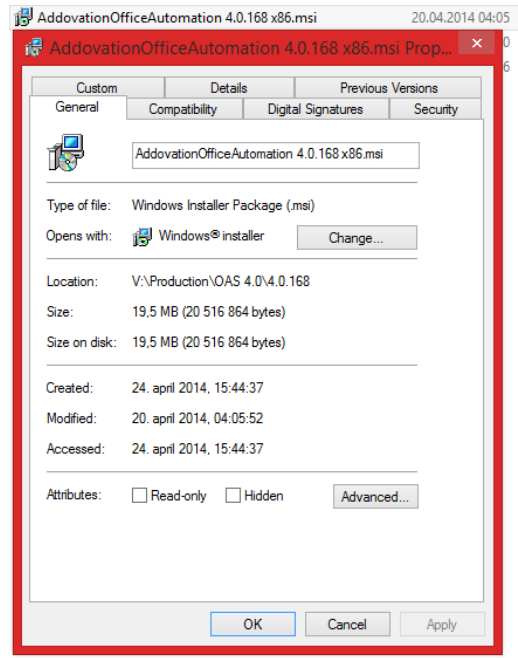
First, to install a certificate into the Trusted Publishers store, **you must have administrator rights** on your computer.

1.1.1 Part 1. Installing using the Addovation msi file

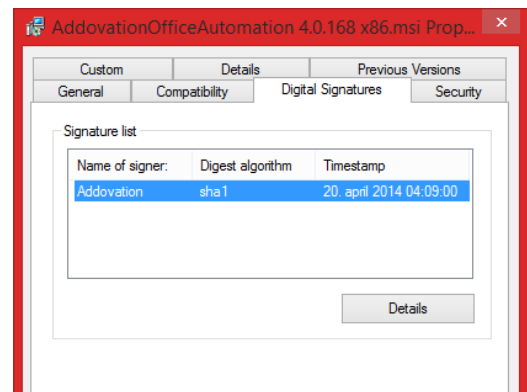
If you have the Addovation msi file, you can complete the installation of the certificate from the .msi file. If you have the certificate file itself, skip Part 1 and go directly to Part 2.

Install by following these steps:

1. Locate the msi file, right click on the file and choose **Properties** in the pop-up menu



2. In the upcoming dialog, click **Digital Signature** tab



3. Now, click on the **Addovation** signature in the list and click **Details**

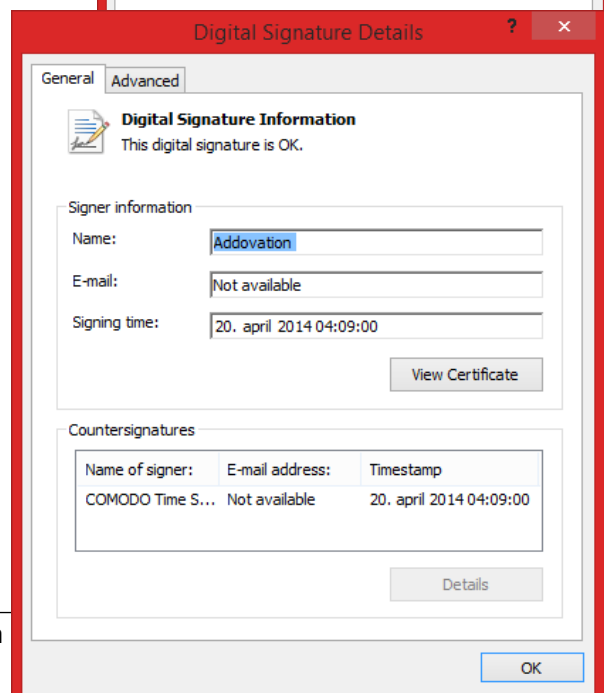
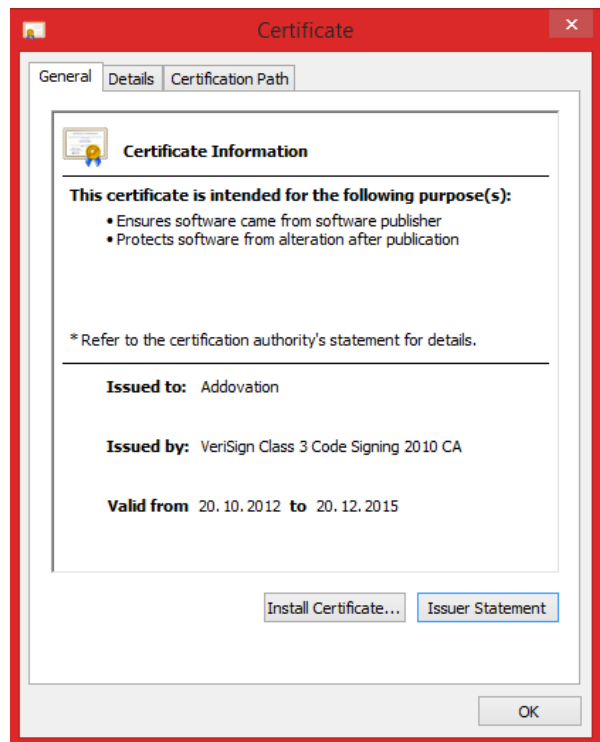


Figure 31 General

4. Click the **View Certificate** button, the dialog below appears:
5. Click the **Install Certificate...** button
6. Go to **Part 2** of the installation guide and proceed from **step 3 to the end**.



1.1.2 Part 2. Installing using the Addovation Certificate file

Provided you have a certificate file, you can install the certificate by following the steps below.

If you do not have a certificate file, install from the installation file (.msi file) as described in Part 1.

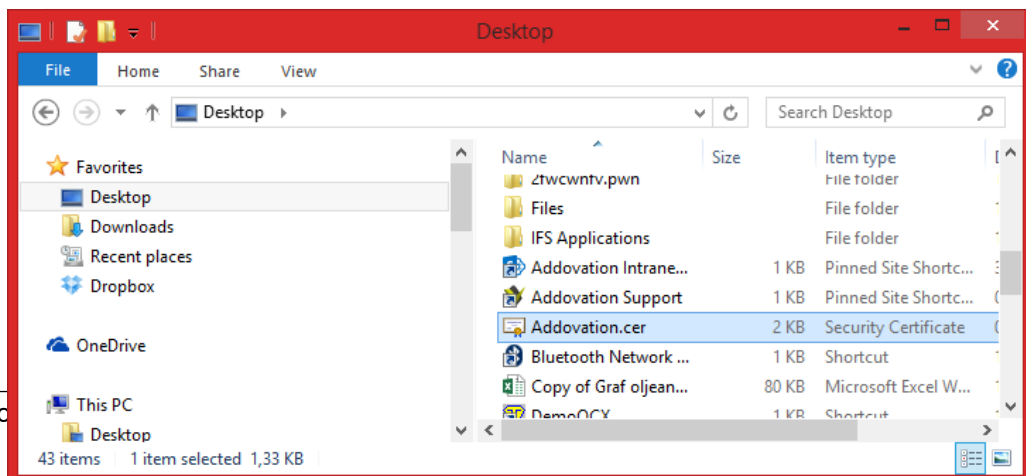


Figure 32 Certificate

Figure 34 Locate Certificate file

1. Locate the certificate file, right click and choose **Install Certificate**
2. The Certificate installation wizard will appear



Figure 35 import wizard

3. Click **Next** button. Choose the **Place all certificates in the following store** and then click the **Browse...** button. The **Select Certificate Store** dialog appears:

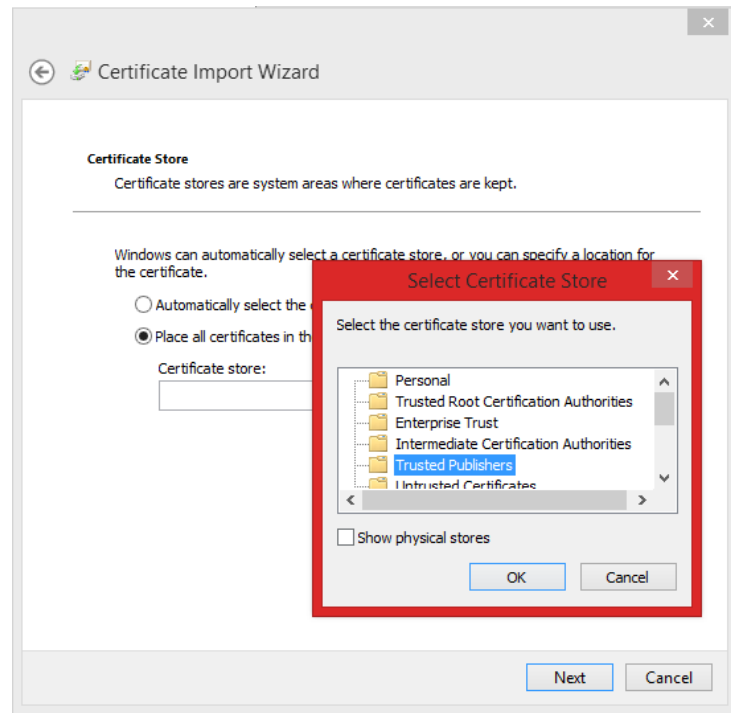


Figure 36 import wizard

4. Select the Trusted Publishers store and click OK. A confirmation page is shown:

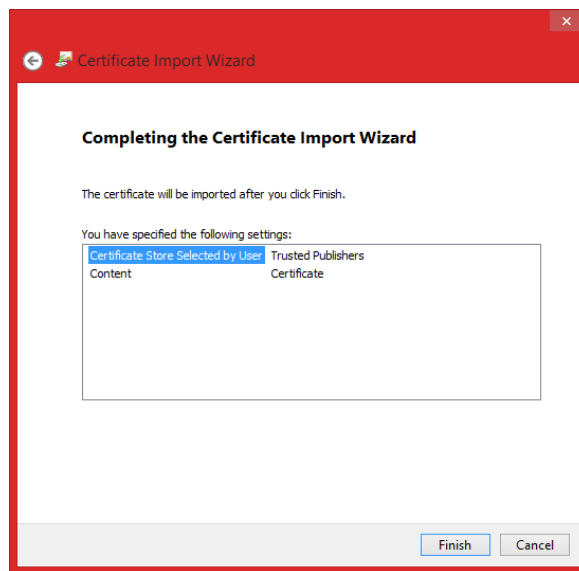


Figure 37 Certificate import wizard

5. Click **Finish**. The installation is confirmed.

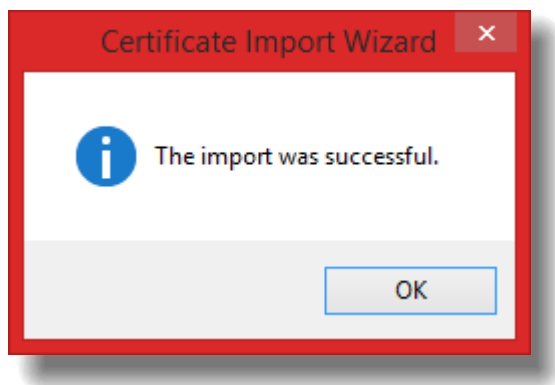
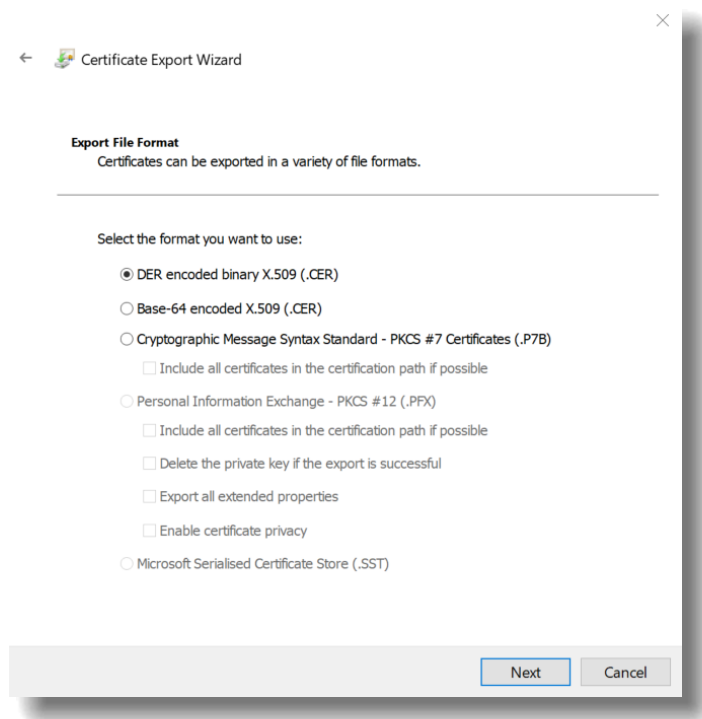


Figure 38 Confirm

This completes the installation for a local computer.

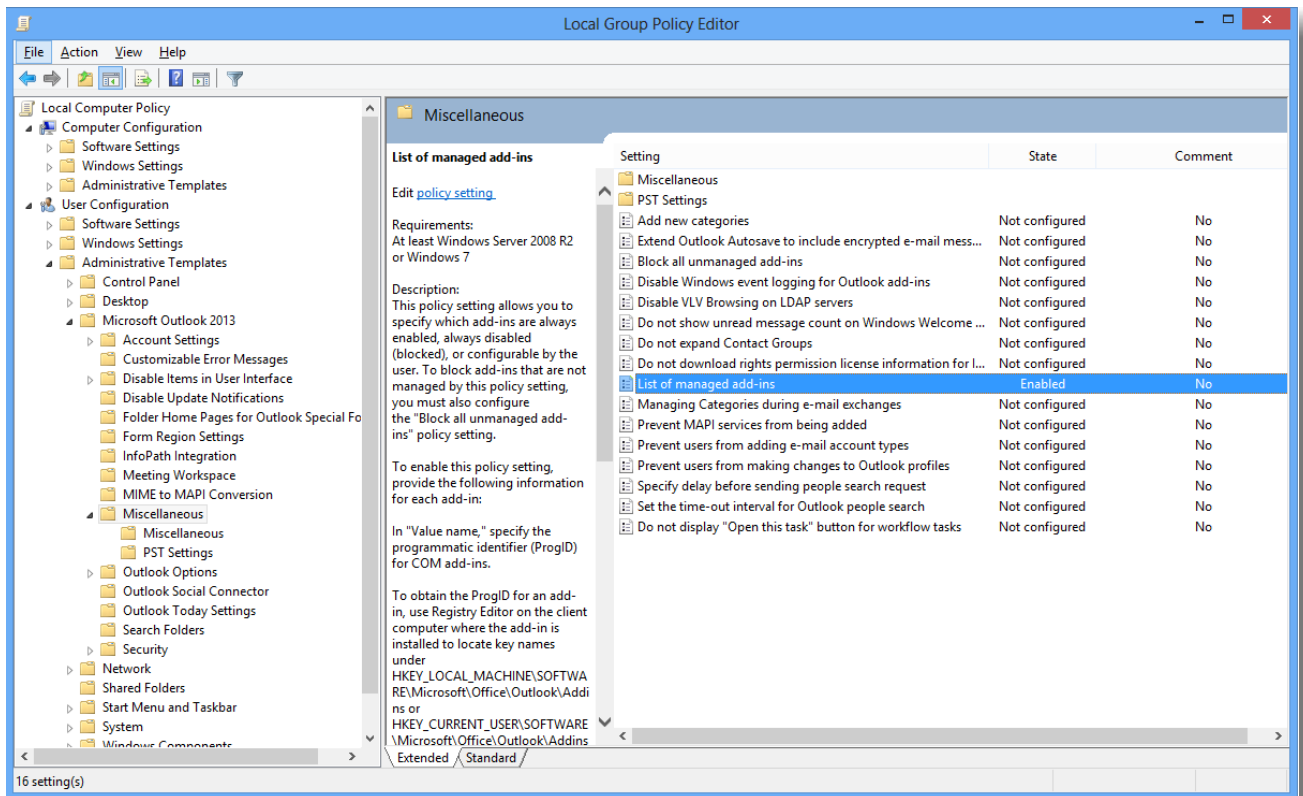
6.3. Deployment

Complete the steps above to install on your local computer. Open certificate manager for local machine **run > certlm.msc**. Export the certificate as **DER encoded X.509** and save it on a network share, your company's deployment share or another appropriate location.

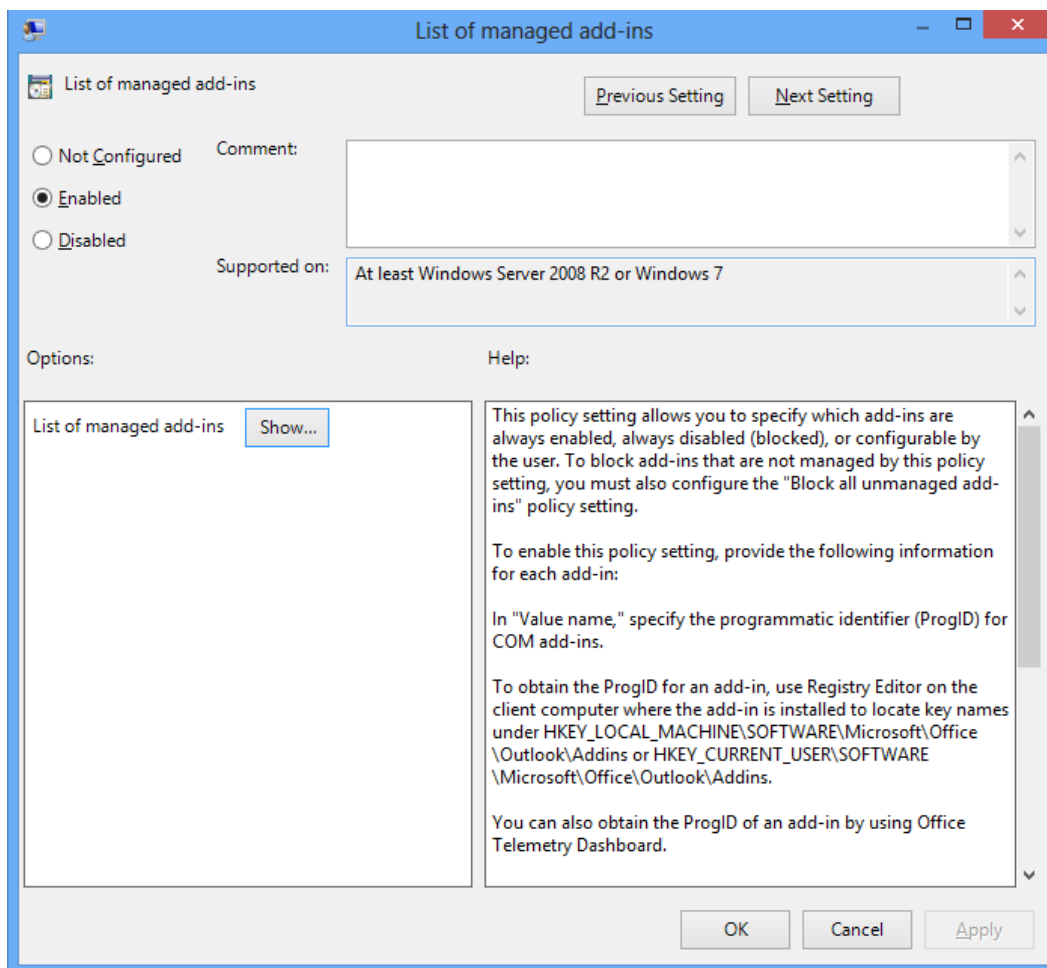


6.4. GPO roll out:

1. Open Group Policy and check that the Office 2013/2016 Administrative Templates are installed
 - If the templates are installed, you will see the “Microsoft Outlook 2013/2016” in the User Configuration > Administrative Templates > Microsoft Outlook 2013> Miscellaneous path
 - If the templates are not installed, you can download the templates from Microsoft. See [Administrative Template files \(ADMX/ADML\) and Office Customization Tool for Office 365 ProPlus, Office 2019, and Office 2016](#)



2. Enable the “List of managed add-ins” policy setting



3. See “Show” button. Add entries for “Addo2.DocMan.Connect” and “Addo8.OfficeAutomationCore.Connect” (the add-ins progId) and set the Value to “1” in this setting. The value “1” means that add-in cannot be disabled by users.

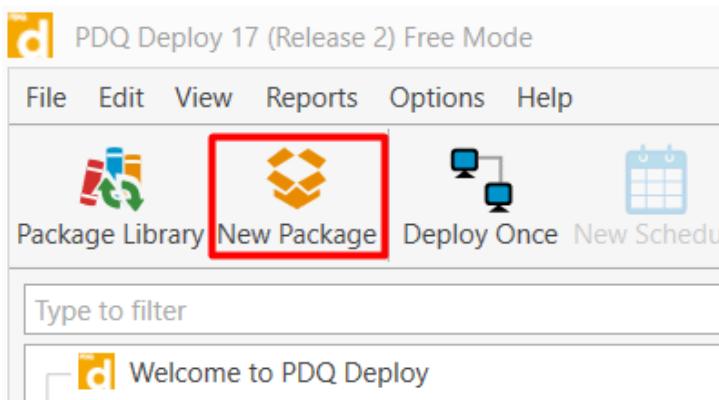
6.5. PDQ Deploy

Use this method to deploy the certificate with the free deployment software **PDQ Deploy** from your computer. This requires you to be domain admin. The tool can be downloaded from here:

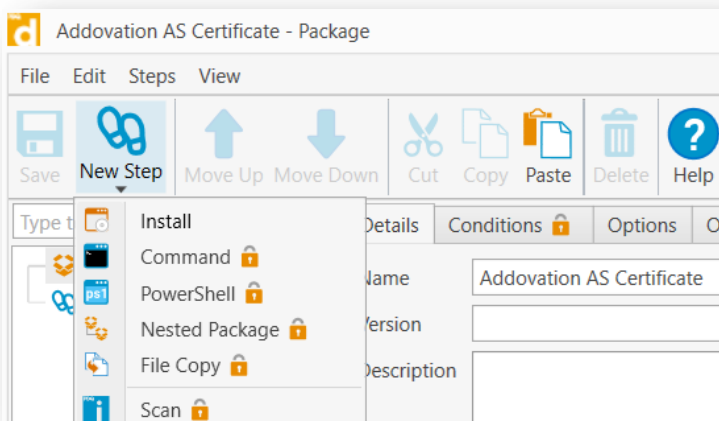
<https://www.pdq.com/pdq-deploy/>

The certificate should be located on ex. a file share. Create a .bat file with the following content:
certutil.exe -addstore TrustedPublisher "\\<path_to_network_share>\Addovation AS.cer"

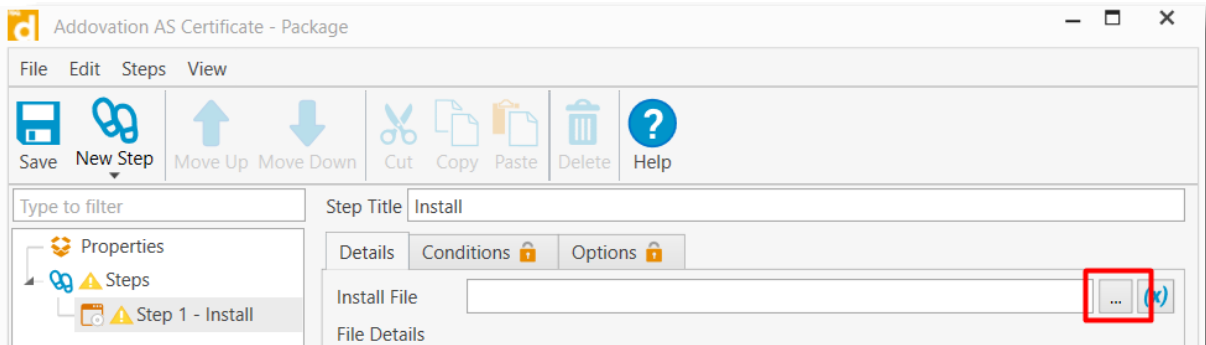
Create a new package in PDQ Deploy



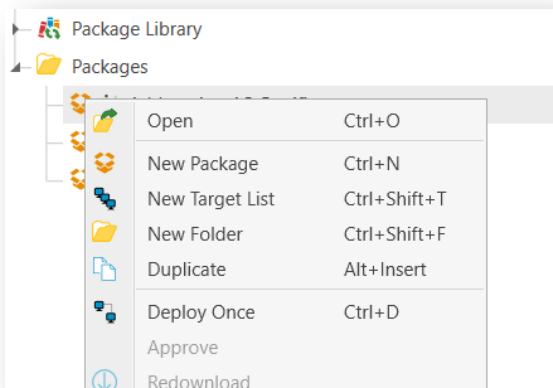
Give the deployment a name and add a new "Install" step



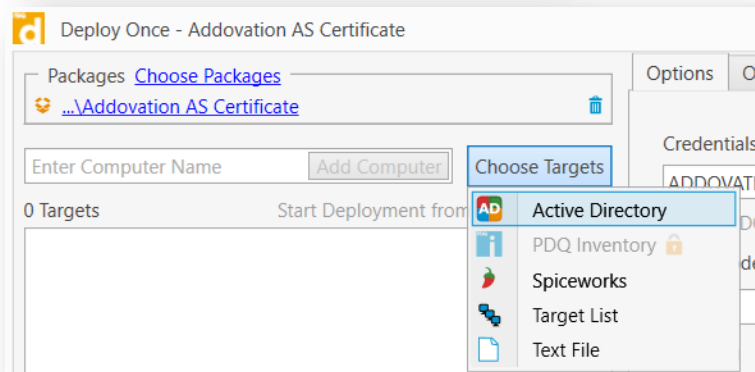
Give the step a name and browse the .bat file located on you network share. Press save.



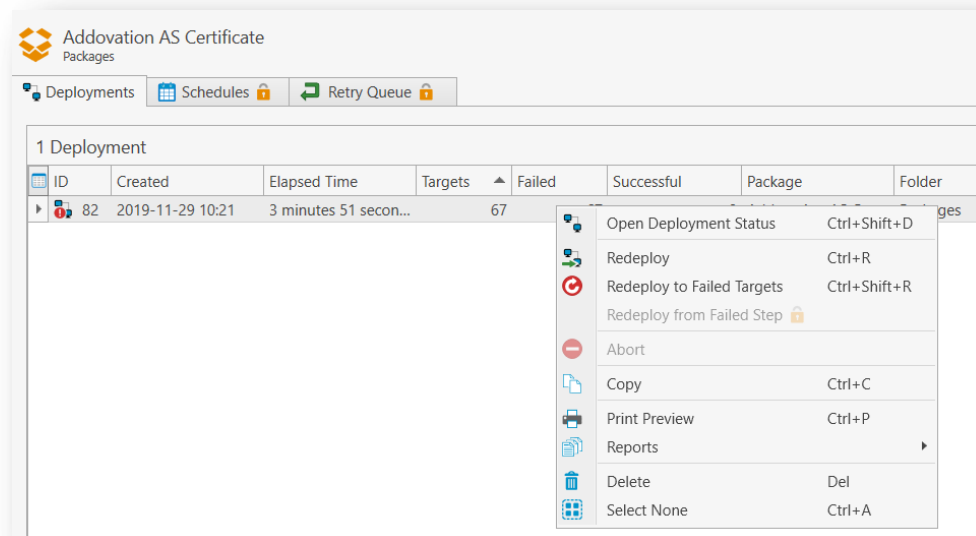
Deploy with right mouse click on the package and then deploy once



Leave default settings and choose target active directory, then locate the computers / group you want to deploy and click deploy now.



Failed targets can be redeployed



6.6. Distribution of the certificate

As mentioned, there are several ways to deploy a certificate, another way is to use PowerShell:

```
Import-Certificate -FilePath mycertificate.cer -CertStoreLocation Cert:\LocalMachine\TrustedPublisher
```

or

```
certmgr.exe -add mycertificate.cer -c -s -r localMachine TrustedPublisher
```

or

```
certutil -addstore "TrustedPublishers" mycert.cer TrustedPublisher "Trusted Publishers"
```

6.7. Alternative installation

As mentioned, there are several other ways to obtain and install a Publishers Certificate, a couple of them described below. If the above description does not fit your needs, please contact Addovation or learn more using the links below.

<http://office.microsoft.com/en-us/word-help/add-remove-or-view-a-trusted-publisher-HA010034138.aspx>

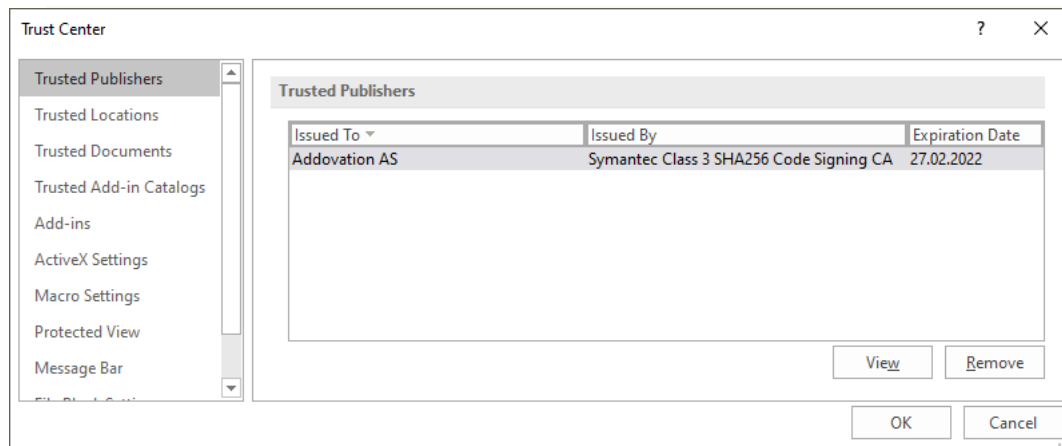
<http://technet.microsoft.com/en-us/library/ff428091.aspx>

6.8. Validate Certificate Installation

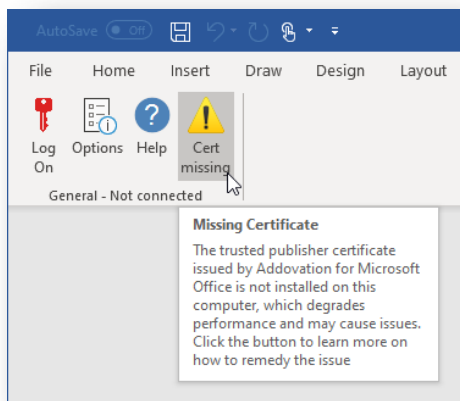
If the certificate were correctly installed it should be visible from Outlook.

File > Options > Trust Center > Trust Center Settings > Trusted Publishers

Addovation AS should be listed as a trusted publisher.



If the certificate is missing, an indication button will also appear in the OAS ribbon:



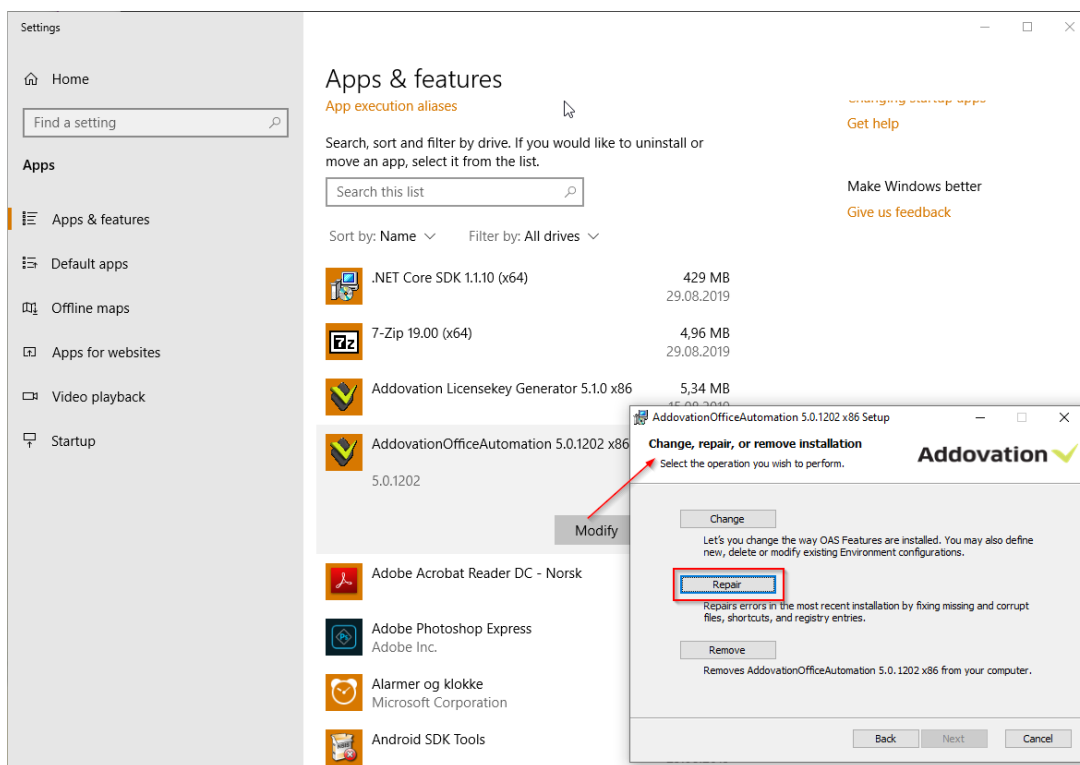
7. Troubleshooting

7.1. Tips and tricks regarding disabled Microsoft Office add-ins

This section contains tips and tricks on how to prevent Microsoft Office and, in particular Microsoft Outlook, from disabling Addovation add-ins. Consider this section as a recommendation to read through if you experience such problems.

7.2. Repair

If you run into problems and cannot resolve them, our recommendation is to run the OAS built-in “Repair” functionality. You do this by opening the Apps & features window from the start menu (RMB click on the Windows Start flag and select Apps and features from the context menu:



In this window, click on the AddovationOfficeAutomation ... app and click the Modify button, after which the installation wizard for OAS opens. Now, click next and then the Repair button as shown above.

7.3. Outlook load timeout - Install certificate

Timeout (too long time spent loading the add-ins) seems to be a problem mainly in Microsoft Outlook. Addovation OAS is a digitally signed software which means that Microsoft Outlook will trust the software if the certificate is installed and skip some checking routines (including online lookups) and thereby making it load faster.

See how in Assistance-OAS-5.0-General-Setup-Guide:

<https://www.addovation.com/wp-content/uploads/2019/02/Assistance-OAS-5.0-General-Setup-Guide.pdf>

Tip on how to centralize roll out:

<https://www.manageengine.com/scm-third-party-patch-management/kb/deploy-signing-certificates-using-gpo-how-to.html>

The important part here is that the software is signed within the time period defined valid in the certificate currently rolled out. If the problem persists, it can also be related to network issues causing the load procedure to time out.

7.4. Disabled add-ins

A key prerequisite for Outlook to load the OAS add-ins quickly enough to avoid disabling is that the associated certificate is installed and available in Microsoft Office (under "Trusted Publishers"). If the certificate is not installed on the local computer, Outlook must verify the add-in with a call to an external authority on the Web. This could potentially cause a delay and is strongly instrumental in making add-ins automatically disabled and blocked by Outlook.

The certificate that the OAS add-ins uses is the same for all versions. Expiration date does not have the same effect on the software as for regular certificates. The certificate is included in the installation package (.msi) that you receive from Addovation, and section 6 in this Guide explains how to install it.

When Outlook blocks add-ons, an entry is automatically created in Registry under:

- HKCU\Software\Microsoft\Office\16.0\Outlook\Resiliency\DisabledItems

For the add-in to be loaded into Outlook, you need to *remove* the values from the Registry.

We recommend customers to install the certificate on all computers that are to use OAS. If this is done, and you still experience that the add-ins are disabled, the next measure would be to explicitly tell Office not to disable the add-in, also known as a *whitelisting*. This is done by adding specific registry entries to the Registry. How to do this is explained in the next section.

1.1.3 Whitelisting

By adding a Registry entry, you can prevent a Microsoft Office application from blocking an add-in. This must be done for each Office application (see the Registry paths used below) where you want a whitelisting. The entries can be inserted into both the HKCU and HKLM registry hive.

- HKCU\Software\Microsoft\Office\16.0\Outlook\Resiliency\DoNotDisableAddInList

OAS for Outlook has two add-ins:

- Addo2.DocMan.Connect
- Addo8.OfficeAutomationCore.Connect

Sample commands that can be used in a Batch file:

```
REG ADD "HKCU\Software\Microsoft\Office\16.0\Outlook\Resiliency\DoNotDisableAddInList" /v  
Addo2.DocMan.Connect /t REG_DWORD /d 1 /f
```

```
REG ADD "HKCU\Software\Microsoft\Office\16.0\Outlook\Resiliency\DoNotDisableAddInList" /v  
Addo8.OfficeAutomationCore.Connect /t REG_DWORD /d 1 /f
```

```
REG ADD "HKLM\Software\Microsoft\Office\16.0\Outlook\Resiliency\DoNotDisableAddInList" /v  
Addo2.DocMan.Connect /t REG_DWORD /d 1 /f
```

Further information can be found here:

<https://docs.microsoft.com/en-us/office/vba/outlook/concepts/getting-started/support-for-keeping-add-ins-enabled>

If the end-user is still experience problems, then please try to log on to the same computer with another Microsoft Windows user. If this user is not experiencing the same problems, the former user profile may be corrupted and probably has to be rebuilt.