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1 Introduction

Addovation’s Office Automation Suite enables user friendly and process specific tools while maintaining the benefit of keeping all data in IFS’s well integrated system. Addovation Office Automation is a proper MS Office Add-In that interfaces to IFS through the IFS Extended server. All data will still be within the IFS database, but the interface will be designed for particular purpose.

1.1 General features and technical info

The Office Automation Suite consists of four modules called Document Management, Information Merger, Quick Reports and Power Tools. They all have the following features:

- Proper add in to MS Office.
- Deploy on multiple platforms and supports multiple versions.
- Translated to several languages.

Installed through distributable MSI package.
### 1.2 Compatibility matrix

Office Automation Suite is compatible with/requires the following operating systems, frameworks and applications

<table>
<thead>
<tr>
<th>Supports / Requires</th>
<th>OAS Version:</th>
<th>4.0</th>
<th>4.1</th>
<th>4.2</th>
<th>4.3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows XP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Windows Vista</td>
<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Windows 7</td>
<td>(32 and 64 bit versions)</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Windows 8.x</td>
<td>(32 and 64 bit versions)</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Windows 10</td>
<td>(32 and 64 bit versions)</td>
<td></td>
<td></td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Office 2007</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>√</td>
</tr>
<tr>
<td>Office 2010</td>
<td>32/64 bit (separate msi files)</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Office 2013</td>
<td>32/64 bit (separate msi files)</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Office 2016</td>
<td>32/64 bit (separate msi files)</td>
<td></td>
<td></td>
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<td>√</td>
</tr>
<tr>
<td>Citrix</td>
<td>Presentation Server 4.5 1)</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Citrix</td>
<td>Presentation Server 4.0 2)</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
</tbody>
</table>

**Notes:**

1) Windows Server 2008 32/64 bit
2) Some limitations
3) Required to run with IFS Applications 9 RTM
4) Limited support for IFS Application 7 in OAS 4.2 can be arranged

---

*Figure 2 Compatibility matrix*
2 Installation Guide
The Office Automation Suite is installed through an MSI package. Run the .msi file and follow the installation wizard.

![Image of installation wizard](image1)

Figure 3 Run the installation file

2.1 Environmental Configuration

![Image of environment configuration](image2)

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.

![Configuration settings](image)

**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 temporarily 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).
2.3 Additional Settings

In the Additional Settings dialog, you can define a symbol that exclude classes and formats with this particular symbol. This field is defaulted to the asterisk symbol. You can also define the Document Search URL in this dialog.
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](image)

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.

![Figure 9 License validation](image)

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.

When you click on the button ‘Get Batch’ creates a .bat file which will 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 installation file.

Figure 10 The ‘Get Batch’ button
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, you need to run the PL*SQL function.
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 save to your drive 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](image)

### 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](image)
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 Power Tools…’ 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.

![Custom Setup](image)

*Figure 15 Custom set up*
2.9 Install setup
Now you are ready to install OAS 5.0. Click install button to complete setup.

![Install Setup](image1)

*Figure 16 Install Setup*

2.10 Complete setup

![Complete Setup](image2)

*Figure 17 Complete Setup*
3 Presentation Objects

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

In order to make it easy to grant access the 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

In order 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 components there are also presentation objects that correspond to a particular button on the ribbon.

Figure 18 Examples of presentation objects by component
3.3 Ribbon
There are three mechanisms in the ribbon that govern button visibility.

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

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

Note. Until the user is 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.

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**Figure 19 Addovation Ribbon**

**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
Presentation object definition files are located under the Program Files folder e.g. C:\Program Files (x86)\Addovation\Office Automation\SQL_SCRIPTS
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 ‘About’ button in the Addovation ribbon.

4.1 Information about the software

In the Options dialog you’ll find information about the OAS version you have installed.
4.2 OAS Configuration options

Under the ‘Options’ ribbon, you can choose the language you prefer and save it as a future language. If you check the ‘Hide messages’ check box, you will turn off the ‘toast message’ that appears when you check in documents, retrieve data and so on. You will also get information about the Log-on data.

4.3 License Information

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

4.4 Doc Man

If this is not already set-up upon installation, the Doc Man page lets you filter classes and formats where the description contains certain words, symbols or characters. E.g. If you put * in the filter field, all classes and formats with this symbol will not show in OAS. This is a neat way of tidying the OAS for any classes and formats that are no longer in use in IFS.

Please note that changing these settings will override installation parameters and will be stored in your profile. The settings will be cleared on uninstall or upgrade.

The ‘Display locked folders’ enables the OAS to show locked folders in the object connection dialog. Untick this box, and all the locked folders are hidden from the dialog.
4.5 Advanced options

The two last Options pages, Environments and Tools requires a password to be entered to open. Click one of the pages and enter the password to enter.

Figure 25 Options advanced logon page

4.6 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
4.7 Tools

From the Tools page, several powerful options can be reached.

- XML – tool to enter XML string into IFS for recognizing Dynamically designed dialogs
- 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.
5. Test settings

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.

![Log on database](image)
6 Performance 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. For OAS to work optionally, it is recommended to install the Addovation Certificate on your computer(s).

There are several ways to this, in this guide we provide you with step by step instructions to how this can be done in an easy way.

There are two starting points for this guide:

- If you are provided with a certificate file, 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

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

Part 1. Installing using the Addovation msi file
If you have the Addovation msi file, you can complete the installation of the certificate from this file.

If you have the certificate file itself, you can 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.

   ![Figure 29 General](image)

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

   ![Figure 30 Digital Signature](image)
3. Now, click on the Addovation signature in the list and click Details

![Digital Signature Details](image1)

**Figure 31 General**

4. Click the View Certificate button, the dialog below appears:

![Certificate](image2)

**Figure 32 Certificate**
5. Click the **Install Certificate**… button:

![Certificate Import Wizard](image)

**Figure 33 Install Certificate**

6. Go to **Part 2** of the installation guide and proceed from **step 3 to the end**.
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.

1. Locate the certificate file, right click and choose **Install Certificate**

![Figure 34 Locate Certificate](image)

2. The installation wizard now appears:

![Figure 35 Import wizard](image)
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](image)

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

![Figure 37 Certificate import wizard](image)
5. Click **Finish**. The installation is confirmed.

![Figure 38 Confirm](image)

That’s it!

**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 investigate using the links below.
