# Office Automation Suite V 5.1

# Contents

# 1    Introduction

The Office Automation Suite by Addovation represents a wide range of functionality which integrates IFS backbone information to the fingertips of any Windows user.  Integration is made available on several of the MS Office application, as well as from File explorer, desktop and even from inside IFS. Features covers areas like

- Information Merger
- Document Management
- File Control
- Signature

It is not possible in a Guide like this to cover every aspect of the functionality, so if you have any questions or demand of additional functionality, please get in touch with Addovation.

The Office Automation Suite is a set of add-ins that appears in the Microsoft Office application Word, Excel, PowerPoint and Outlook.  The add-ins are visualized through a new Tab in the office ribbon of each of the applications.
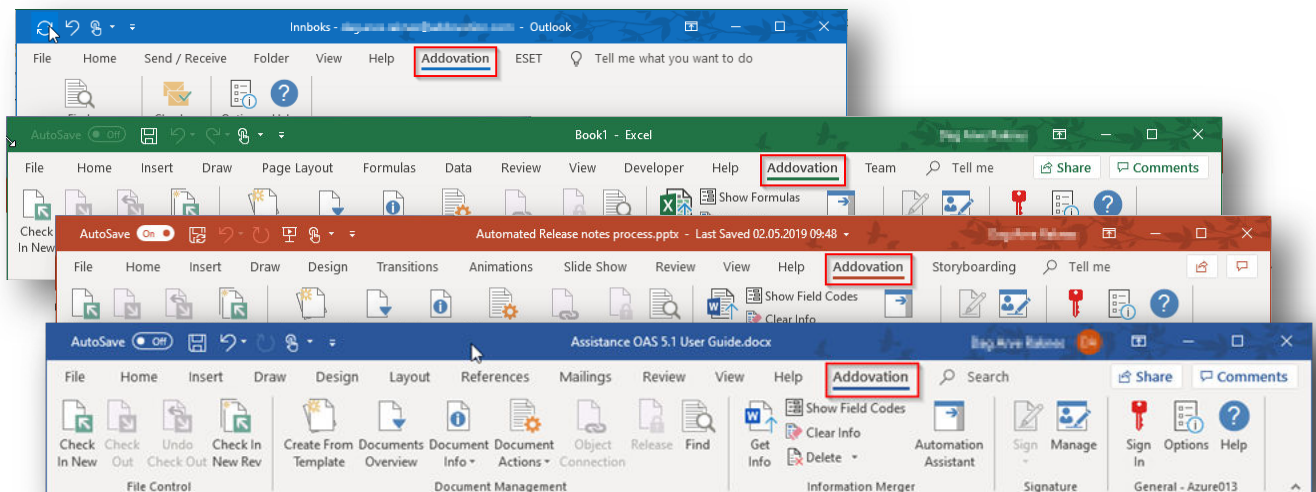


Depending on what modules have been purchased, two or more button groups will appear in the ribbon.

The add-ins connect and interacts with IFS once you have logged on.

## 2 Connect to IFS

The first thing you need to do is to connect to IFS using your IFS credentials. The first time you go to the Addovation tab on the ribbon, you will only see three buttons:
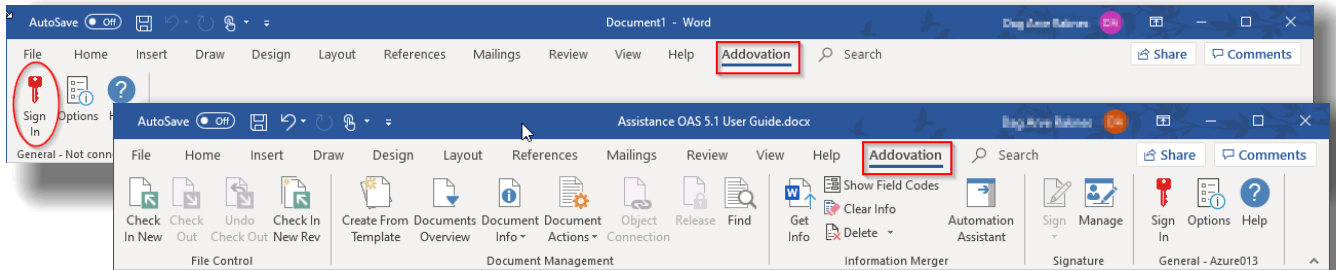


*Figure 1 The dynamic Addovation Office ribbon tab*

To sign in to an IFS database, click the **Sign In** button and enter your IFS username and password, and – if the option is there to choose among multiple environments – choose the IFS environment you want to sign in to from the Environment drop down. In most cases this would be the IFS production environment, configured by your IT department.

Most customers are set up with a few Environments, like e.g. Test, Education and Production. Normally a Production environment is set up as the *default environment*. If you sign in to another environment, the key button on the ribbon will turn red to indicate that you are no longer signed it to your default environment (see image below).
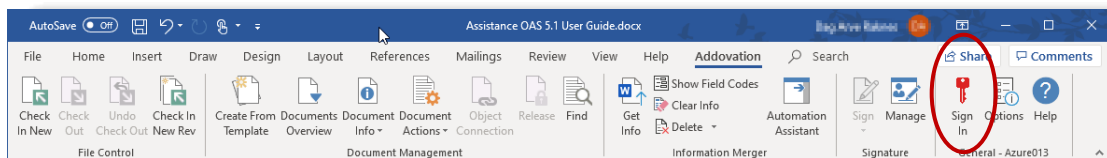


If you want to view or check on how an environment is set up, you can expand the logon dialog by clicking the Options button in the lower left-hand corner
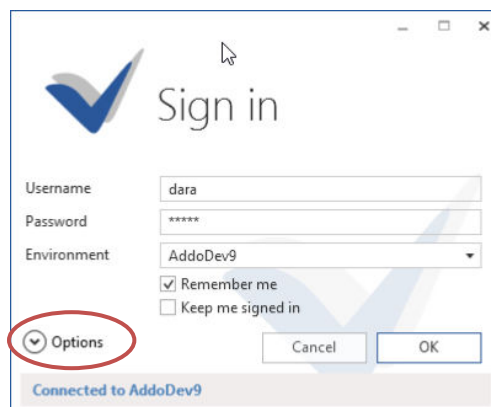


*Figure 2 The Sign in dialog*

From the expanded Sign In dialog, you can review the settings and even make your own custom environment; when you modify any value, the Environment field changes to *Custom* and the Save button gets enabled, and you can save environment which will be stored in the registry for later usage.
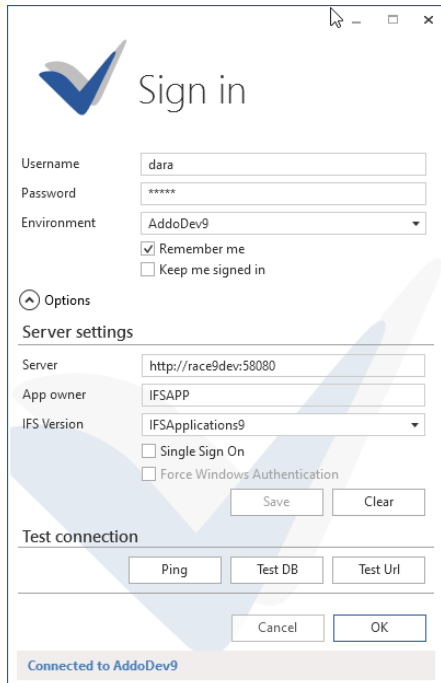


*Figure 3 The Sign In dialog in expanded mode*

There are two check boxes (also visible in the non-expanded dialog:

- **Remember me** – check this to make OAS remember your username/password combination for any environment.  The username and password are remembered per environment.

- **Keep me signed in** – check this to make OAS sign in automatically the next time you open an Office application (Word, Excel etc.) and hit the Addovation tab.

To edit/configure the predefined environments or create new environments, ***please use the Options dialog*** (see section 10.2.1 for a description on how to do this).

The Addovation ribbon might vary in appearance depending on which modules are licensed for your company.  It also might vary depending on how your administrator has granted access to various button for you.

The Single Sign On should only be checked if you have an IFS installation prepared for this.

# 3　　Information Merger

The main functionality of this component is to assist the users to include/utilize information from IFS in the different applications in MS Office (Word/Excel/PowerPoint)
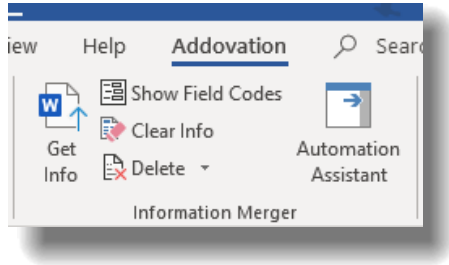


*Figure 4 The Information Merger Ribbon button group*

## 3.1　The Automation Assistant - Overview

The Automation Assistant (AA) is a tool aiding you in building document templates, executing quick reports, creating mailing lists etc. There are up to 4 different *pages* in AA task pane, depending on which hosting Office application you are running (i.e. Word, Excel etc.) and what modules your company have purchased.

The Automation Assistant *pages* are all activated by buttons in the top of the task pane (like any other MS Office task pane):

- *Properties* – for working with / using properties in your documents
- *Grid Queries* – for using quick reports
- *Labels and mailings* – for creating and using/utilizing the mail merge functionality in Office
- *Building Blocks* – for building advanced documents

### 3.1.1　Properties

The **Properties** page is activated by clicking the upper, leftmost button on the Task Pane.  The tree view control show properties associated with the document and the Business Objects associated (connected) to this specific document.  This information can be use in templates and documents in various ways.

Green property names indicate that they have been updated from the database, whereas black properties indicate that they have not been read since you opened the document.  By clicking **Get Info**, the properties will be updated.  If they remain black, the business object connection has probably been removed from the document. In this case, object information stored in the document cannot be updated.

Yellow folders represent business object types that is supported "out of the box" by OAS.  Grey folders contain Custom defined business objects.  The latter will be covered later.

Due to restrictions on the length of *property values* in Word, they can have a maximum length of 255 characters.  However, this is not the case for Information Merger fields (displayed in AA).  So, any property exceeding the Word limitation will be indicated by a yellow warning triangle in the icon (see illustration below).



*Figure 5 Automation Assistant - Properties section*

If you use such a property (i.e. drags it on to the document, it will be truncated at 255th character). You get the option to insert a content control to host the value, in which case you can use the whole text string (no clipping).
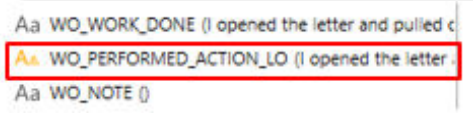
*Figure 6 Property exceeding Word limit of 255 characters*

In the lower section of the page there are more options (expandable sections) that you can use to spice up your template with pictures and links to IFS forms and documents and even insert barcodes. All these options will be explained later in this document.

### 3.1.2   Grid Queries
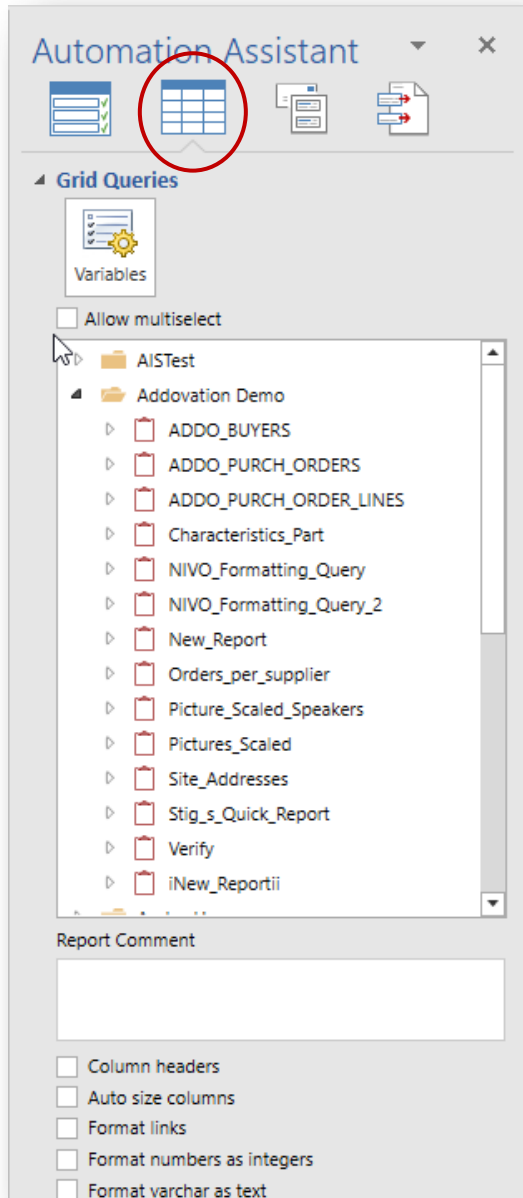


This task pane page is accessed by clicking the upper, second button in the task pane.  It gives you access to all the quick reports in IFS to which your user has been granted access.

In Word, you can extract tabular information from IFS and insert it into the document simply by dragging and dropping a report from the task pane on to the document.

By checking the Allow multiselect check box, you can even select what columns in the report you want in your document.
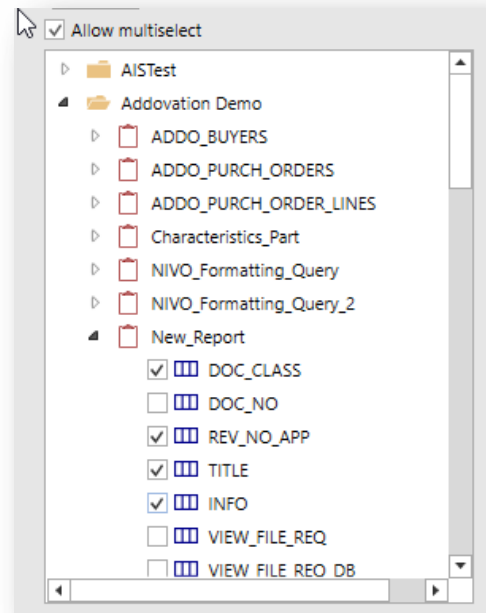


With the power of Excel and IFS combined, you can build reports and graphs that updates according to the variables you choose for your template.

*Figure 7 Grid queries navigation pane*

### 3.1.3  Labels and Mailings

This page is accessed by clicking the upper, third button in the task pane.  This will enable you to utilize data from IFS in the Office Labels and Mailings functionality in your own document.
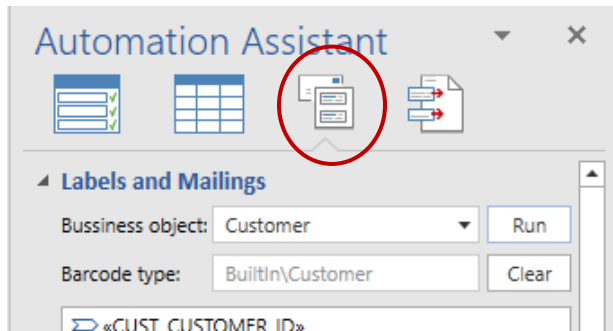


*Figure 8 Labels and Mailings pane*

### 3.1.4  Document Blocks

This page is accessed by clicking the upper, fourth button in the task pane.  This will enable you to merge other documents, fetched from IFS into a master document that you build.  By using this functionality, you can compose complex, combined documents with a professional look.  More on this later.
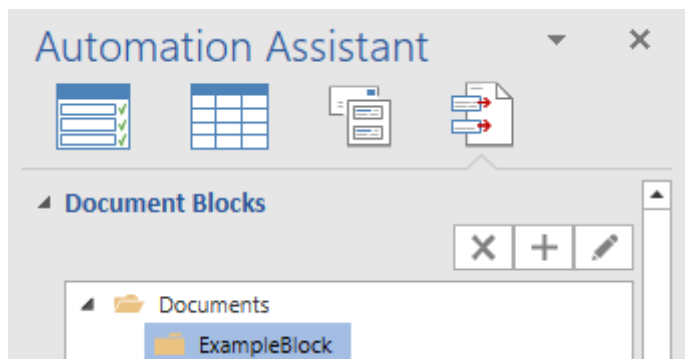


*Figure 9 Document Blocks*

## 3.2 How to create a template

In Office Automation Suite 5.1, you have even more template automation opportunities related to IFS information than before. You can add information from all IFS business objects, as well as pictures, links and bar-/QR-codes.

### 3.2.1 Adding information from supported business objects

The most common IFS business objects are available in the Automation Assistant. To use information from these objects to build an automated template, follow the procedure below.

Steps to create a template:

1. Open an **MS Office application** (Word, Excel or PowerPoint, here we use Word)
2. Click on the **'Addovation'** ribbon and log in with your standard IFS credentials.  If you are running single sign-on and has checked the *Automatic logon* in the Sign In dialog, you will be logged on automatically.
3. Click **'Check in new'** to connect your document that is to be the new template to the correct class, format and business object(s).
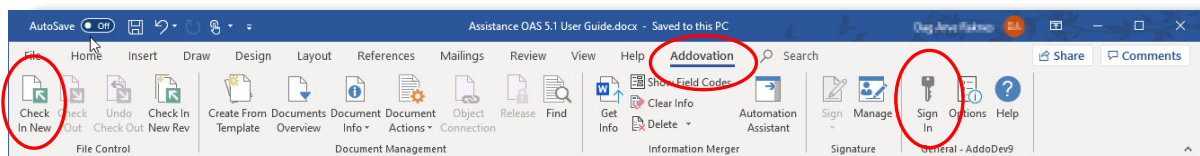


*Figure 10 Addovation Ribbon*


*You need to check in the document and connect it to business object(s) before you can start building your template. The reason for this is that the solution needs to know what kind of information you would like to automate before you proceed building the template. You can read more about how to check in here.*

4. Click on the **Automation Assistant** (AA) ribbon button to open the AA task pane. Once you have checked in you document and linked it to the right business object(s), the information from the object(s) will be visible in the Automation Assistant.

    Business objects information elements are shown in a tree view control (see right).

    The list can be updated by clicking the Get Info button on the main Addovation ribbon.

5. **Drag and drop** any information element from the Automation Assistant onto your document. As you drag fields into the document you will see that their values are filled in automatically. Note that any property that is empty will now show in the document.

6. **Do a quality check** of your document, before checking your template into IFS:
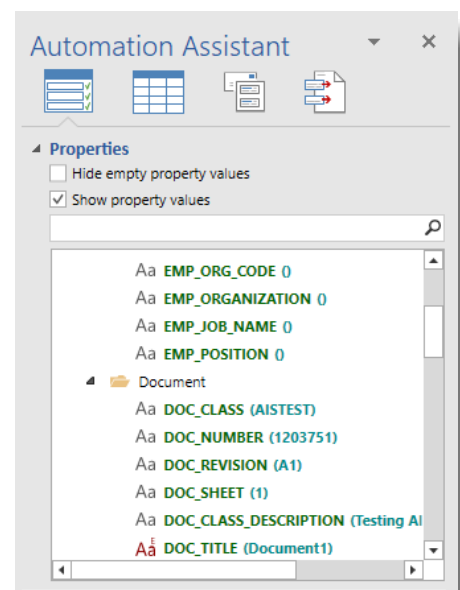


*Figure 11 Properties task pane*
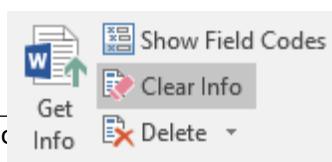
*Figure 12 Information Merger ribbon buttons*

- Click on **Show Field Codes**/ unclick **Show Field Codes**
- Click on **Clear info**
- Click on **Get info**

7. Remember to click on **'Clear Info' as the last thing you do** before you check in your template to IFS. This will leave the references to the IFS Applications fields, allowing your template to extract the right information each time the template is used.

## 3.2.2 Adding information from other objects to your template

If you want to use information from non-supported (less commonly used) business objects in your template, you must add them to the Automation Assistant in a slightly different way.

**This is how:**

1. Make sure your document is Checked in and out again and connected to the desired business object(s).
2. Open the Automation Assistant. The unsupported objects will now appear under the ¨Document properties – Custom" node (grey colored folders). If it/they don't show up, click the Get Info button
3. Right click on the object and select **Custom query** from the pop-up menu.
4. In Simple mode (Simple tab) choose the Class/format wanted, or in the Advanced tab, add a Custom query
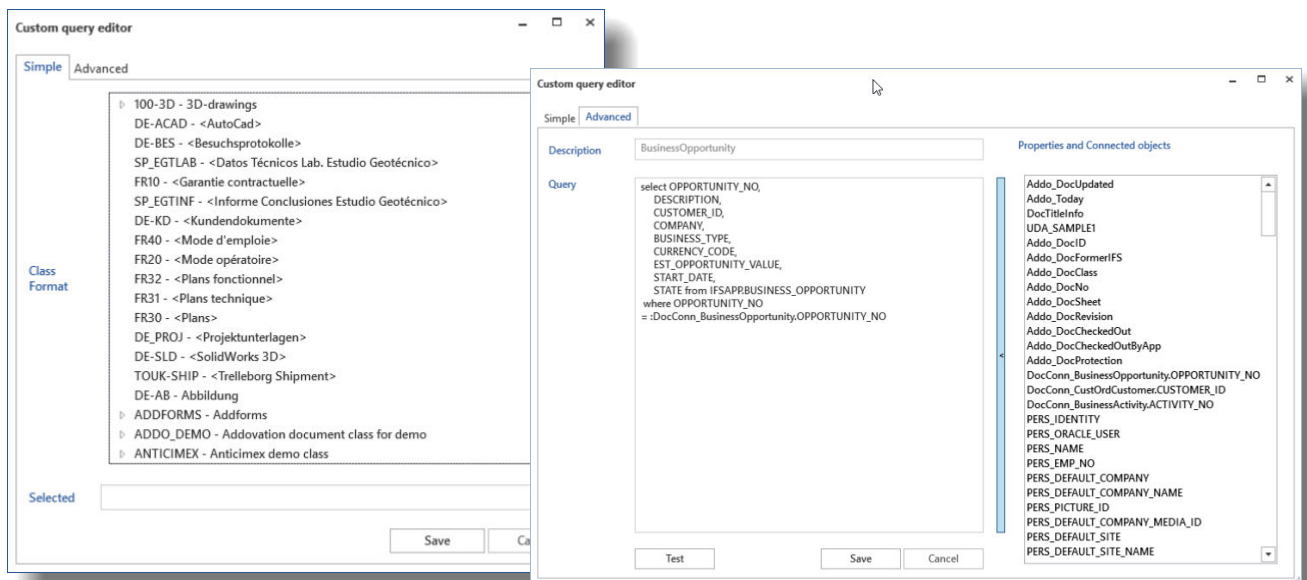


*Figure 13 Custom query editor - two modes*

5. Click **Save**, the dialog closes.
6. Press **Get Info** in the Addovation Ribbon
7. The information from the business object will now be available under the 'Document properties – Custom' node.
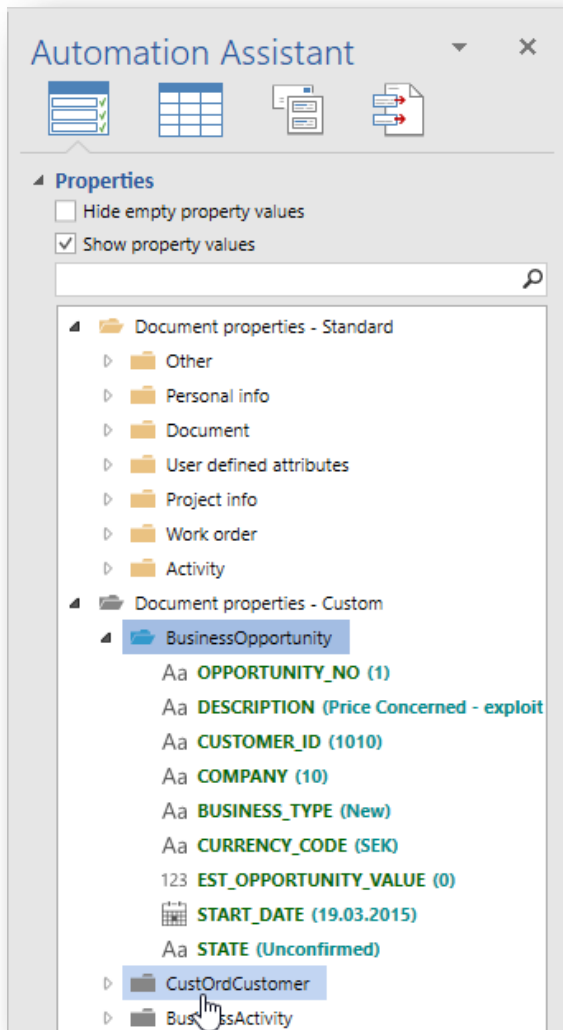
All connected business objects are available and can be viewed in the Automation Assistant.

Custom queries with modified query turn into blue (folders)

*Figure 14 Properties after Custom query is defined and executed*

**TIP!** *When a property is empty (no value) nothing is displayed in the document even though you have dragged the property into the document. To get all property placeholders displayed in the document, including empty properties, **hold the Ctrl key down while clicking the Get Info button** on the ribbon.  By doing so, all empty merge fields will be filled with the name of the property.*

### 3.2.3   Adding pictures to the template

With new features in OAS 5, you can add pictures to your templates that will be updated automatically. Examples where this function can be useful is product catalogs, CV's etc.

These are the steps to add a picture to your template:



*Figure 15 Automation Assistant - Media*
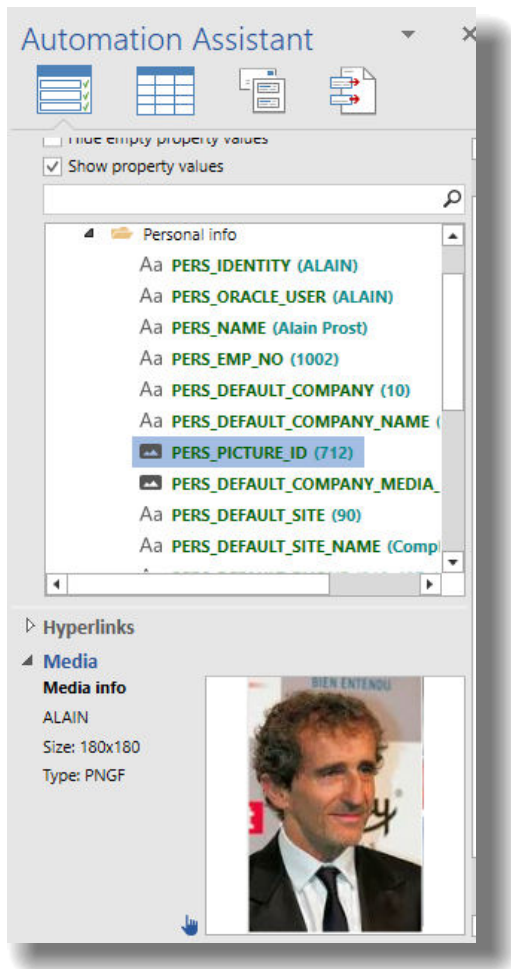
1. Select/expand the **Media** section in the lower part of the Automation Assistant Properties page
2. Open the object / folder node in the properties tree view where the picture is located, e.g. Personal info as shown to the left
3. Available pictures will appear (property icon indicates picture), select the picture you want to use, e.g. PERS_PICTURE_ID shown here
4. A preview of the picture appears in the media section
5. Drag and drop the picture into your document. You can format and resize the picture as you like.

### 3.2.4 Adding links to documents or forms in IFS

With OAS 5, you can also add links to documents or IFS forms into templates/documents.

This is how:



*Figure 16 Documents Link*
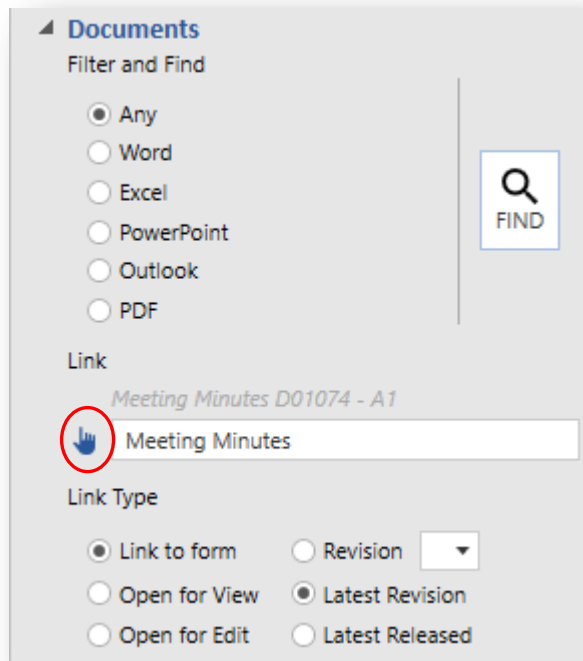
1. Click on the **Documents** section in the lower part of the Automation Assistant
2. Click on the **Find** button to find the document you wish to link to. You can limit the search result by selecting document format like e.g. Word. The Search and Find dialog now open up.
3. Once you have found the document, press select.
4. Specify what is to happen if the link is clicked. Select one of the alternatives under **Link Type**
5. You may change the text of the link that is to appear in your document by editing the text in the text box next to the hand symbol
6. **Drag and drop** the document link onto the document by grabbing the hand icon and drop it in your document.

### 3.2.5 Adding hyperlinks

Another feature in OAS 5 is the possibility to add links to forms in IFS. You can choose to add a link to an empty form, or to a form with data. The link string can be entered specifically for each link.

This is how:
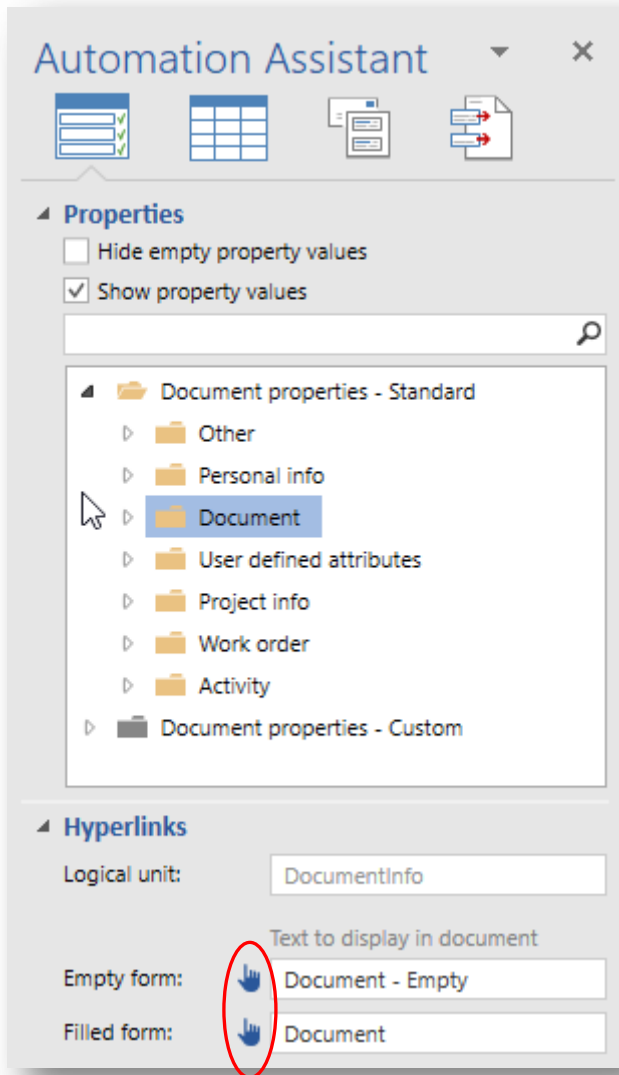


1. Click on / expand the **Hyperlink** section in the lower part of the Automation Assistant Properties page
2. In the properties tree view control, select the business object where the form you want to open is located
3. Edit the text to be displayed in the document in the textbox next to the hand symbols (optional)
4. Drag and drop the form link into your document, by grabbing one of the drag and drop (hand) icons.

*Figure 17 Hyperlinks section*

### 3.2.6 Adding a quick report in your template

The grid query function let you retrieve data from IFS by executing quick reports in different ways. This section describes how you make use of grid queries in templates.

**This is how:**

1. Click on the "Grid Query" button in the Automation Assistant ribbon
2. A tree structure with Quick Reports available to you appears.
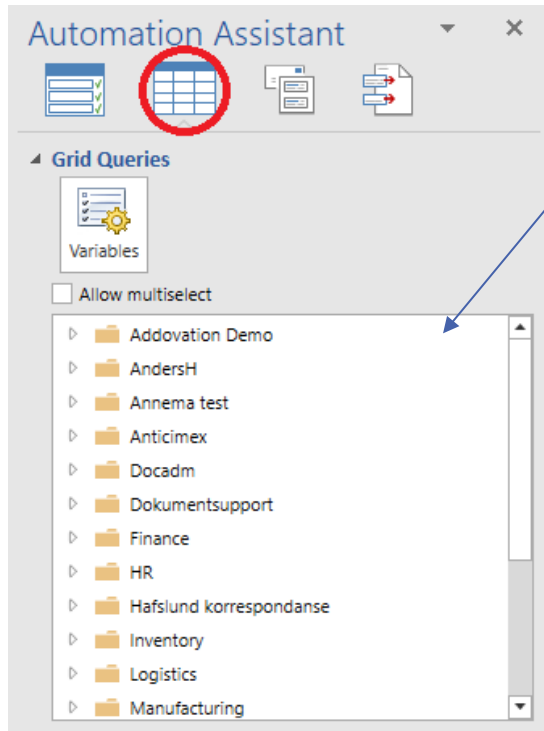


*Quick Report folder structure. Open a folder to view the quick reports available to your user!*
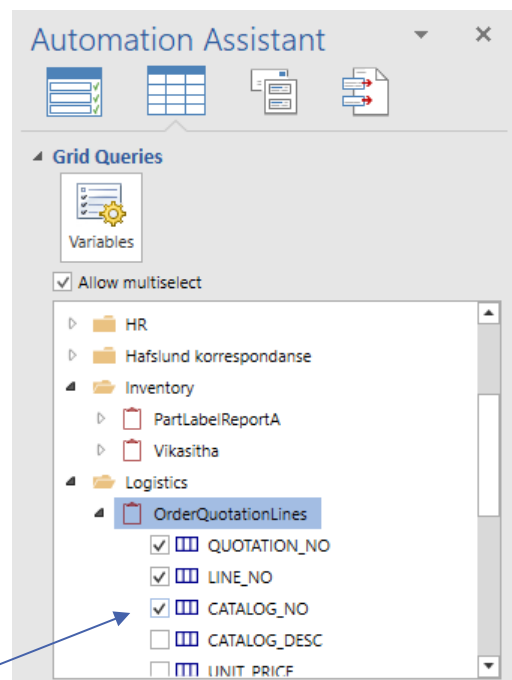
*An expanded Quick report folder, where specific information from a quick report is chosen with the multi select function*

*Figure 18 Grid Queries page of the Automation Assistant*

3. By expanding the folders, you will see the available Quick Reports. By expanding a report, you will get an overview of available columns within the quick report.
4. By ticking the **Allow multiselect** check box, you can individually select columns that you want to include in your document. Select (tick) each column that you want displayed and drag and drop the selected columns onto the document.
5. Click on the 'Get Info' button to extract data from IFS and populate your document.
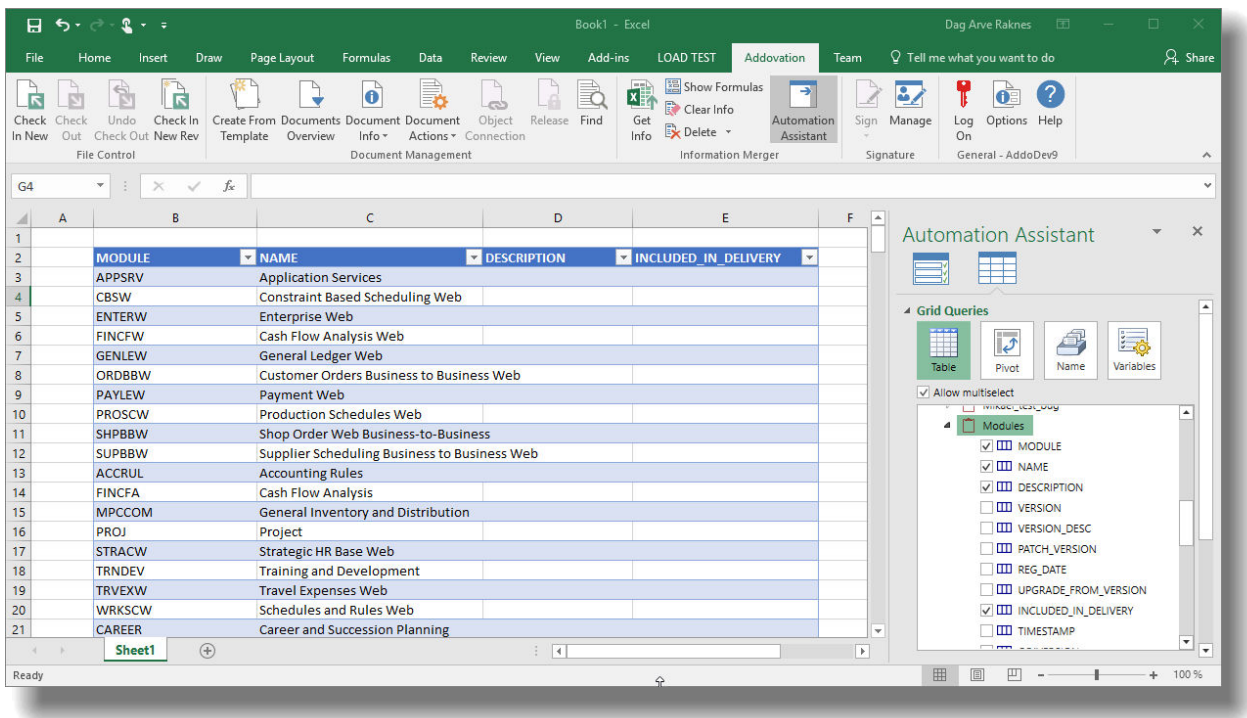
*Figure 19 Quick reports into excel work sheet*

Depending on the Quick report, you may be asked to fill in one or more input variable values prior to running the report (if you are unsure of what variables to use, please contact your administrator).
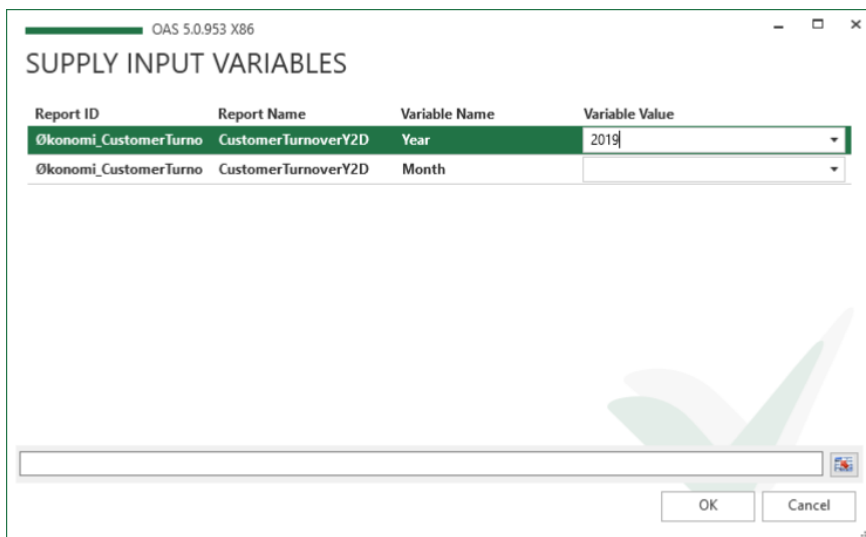


*Example of a report that requires input values before it can be executed and extract information from IFS*

If you want to change the variables, you can click on the variables button in the Automation Assistant (see Figure 19 Quick reports into excel work sheet)

*Figure 20 Grid query report Variable input dialog*

### 3.2.7 The Table, Pivot and Name options

The Automation Assistant enables you to extract and analyze data from IFS in different ways. By taking advantage of the features Table, Pivot and Name, you get an even more flexible solution.  These three buttons are "mode selectors" which means that only one of the can be active at any time.

**Table:** Expand the folder structure to find appropriate data. You may drag and drop the entire data source or selected elements to form a table. Use Excel functionality to design and format the table. You may input variables by using the **Variables** button.

**Pivot:** Expand the folder structure to find appropriate data. You may drag and drop the entire data source or selected elements to form a pivot table in a sheet. Use Pivot Table Field to do pivoting and Excel features to change style and format. Input variables may be assigned using the **Variables** button.

**Name:** Expand the folder structure to find appropriate data. You may drag and drop the entire data source or selected elements to a named range in a sheet. You may get access to the data in the named range through the Name Manager in Excel. The sheet will -by default be- hidden and only available when the Automation Assistant is visible.
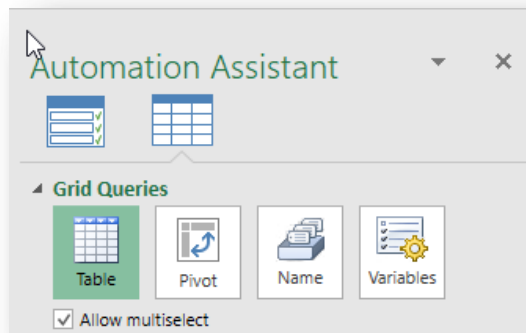


*Figure 21 Table, Pivot and Name are available from the Automation Assistant*

### 3.2.8 Named Variables
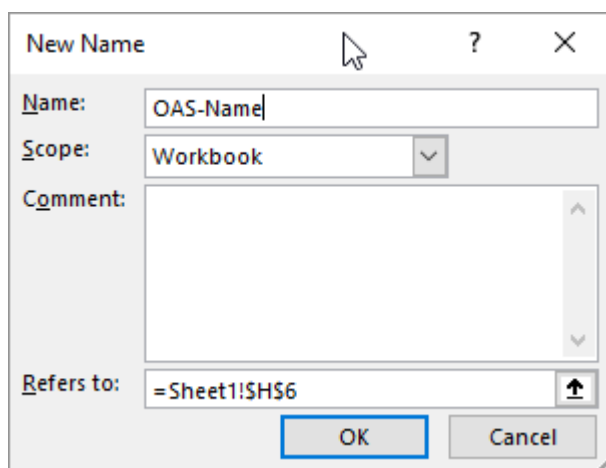


*Figure 22 Define Name*

You can also retrieve values from other properties, such as 'project id'. This is done by typing e.g. = Project_id in the variable value. When you edit a document that is attached to a project in IFS, the Project_id will show the correct value automatically.

You can also use named ranges from the Excel spreadsheet to manage your variable input by selecting from a list of values. To use other named ranges in the Excel spreadsheet, select the cell you want to name, right click and select 'Define Name'. Note that the named range is limited to the value of a single cell.

### 3.2.9 Refresh XML



If you have made changes to a Quick report in IFS, this might cause problems executing the report. You will get a warning asking you to adapt the template to the modified quick report. Select the quick report that you have modified, right mouse button click on the report and select the **Refresh XML maps** menu item from the context menu.
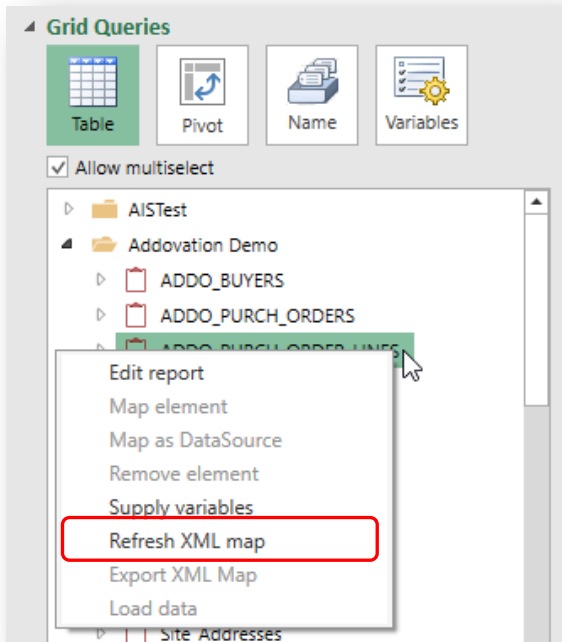
*Figure 23 Grid Queries reports context menu*

If presented to the following dialog, make sure to choose the second alternative, "Match element data type" to keep formatting intact (e.g. hyperlinks):
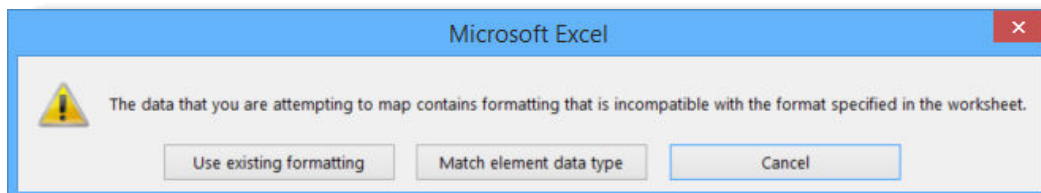


*Figure 24 Dialog box*

### 3.2.10 Document Blocks

The Document Blocks functionality represent a powerful addition to the Word application. This will enable merging of sub-documents from IFS Document Management database into a master document and thus make you able to automatically create complex and professionally looking composite documents.

By combining this functionality with our backend products, this can even be done server side; automated and triggered by events in IFS. But that is another story, contact us if you want additional information.

Here we will briefly explain how this works.

**Steps to build a master document based another document located in the IFS database:**

1. Click the Document Block icon in the Automation Assistant task pane ribbon
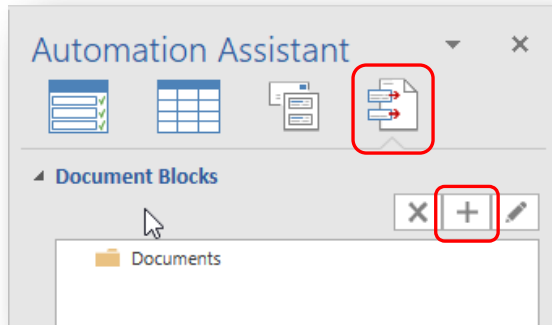


*Figure 25 Automation Assistant*

2. Click the plus button to add a new document block
3. When the Custom Query Editor appears, select any available Class/Format combination in the tree view control in the **Simple** tab, or go to the **Advance** tab where you can edit your customized query.
4. Make sure you replace the ":PROPERTY_NAME" in the query to an actual property value
5. You can test the query (for syntactical errors) by pressing the Test button
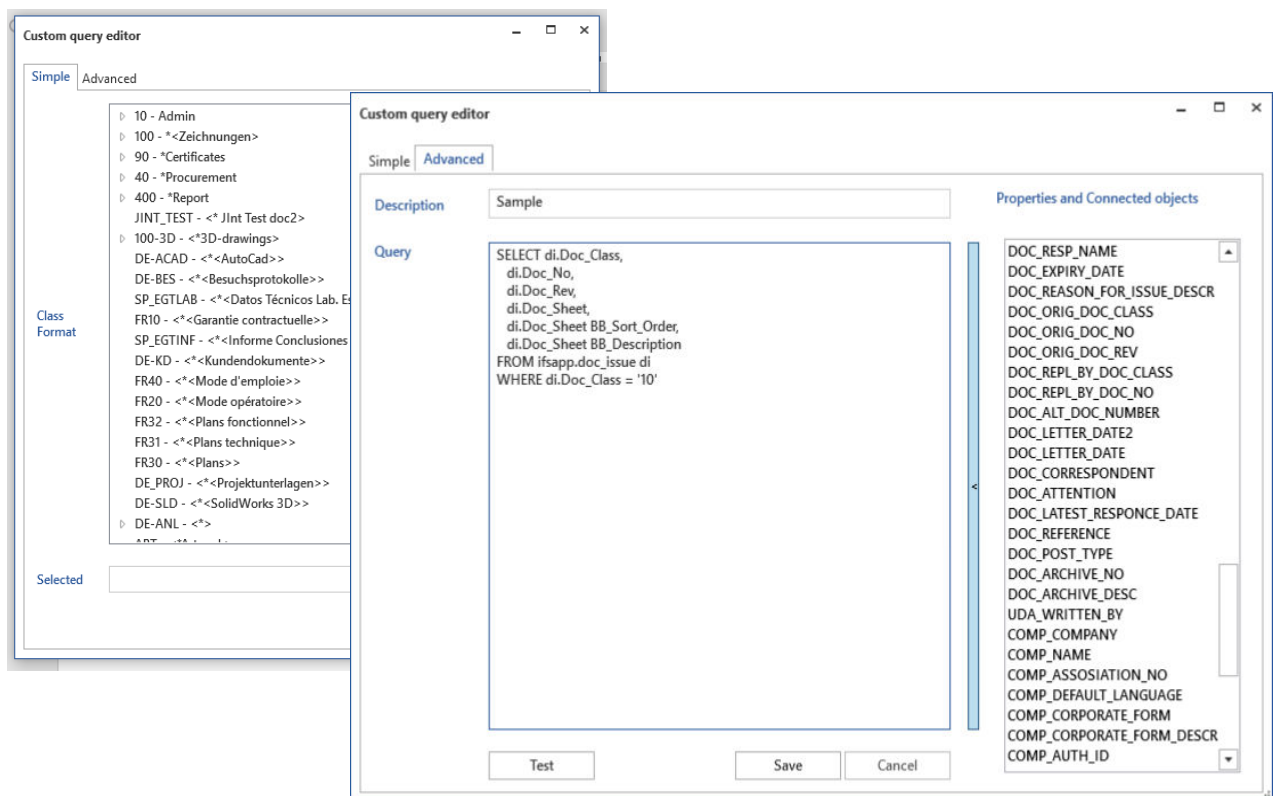


*Figure 26 The query editor - Simple and Advanced mode*

6. Save the Block, the dialog closes
7. From the Automation Assistant, drag & drop the Block you just created on to you document page

8.  Select Get-Info
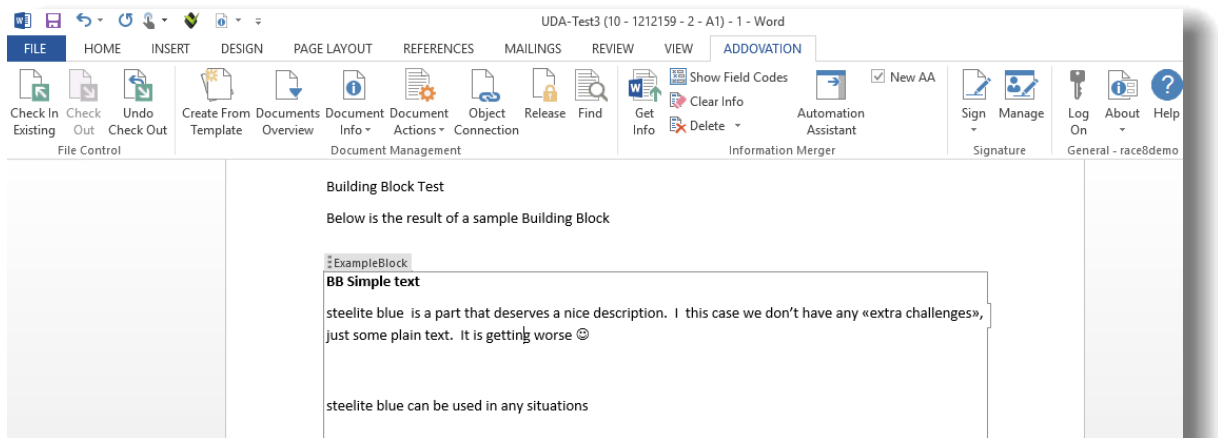


*Figure 27 Document with a Building Block*

# 4    Document Management

This section describes how to create & handle document templates created in the previous chapter.

## 4.1    How to distribute a template in IFS

After you have created the template and checked it into IFS as described in the previous chapter, you must tell IFS that you would like to use this document as a template.

This is how you configure your template as a Doc File Template:

1.  Open the document which you have created using the Automation Assistant in the previous chapter
2.  Log in to IFS Environment via Addovation ribbon
3.  Click the Document Actions | Distribution menu option
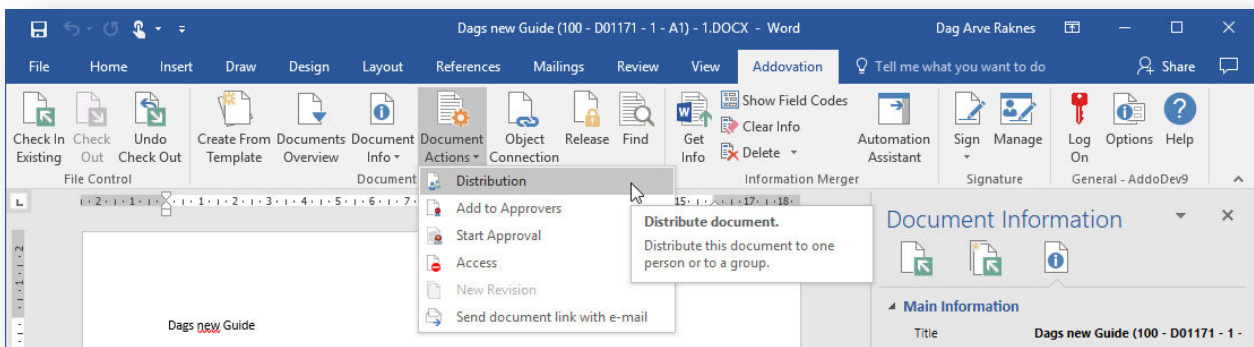


*Figure 28 Document with a Building Block*

4.  You will be directed to the document revision page in IFS (the instance you are currently connected to)

5.  Once you have found the document, you must set the status to 'Released' (this can also be done from OAS directly during the check in). Then right click, choose 'File operations' and click 'Set As Doc File Template'
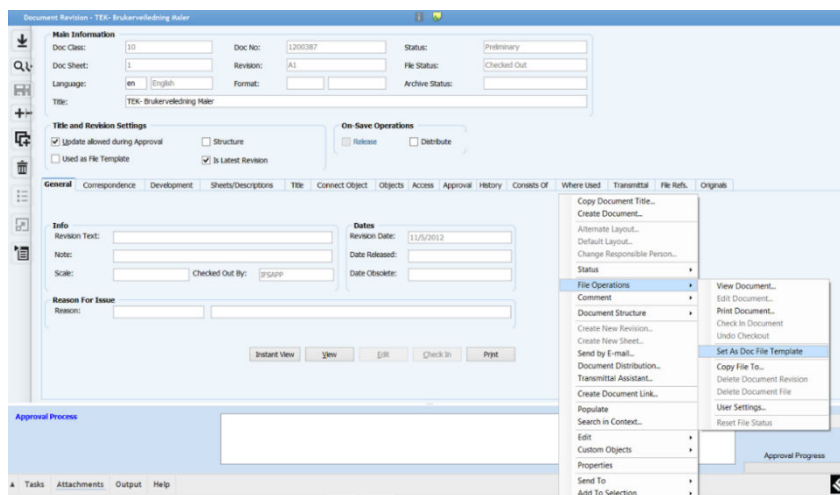


*Figure 29 Document revision in IFS*

You can                                                                                                                            add information into the description field on the document card to explain to the users the purpose/characteristics of the template.

## 4.2   How other users can access your MS Office template

Once you have released the template document and made it a file document template in IFS, the template should be available from Office Automation Suite.

This is how you and other users can access and use the template:

1. Open Word, Excel or PowerPoint (depending on the format/file type of your template)
2. Click on the tab **Office Automation** and log in using your IFS credentials.
3. Click on the **Create From Template** ribbon button. A dialog opens where you can browse available Templates, depending on the Office application/language you have chosen.  When used from Word, you only see Word templates, from Excel you see only Excel templates and so on.
4. Select a template from the tree view in the left region of the dialog
5. Once a template is selected the **Get template** button gets enabled.
6. When you click the **Get template** button, the document template is fetched and opened in the Office application used.
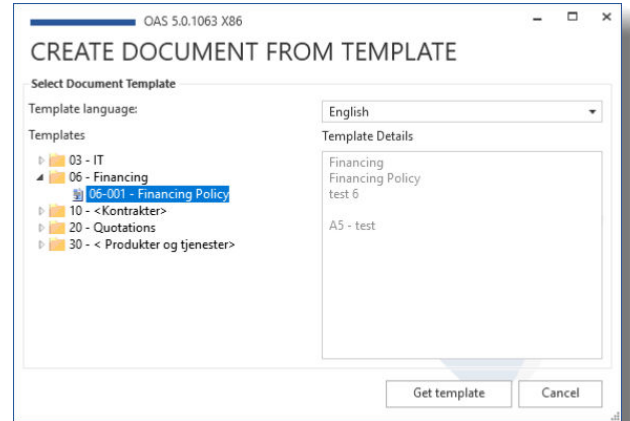


*Figure 30 Create Document from Template dialog*

Now you may use the document in any manner you like; no new document is created in IFS at this point.  Later you can optionally choose to check it in to IFS using the check in functionality in OAS.

Remember that before you can take advantage of and use information from IFS, the document must be checked into IFS and connected to one or more business objects.  This can be done using '**Check in new**' and then '**Check in and continue**' from the check in task pane. Then the magic appears – all mapped fields are automatically populated!

## 4.3   How to send the document link with e-mail
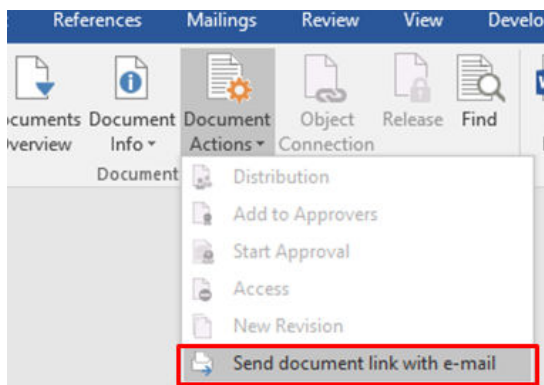


*Figure 31 Send the document link*

After you have checked in the template into IFS as described in the previous chapter – or whenever you have opened a document from IFS, you can email a document link for the document. Click on Document Action→ 'Send document link with e-mail'

Document hyperlink will be open with outlook (As below). Now you can send it to anyone
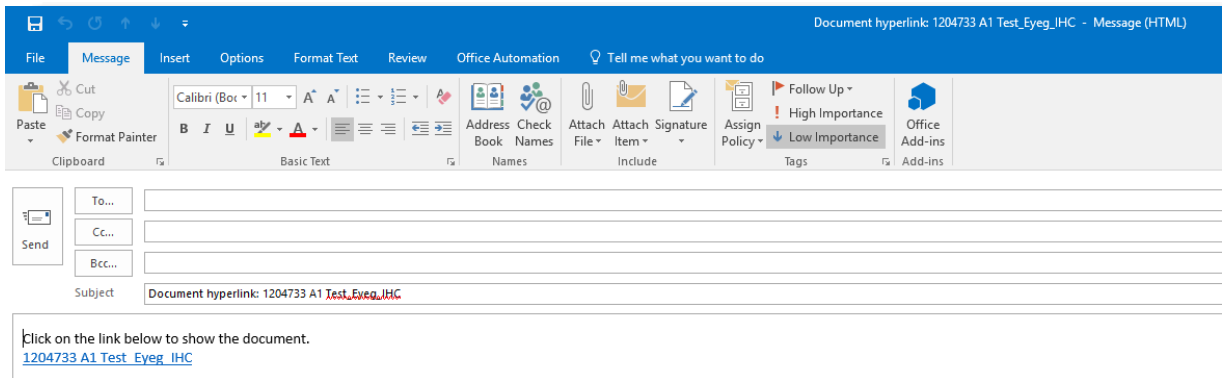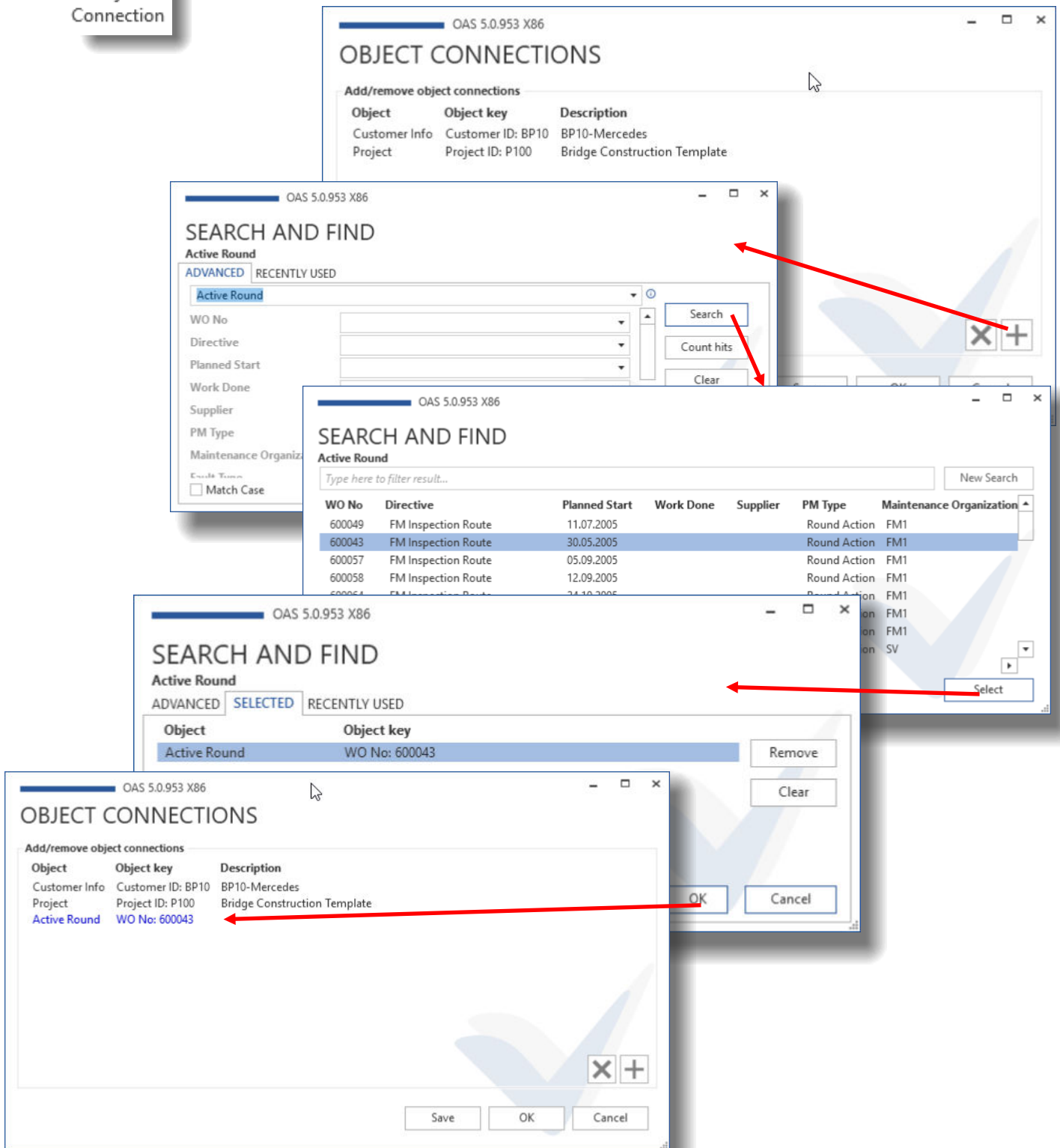


*Figure 32 Mail item opened with link ready for sending*

## 4.4 Connect IFS Business Object(s)

To connect a document to a business object in IFS, click the Object Connection button on the Office ribbon | Addovation tab. The Object connections dialog opens:



*Figure 33 Object Connection process*

Steps to connect your document to a business object (See Figure 33 Object Connection process):

1. The document must be checked in to IFS
2. Open the document in the associated Office application (e.g. Word as shown in the current example)
3. Click **Object Connection** button on the Addovation ribbon
4. The Object Connections dialog opens and shows existing object connections if any
5. Click the + button to open Search and Find dialog
6. Select the object type of the business object you want to connect to from the drop-down control, e.g. Active Round as in this example
7. Click **Search** button and select the business object you want to connect to (e.g. WO no 600043 as in this example)
8. Confirm your choice by clicking the **Select** button
9. The new business object is now added to the list of connected objects, colored blue to indicate that it is new and not yet saved.
10. Click **OK** button to confirm the connection

Note: This is possible during the Check-in process as well.

## 4.5 IFS Quick Connections

### 4.5.1 How quick connections work within Office Automation Suite
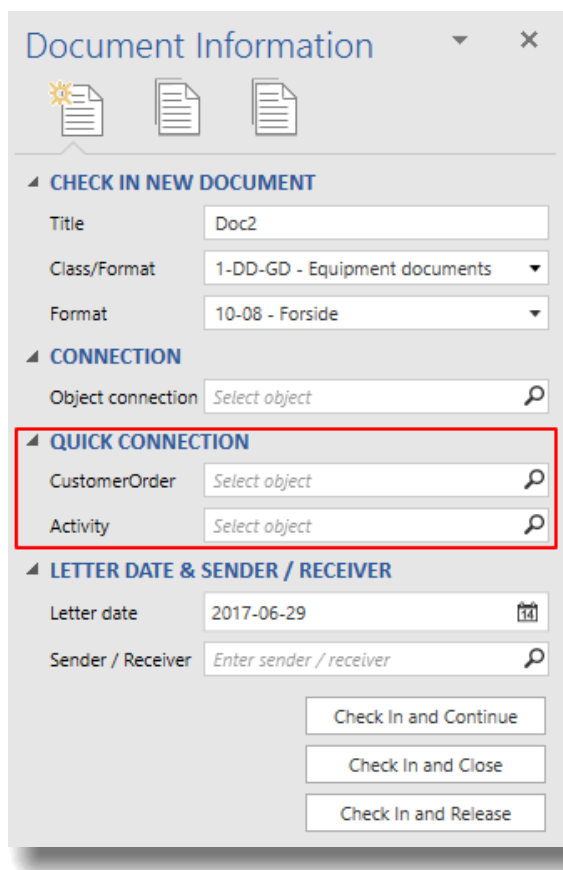


*Figure 34 Quick Connections showing up in Check in New Document task pane*

By setting up quick connections in IFS, users of Office Automation Suite will find it much easier to connect their documents to different business objects. The quick connection works as a shortcut to specific business objects and user can simply connect by click on the magnifying glass, search for the object type in question and connect.

In this example, we have made 'CustomerOrder' & 'Activity' quick connections within the class/format combination.

There can maximum be 6 quick connections within one class/format combination

### 4.5.2 How to configure quick connections in IFS

A quick connection will significantly simplify the process of connecting a document to the right business objects. This is the way to setup a quick connection in IFS.

1. Sign In to IFS.
2. Add a new technical class for instance called «QuickConn».

   a) Select «Application Base Setup» from the Navigator.
   b) Select «Characteristics Basic Data»
   c) Select «Technical Class and Attributes»
   d) Select the tab «Classes».
   e) Add a new one by clicking on the new button.
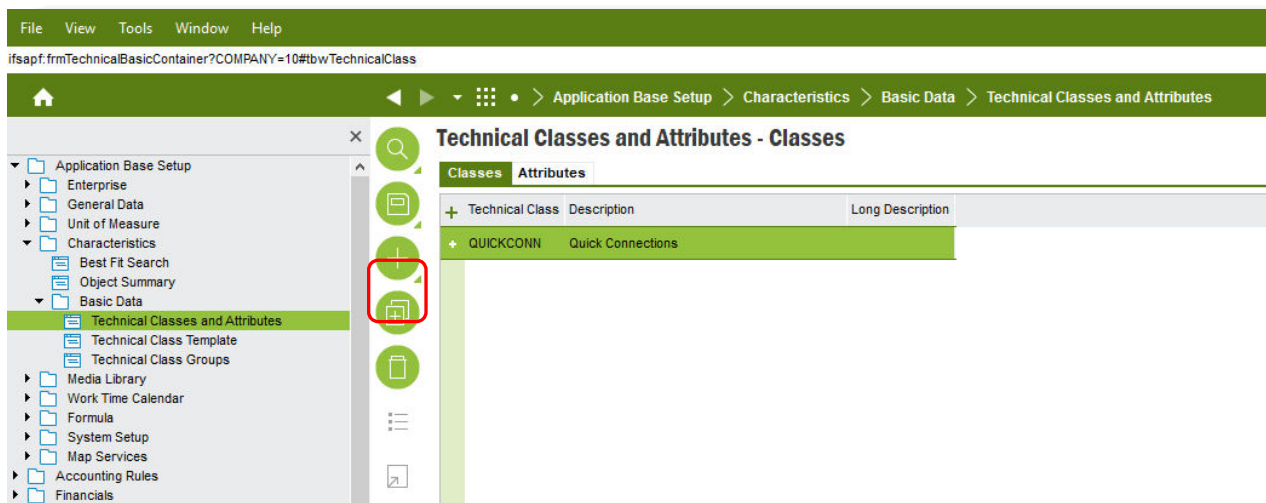


*Figure 35 Configure Quick Connection*

3. Continue in the same form now using the tab «Attributes»
   a) Create a new attribute. The name must have the prefix OBJCONN and then a running number, etc. OBJCONN1, OBJCONN2and so on.
4. Now the class and the attribute(s) must be connected.
   a) Select «Technical Class Template» from the Navigator.
   b) Select the same class as the one you created in step 2
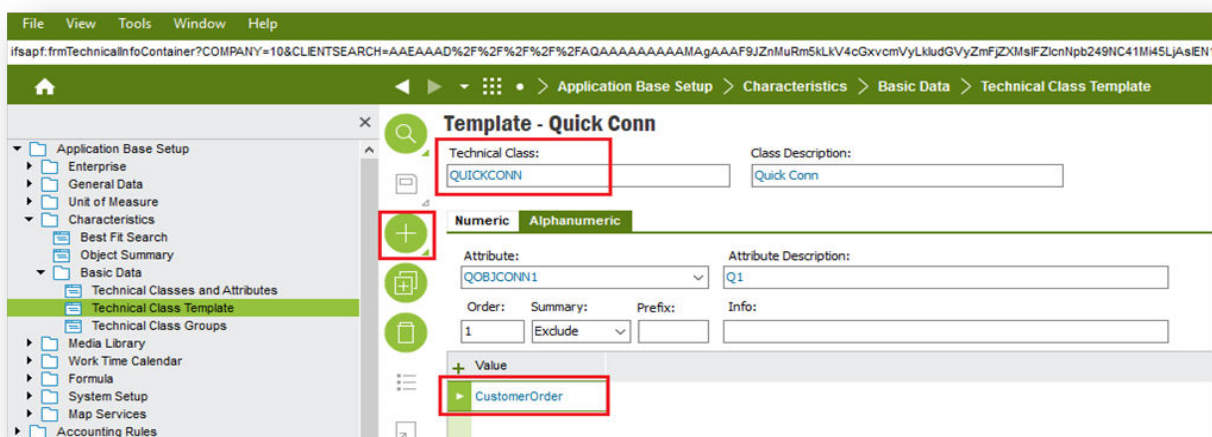


*Figure 36 Template Quick Connection*

c) Then add an attribute. In the value-field you must add the logical unit in IFS, in this example «CustomerOrder». You can find the total list of all available logical units in IFS in Solution Manager, "Object Connections".

5. In the last step, we must connect the technical class to the document class or format. Notice that format has the highest precedence.
   a) Select «**Document Management**» from the Navigator.
   b) Select «**Basic Data**».
   c) Select «**Document Class Management**»
   d) Find the class or the format you want the connect to the technical class by clicking on the "**Attachment**"-button on the bottom and the select "**Select Technical Class**" available from right mouse button. *In version 7 you must use the clip-icon.* Notice that you can delete quick connections from the technical class if you want to exclude the default settings.
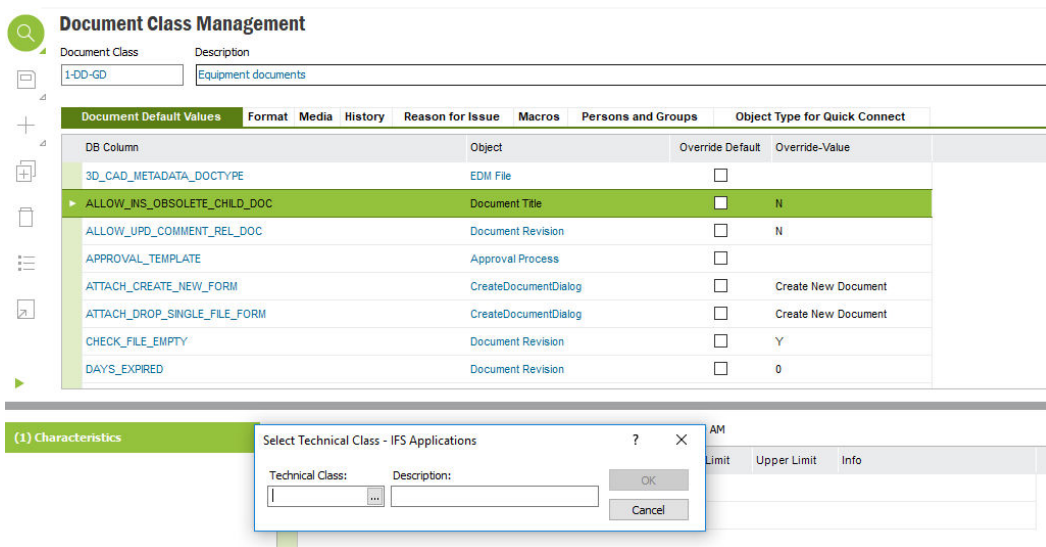
*Figure 38 Document class management*
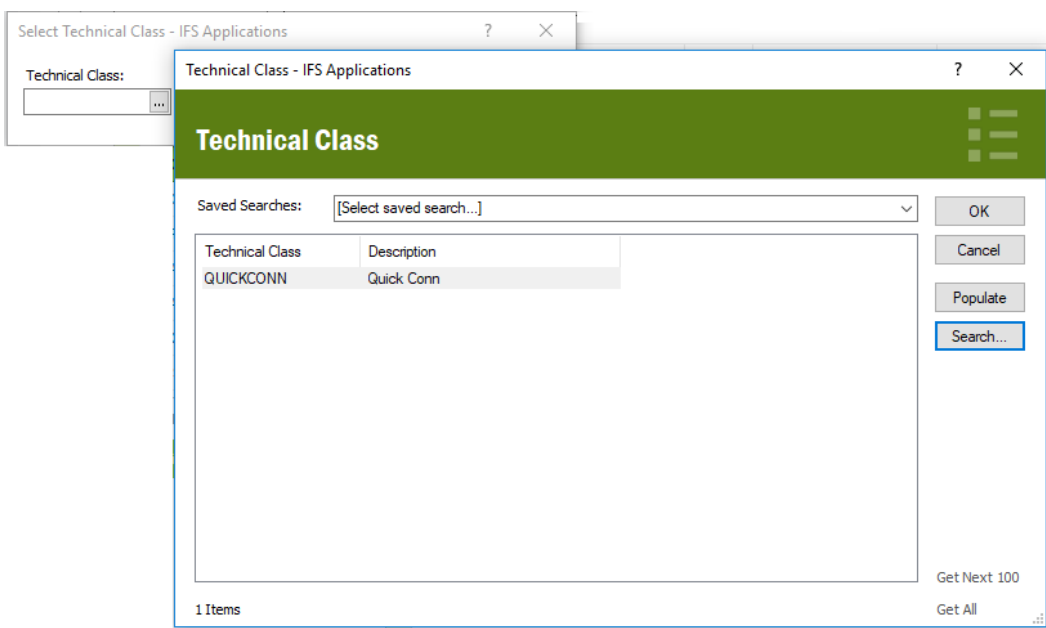
*Figure 37 Select Technical Class*
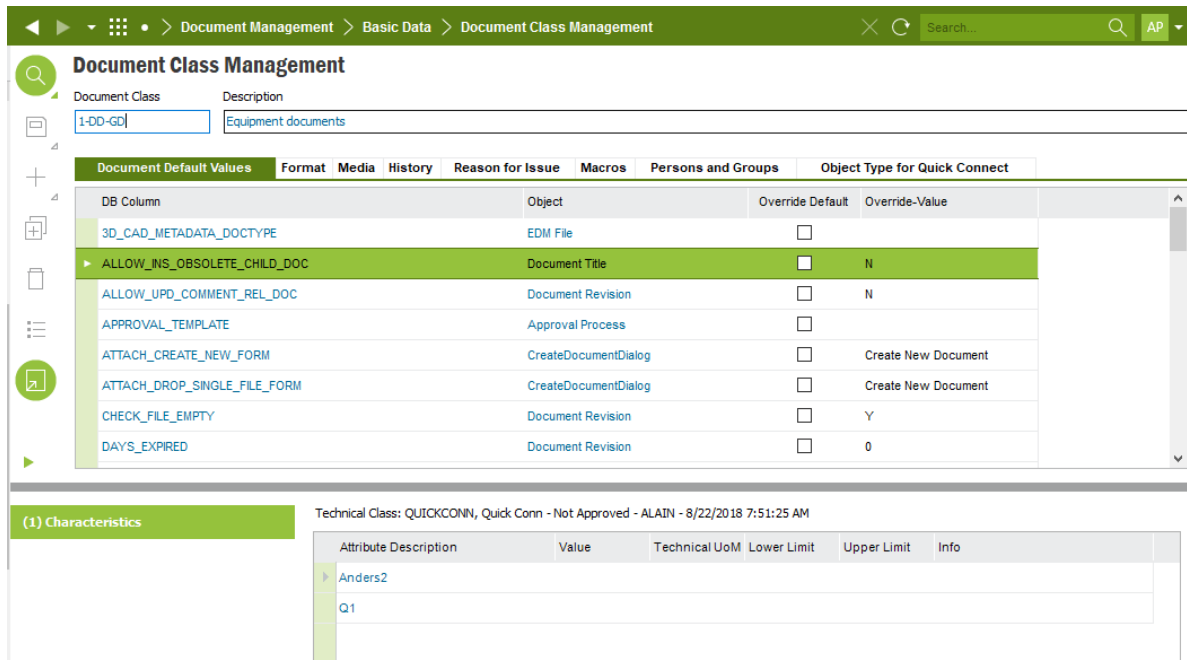
*Figure 39 Document class management*
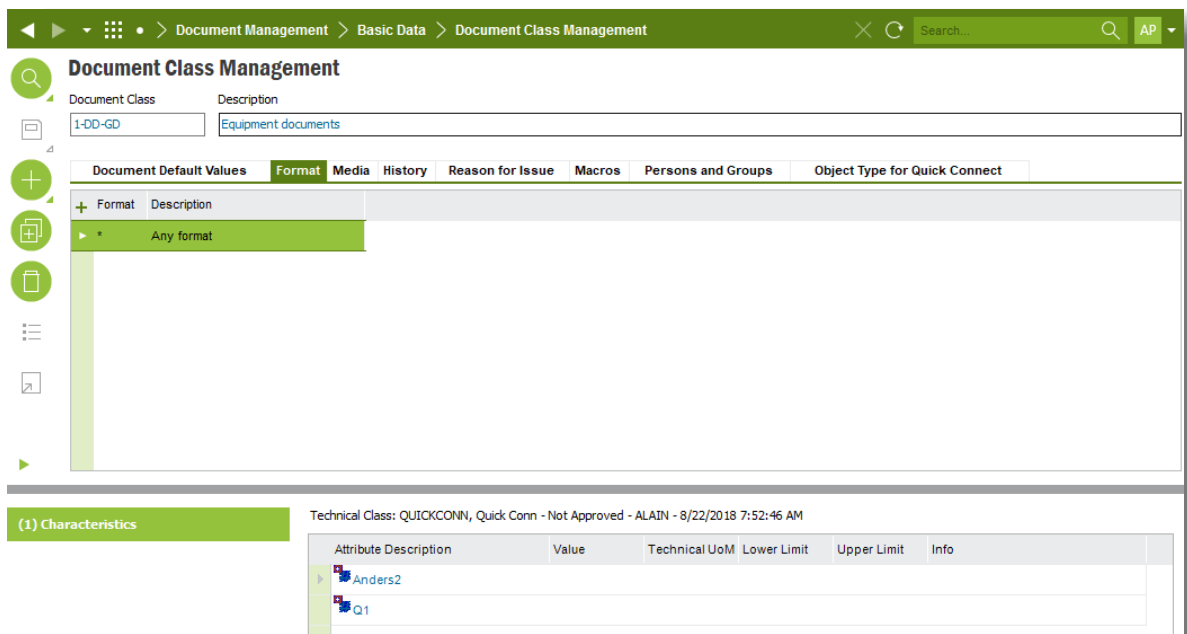


*Figure 40 Document class management - Format*

## 4.6 Search and Find – Document mode

The Search and find functionality in OAS is part of the Document Management module (Doc Man) and requires that this module is part of your license key.

### 4.6.1 Introduction
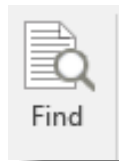
Searching and finding documents in IFS; using OAS makes it an easy task. From within Word, Excel, PowerPoint and Outlook and even right from your desktop you can search for, find and optionally check out and modify documents from IFS. The Find button is there, right on the Office ribbon.

*Figure 41 Find Button*

From desktop, you can use the same Search and Find functionality by RMB clicking on your desktop. Then from the context menu choose **Find IFS Documents…** which opens the Search and Find dialog.
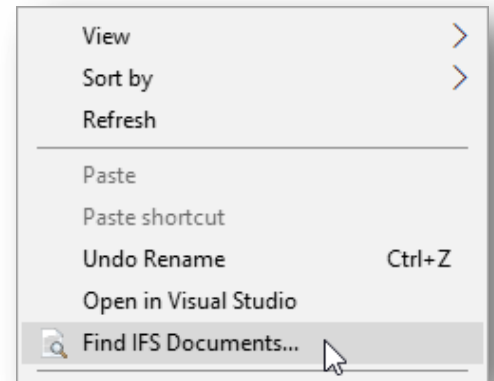


*Figure 42 Desktop context*

The dialog operates in two main modes

- The *search mode*, and
- The *result mode*

In *Search mode*, the dialog has several tabs which focuses on different ways of searching for a document:

- SEARCH – simple way of searching for a document
- SEARCH BY OBJECT – search for documents associated with certain business object type
- PREDEFINED – fixed searches that is set up for you to use
- ADVANCED – use any document characteristic and combinations to look for a document
- RECENTLY USED – list of documents that you have been using recently

The dialog is *context aware* in the sense that if you start it from e.g. Word, it will only search for Word documents only, if you start it from Excel, only Excel documents will be searched for.  When started from the desktop, all kind of documents will be searched for.

In *Result mode*, the dialog also enables you to do basic operation on the documents that you locate, like checking in a document that is checked out, undo check-out etc. By RMB (Right mouse button) clicking on a document line, you get the context menu which gives you the options.  Please refer to section 4.6.7 for further details on this.
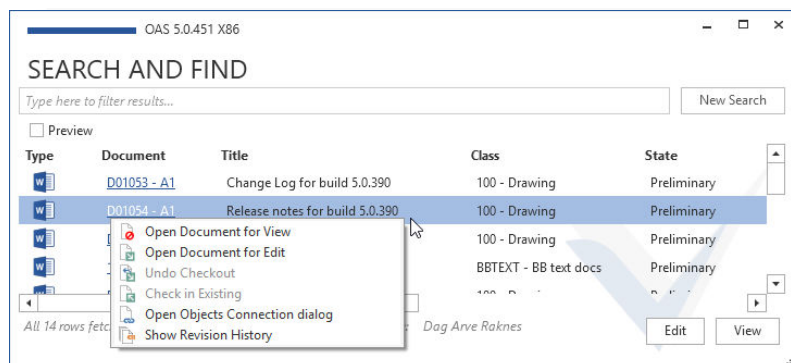


*Figure 43 SEARCH AND FIND dialog - result mode context menu*

### 4.6.2 The SEARCH tab

The Search and Find dialog in its simplest form makes it easy to do basic search operations and find documents in IFS. In its initial startup mode, only one input field is visible. You even don't need to enter any information into this field, you can simply hit the **Search** button, and the search for documents starts, locating any documents you have access to and where you have been involved and that has been modified the last 100 days.
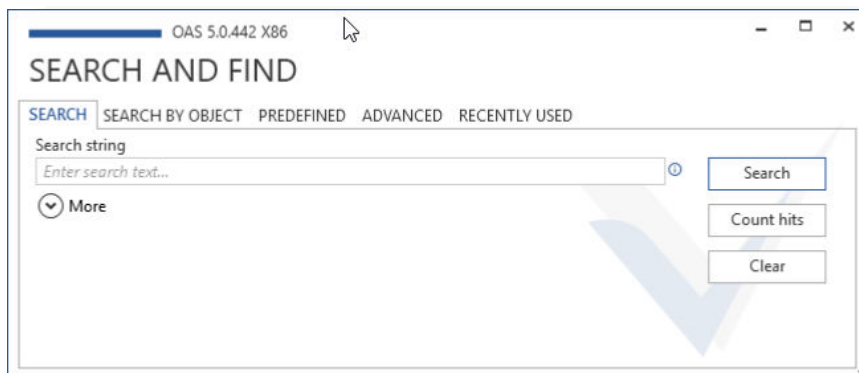
*Figure 44 SEARCH AND FIND dialog in startup mode*

If you want to narrow your search, you can enter a *search text* in the Search string field; this search string will then be used to find documents that *contains* the search text in the *title* of the document.

For adding more criteria to your search, there are several additional options for you to use.

The first options are revealed by clicking the **More** button, which expands the dialog (see figure to the right).
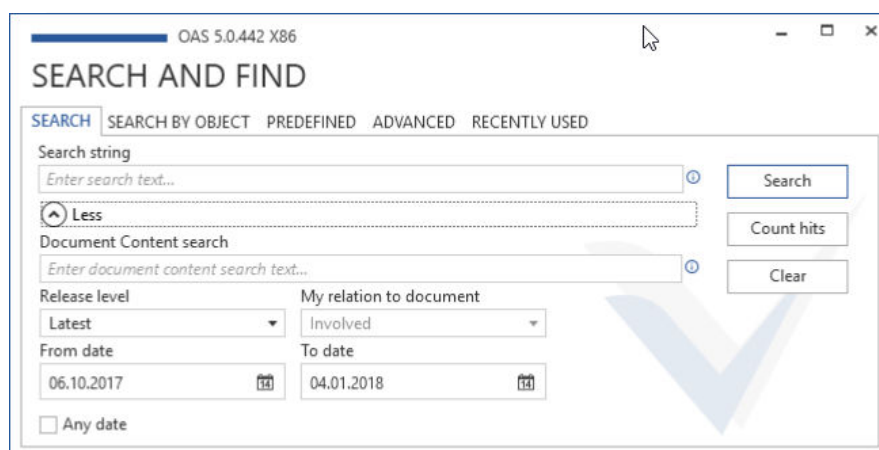
*Figure 45 SEARCH AND FIND dialog in expanded mode*

In expanded mode, you can select additional options:

**Any date** – By ticking this checkbox, you will search for documents not paying any attention to when they were created (i.e. the last 100 days constraint is removed, and any from / to dates will have no effect).

**Document Content search** – enables you to search for a document which contains the search text *within the document itself* which is a very powerful search option.

In order to use Document Content search, we need to synchronize corresponding Text Index in IFS ("DOCUMENT_CONTENT_TIX") in regular intervals. To do so, follow these steps:

- Go to Search Domains window in IFS Application and search for the Index with name "Document Content".
- RMB "Show Details"
- Use Schedule Domain Activation or Drop Index and recreate it to synchronize the index.
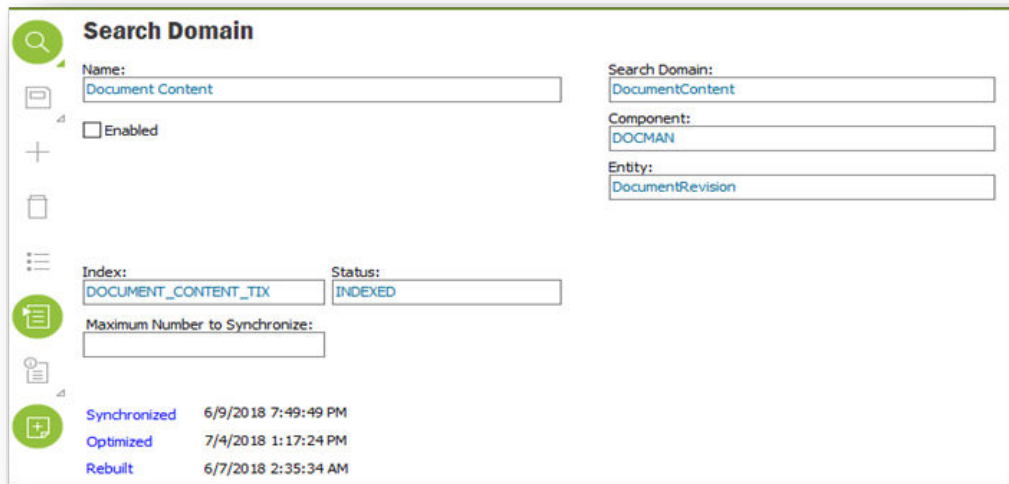
*Figure 46 Synchronizing Indexes using Search Domains*

**Release level** – Determines whether you will find any latest revision of the document, or the latest released.

**My relation to document** – enables you to filter the result by specifying the relation you have to the document. If you haven't been involved with the document in any way but still want to find it, you need to untick this check box.

**From date / To date** – By changing the *from date* and *to date* you can search for documents within a date range. Note that the Any date must be unticked for this option to take effect.

When the Search button is hit, the dialog changes to result mode and shows all the documents found in IFS that matches the search criteria is listed.
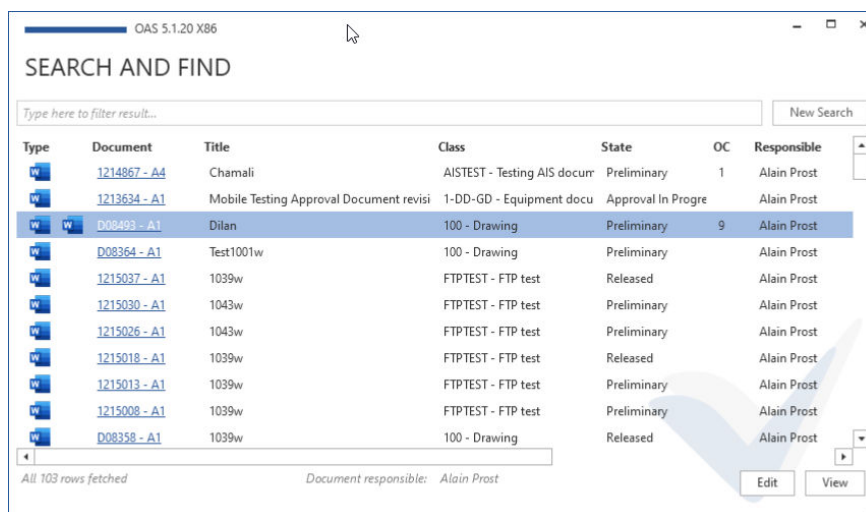


*Figure 47 SEARCH AND FIND dialog in result mode*

From the result view, there are several operations that you can do.

The **New Search** button takes you back to the initial search mode and let you do another search.

The **Edit** button (enabled when a document is selected in the list) opens the marked document for edit, i.e. checks it out from IFS and let you

modify it and do other operations on it.

The **View** button opens the document for view only, i.e. you cannot do any modifications to it unless you check it out (which you can do from the OAS ribbon once the document is opened for view).

*Figure 48 SEARCH AND FIND result mode filtering*
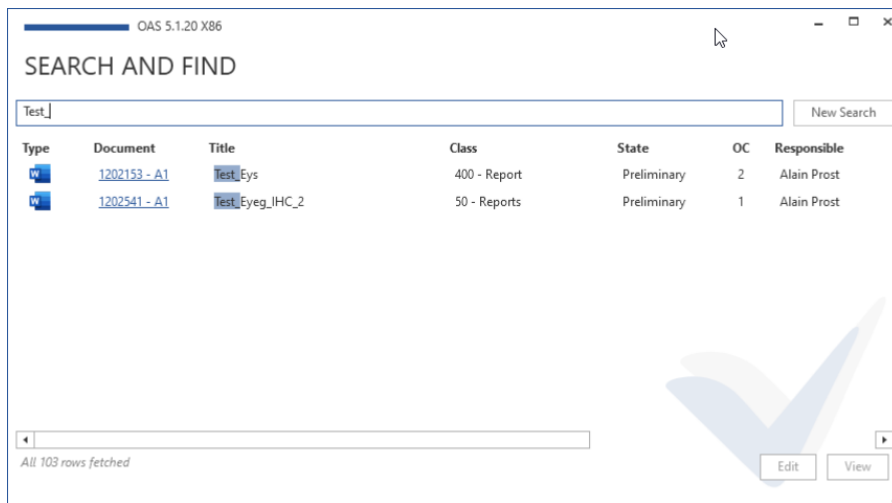
By entering text in the input field, you can filter the result. E.g. in the example shown here, we entered the text "Test_" in the *Type her to filter results…* field and thus narrowed the search as shown in Figure 48 SEARCH AND FIND result mode filtering.

*TIP!* *Note that the filtering option has a limitation when a very large number of documents matches the search criteria (more than 500 documents). In this case, the list of documents in the result list will initially contain the first 500 documents. As you scroll down the list, additional documents will be added to the list. Doing a filtering on the result list will only filter among the documents present in the list.*

In the case that there are more than 500 rows in the result dialog, note that the text below the result list says "*500 rows fetched*" (as opposed to "*All rows fetched*"), which implies that there are more rows to be fetched from the database.

Scrolling down the list will fetch additional 500 rows as you reach the end of the list, until all rows matching the criteria has been loaded.
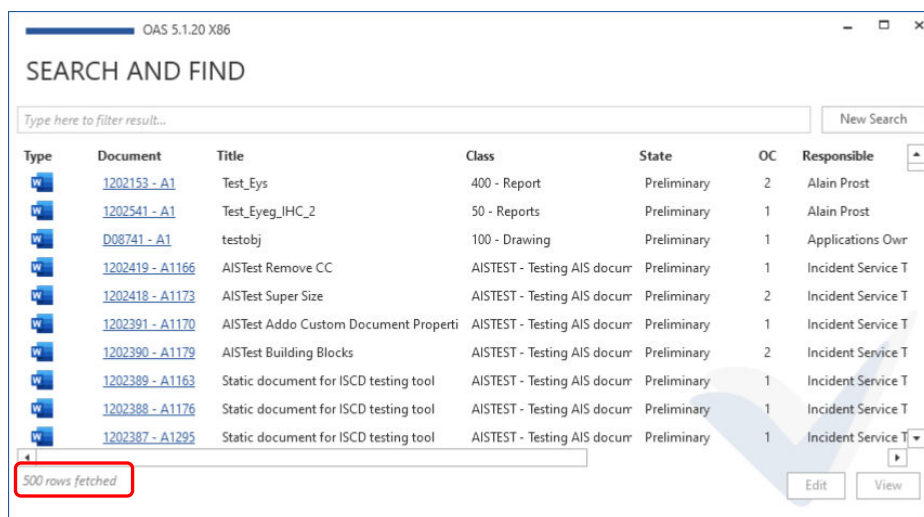


*Figure 49 SEARCH AND FIND with partial result fetched*
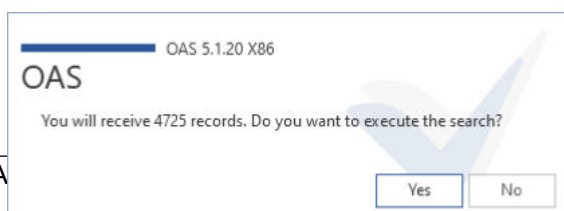


If you suspect there could be many documents matching your search criteria, it is a good idea to use the **Count hits** button rather than using

the **Search** button. The Count hits button counts the number of documents that matches you search criteria and displays a confirmation dialog that tells you how many documents you will receive and give you the option to execute the search or go back and refine your search criteria.

### 4.6.3  The SEARCH BY OBJECT tab

From the SEARCH BY OBJECT tab you can search and find documents associated with a specific business object type. E.g. to find documents related to Work Order Quotations, select this object type from the drop-down control and hit Search (or Count hits) button.

The More button can be used in this tab as well to set additional search criteria.
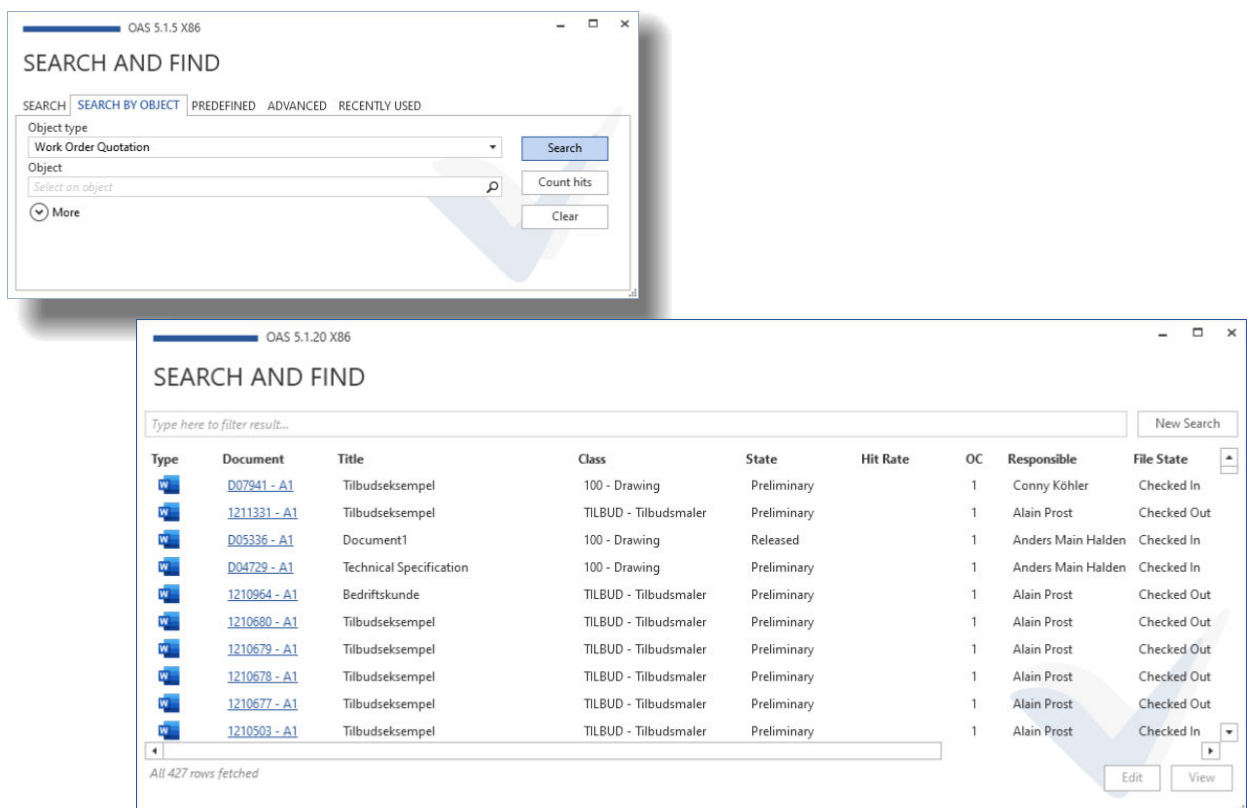


*Figure 51 Search by Object*

### 4.6.4  The PREDEFINED tab

From the PREDEFINED tab, you do searches using predefined criteria. Click on one of the links on the tab, each of them is quite self-explanatory.
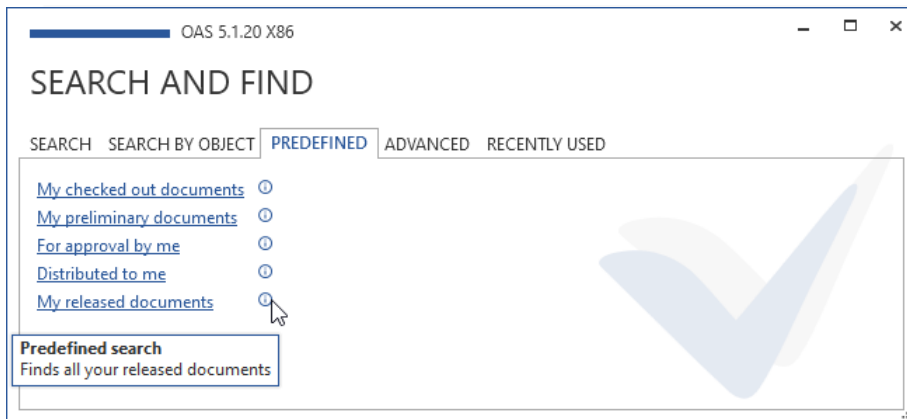
By hovering the mouse pointer over the information icon next to each link, you will get a tool tip explaining what criteria is used for each of the links.

*Figure 52 SEARCH AND FIND - PREDEFINED tab*

### 4.6.5 The ADVANCED tab

From the ADVANCED search tab, you can set up search criteria using most of the metadata fields for the document.  I.e. if you want to search for documents associated with class(es) matching the string "FTP", you may enter the string "%FTP%" into the Document Class field.

All available fields are listed. You may combine any number of fields in your search.

The drop-down controls help you find/enter wildcards that you can use.
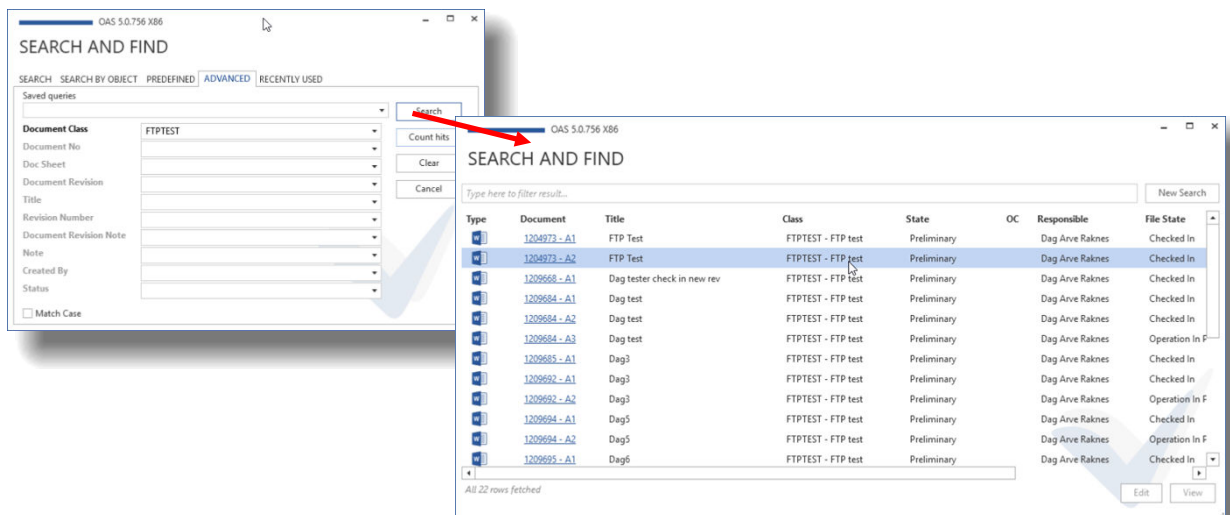


*Figure 53 SEARCH AND FIND - ADVANCE tab*

### 4.6.6 The RECENTLY USED tab

Using RECENTLY USED, you can see a list of documents that you have recently used.  From here, you can select a document (click the line), and from the RMB context menu you will have the option to do the action you want with the document.
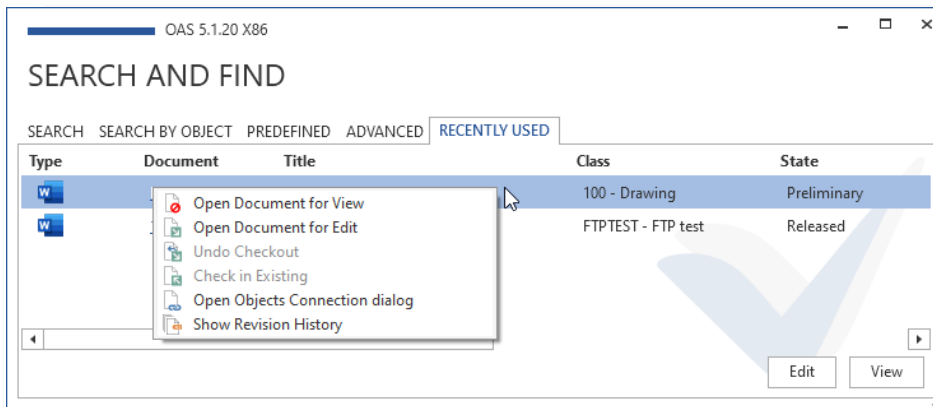
*Figure 54 SEARCH AND FIND - RECENTLY USED tab*

### 4.6.7    Options in SEARCH AND FIND *Result mode*

When the SEARCH AND FIND dialog is in the result mode, there are several operations you can do to the listed documents. The two obvious operations are the Edit and View buttons (that also appears in the context menu)
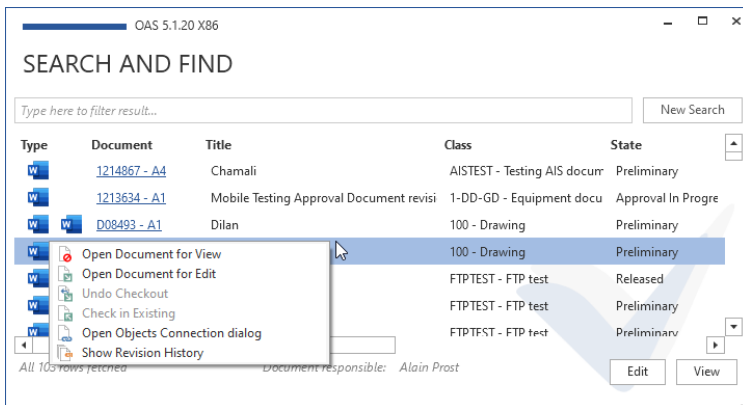


*Figure 55 SEARCH AND FIND - Context menu in result view*

Directly, in the list, you can also double-click the document icon (it the picture here, the Word icon) to open a document for view.

In the Document column, the document number is listed as a hyperlink. This hyperlink opens the document card for the current document in IFS (you need to log in to IFS if not already done).
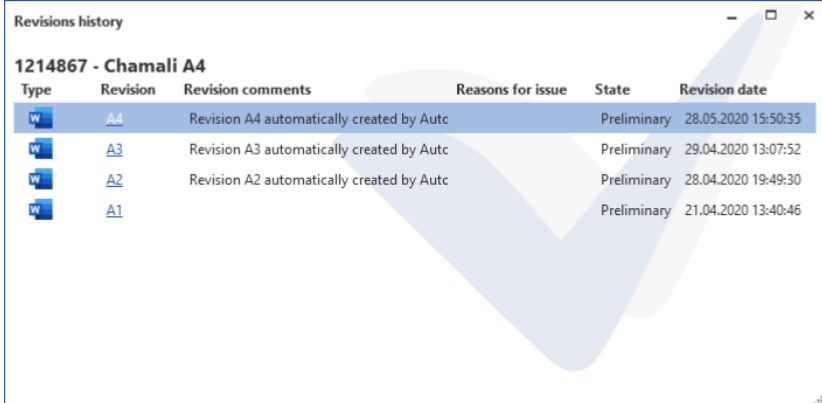
The two first context menu options works the same as the Edit and View buttons.

**Undo Checkout** – this option becomes available if a document is checked out to you. By selecting this option, you may undo a check out operation.

**Check in Existing** – this option becomes available if a document is checked out to you. By selecting this option, you can check in a document without opening it in Word.

**Open Objects Connection dialog** – this option does exactly that, and let you maintain all object connections for the selected document.

**Show Revision History** – opens a new dialog listing all revisions of a document. From this window, you can do almost the same operations as from the result window.



*Figure 56 SEARCH AND FIND - Document revision history dialog*

## 4.7 Search and find dialog – Business Object mode

The search and find functionality is not used exclusively for searching for documents. It is also used for searching for business objects (abbreviated BO for simplicity) from numerous contexts in OAS.  When searching for BO's, the dialog behaves slightly different that in Document Search mode.

### 4.7.1 General Business Object Search and Find

Some of the places where you will use the "Search and find for business objects dialog" is when

- you are going to check in documents using Document Management
- you have checked out a document and want to add object connections from object connection maintenance dialog
- you select messages in outlook that you want to check in to IFS
- you select files in file explorer that you want to check in to IFS

### 4.7.2 Document check in - object connection search and find

When you are going to check in a document, you might want to (or even are supposed to) associate the document with one or more business objects. There are fields in the Check in task pane that is meant for this; the Connection field and the Quick Connection field. Both these fields have a magnifier button which opens the Search and find dialog – in BO mode.
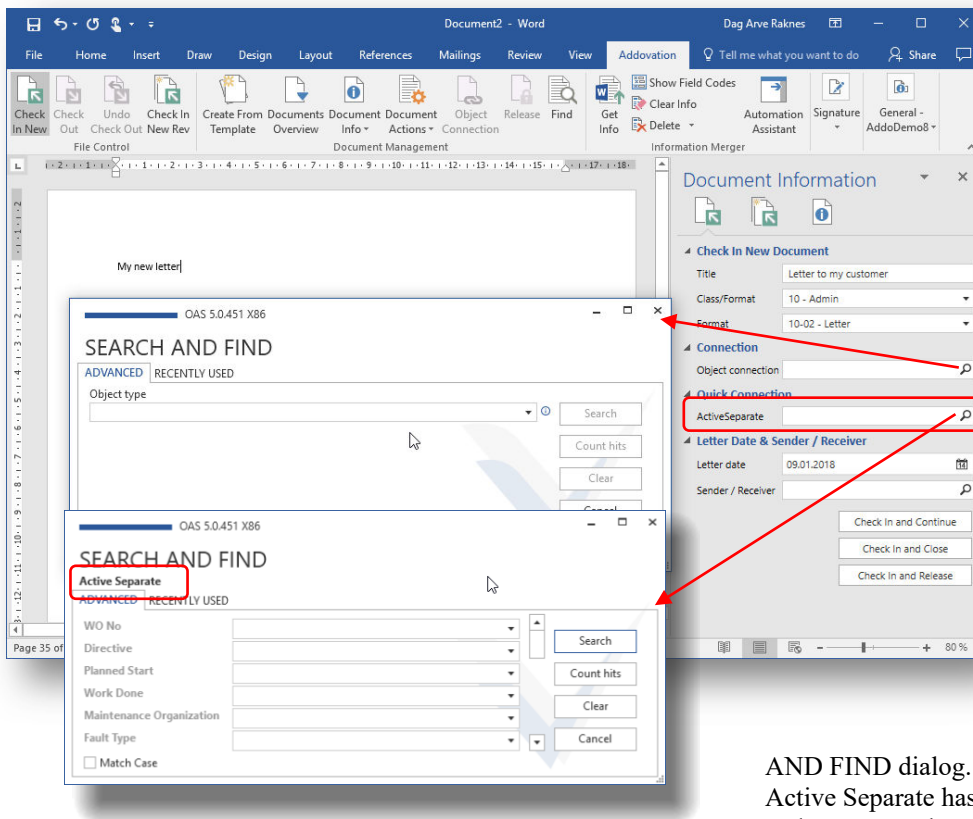


The dialog opens slightly different from these two positions; from the Object connection field you can search for any BO type object, from the Quick Connection field the BO type is preselected for you, as you can see from the lower SEARCH AND FIND dialog.  Here, the object type Active Separate has already been selected, and you can only search for a BO of this type.

*Figure 57 SEARCH AND FIND - Business Objects mode*

### 4.7.3 Add Object connections to a checked-out document

When a document is checked out from IFS, you can manage the BO's that the document is associated with by using the OBJECT CONNECTIONS dialog.  Click the **Object Connection** button on the Addovation ribbon tab to open the dialog. From this dialog you can remove [X] or add [+] object connections from/to the current document.
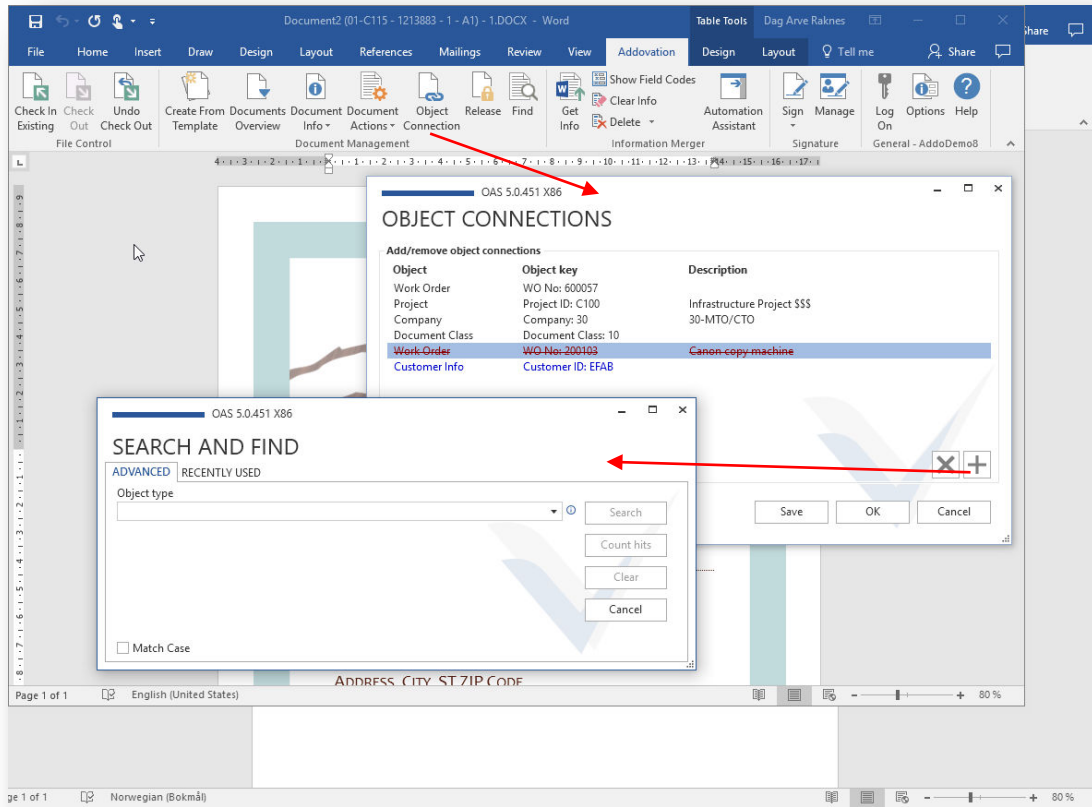


*Figure 58 Object connection maintenance dialog*

Any changes in object connections are not actually done in the database until you hit the **Save** or **OK** button.  The changes are visualized by marking deleted with a red, strike-through font and new with a blue colored font. See ***Error! Reference source not found.***.

If you hit the **Save** button, the changes are done to the database (IFS) and the dialog remains open and you can continue any object connections maintenance if you like.

If you hit the **OK** button, all the changes are saved to the database, and then the dialog is closed.

If you hit **Cancel**, you cancel all changes in the dialog (i.e. they are not done in the database) and the dialog is closed.

How to search for and use the SEARCH AND FIND dialog with BO's will be covered in the next section.

### 4.7.4 Using the SEACH AND FIND dialog with BO's

Using the SEARCH AND FIND dialog for Business Objects lookup, the appearance of the dialog is slightly different, but the principles the same as when searching for documents. The dialog has two different tabs, we will describe the use of each of them in this section.

#### 4.7.4.1 Using the ADVANCED tab

As already mentioned, the SEARCH AND FIND dialog may open in two different modes depending on the context it is opened from. In the first dialog shown here, BO of any type can be browsed for. In the second dialog, the BO type is preselected and cannot be changed, in this particular case we show the object type Active Separate that has been preselected.

Looking at the general way of browsing for business objects (first picture), the dialog has two tabs; the ADVANCED tab and the RECENTLY USED tab.

The steps to find a BO from, say the check in new document task pane, where you want to connect your new document to a *project*, could be the following:

1. Click on the magnifier glass in the Check in new document task pane (see **Error! Reference source not found.**)
2. Select the object type of the BO that you are looking for
3. Optionally you can now fill in additional search criteria using characters and wildcards
4. Hit the **Search** button. A list of matching projects will open
5. Mark one of the projects listed and hit the **Select** button.
6. A new tab will now appear in the SEARCH AND FIND dialog
7. where the selected BO(s) is listed
8. Optionally, you can now enter the ADVANCED tab again and search for additional BO(s) that you want to associate your document with
9. When have completed adding business objects to your document, click the OK button to confirm establishing the object connection links in the database. The dialog will now close.
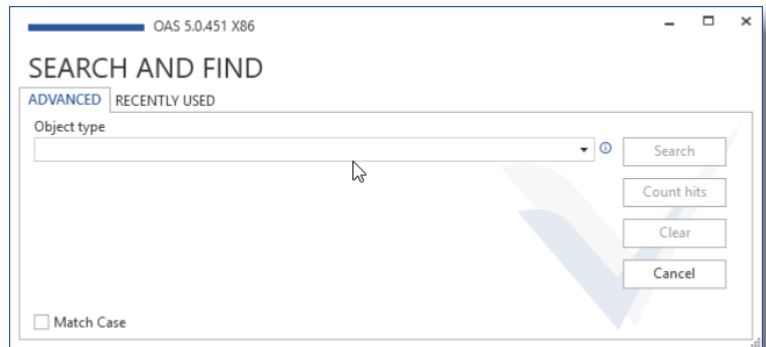


*Figure 59 SEARCH AND FIND - any business object mode*



*Figure 60 SEARCH AND FIND - predefined business object mode*
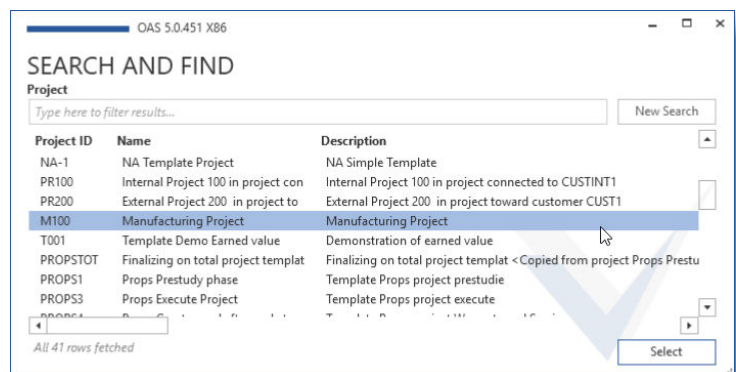


*Figure 61 SEARCH AND FIND - Search result list*
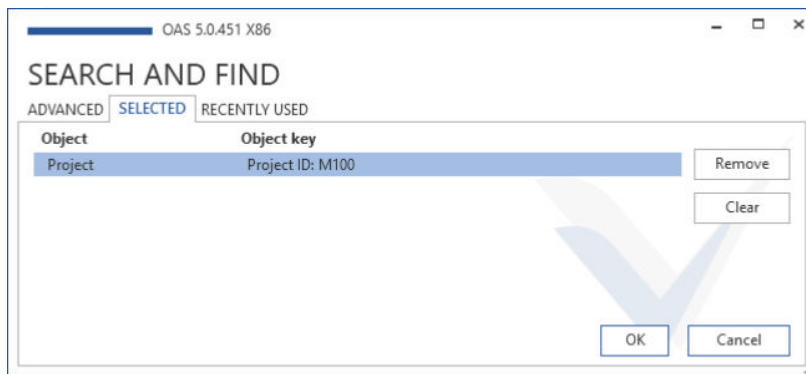
Of course, you can at any time during this flow click the cancel button to interrupt the complete process. Any previously established connections will not be affected by a cancel operation. They must be removed explicitly.

*Figure 62 SEARCH AND FIND - SELECTED tab*

### 4.7.4.2    *Using the RECENTLY USED tab*

The RECENTLY USED tab is quite self-explanatory; this tab simply shows business objects that you have recently used and lets you reuse them in a simple way.  Say, you are working on a project creating numerous documents along the way.  You want to associate all these documents with e.g. the project, the customer and may be some other business objects.  In this case it is convenient to be able to use the RECENTLY USED tab and get project id and customer id from there without having to search for them each time you check in a new document.
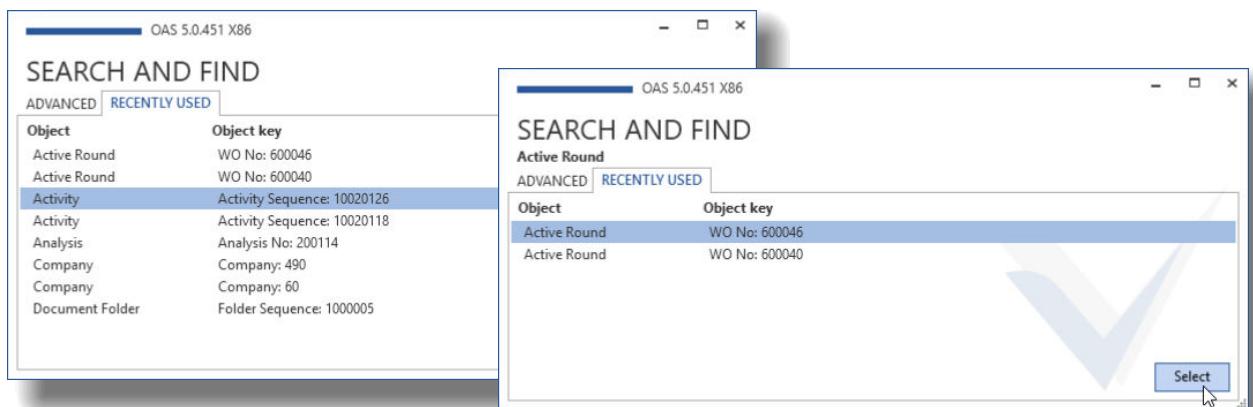


*Figure 63 SEARCH AND FIND - RECENTLY USED tab without filtering (left) and with filtering (Active Round)*

There is a trick to be aware of though.  When the dialog opens, it always opens with the ADVANCED tab active (see **Error! Reference source not found.**).  So, to use the RECENTLY USED tab, you obviously must click on this tab.  And here's the trick:

- If you leave the Object type control empty when clicking the RECENTLY USED tab, all recently used objects *of any type* will be listed and you can pick any.
- If you select an object type in the ADVANCED tab before you click the RECENTLY USED tab, the recently used objects list will be filtered on the object type that you selected.

### 4.7.4.3    Using saved searches

If you have *saved searches* in IFS, these can also be reused in OAS. Note that for OAS to detect saved searches on a business object type, they must be saved with the "global" flag checked, as shown below.
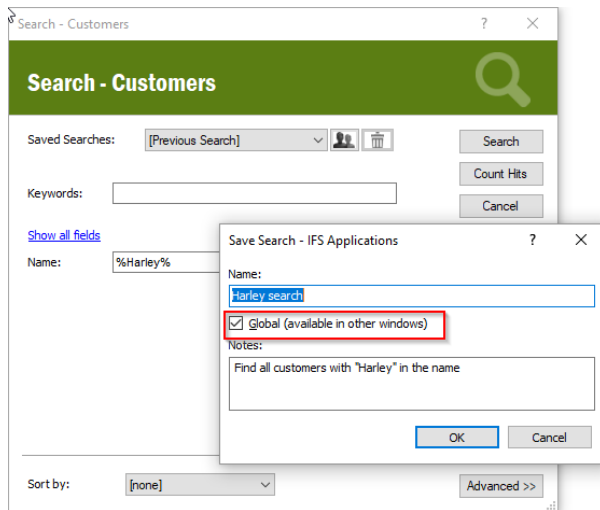
When the saved search is flagged as global, it will appear in the OAS when the same object type is chosen in the SEARCH AND FIND dialog
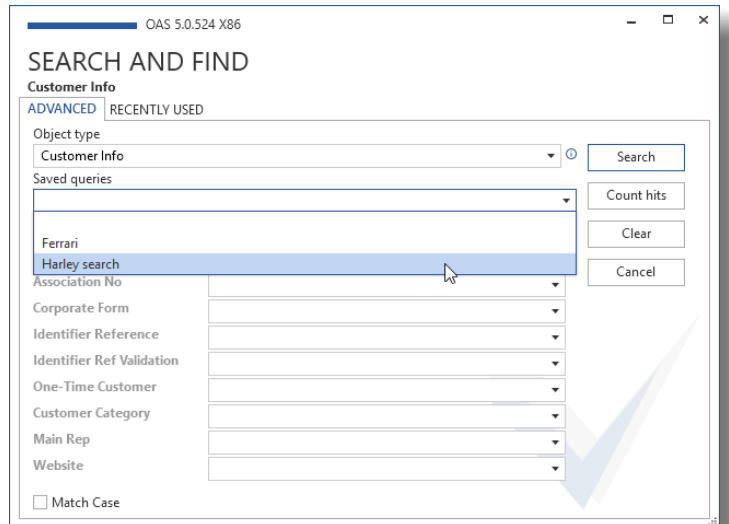
*Figure 64 SEARCH AND FIND – Saved search for customers info*

- *The user profile (IFS) needs to be saved after a new search has been saved, and OAS needs to be restarted to catch the profile changes in IFS.*
- *Saved searches containing # marked variables (e.g. … and USER_SIGN like '#PERSON_ID#') are not supported by OAS.*

## 4.8 Using OAS from Outlook

OAS adds a lot of useful features to Outlook, like

- Checking in one or more messages and/or attachments to IFS
- Sending messages and checking them in to IFS in one operation
- Setting up Synchronized folders in Outlook so that any message dropped in a Sync Folder gets checked in according to configured rules. For a closer description of this functionality, please refer to section 8 below.

### 4.8.1 Checking in messages from outlook

You can check in messages and files – typically attachments to a message – from Outlook using OAS functionality. Follow these steps to check in from Outlook.

The CHECK IN DOCUMENT dialog contains the usual information fields needed to check documents into IFS, like class and format etc. It also contains a list of documents available for check in. To the left of the document list, there is two columns with check boxes, the leftmost (**Complete**) is for marking check in of messages *including* attachments, the rightmost (**Item**) is for selecting messages and attactchments to be checked in as individual (separate) documents.

1. From the Outlook message list, mark one or more messages where you want to check in either the complete message(s) or the attachment(s)
2. Open the CHECK IN DOCUMENT dialog by selecting the **Check in to IFS** option on the context menu (RMB click)
3. A list of messages and attached files appears in the dialog
4. In the header of the dialog, enter class and format and any other information. Class and format will be propagated to all the lines (documents listed)
5. Tick the messages and/or documents you want to check in

*Figure 65 Outlook message list - context menu*

6. Optionally, you can modify any class/format for each line
7. Optionally you can also establish object connection like described before by clicking the magnifier of the Connections field
8. When you have completed selections, confirm the check in operation by clicking Check in button
9. There is a "Result" column to the right in the dialog, this will contain a document number formatted as a hyperlink if check in succeeded, otherwise it will indicate an error. You can click the link to open the document card in IFS.

You can check in documents as preliminary or do the check in and release operation in one go by clicking the Check in and Release button.

*Figure 66 CHECK IN DOCUMENT dialog*

### 4.8.2 Check in files from file explorer
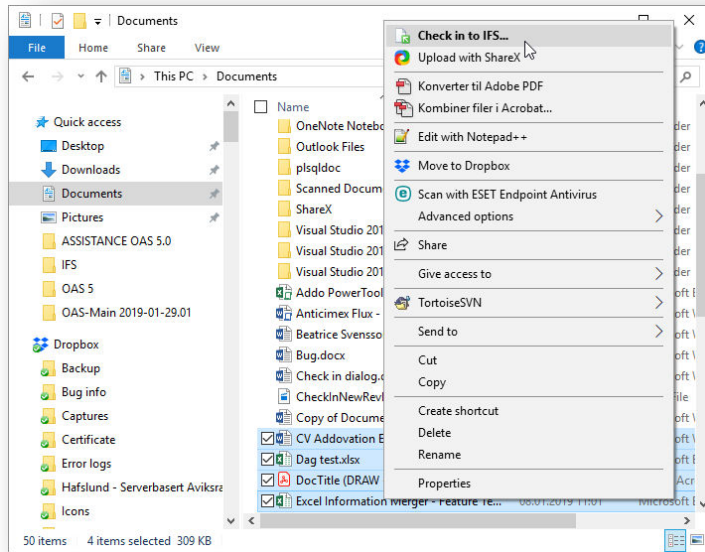


Files can be checked in directly from File Explorer using OAS functionality. Select the files you want to check in, open the context menu (RMB click on the selected files) and select the **Check in to IFS** option.

The Check in Document dialog (same as used when checking in documents from Outlook, but slightly different when it comes to the check boxes. Simply tick all files that you want to check in, the rest is as described for checking in messages and attachments (see previous section).

*Figure 67 Checking in files from File explorer*
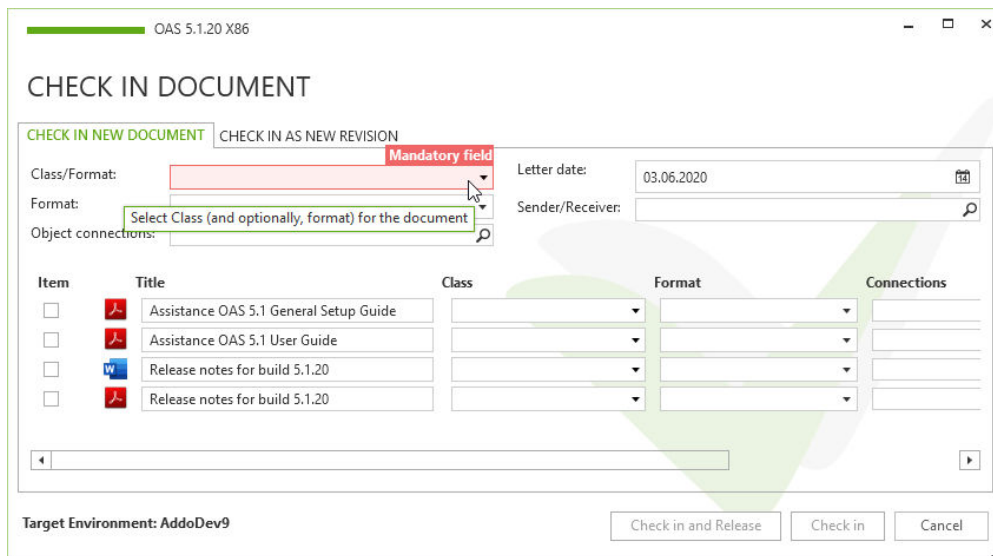


*Figure 68 CHECK IN DOCUMET dialog - file check-in*

### 4.8.3 Send & Check in from Outlook

If you are going to send a message to e.g. a customer and want to check in the message to
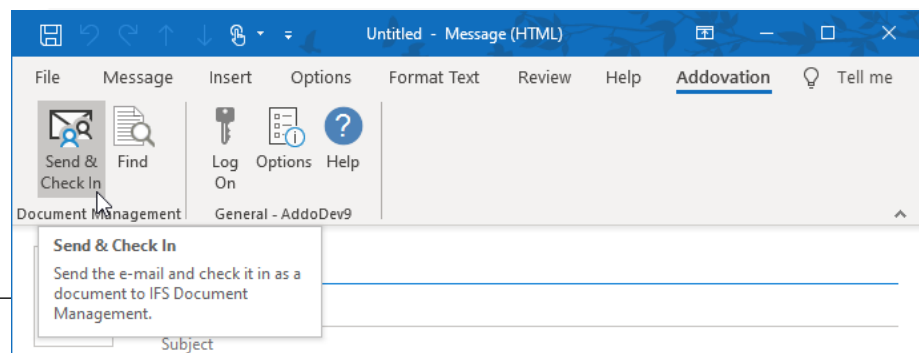
IFS, connect it to a project (or any other business object) and assign a Class and Format to it, this can be done in one operation using the **Send & Check In** functionality in OAS.

When you have opened a new message, click the Addovation tab on the Message ribbon. This looks like shown in *Figure 69 Send & Check In from Addovation Message ribbon*. There is a Send & Check In button that opens a dialog for entering check in information
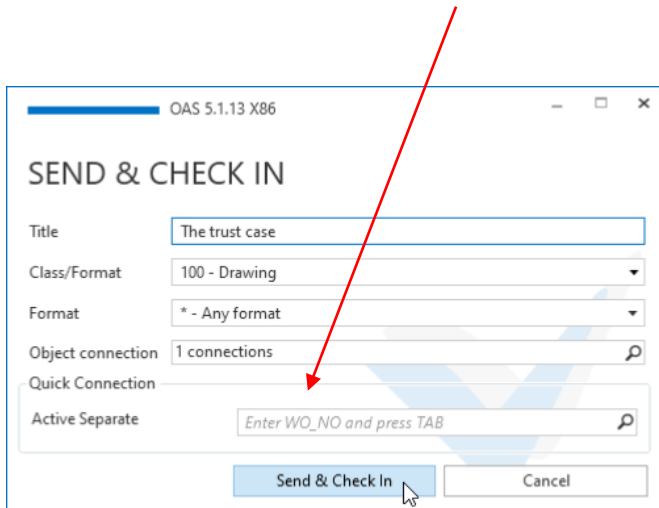


Complete the form by filling in all needed information and click the Send & Check In button. The message will be sent and when it disappears from the outbox, it will get checked in to IFS.

The Title field will become the IFS document title.

*Figure 70 Send & Check In dialog*

*If the class / format is configured with a quick connection, this will be made visible at the bottom of the dialog. In this case you can type or paste a corresponding id into the field directly. Up to 6 quick connection can be configured for each Class/format*

# 5   File Control
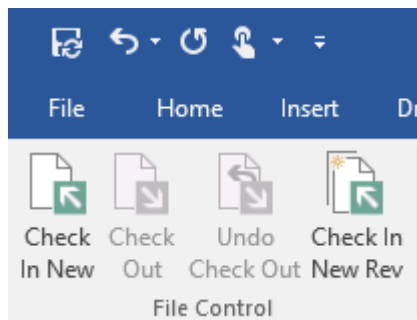


The file control ribbon button group represents the basic functionality to interact with IFS Document Management.  The buttons here enable you to check documents in and out of IFS in various ways.

The button group is dynamic in the sense that buttons that are not relevant at a given moment can be disabled and even completely hided. The button / button state shown in ***Figure 71 File Control ribbon button group***, is how the buttons will appear for a document that is not check in to IFS.  Here you can check the document in as new document or as a new revision of an existing document.

*Figure 71 File Control ribbon button group*

The steps will be the same whether you are logged in to Word, Excel or PowerPoint.  In Outlook the procedure is different, as described elsewhere in the Guide.

## 5.1   Check in New

To check in a document as a new IFS document, follow the steps below.

1. In the hosting application (e.g. Word) go to the Addovation ribbon tab
2. Log in to the Office Automation Suite (if not already done)
3. Hit the **Check in New** button, and the Document Information | Check In New Document task pane page opens
4. Fill in the required fields (red fields are mandatory), when all mandatory fields are filled in with values, the check in buttons will become available
5. Check in choosing one of the check in buttons at the bottom of the task pane, each of them are explained below
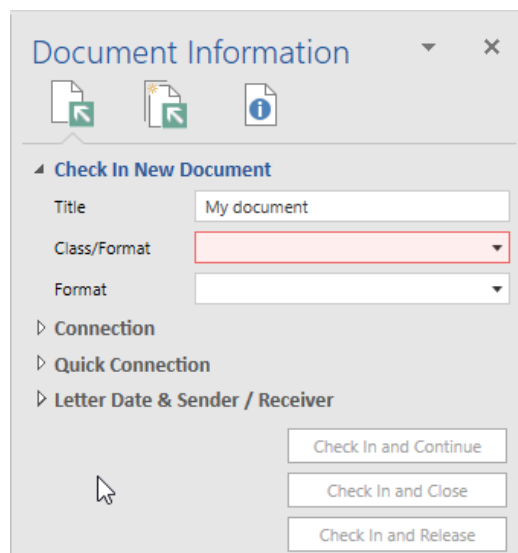


*Figure 72 Document Information | Check In New Document page*

**Check in and Continue:**
This action will Check-in the document to IFS Document Management, and Check it out again, enabled for edit.

**Check in and Close:**
This action will check in the document to IFS and then close the document.
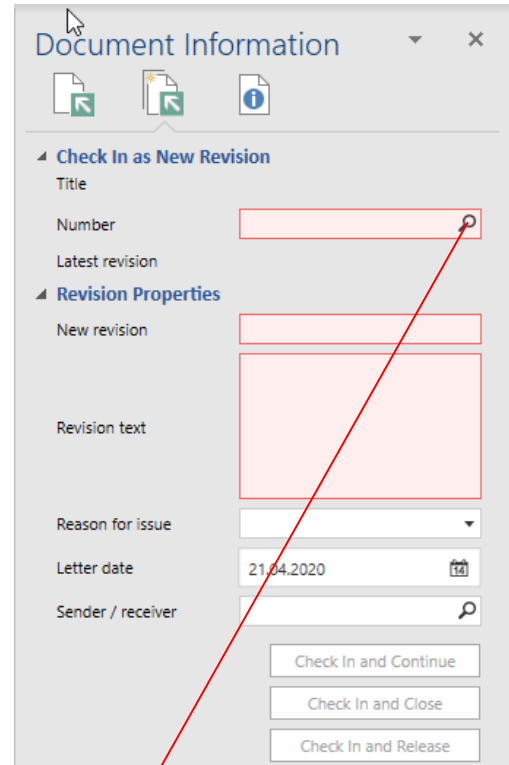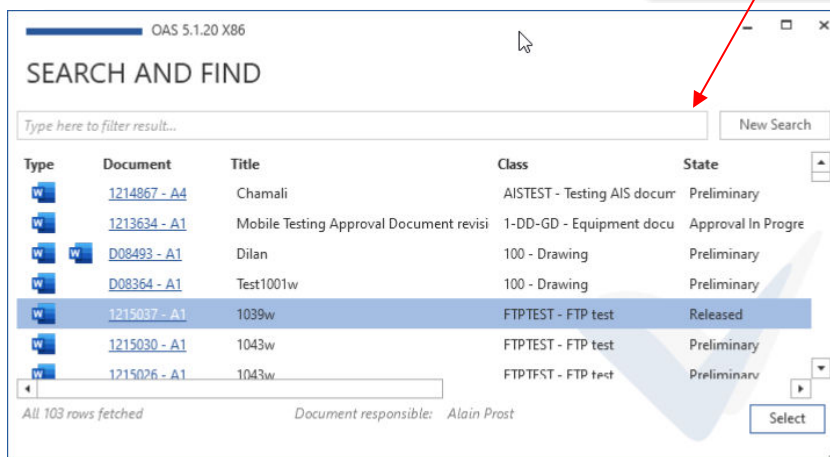
**Check in and Release**
This action will check in the document to IFS and then release the document.

## 5.2   Check In as New Revision

To check in a document as a new revision to an existing IFS document, follow the steps below.

1. In the hosting application (e.g. Word) go to the Addovation ribbon tab
2. Sign in to an IFS environment (if not already done)
3. Click the **Check in New Rev** button, and the Document Information | Check In as New Revision task pane page opens
4. Fill in the required fields (red fields are mandatory), first, you need to find the identity of the document you are going to replace.
5. Click on the magnifier glass of the Number field.  The SEARCH AND FIND dialog open up
   a. Browse and find the document you want to replace
   b. Mark it in the list (click the line)
   c. Hit the Select button
   d. The dialog closes and all relevant information like title, number, revision and a proposal for new revision will automatically be filled in
6. Fill in the Revision text
7. When all mandatory fields are filled in with values, the check in buttons will become available
8. Check in choosing one of the buttons at the bottom of the task pane.  They work the same as for Check in New.



*Figure 73 Check in New revision*

If you know the document number of the existing document, you can type the number directly into the Number field and hit Tab. OAS will do a lookup for you and

- if a document matches the number entered and only one match is found (the number need not be complete), the Title and Latest revision fields are filled in as well as a suggestion for New revision
- To erase the document number field, click the trash bin
- if the number entered matches more than one document, the Search and Find dialog opens with the search result, and you can mark and select the document you want to use.

**Document Information**

Check In as New Revision

| | |
|---|---|
| Title | **New One** |
| Number | D06570 |
| Latest revision | A1 |

Revision Properties

| | |
|---|---|
| New revision | A2 |

**Document Information**

Check In as New Revision

| | |
|---|---|
| Title | |
| Number | 121 |
| Latest revision | |

Revision Properties

| | |
|---|---|
| New revision | |
| Revision text | |

21.04.2020

Check In and Continue

Check In and Close

Check In and Release

OAS 5.1.5 X86

**SEARCH AND FIND**

Type here to filter result...                                    New Search

| Type | Document | Title | Class | State | OC | Responsible | File State |
|------|----------|-------|-------|-------|-----|-------------|-----------|
| | 1214837 - A1 | Test OAS 5.1 | 1-DD-GD - Equipment docu | Preliminary | | Dag Arve Raknes | Checked In |
| | 1214399 - A2 | Tilbudseksempel | TILBUD - Tilbudsmaler | Preliminary | 3 | Dag Arve Raknes | Checked In |

All 2 rows fetched                                                                  Select

# 6    Quick Guide to Create, Check-in & Distribute Templates in IFS

Here is a coarse overview of the steps involved to create and prepare a document and how to make it a distributed template in IFS:

1.    From OAS

    a.    Open Word, Excel or PowerPoint.

    b.    Click on the **Office Automation** tab and log in using your IFS credentials.

    c.    Select the **Check in new** button and complete the check in steps

    d.    Press the '**Automation Assistant**' button.

    e.    Drag the desired properties from the Automation Assistant and into your document.

    f.    Remember to click on **Clear Info** button before checking in the completed template!

2.    Sign in to IFS Applications.

    a.    Search for the document you just checked in from MS Office.

    b.    Update the status on the document to 'Released'.

    c.    Right click; choose 'File operations 'and then press 'Use the document file template'.

    d.    Save changes.

# 7 User Defined Attributes

This is an added functionality enabling pop-ups dialogs prompting the end-user to insert standard or required information (User Defined Attributes - UDA) for a certain document type. The information which is to be inserted is defined by assigning technical attributes in IFS and connecting these to the respective document class or format in IFS.

This connection will cause a pop-up in MS Word prompting user to fill in values for the UDA's, such as "Title", "Date of Meeting", and "Attendees" etc. Using Addovation Information Merger, you can make these values automatically be displayed in the document. The information entered by the end-user is stored in the document itself, not in IFS.

The field prompts are set in the attribute description of the technical attribute connected. Office Automation will prioritize attributes connected to the document format. If there are no technical attributes connected to the document format, any attributes connected to the document class will be used. If there are no connected technical attributes, the prompt will not be displayed.

## 7.1 Setting up the technical attributes

### 7.1.1 Step 1: Create Technical Class

Open IFS and navigate to IFS Applications / Application Base Setup / Characteristics Basic Data (from IFS Navigator). Open the "Technical Classes and Attributes" window.
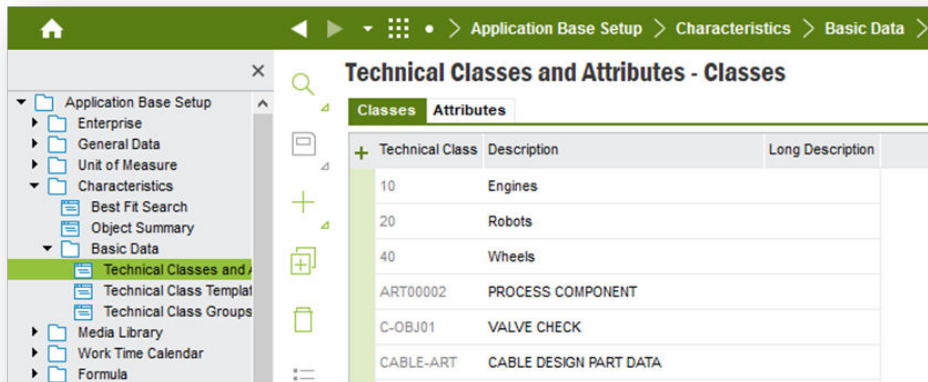


*Figure 74 IFS EE - Technical Classes and Attributes*
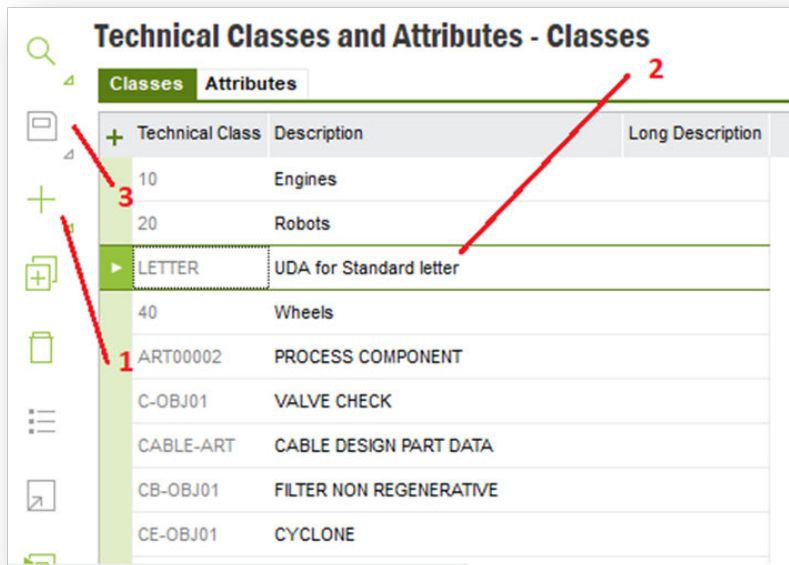
*Figure 75 IFS EE - Technical Classes and Attributes*

Click the plus button / "New", define the technical class and description and save the entry. Note that the technical class should correspond to the document class or format where this prompt is to be displayed.

### 7.1.2 Step 2: Create technical attributes

Select the "Attributes" tab of the "Technical Classes and Attributes" window. Click the plus button / "New" and define the attribute. Note that the type should be "Alphanumeric" for text and that the Attribute Description is the text that will be displayed to the user in the prompt.
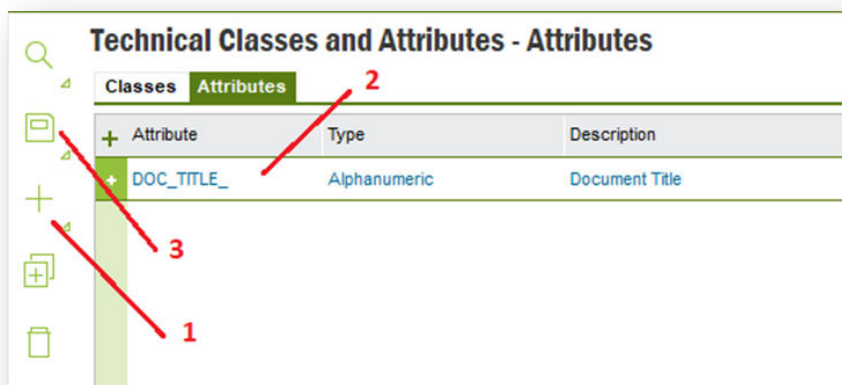


*Figure 76 IFS EE - Create technical attributes*

### 7.1.3 Step 3: Assign technical attributes to technical class



*Figure 77 IFS EE – Technical class Template*
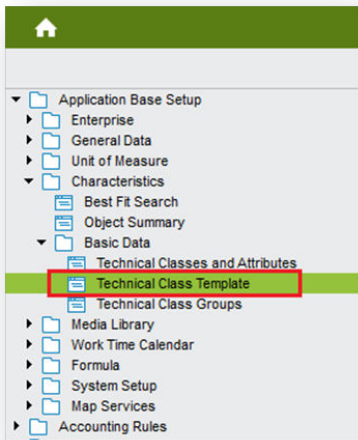
Navigate to the "Technical Class Template" window, found under IFS Applications / Application Base Setup / Characteristics Basic Data / Technical Class Template (in IFS Navigator).

Find the technical class you assigned earlier by querying its name or description. Click the white space under "Attribute" and enter the name of the attribute you wish prompted from this technical class. Remember that the technical class should correspond to the document class or format that the prompt is intended for.

If you do not remember the name given, it can be found by clicking the "Populate" button.



*Figure 78 IFS EE - Template - UDA for standard letters*

Repeat steps 2 and 3 for the desired amount of prompt fields for the chosen class or format.

## 7.2 Enabling connections between a technical class and a document class or format



*Figure 79 IFS EE – Navigator pane*
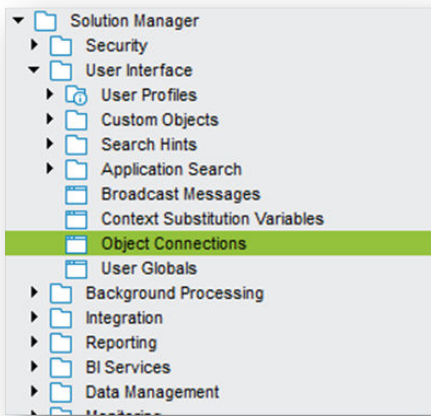
To enable the connections between technical classes and document classes or formats, you need to open IFS Enterprise Explorer and navigate to Solution Manager | Configuration | Object Connections.

Create a new Logical Unit (LU) by pressing the plus button / "New" and enter information as shown below. Save and refresh cache.
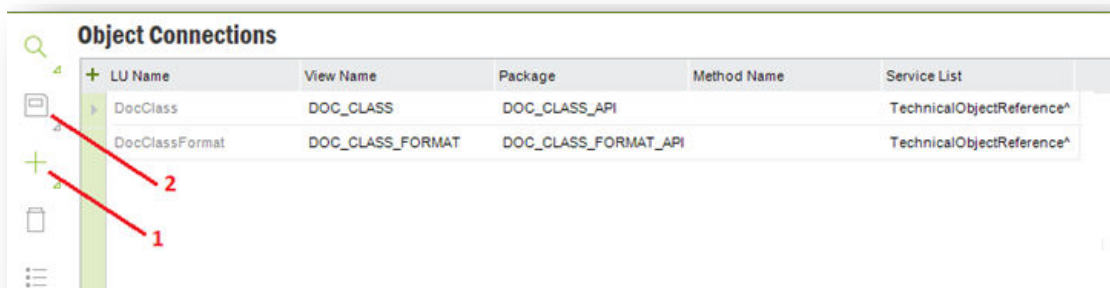


*Figure 80 IFS EE – Object connections*

## 7.3 Connecting Technical Classes to Document Classes or Formats
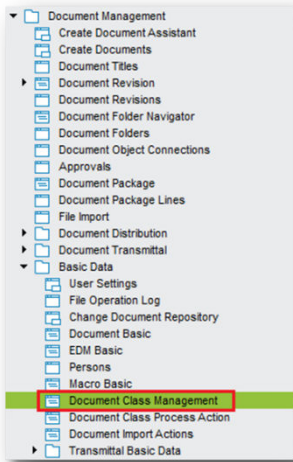


*Figure 81 IFS EE – Document management*

To connect the technical class with its corresponding attributes to a document class or format, navigate to Document Management / Basic Data / Document Class Management.

Find the right document class. Either choose the document class (by clicking the whitespace in the class field) or mark the row with the format you wish to use. Click the Attachments to choose the technical class you want to connect (4).

To connect a technical class, click the whitespace within the "Technical Class" field and click the plus / "New" button. Write the name of the technical class you want to connect, press the tab button (on the keyboard) to verify that the right description appears and click save.

The attributes assigned to the connected technical class will now display.

Use "Value Text" to set standard values for the UDA, such as "Sales Quote" or "Project Report".

Use "Info" to set displayed user tip when mouse hovers over the blue
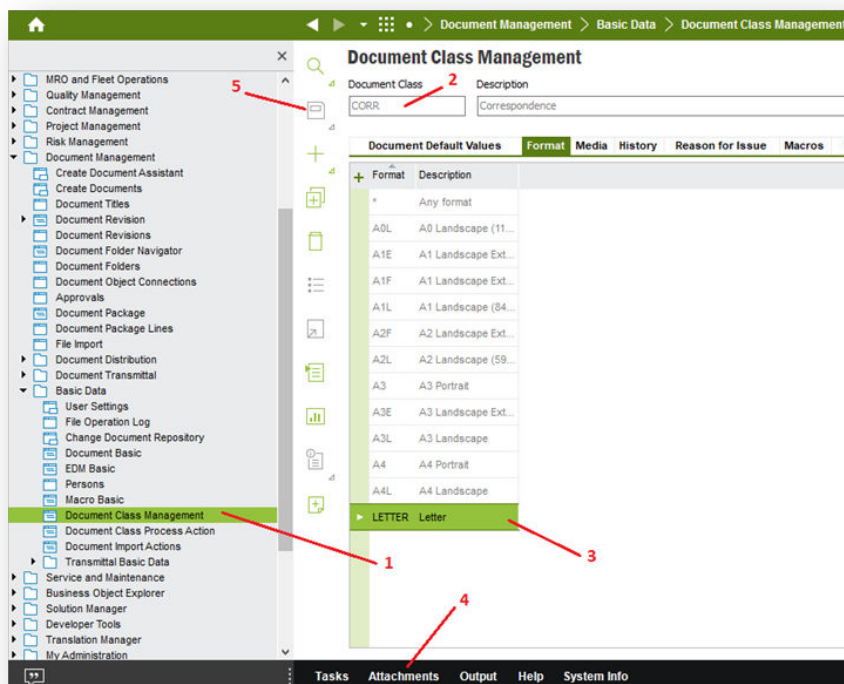


*Figure 82 IFS EE – Document Class Management window*

"i".

## 7.4 PDF Merge Tool

The PDF Merge Tool from Addovation is a small software that allows you to quickly merge several PDF documents together. The tool can be started from the start menu and looks like this:
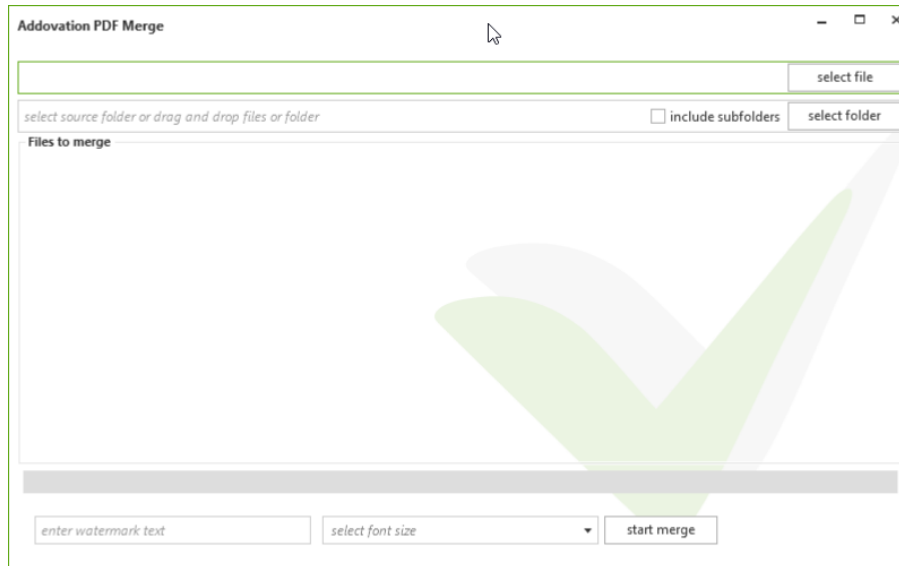


*Figure 83 PDF Merge Window*

By dragging files or folders into the "Files to merge" area, all PDF documents found in folder (or subfolders) will be added to the list:

We can mark items in the list to re-arrange them by using drag and drop there as well. By double clicking on the files we can automatically open them in order to see what the document is. The document will be opened in your default PDF reader. Before we can merge documents, we need to select an output file like this:
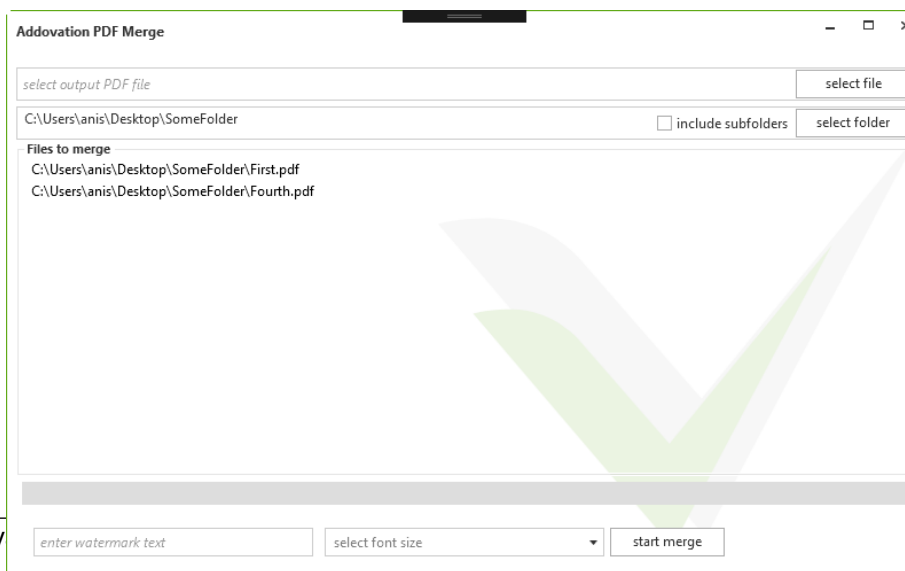
After merge has been done, the result will be automatically opened for viewing:
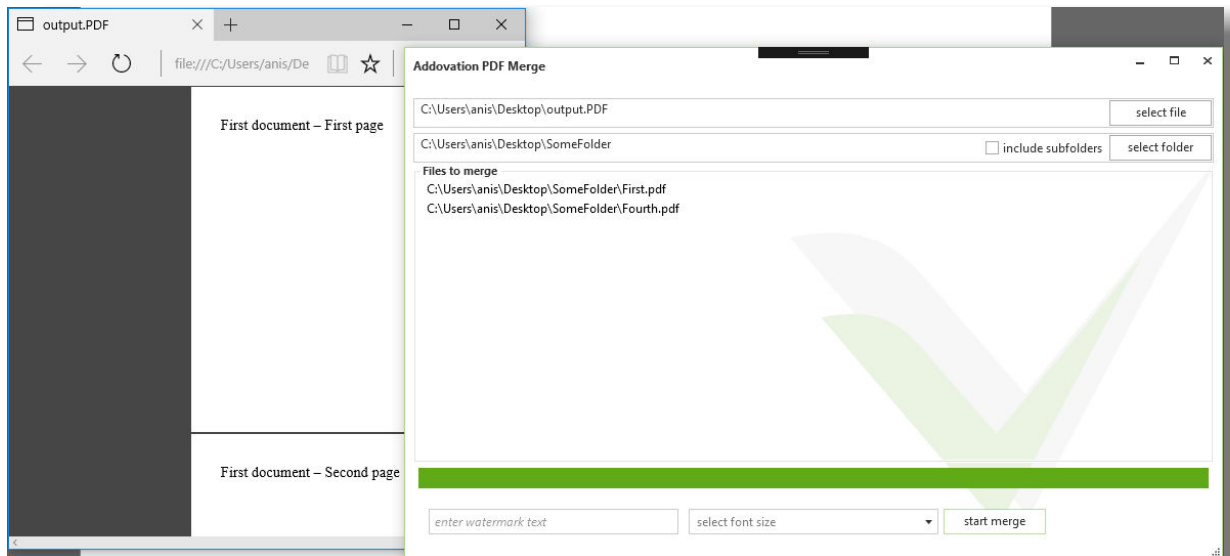


*Figure 86 PDF Merge – View*

Some PDF documents (but not all) allows us to embed watermark, by entering a text and selecting a font size we can easily embed a watermark:



*Figure 87 PDF Merge – Add watermark*

Limitation: Images converted to PDF seems not be able to add watermarks while as documents exported to PDF from Word works fine.
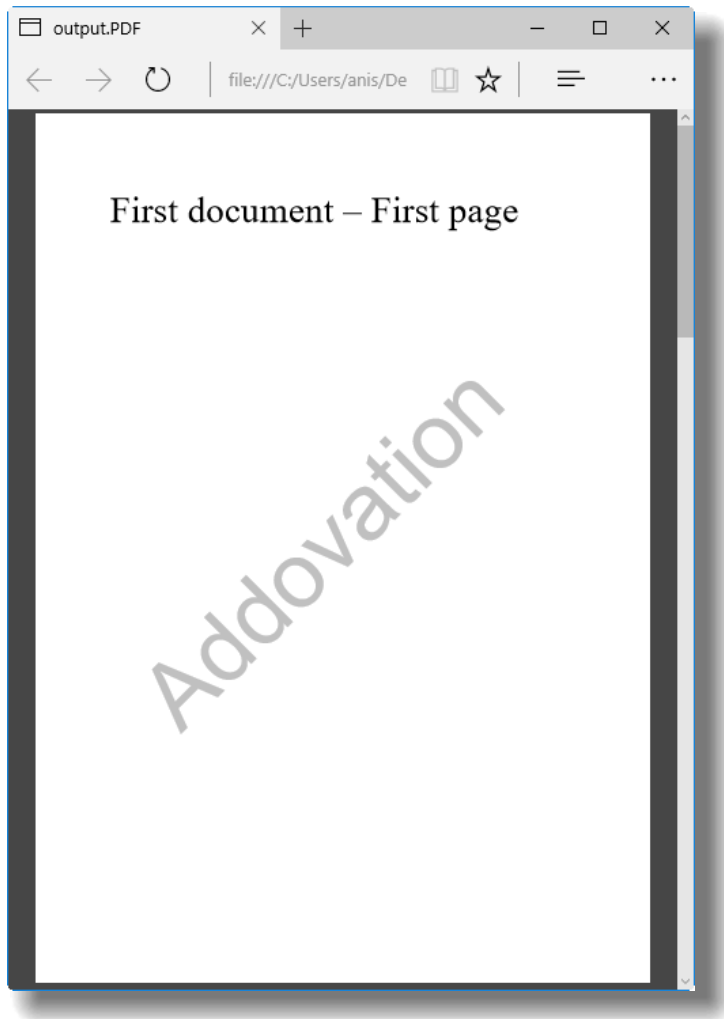
*Figure 88 PDF Merge – Watermark*

# 8 Outlook Folder Synchronization

## 8.1 Introduction

Outlook Folder Synchronization (or Folder Sync) is a very convenient functionality used for synchronizing given folders in Outlook with IFS. The basic idea is that when the Outlook folder is defined as a synchronized folder, any email dropped in it will be checked in to IFS, either manually or automatically depending on the folder configuration, using the settings defined for that folder. A folder sync definition needs the following characteristics to be configured:

- Mapped Outlook Folder – the folder in outlook where action is to take place
- Document Class – class that will be used for checking in to IFS
- Document Format – format used for checking in to IFS
- Object Connections – select a business object (of any kind) to which the email will be connected

In addition, you need to define what and how things are going to behave when the sync action takes place.

So, you can create a folder in Outlook (or from OAS Options), configure it in OAS Options, and whenever a mail is dropped on the Sync folder in Outlook, action is taken to check it in to IFS.

## 8.2 Folder Sync definition

The folder sync is configured in the OAS Options dialog | Folder Sync page (see illustration to the right). Note that the Folder Sync page will only be visible when the OAS Options dialog is started from Outlook.

There are two main approaches to create and configure a synchronized folder:

- You can create a completely new configuration, or
- You can create a new configuration that connects to existing checked in emails and "reverse sync" some or all matching emails. This option can also be used if you accidentally delete an existing Outlook Sync folder and want to reestablish it.

When a Folder Sync is defined, you may want to "reverse sync" some or all the emails that was checked in to IFS using the same definition (either from other users in your company or by yourself). This can be done by using the **Sync Folder** button. The Outlook folder that you are targeting must be empty, if not empty you will receive a warning and no synchronization will take place.
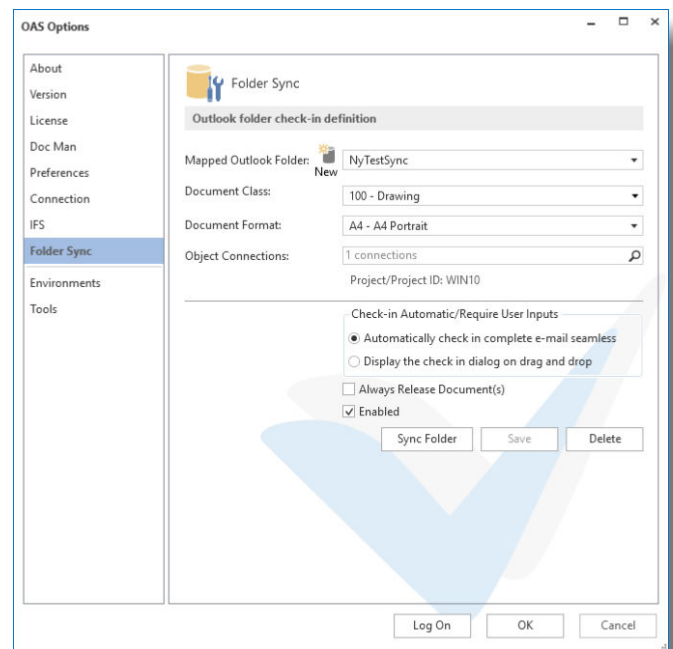


*Figure 89 Folder sync config page*

After the Folder Sync is defined, you need to restart Outlook before any action takes place. See section10.1.7 below for further details.

## 8.3   Reverse Folder Sync

As mentioned above, you can also reverse sync a folder which means that you can fetch previously checked in emails from IFS and populate the Outlook folder with these emails.  Potentially all emails in IFS matching the definition of the sync folder, i.e. Class, Format and connected business object can be fetched and put in the folder.

To start the operation, click the Sync Folder button.  If the folder is not empty, you will get a warning and not be able to complete the operation:
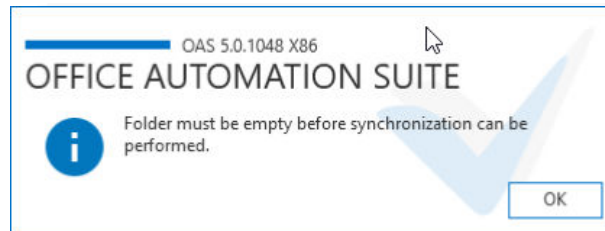


*Figure 90 Message if folder is not empty*

If the folder is empty, the Sync Folder dialog will appear.

If you click the Count button, you will get information on how many checked in emails that matches the definition of the specific Sync Folder.

Before you start syncing emails, you may want to limit number of emails fetched from IFS.  You may limit this in two ways:

- By number: Enter a max number of emails to fetch, and
- By date: Enter a date from which you want to include emails.

Both parameters count; only emails checked in after the date specified will be fetched.  If this number of emails exceed the maximum number of emails, the number of items fetched will be reduced as well.

Click the Sync Folder to start the operation.  The dialog will now display a progress bar, and the Count and Sync Folder buttons get disabled.

The Cancel button can be clicked at any time to abort the operation.  In this case the whole operation is aborted; no emails will be put in the Outlook folder.

When the operation is completed, the Cancel button changes to Close, and the downloaded emails are put into the Outlook folder.

*Figure 92 Sync folder dialog showing progress bar*

# 9 OAS Client Gateway Utility

OAS also contains a Client Gateway solution.  This is an executable (OAS.exe) that can be used from within IFS as a client gateway by defining and using it in IFS Custom context menus.

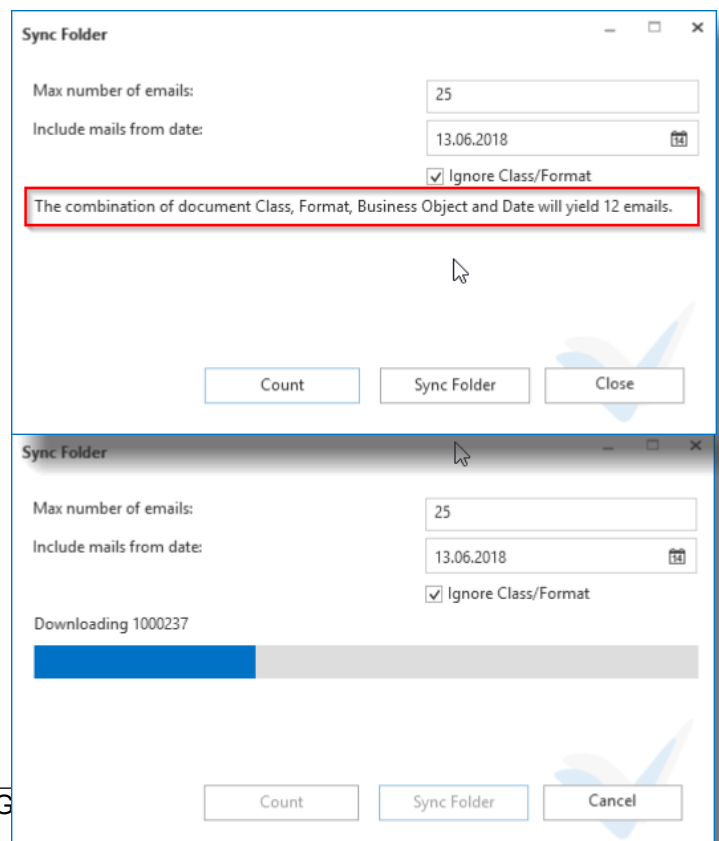This chapter will explain how OAS.exe works and how to use the built-in commands and their respective additional arguments. The commands include functionality for

- Open OAS Search dialog for documents (SEARCH_DOC),
- Creating documents (CREATE DOC) and
- Sending emails (SEND EMAIL)
- Requesting a template from IFS (GET_TEMPLATE)

The utility can be called from IFS applications through *custom context menu* items. The menu action will target 'Oas.exe' and requires that Addovation's Office Automation Suite (OAS) is installed on the end-user machines.  By adding a Custom Menu item for the relevant IFS window, an end-user will be able to start Addovation's application. The menu choice will pass along the required parameters when configured correctly. A custom menu event will be created with an 'External Program' Action. IFS application must pass command line parameters to the executable.

The three command arguments mentioned above is the "main commands" that triggers the intended functionality. Within each main command there are several optional command arguments that is listed in the following sections. Not all options are available for all main commands, please consult the following sections for a closer description on which optional command arguments are available for which main command and how to use them.

General command line format

> <path>oas.exe <main command> <optional argument>…<optional argument>

The <path> is needed when the oas.exe is not located in a folder that is part of the windows path definition.

The command argument TARGET_ENV applies to the CREATE_DOC and SEND_EMAIL commands only and is optional.  The effect of this argument is that if you are already logged on to another environment than that specified by the TARGET_ENV argument, the user will get a warning that they are attempting to execute the command targeting another environment (IFS database) than the one they are logged into in IFS.
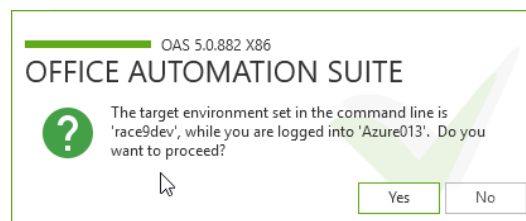


*Figure 93 Target environment warning*

By hitting the **No** button, the operation is cancelled. Hitting **Yes** will make oas.exe complete the operation using the database logged in to by OAS.

## 9.1 The SEARCH_DOC command

### 9.1.1 General description

The SEARCH_DOC command ('Search document') will trigger the OAS SEARCH AND FIND dialog aimed at searching for documents in IFS Application. The end-user can start the process from a right mouse button (RMB) menu in IFS. It is possible to implement an RMB menu in any IFS window for SEARCH_DOC.

### 9.1.2 Command format

Main command argument is

➢ CMD=SEARCH_DOC                  {main command}

➢ Optional arguments
   • SEARCH=123                   {search string for narrowing the search}

When an end-user selects the IFS menu option 'Search document' (see config in IFS below), documents where search criteria matches the search string specified will be listed in the OAS SEARCH AND FIND dialog

➢ E.g.: oas.exe CMD=SEARCH_DOC SEARCH=123

Below is a custom menu created for the SEARCH_DOC:
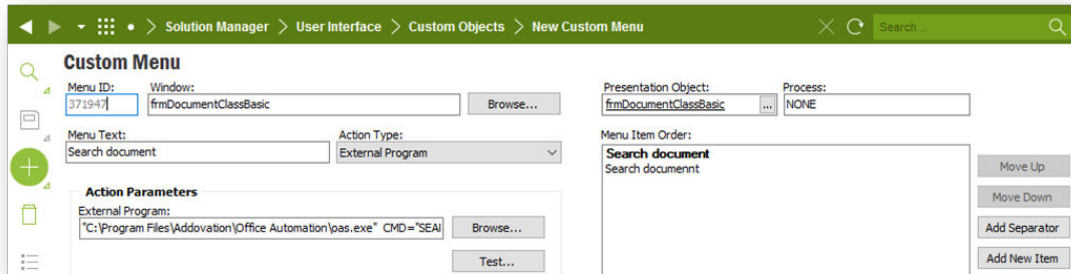


*Figure 94 IFS EE - Custom menu definition*

The Command Prompt window can be used to test the different commands. To search for documents containing the letters "act P", enter the command into a command prompt window like shown below

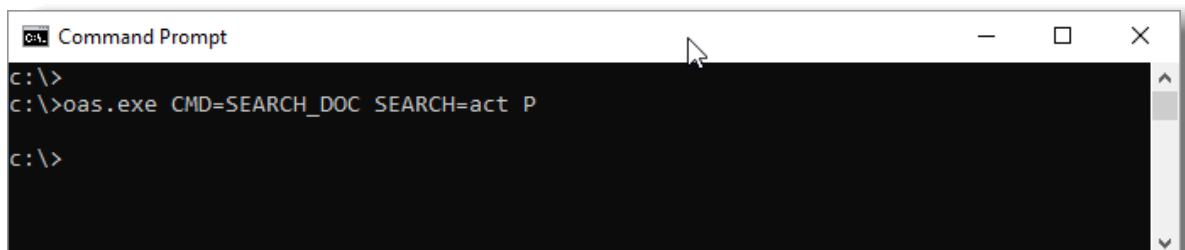   • oas.exe CMD=SEARCH_DOC SEARCH=act P



*Figure 95 Search Doc – Command prompt*

Documents matching the search string entered will be listed in the OAS **SEARCH AND FIND** dialog:
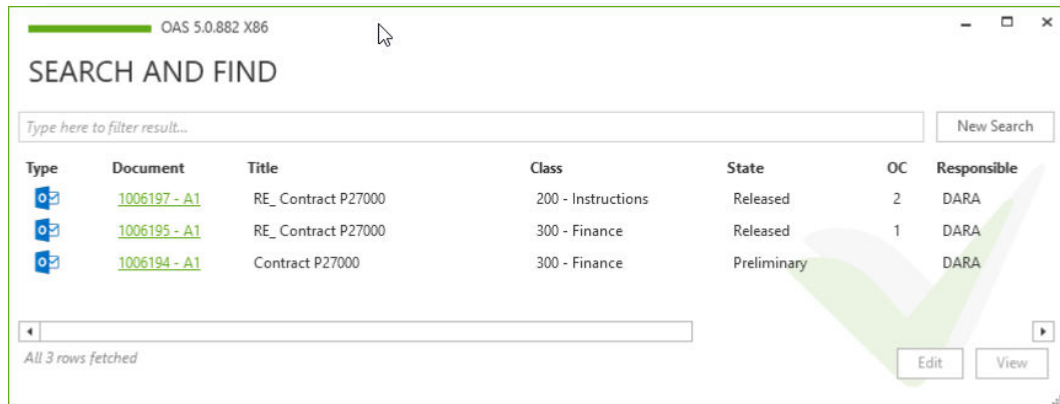


*Figure 96 OAS SEARCH AND FIND result dialog*

## 9.2 The CREATE_DOC command

### 9.2.1 General description

The CREATE_DOC command creates a (Word) document from IFS Application using the OAS functionality. The end-user can start the process from a right mouse button menu in IFS as long as a custom menu option has been configured in IFS. It is possible to configure custom menu options (RMB menu) in any IFS window for CREATE_DOC.

### 9.2.2 Command format

Main command argument is

➢ CMD="CREATE_DOC"                                  { main command }

➢ Mandatory arguments
   - DOC_CLASS="TILBUD"                      { specify document class }
   - DOC_FORMAT="BED"                        { specify document format }
   - DOC_LANGUAGE="en"                       { specify document language }
   - DOC_TITLE="Bedriftskunde"               { specify document title }

➢ Optional arguments
   - LU_NAME="WorkOrderQuotation"            { specify logical unit }
   - KEY_REF="QUOTATION_ID=200015"           { specify key ref for object connection }
   - TARGET_ENV="PROD"                       { specify target environment }

### 9.2.3 Setting up and usage

When an end-user selects the configured IFS custom menu option, e.g. 'Create document (OAS)' like shown below where the oas.exe utility is used to create new documents from the "Work Order Quotation" window in IFS, a new Word document will be created using Microsoft Office.
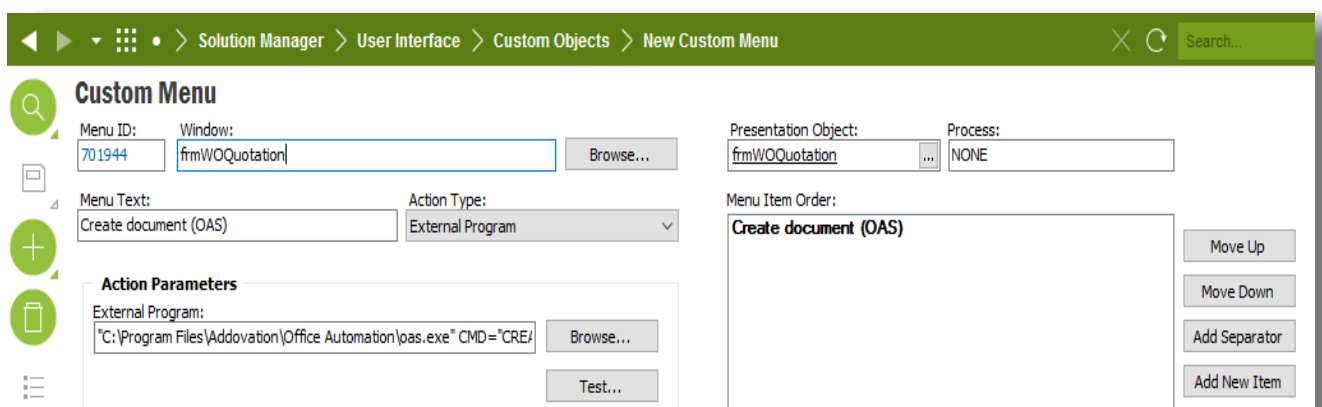


*Figure 97 IFS EE - Custom Menu definition page*

➢ The command line could be e.g.: oas.exe CMD="CREATE_DOC" DOC_CLASS="TILBUD" DOC_FORMAT="BED" DOC_LANGUAGE="no" DOC_TITLE="Tilbudseksempel" LU_NAME_1="WorkOrderQuotation" KEY_REF_1="QUOTATION_ID=200015||^"

The External Program field holds the value:

"C:\Program Files\Addovation\Office Automation\oas.exe" CMD="CREATE_DOC" DOC_CLASS="TILBUD" DOC_FORMAT="BED" DOC_LANGUAGE="en" DOC_TITLE="Bedriftskunde" LU_NAME_1="WorkOrderQuotation" KEY_REF_1="QUOTATION_ID=&QUOTATION_ID||^"

The steps involved to create a new document from IFS (when a custom menu has been configured) are the following:

Step1: Start IFS Applications and go to the Prepare Work Order Quotation

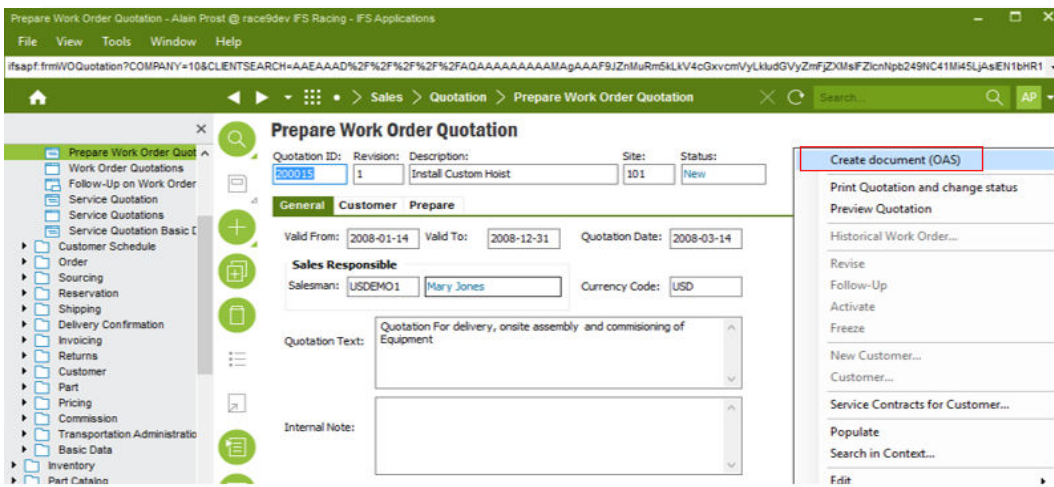Step2: Select specific Quotation & click RMB -> Create document (OAS)



*Figure 98 IFS EE - Custom Menu definition in context menu*

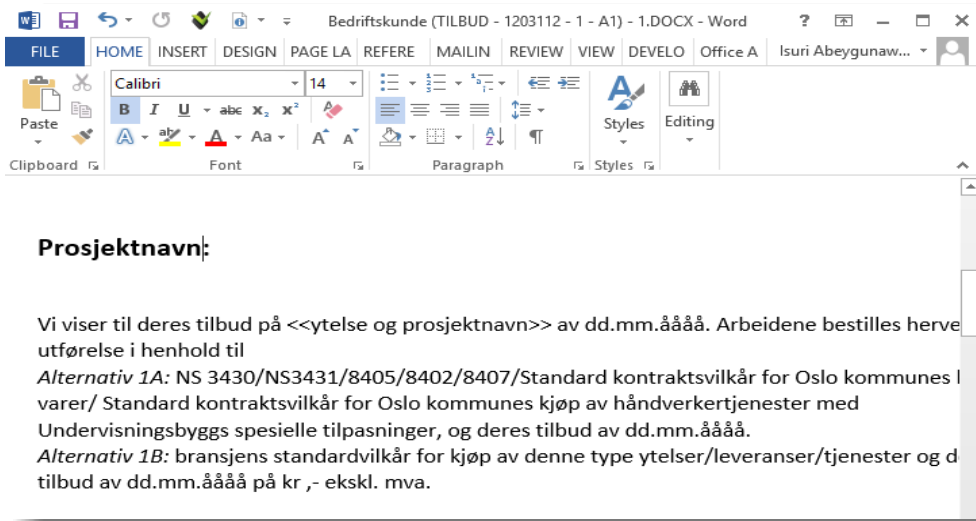Step3: The created document will open in MS Word
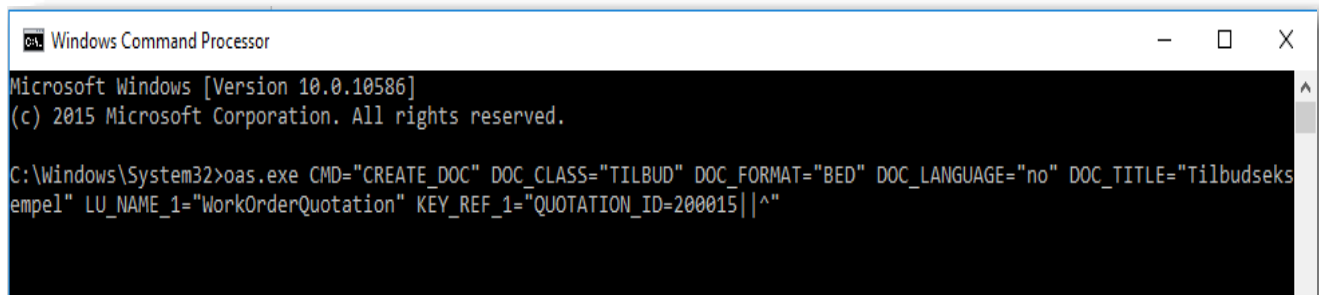


*Figure 99 Created Word document*

By entering the below command into a command prompt window, users can test and create a document without opening IFS applications. Note that the entered argument values must match the targeted environment.

- oas.exe CMD="CREATE_DOC" DOC_CLASS="TILBUD" DOC_FORMAT="BED" DOC_LANGUAGE="no" DOC_TITLE="Tilbudseksempel" LU_NAME_1="WorkOrderQuotation" KEY_REF_1="QUOTATION_ID=200015||^"
- oas.exe CMD="CREATE_DOC" DOC_CLASS="MLAPP" DOC_FORMAT="MLAPP" DOC_LANGUAGE="en" DOC_TITLE="Merkelapp_ordrenr._R20128" LU_NAME1="CustomerOrder" KEY_REF_1="ORDER_NO=R20128||^"

The command entered in a CMD window



*Figure 100 Create doc using command prompt*

## 9.3 The SEND_EMAIL command

### 9.3.1 General description

The SEND_EMAIL command sends documents from IFS as file attachments by email. The end-user can start the process from a right mouse button menu (context menu) in IFS. It is possible to send selected documents from several Logical Unit windows, e.g. the Purchase Order window. In this case, sending documents are connected to a specific Purchase Order selected in the IFS Purchase Order window.

Benefits:

- ✓ The customer will gain increased control over their processes by logging.
- ✓ Avoiding accidentally sending restricted files.
- ✓ Saving time when creating email messages.

A new Microsoft Outlook e-mail message window will open with attachments corresponding to the available files connected to the business object opened in IFS at the time it was triggered. The list of documents will be filtered according to their document class and the user's rights as defined in the documents' Access matrix. The user can remove documents that is included as attachments in the email message before sending the email.

- The selected documents will be attached as file attachments with the prefix 'Copy of'.
- The message body and subject will be generated using a string defined in the global profile in IFS.
- The Order number will be merged into the subject text when and where the placeholder text is located.
- The Order number and selected filenames will be merged into the body text where and when placeholder text is located.
- The recipient will be set to the email address of the contact person as defined under the Order's Order Info.

When the message is generated in Outlook the solution will log an entry in the history of the selected document(s). This will happen regardless of whether the e-mail is sent or not.

### 9.3.2 Command format

Main command argument is

- ➤ CMD = **"SEND_EMAIL"**                          { main command }

- ➤ Mandatory arguments
  - **ORDER_NO = "100005"**                  { specify order number (integer) }
  - **BODY = "ORDER_NO=100005"**         { mail body }

- ➤ Optional arguments
  - **FORM_VIEW_STATUS = "true"**          { "true" means show form view, "false" will hide it }
  - **TARGET_ENV = "PROD"**                { target environment }
  - **SUBJECT = "My subject for order #{0}"**  { Sets the subject in e-mail and body. By default, and if not text is provided the subject is "Purchase Order {0}". The optional {0} placeholder is replaced by the order number parameter. }
  - **PROFILE = "MyOtherProfile"**           { Provide base profile name as found in IFS Applications, used to store scripts and texts. Defaults to "Addovation Standard Profile" if not provided. }
  - **UPDATE_HISTORY = "False"**            { This parameter determines if the purchase order/lines should be updated. }

Sample command line:

- ➤ oas.exe CMD="SEND_EMAIL" FORM_VIEW_STATUS="true" ORDER_NO="100005" BODY="ORDER_NO=100005"

### 9.3.3 Setting up and using custom menu in IFS

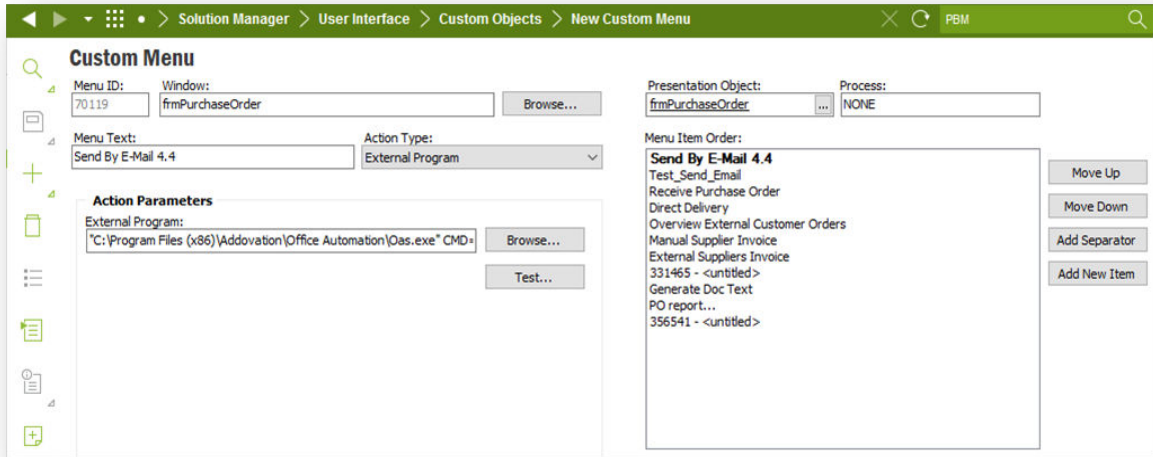Below is an example of the custom menu item created for the SEND_EMAIL:



*Figure 101 IFS EE - Custom menu definition for SEND_EMAIL*

The value of the **External Program** field (Action Parameters):

"C:\Program Files (x86)\Addovation\Office Automation\Oas.exe" CMD="SEND_EMAIL" FORM_VIEW_STATUS="false" TARGET_ENV="Race9Dev" ORDER_NO=&ORDER_NO BODY="ORDER_NO=&ORDER_NO"

A custom menu for the 'Send by e-mail' event will be created with an 'External Program' Action.

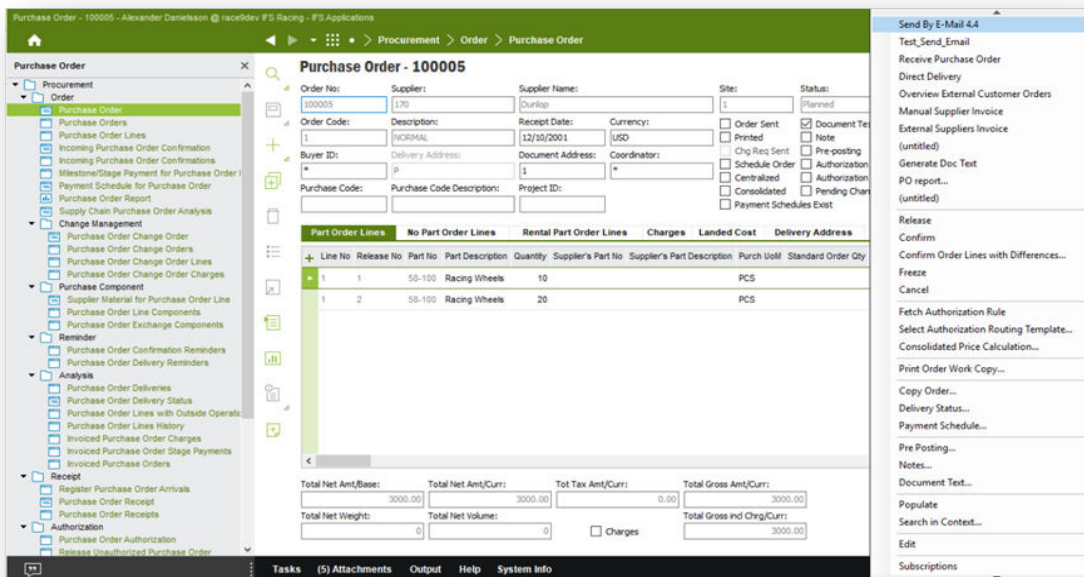Step1: Go to the Purchase Order (Race9dev)



*Figure 102 IFS EE - Custom menu option shown for Purchase Order*

Step2: Select specific Order & click RMB -> Send by E-Mail
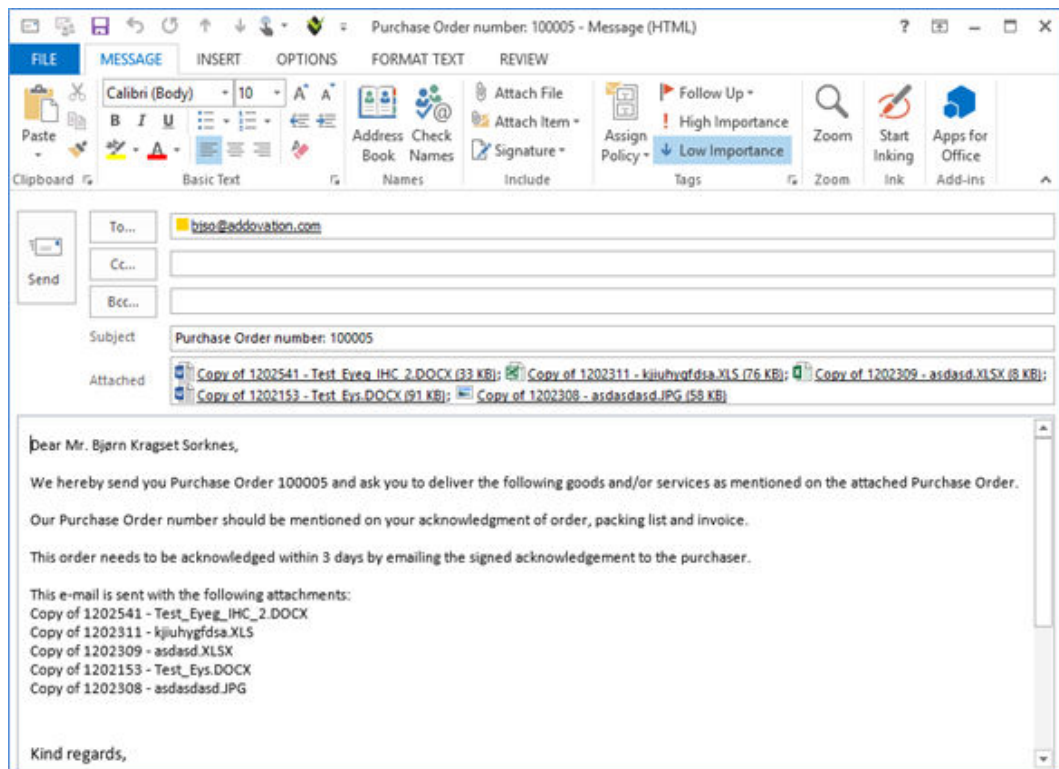
Step3: It will open the created mail in outlook



*Figure 103 Created mail shown in Outlook*

### 9.3.4  Testing the command

By entering oas.exe commands into a *command prompt* window, users can test / send an email without opening IFS applications.  Sample commands:

- oas.exe CMD="SEND_EMAIL" FORM_VIEW_STATUS="true" ORDER_NO="100005" BODY="ORDER_NO=100005"
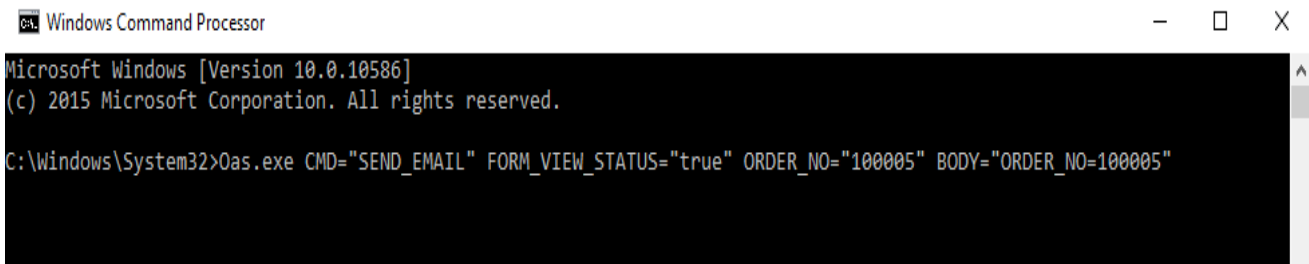- oas.exe CMD="SEND_EMAIL" FORM_VIEW_STATUS="true" ORDER_NO="201059" BODY="NAME=123"



*Figure 104 Send email using command prompt*

### 9.3.5    How to set/change email importance default value

In Purchase Order Send Mail default importance is set to Low.

If default importance needs to be change, add new entry to Profile [OAS] named "**MailItemImportance**" with values High, Low or Normal (case-insensitive). In case "**MailItemImportance**" value is empty or misspelled, the default importance will be set to normal.
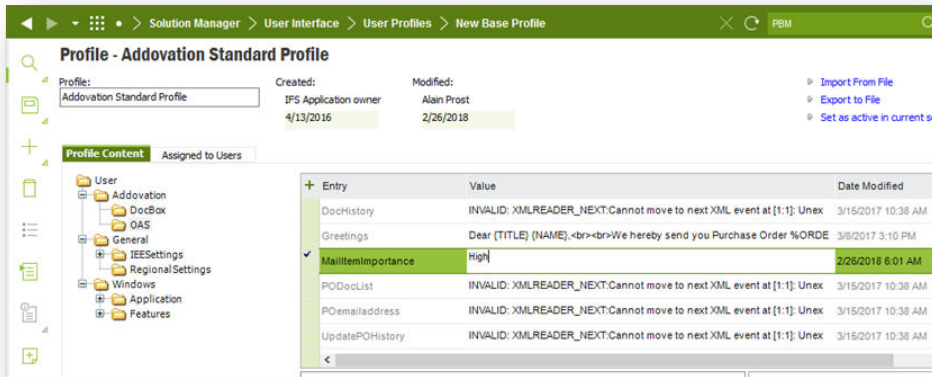


*Figure 105 IFS EE - Setting up Profile values affecting Send email*

If MailItemImportance = Low, this is reflected in the created mail item: Likewise, if MailItemImportance = High, the high importance flag is set
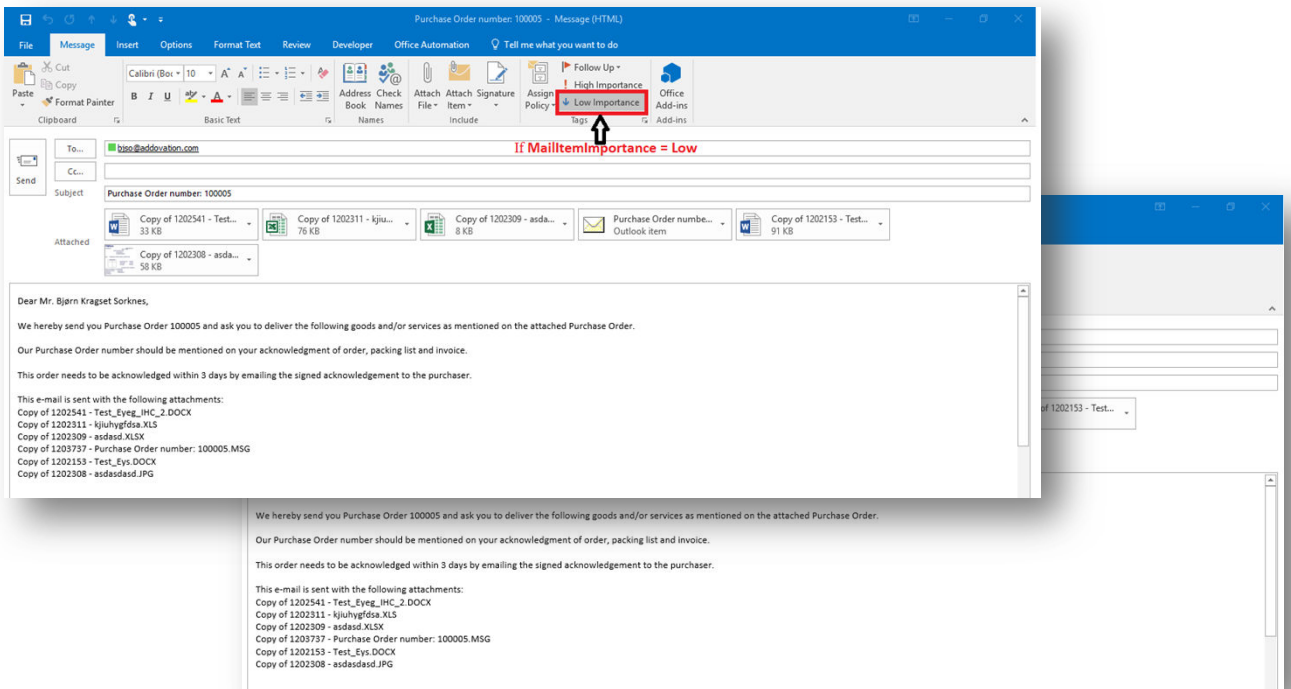


*Figure 106 Mail Item Importance*

Use MailItemImportance = Normal for mails with normal importance, i.e. no high or low importance.

## 9.3.6　More sample commands

Here we will show you a few examples on how the different optional parameters can be used, and the result.

### 9.3.6.1　PROFILE parameter

This parameter requires the use of a *valid* Base Profile name in IFS Applications. The profile is used to store SQL scripts and texts for use by OAS. The app defaults to "Addovation Standard Profile" if nothing is provided. You may for example use "Addovation Standard Profile2" or similar for other scripts/texts.  The profiles can be view in IFS:



*Figure 107 Profiles in IFS*

More sample command lines

**Replaces subject:**
oas.exe CMD="SEND_EMAIL" … ORDER_NO="100005" SUBJECT="My subject {0}"

**Looks for scripts/text in selected base profile:**
oas.exe CMD="SEND_EMAIL" … ORDER_NO="100005" PROFILE="Other profile"

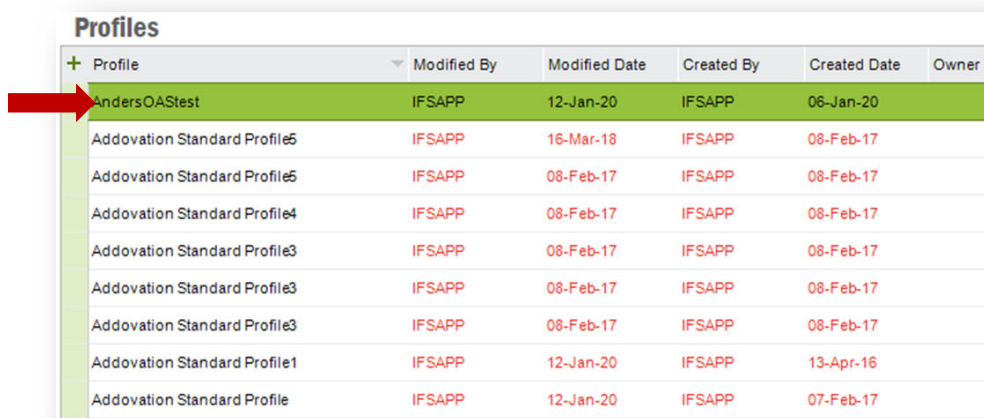**Set to 'False' to avoid updating lines/documents history:**
oas.exe CMD="SEND_EMAIL" … ORDER_NO="100005" UPDATEHISTORY="False"

Note that this «…» is shorthand for the standard parameters that are also required

**Overrides e-mail subject and uses other profile:**

oas.exe CMD="SEND_EMAIL" FORM_VIEW_STATUS="true" ORDER_NO="100005" BODY="ORDER_NO=&ORDER_NO" SUBJECT="My subject {0}" PROFILE="AndersOAStest"



*Figure 108 Different Profiles can be configured in IFS*

**Overrides e-mail subject, uses other profile, and skips updating history:**

oas.exe CMD="SEND_EMAIL" FORM_VIEW_STATUS="true" ORDER_NO="100005" BODY="ORDER_NO=&ORDER_NO" SUBJECT="My subject {0}" PROFILE="AndersOAStest" UPDATEHISTORY="False"
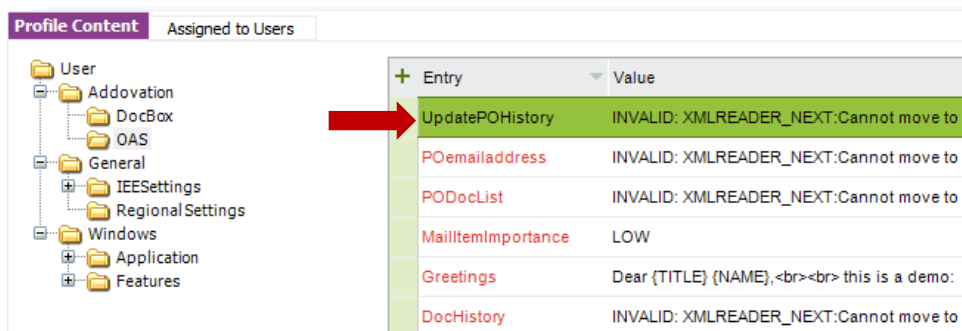


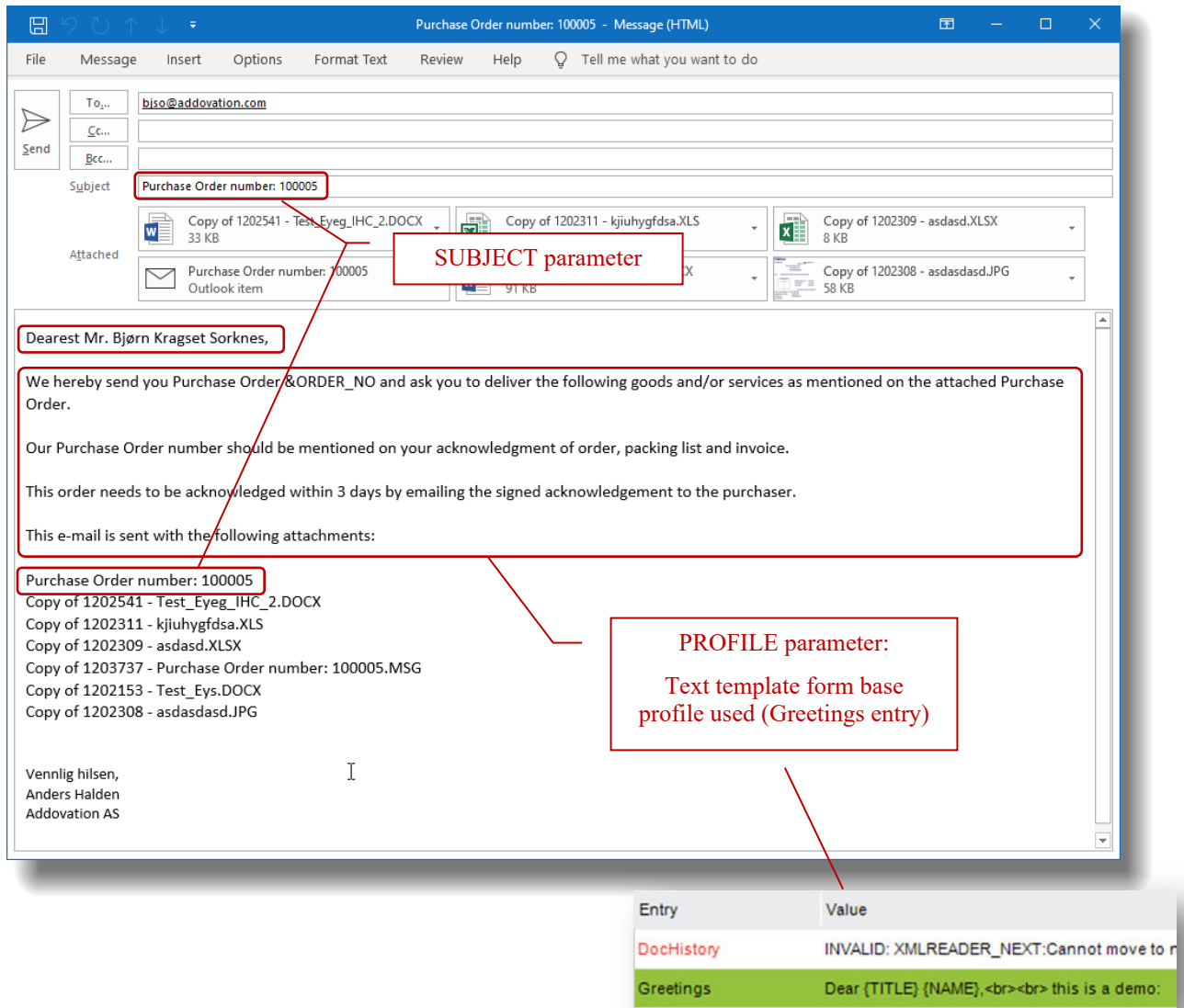*Figure 109 Profiles values configured in IFS*

*Figure 110 Sample E-mail created with the SEND_EMAIL command*

## 9.4 The GET_TEMPLATE command

### 9.4.1 General description

The GET_TEMPLATE command requests a document template from IFS Application using the OAS functionality and opens in it the appropriate Microsoft Office application.

### 9.4.2 Command format

Main command argument is

➢ CMD= "GET_TEMPLATE"                               { main command }

➢ Mandatory arguments
  • DOC_CLASS = "TILBUD"              { specify document class }
  • DOC_FORMAT = "BED"               { specify document format }
  • DOC_LANGUAGE = "no"              { specify document language }
  • DOC_TITLE = "Offer sample"       { specify document title }

➢ Optional arguments
  • CP_<CUSTOM PROPERTY> = "<Value>"      { define a Custom Property with value }
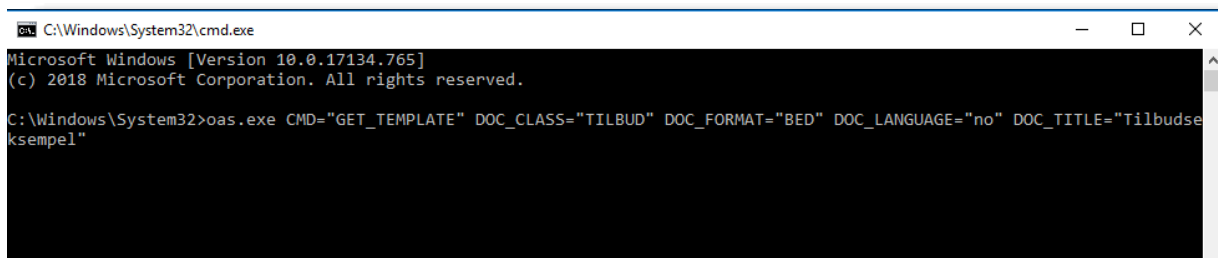
By entering the below command into a command prompt window, users can request a template without opening IFS applications. Note that the entered argument values must match the targeted environment.

Sample command line:

• oas.exe CMD=" GET_TEMPLATE" DOC_CLASS="TILBUD" DOC_FORMAT="BED" DOC_LANGUAGE="no" DOC_TITLE="Offer sample "
• oas.exe CMD=" GET_TEMPLATE" DOC_CLASS="TILBUD" DOC_FORMAT="BED" DOC_LANGUAGE="no" DOC_TITLE="Offer sample " CP_MYARG1="1234" CP_MYARG2="5678"

In the latter example, two Custom Properties will be defined, named MYARG1 and MYARG2 containing the corresponding values.

***NOTE: to get custom properties defined, the name must be prefixed by "CP_" to be recognized as a custom property.*** The first command (with document title set to "Tilbudseksempel") entered in a CMD window :



*Figure 111 Get Template using command prompt*

## 9.5   Using oas.exe with IFS Aurena web client

When using oas.exe we normally send in the parameters as such: oas.exe CMD=SEARCH_DOC SEARCH=Test. In order to use the same parameter string with same arguments, copy paste the full string into Chrome like so:
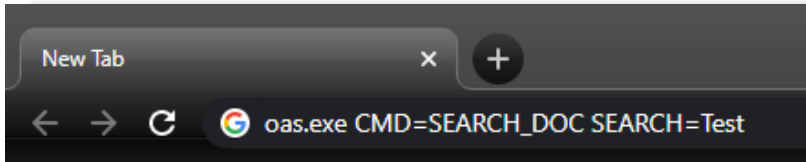


Change oas.exe-part and replace all space with &-character (it might work without, but it is highly recommended to use & as space separator):
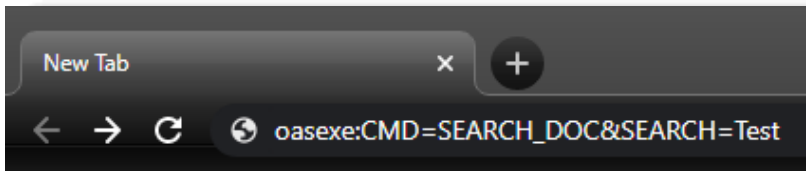


String should now look something like this: oasexe:CMD=SEARCH_DOC&SEARCH=Test

By pressing enter, it should now invoke and open oas.exe using the supplied command and parameters:
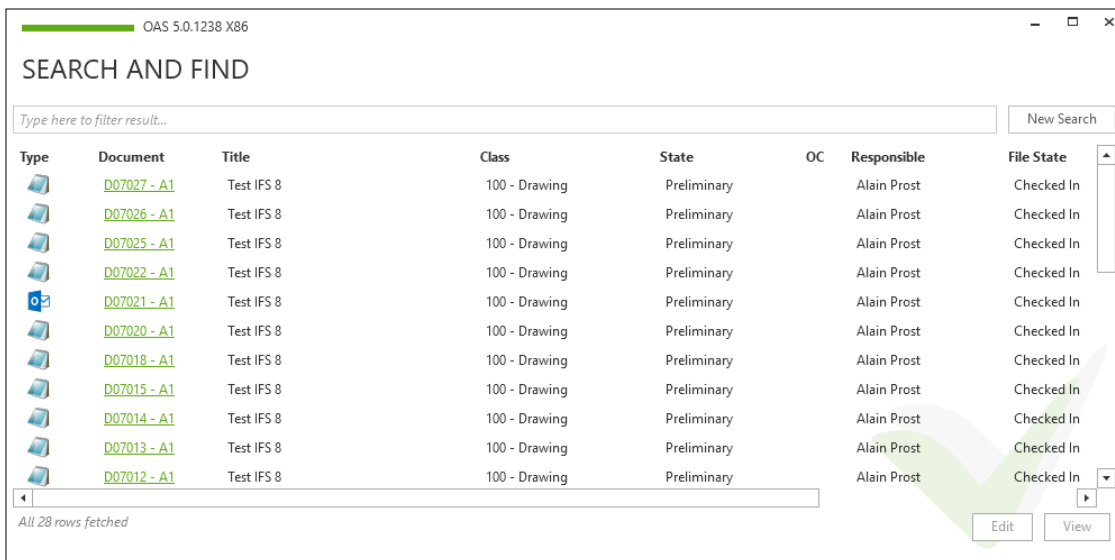
# 10 Configuration options
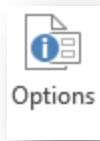
When you have installed the OAS, you will have the opportunity to view configuration settings and change / reconfigure the software if needed (post installation adjustments). This can be done by clicking on the 'Options' button in the Addovation ribbon, *General* button group.

## 10.1 The OAS Options dialog

The Options dialog have several *pages* of information, like About, Version, License and so on. Each page is displayed in the rightmost region of the dialog and selected by clicking the appropriate page selector on the left-hand side of the dialog.

### 10.1.1 The About page

In the About page, you'll find general information regarding what version of the software you are running, the purchased modules of Office Automation Suit, and review to what company the product license has been issued, together with the build number. Valid licenses are indicated with green Addovation logos, licenses that are about to expire or are in grace period are colored yellow, and expired licenses are marked with red logos.

If one or more licenses has expired or are close to expire, you will get a
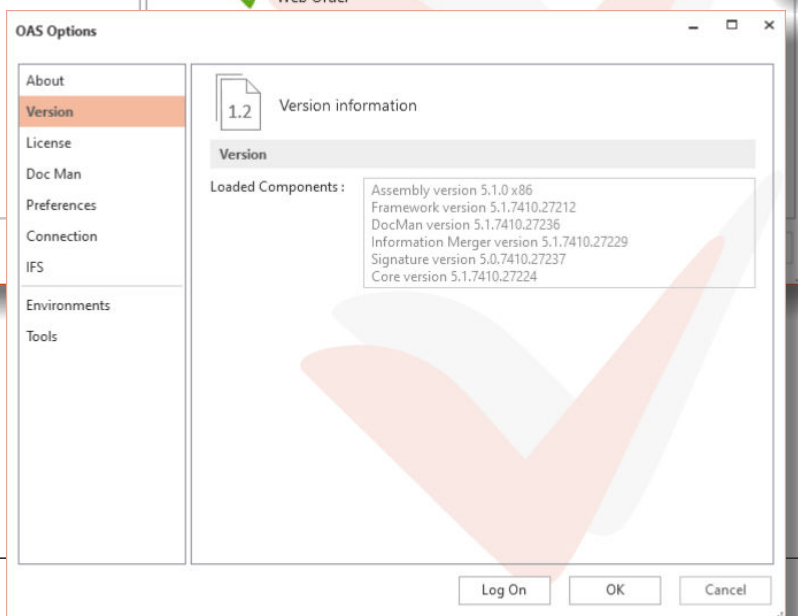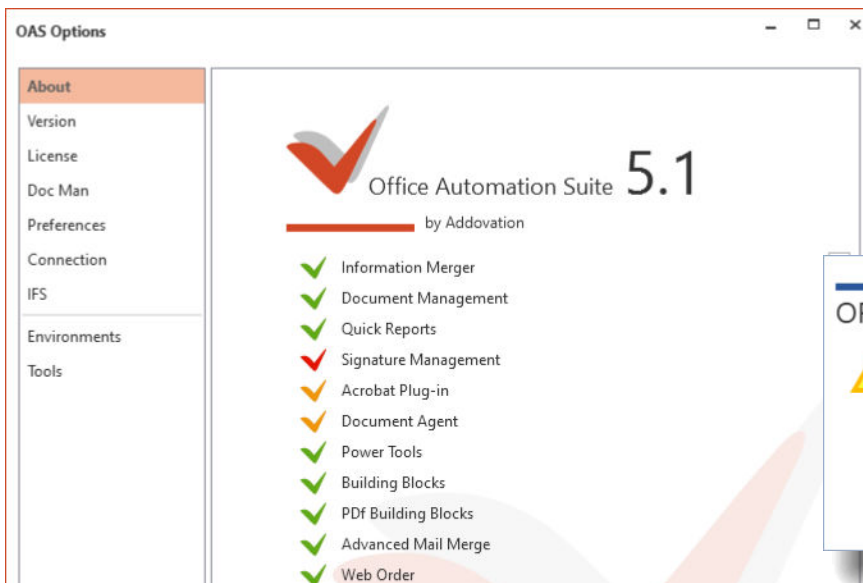


warning whenever you Sing In to IFS:

### 10.1.2 Version page

Using Version page, you can get detailed Information

about the OAS version you have installed on your computer.

All the loaded components will be listed with their version number.

*Figure 113 OAS Options – Version page*

## 10.1.3 License page
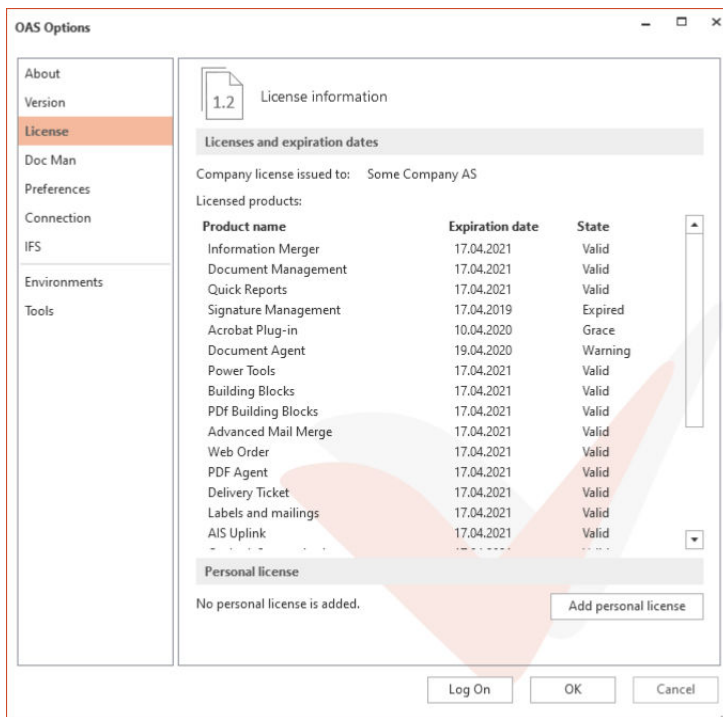


The License page shows you all your currently purchased product (modules) licenses. You can add and update your personal license from this page. You will also see a list of the products you have registered for, the license state and the expiry date.

*Figure 114 OAS Options – License page*

## 10.1.4 Doc Man page
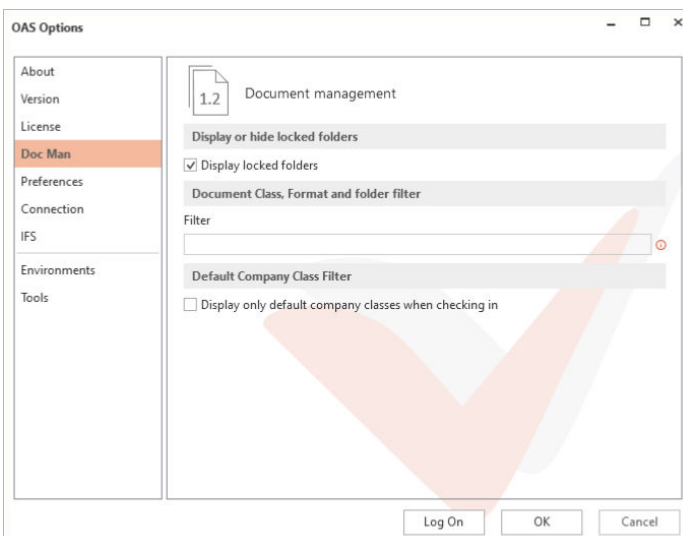
The Doc Man page lets you configure what Folders, Classes and Formats are shown when using OAS. By defining filters, you can hide Folders and Classes/Formats that are not used.

The **Display locked folders** checkbox governs whether OAS is to show locked folders in the object connection dialog or

not. When ticked, OAS shows all hidden folder; untick this box, and all the locked folders will be hidden.

The **Filter** field can be used to 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.

The checkbox **Display only default company classes when checking in** can be used to hide all classes/formats that doesn't belong to your default company. This requires that classes are named using a naming convention where classes belonging to a given company *starts with* the company

*Figure 115 OAS Options – Doc Man page*

number, then *a dash* and then *the class name*; <company number>-<class name> e.g. "490-Administration". If no classes match this pattern, there will be no classes displayed, and an error message will be shown. This works together with the Filter setting, i.e. filtering can be applied "on top of" company class filtering

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.

## 10.1.5 **Preferences page**
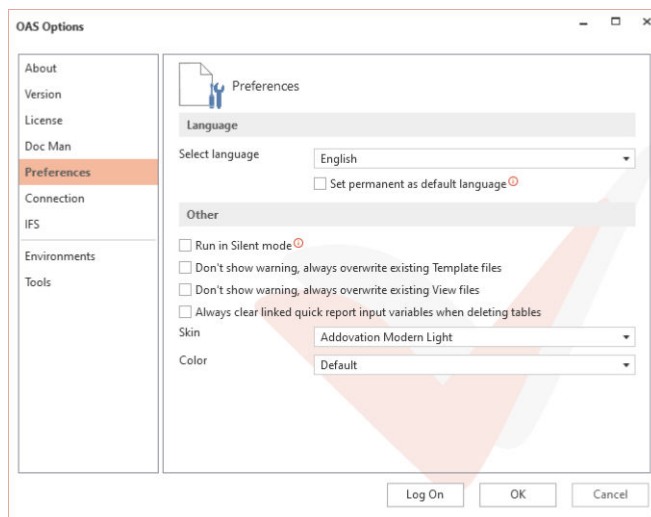


*Figure 116 OAS Options – Preferences page*
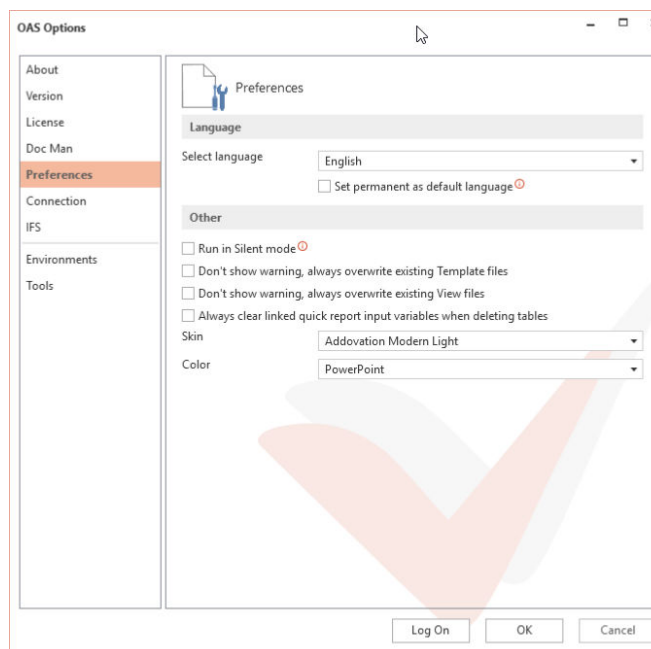


Using the **Select Language** you can change OAS language and Tick **Set Permanent as default language** check box will permanently switch OAS to a new language. This can be modified manually at any time.

If you tick the **Run in Silent mode** check box, the amount of message boxes will be reduced, you simply get warnings and error messages through the Notification message. All important message boxes will still be shown.

By changing the skin, the appearance of the background will change. We recommend running with standard Skin.

The two "**Don't show warning…**" check boxes turns of the warning when temporary files such as template files and view files already exist and will be overwritten. These warnings can also be turned off when the warning dialog is shown.

By changing the color, the you can change the background color of OAS.

When the "Default" color is chosen, the background color automatically changes to the color scheme of the application hosting OAS, like green for Excel, blue for Word and so on. If you change the Color, this automatic coloring from application to application will be turned off, and the color will always be what is set by you.

We recommend using Default.



*Figure 117 OAS preferences colors*

### 10.1.6 Connection page
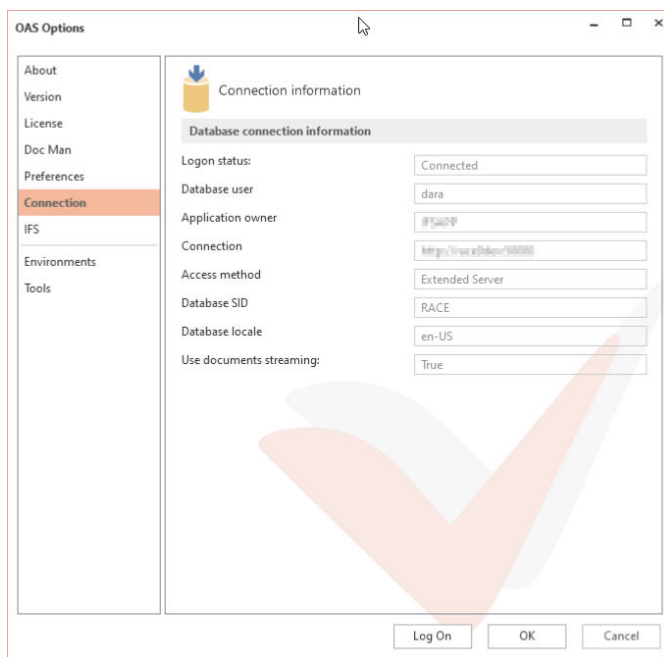


The connection page shows the connection information, like target database, logon status, username, application owner, connection string etc.

### 10.1.7 Folder Sync page

This page is visible only when you work with Outlook and you have purchased the OAS Outlook Synchronization license. By setting up Folder Synchronization you can Simplify and automate document (message) check in to IFS from Microsoft Outlook. This may include connecting the message to different order types

*Figure 118 OAS Options – Connections page*

(customer order, purchase order maintenance order), project and equipment objects. From *Folder Sync* page you configure how the synchronization between the Outlook folder and IFS should happen.

Use the Mapped Outlook Folder drop-down control to select the Mapped Outlook Folder you what to see/manage. Mapped Outlook Folder drop-down control shows only the folder names which currently available inside outlook Login users 'Inbox'.

Modify any settings and hit Save for saving them. Use delete to remove and new button to create new Sync Folder.
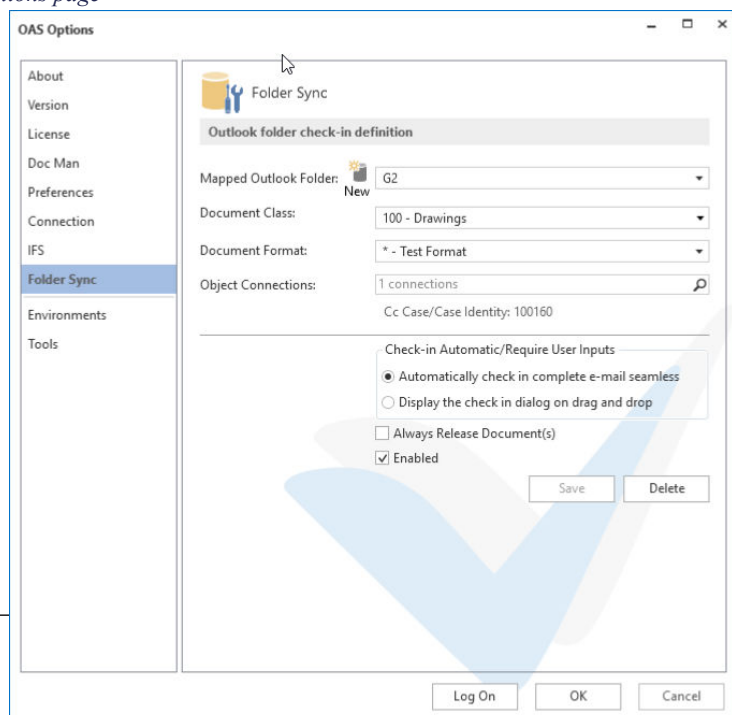
Folder Sync configuration settings are saved in the IFS User Profile

(Addovation/UserSettings/

*Figure 119 OAS Options – Folder Sync page*

OutlookSyncConfig; see Figure 123
Folder Sync Details saved in IFS User Profile)

The configuration parameters in the Folder Sync page (ref. Figure 119 OAS Options – Folder Sync page) is explained below.

- **New Button** – when you click on the New Button it will pop up a browser dialog for browsing an outlook folder, and you can select the outlook folder you want to map. You can only select sub-folders of the Inbox folder. If you select a folder which is not a subfolder of the Inbox folder, a warning is displayed saying "Please proceed by selecting a folder inside Inbox!". Press the OK returns control to the folder selection menu.
- **Automatically check in complete e-mail seamless -** If "Automatically check in complete e-mail seamless" is selected, e-mail and attachments to the e-mail will be check in to IFS. This option will be enabled if the user enters Document class, Format and Object Connections.  If "Automatic check-in" is selected, Emails that have previously been checked into IFS will be ignored and other Emails check in automatically
- **Display the check in dialog on drag and drop** - This option box will be enabled if the user enters Document class, Format and Object Connections. If the "Display the check in dialog on drag and drop" is selected, the CHECK IN DOCUMENT dialog will be displayed to do the check in, with default selected values (user can change those as need):

*Figure 120 OAS Options – Connections page and corresponding registry settings*
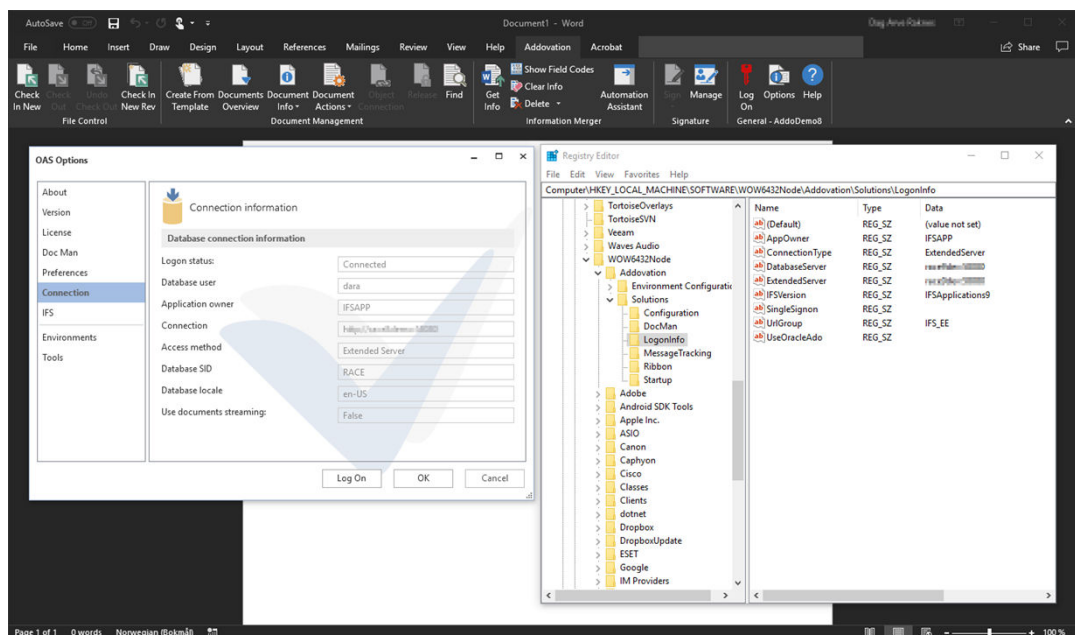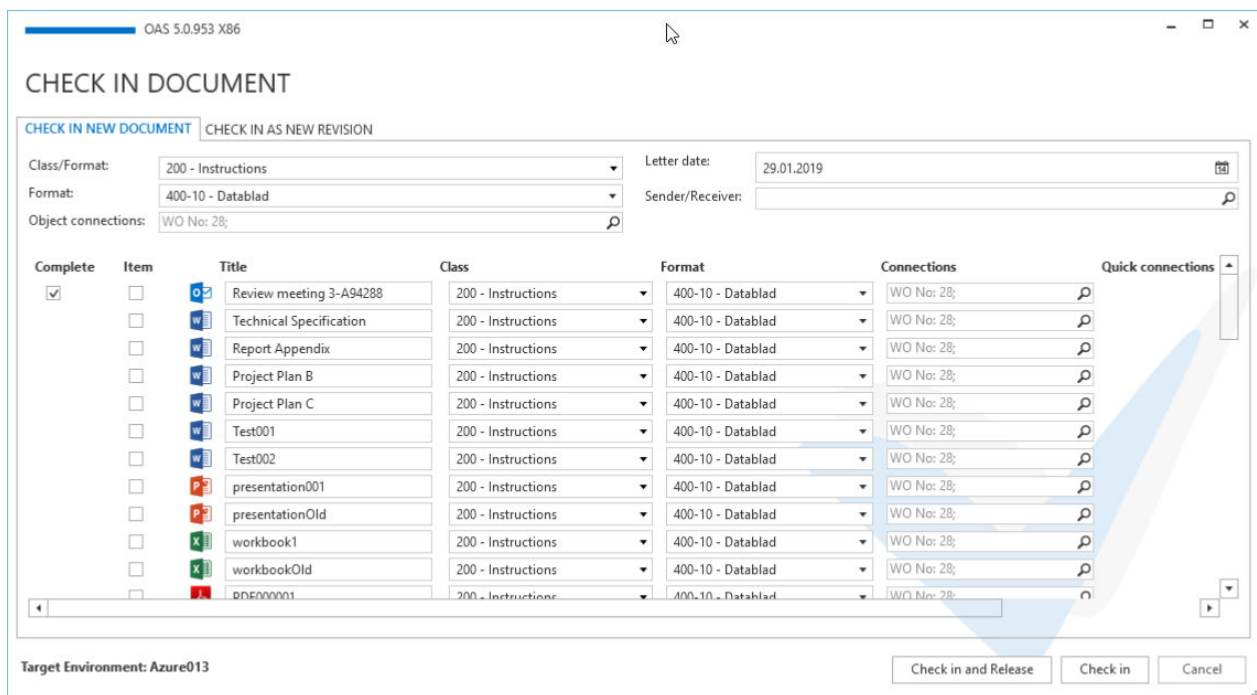
*Figure 121 Check-in window pop ups when **Display the check in dialog on drag and drop** option is configured*

- **Always Release Document** - Default set to "YES". If "Always Release Document" is checked, the document will both first be checked in and then released. This option is only available for automatic check in.
- **Enabled** - Default set to "Yes". This is Enable/Disable the Drag and Drop Functionality with the outlook Sync Folder, which means that if set to Yes, the user can drag mail messages into the synchronized folder and thereby getting them checked in to IFS according to the rules configured for that folder.

After Creating an Outlook-IFS Synchronization Folder in Outlook Sync

1. Sign in to IFS.
2. If the user has set Registry Key **CheckFoldersOnLogin** to True in **Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Addovation\Solutions\Configuration**, the mails (which is not already check-in) in Sync folders with Automatic Check-in configuration, will be check in automatically after login, and the mails (that are not already check-in) in Sync folders with Require User Inputs configuration, will show a dialog by asking "Would you like to Process the pending mails in Folder Sync?".

   If you click "Yes", the CHECK IN DOCUMENT dialog (as shown in Figure 121 Check-in window pop ups when **Display the check in dialog on drag and drop** option is configured) will be displayed. If you click "No" the mails (which has not already check-in) will remain as is. If the user has not set the Registry Key **CheckFoldersOnLogin,** the mails (which has not already check-in) will remain not checked in.
3. You may drag and drop single or multiple emails that you want to check in, to a sync folder, and the Emails will automatically be checked in to IFS according to the rules set up for the folder where they are dropped.

4. If you drop a mail which has already been check-in, a warning like the below will be displayed, and no check in will occur.
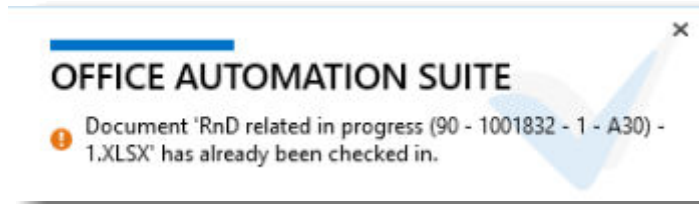


*Figure 122 Notification pops-up when drag and drop detects an already checked in mail message*



*Note that Folder synchronization will **not occur** – even when Enabled is set (ticked) – if the level of the folder used in Outlook exceeds the max level configured under the Tools page. So, if no action is taken when a message is dragged into a sync folder in Outlook, check the level (a warning will be issued).*
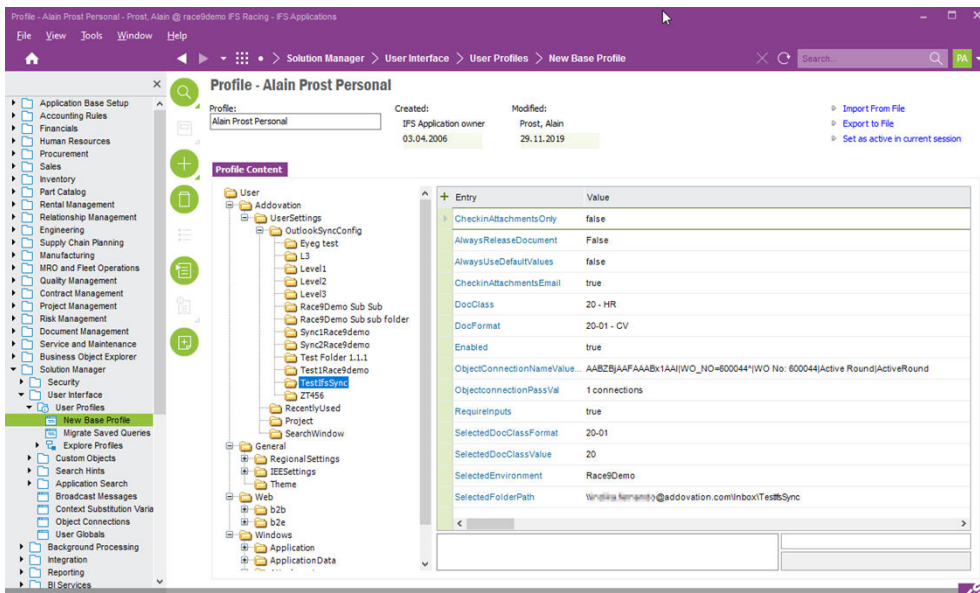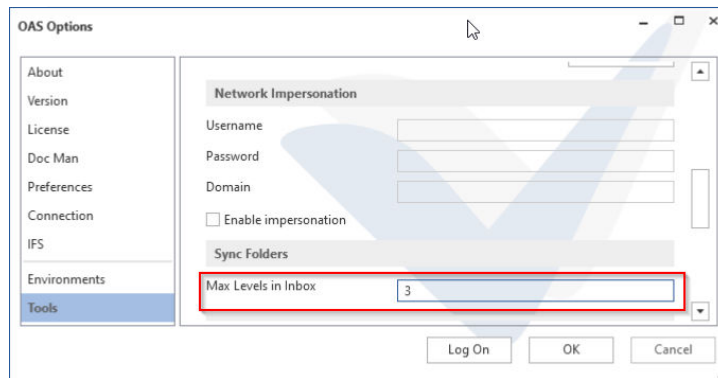
*Figure 123 Folder Sync Details saved in IFS User Profile*

### 10.1.8 IFS page
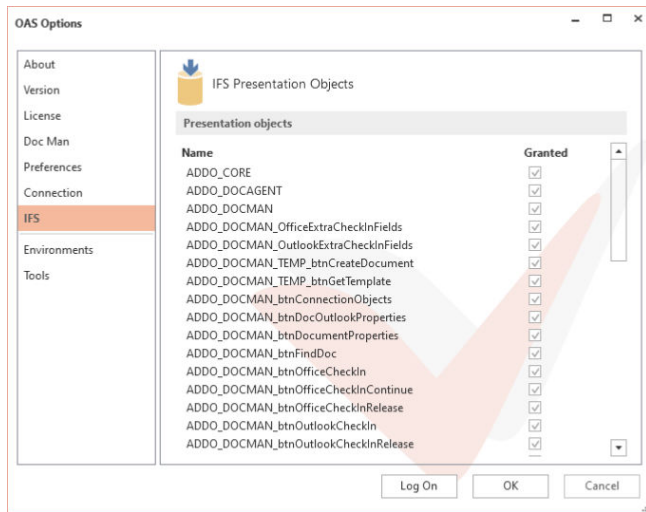


Opening the IFS page, you can see which IFS presentation objects related to OAS that has been granted to you.

To change grants here, you will need elevated privileges and it must be done from within IFS (or by running grant scripts). This is normally an administrator's task.

*Figure 124 OAS Options – IFS page*



*Figure 125 IFS EE - Presentation Objects*

## 10.2 Advanced options



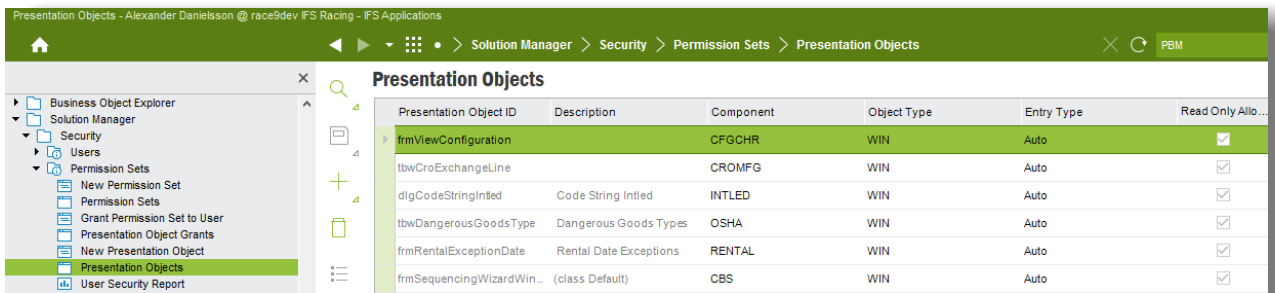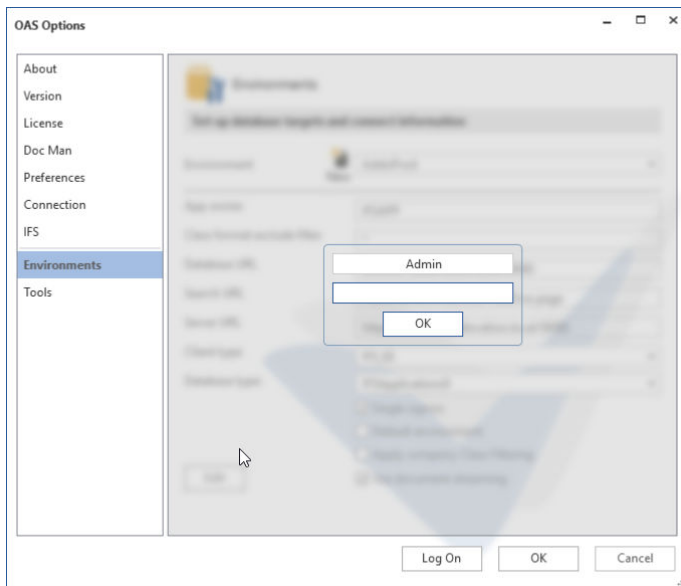*Figure 126 OAS Options – Log on to Admin*

The two last Options pages, *Environments* and *Tools* requires a password to make changes.

Most of the configuration and tasks to be done here are administrator tasks (or at least experienced user tasks).  Some of the tasks needs that you have administrator privileges on your computer and/or application owner access to the IFS database.

The Environments page allows users without elevated privilege to view different environment definitions. As the text in read indicates, you need to run the application (in this case Word) as an administrator to be able to create or modify any environments.  When you do, the red text is replaced by an Edit button, and as soon as you hit the Edit button, the password must be entered.

The Tools page requires the password immediately.  The next sections briefly explain the usage of these pages.

### 10.2.1  Environments page

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

Use the Environment drop-down control to select the environment you what to see/manage.

When the OAS options dialog is opened from e.g. Word (run as Administrator), the two buttons "Save" and "Delete" gets visible.

Modify any settings and click Save for saving them. Use delete or new buttons to remove or create new environments.

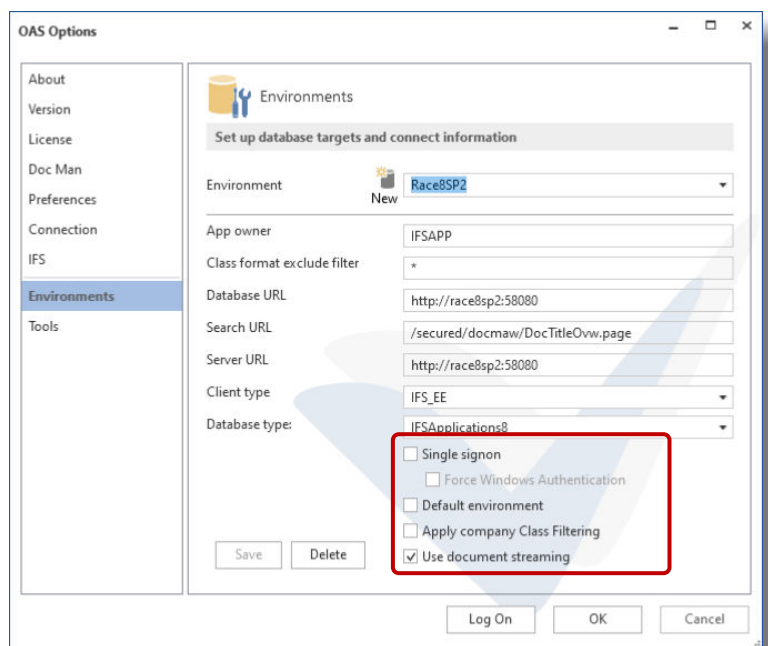The configuration parameters framed in the picture is explained below.

- **Single signon**: means that the that the environment you are targeting with this definition has been set up



*Figure 127 OAS Options - Environment page*

---

as an SSO environment.  This again means that the AD user will be used for logging in to IFS. This setting must match with how IFS is set up.

- **Force Windows Authentication:**  to be checked if LDAP is used (logging on to IFS using SSO on a different domain)

- **Default environment**: tells OAS that this is the environment that will be the default for the user.
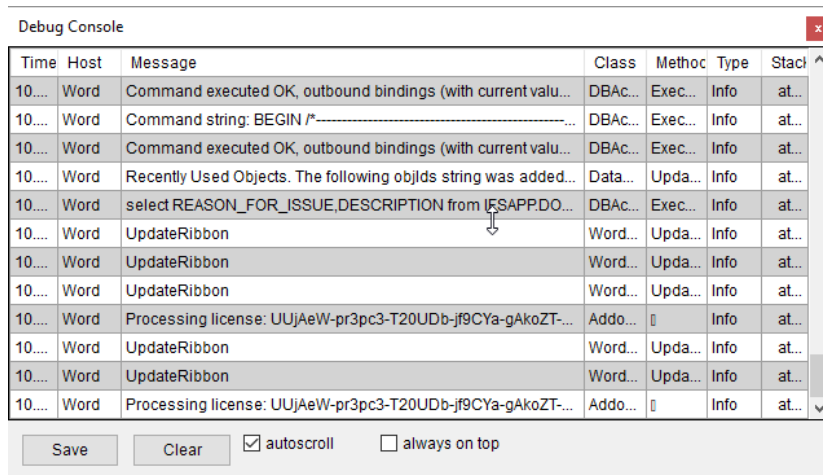
  In the OAS ribbon, there is the Sign In button with the key picture on it.  On the button group text line, you can see the environment you are signed in to. If the default environment is used, the key is colored grey. If NOT logged into the default environment, the key will be colored red, to warn users that the default environment is not currently used.  Typically, a customer would define the production environment as the default.  Then there can be other environments as "Education" and "Test" environments.  So, whenever a user connects to a non-production environment, the key will light up in red to give the user a visible indication/warning.

- **Apply company Class Filtering**: this check box enables/disables the class filtering functionality for this environment.  See description of how the company class filtering works in section 10.1.4.

- **Use document streaming**: this checkbox indicates whether you will use the *document streaming* functionality in OAS.  Please see section 11.1 for a closer description of document streaming and when to use it.  The recommendation is always to activate document streaming .

### 10.2.2 Tools

#### 10.2.2.1 Test and debug options

OAS has several debug options. There is a separate OAS Debug Console that can be activated by hitting the F11 function key while the OAS Options dialog is open (or by clicking the Debug button in the Tools page). This console displays important information which is useful when it comes to finding the source of a problem



*Figure 128 OAS Debug Console*

From the Tools page you can also set up to log the same information that is written to the debug console, to a log file. To do this, follow the steps below:

1. Open the OAS Options dialog
2. Select the Tools page (log in)
3. In the Test and debug options section
   a. Tick the Log to file checkbox
   b. Click Browse next to the text box and find your location for the log file (optionally write in file location)

*Remember to turn off the logging to file after you have used it, failing to do so will significantly degrade performance (if logging to file is active).*

The log file is in CSV format which can be opened in Excel and/or sent to others for inspection.

You can display some "hidden" document properties that OAS uses for recognizing whether a document is an "OAS" document and has been checked out from IFS or not. Tick the "**Display Addovation properties in Automation Assistant"** check box to unhide these properties. The information will appear as shown in Figure 130 AA - Addovation "hidden" properties displayed under the Addovation node.

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

- The **XML…** button – tool to enter an XML string into IFS for recognizing Dynamically designed dialogs. This requires that custom dialogs are built specifically for your company and is an administrator task to perform.

  It is a tool to insert the XML definition for the Custom build dialog into IFS, and as such is a one-time operation.



*Figure 129 OAS Options - Tools page*



*Figure 130 AA - Addovation "hidden" properties displayed*

- The **Diagnostics…** button – Runs and create a diagnostic report for the OAS installation. This can be useful if you experience any problems with your installed OAS software.

- T
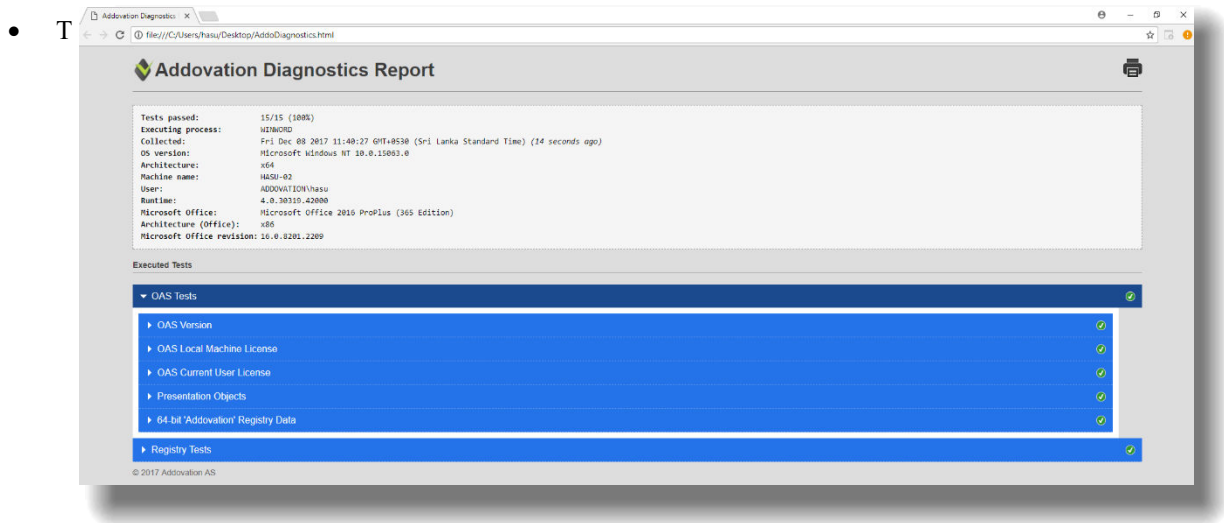


*Figure 131 The Addovation Diagnostics Report*

he **SQL…** button – Opens SQL Query Execution dialog for running simple SQL queries from within OAS
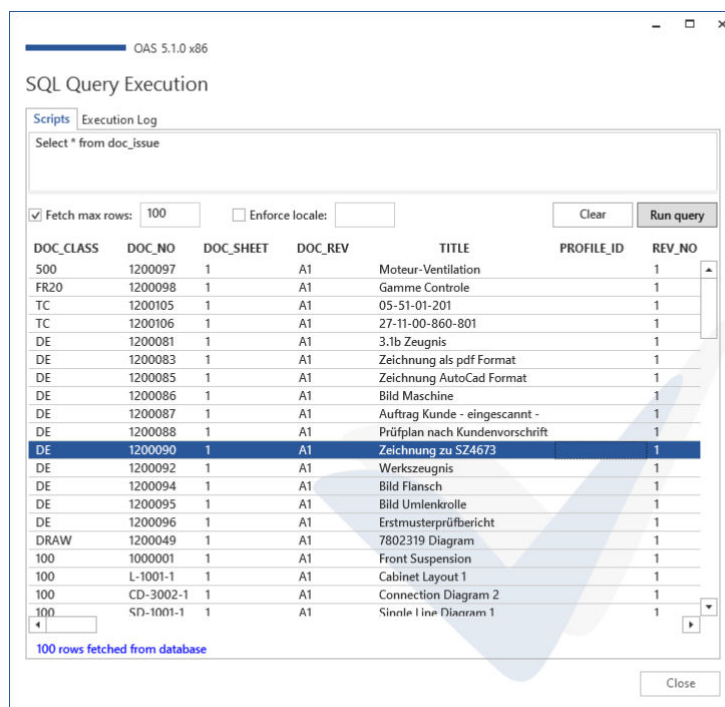


*Figure 132 The SQL Query Execution dialog*

- The **PL*SQL** button opens a dialog for executing PL*SQL scripts.  This is also a typical *administrator* task to perform.

  This dialog is intended for executing scripts that follows the OAS

installation that creates all needed presentation objects in the IFS database. The dialog is also available during installation of the OAS software.

By default, these scripts are included in the list of scripts to execute. They need to be executed only once, as they insert permanent object to the IFS database that is the target of the operation.

You can un-tick all the standard scripts and browse for any other scripts that you want to execute.

*Figure 133 PL\*SQL Scripts execution dialog*

Enter Username and Password and target database before hitting the **Execute** button.
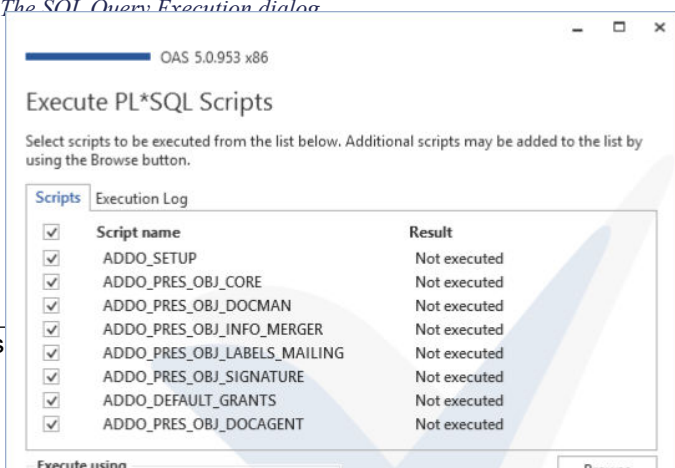
### 10.2.2.2   Network Impersonation

This section can be used for running functionality in OAS "as another user". This means that you can execute e.g. reports that that your personal user doesn't have the needed rights to execute, provided you have the username and password for a user that do have these rights. Enter username, password and domain, and tick the "Enable impersonation" to do so.

### 10.2.2.3   Import/Export EDM Templated

From Import/Export EDM Templates section in the lower part of the Tools page, you can Import (Download) EDM Templates to a working directory from IFS environment and Export (Upload) EDM Templates to IFS. You can search in the IFS IEE client for "EDM Basic" (e-document management) and get overview of the documents being used as templates in IFS/OAS.
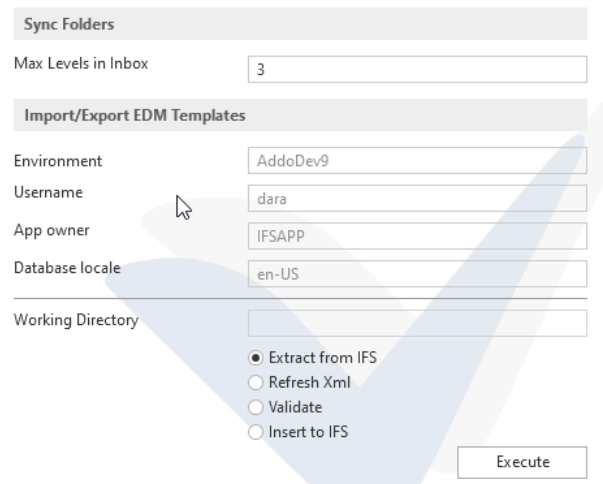
*Figure 134 Import/Export EDM Template*
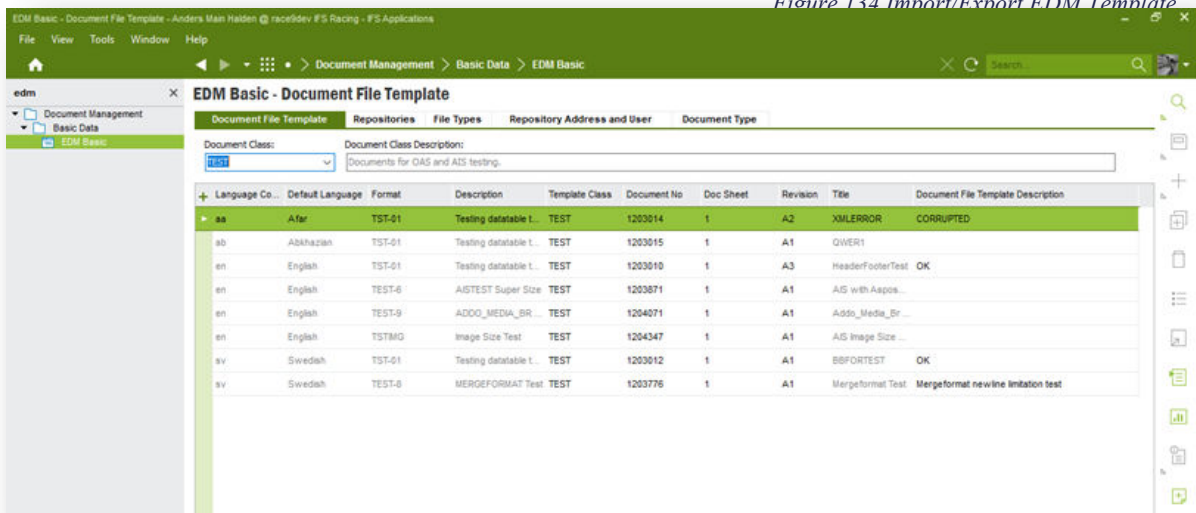
*Figure 135 IFS EE _ EDM Basic - Document file template*

# 11 Additional information

## 11.1 Document Streaming

Document streaming is a functionality that has been created mainly to remedy some shortcomings in the IFS Access Provider (AP) and FTP repository.

Document streaming is a configuration switch that is managed from the OAS Options dialog. The switch is set per environment and, as it is said in the dialog; you need to run as an administrator to make changes to these settings.
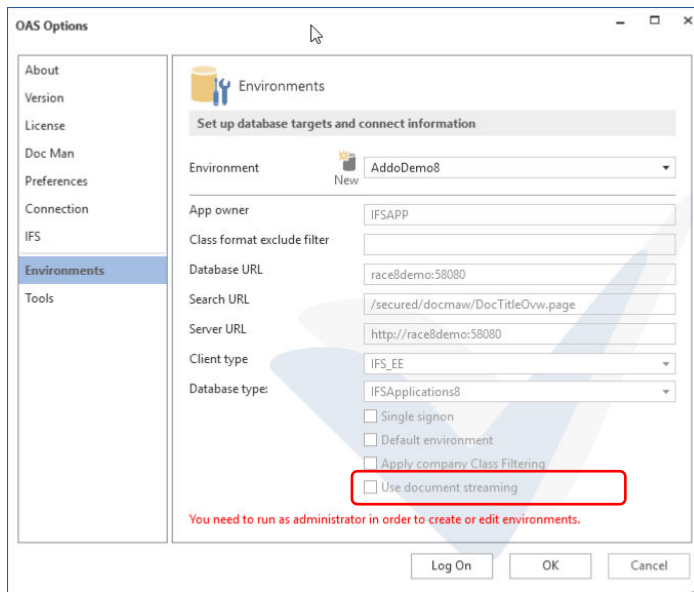


*Figure 136 OAS Options - Environments configuration*

### 11.1.1 Big files.

It turns out that the IFS Access Provider (AP) can run into a timeout problem if you try checking in big files, typically 40 Mb or larger. By turning on the Document streaming option, we bypass the AP and transfer the file(s) to the server using alternative methods. It is recommended to activate this option by ticking the check box.

### 11.1.2 FTP

Likewise, when checking in files (documents) that is set up with an FTP class / format, this has caused problems at some customer installations. The remedy for this has also been to use Document streaming. In this case, OAS automatically turns on Document streaming for the specific check in operation, i.e. no need to configure.

# 12 Presentation Objects Guide

## 12.1 Introduction

Addovation Office Automation Suite (OAS) can be tailored to each users' individual needs.  This means that parts of the functionality can be hidden for some users, while being available / shown to others.  To govern this, we use IFS Presentation Objects (PO's).

This guide shows what functionality and buttons that can be governed by PO's and how to do this. Presentation objects must be granted by a system administrator.

### 12.1.1  Presentation Objects

The concept of Presentation Objects (PO's) was introduced to simplify the tasks of setting up and maintaining permission sets. Presentation objects are defined and stored in IFS.  They are used to administrate access to parts of the functionality in IFS.  Addovation has expanded the usage of the PO's to be used for the Addovation solutions as well.

## 12.2 OAS functionality in general

The functionality in OAS is organized into modules, all of which are associated with a license key.  Without a license key that "unlocks" the module, the corresponding section in the Addovation ribbon tab will not be visible. Which licenses your company has purchased can be seen in the OAS Options dialog, under the license tab:
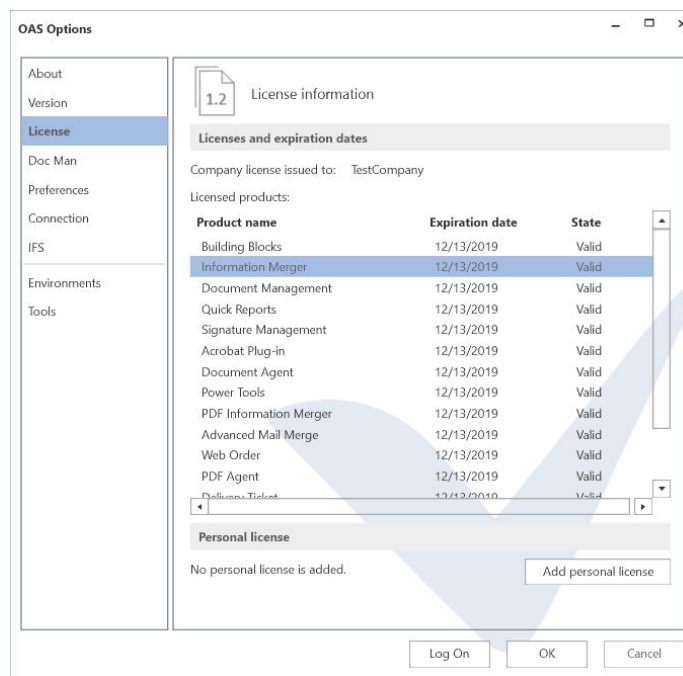


*Figure 137 OAS Options - License information page*

There are three levels that determines whether a given button or button group (i.e. functionality) will become available / visible in the application:

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1. A license must be acquired for the functionality in question
2. The user must be granted access to the functionality (though PO) and
3. The user must be logged into the database.

## 12.3 MS Office Ribbon

When you have installed the Addovation Add-ins to Microsoft Office, a separate Office ribbon tab becomes visible in the Office ribbon.  When you log in to IFS Applications (using the log in button / dialog), a set of button groups, like File control, Document Management etc. becomes visible.  Each button group represents a module in OAS like e.g. Document Management.

When the Application is first opened, only the General button group is displayed.  When you Sign In to IFS, all available button groups will appear like shown in the figure below (in this case MS Word).
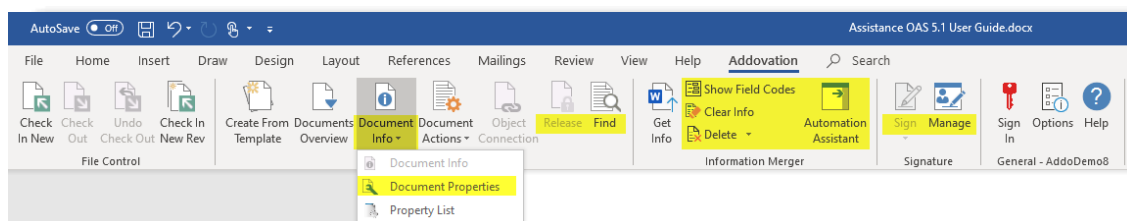


*Figure 138 ADDOVATION Ribbon tab*

The highlighted buttons are governed by presentation objects. E.g., the Automation Assistant button is governed by a presentation object, which means that the administrator can decide what users should gain access to the Information merger functionality in OAS.

In the following sections we will cover all available parts of the functionality where availability can be modified (on a user basis) by adding / removing PO's to the users.

### 12.3.1 File Control

#### 12.3.1.1 Check in New document

When the *Check in New* button is clicked, a task pane like the one below is opened.



Here you can control the framed buttons (red) with the following PO's:

*Figure 139 Check In New task pane*

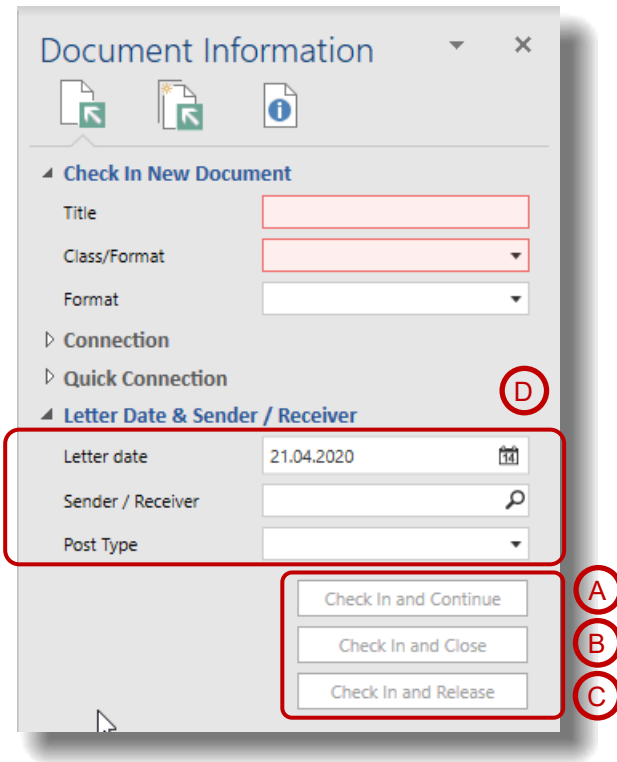| # | Presentation Object (PO) | Description |
|---|---|---|
| A | ADDO_DOCMAN_btnOfficeCheckInContinue | Controls the display of the **Check in and Continue** button in Office |
| B | ADDO_DOCMAN_btnOfficeCheckIn | Controls the display of the **Check in and Close** button in Office |
| C | ADDO_DOCMAN_btnOfficeCheckInRelease | Controls the display of the **Check in and Release** button in Office |
| D | ADDO_DOCMAN_OfficeExtraCheckInFields | Controls the display of the Letter Date and Sender / Receiver field group in Office |

*Table 1 Presentation Objects*

### 12.3.1.2   Check in New Rev

The following elements in the Check in New Revision task pane are controlled via the same PO's as listed for the Check in new document in the table above, the task pane looks like this:
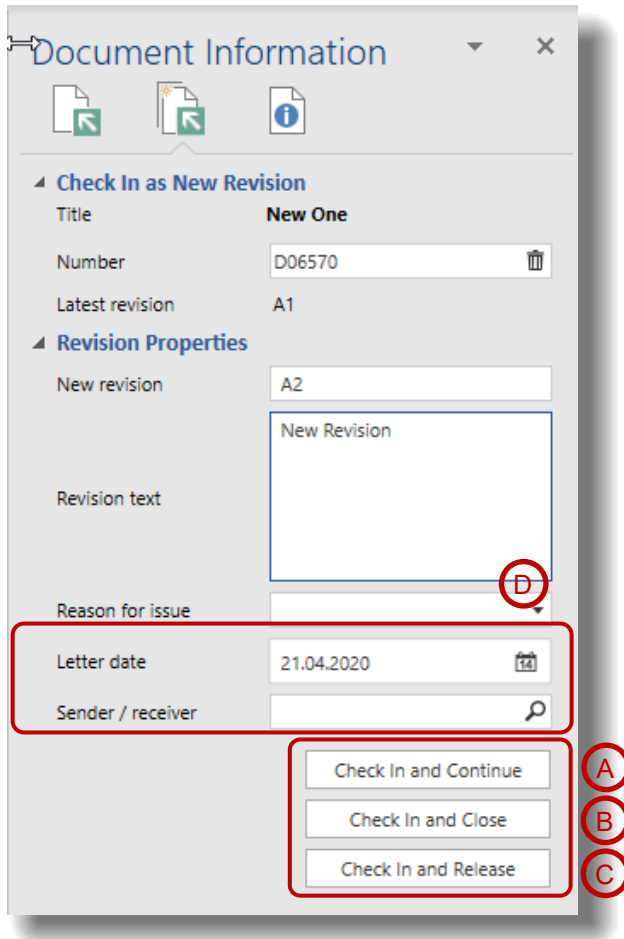


*Figure 140 Check in new revision task pane page*

## 12.3.2   Document management

In the Document Management Button group there are several buttons that are controlled by PO's.  They are described in the following sections.
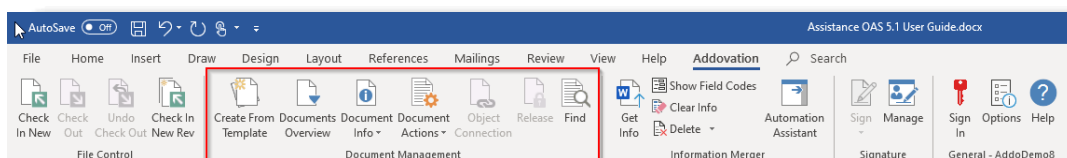


*Figure 141 Document Management button group*

The first button is the Create from Template.

### 12.3.2.1  Create from Template

The Create New Document from Template dialog is used to fetch the template. See table below for PO names.
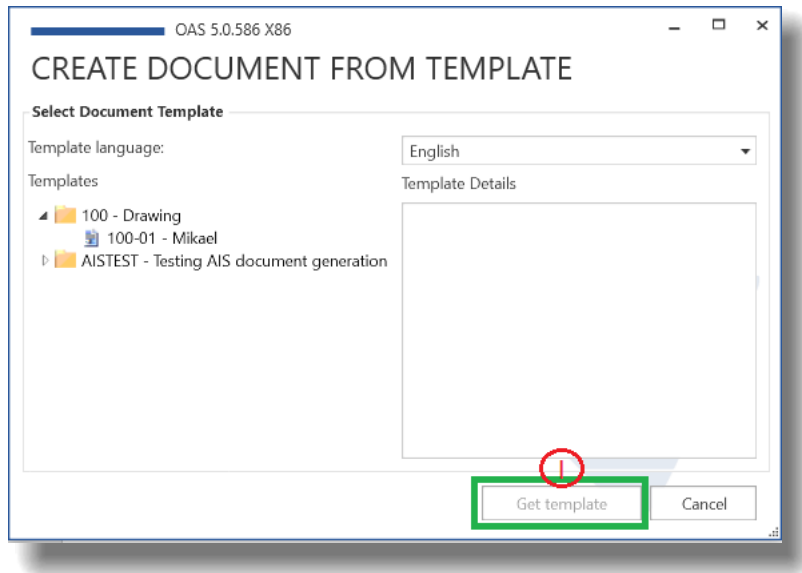


*Figure 142 Create from Template*

| # | OAS Objects | Presentation Object | Description |
|---|---|---|---|
| **I** | Get Template | ADDO_DOCMAN_TEMP_btnGetTemplate | Controls the display of the Get Template button in the **Create New Document from Template** dialog |

### 12.3.3  **Information Merger**

*Table 2 Presentation Objects - Get template*

For the Information merger, buttons can be controlled both in the Ribbon and in the Automaton Assistant task pane.

### 12.3.3.1  Ribbon buttons

Information Merger buttons on main tab
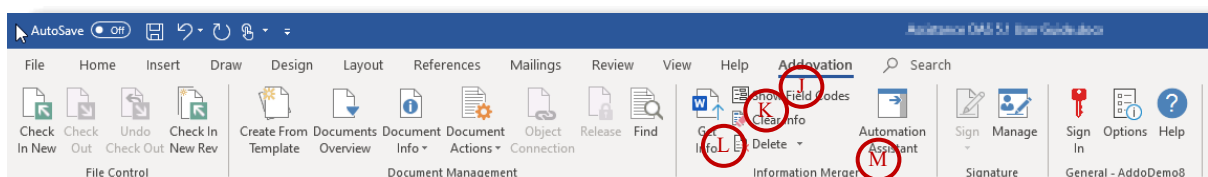


*Figure 143 Information merger buttons*

| # | OAS Objects | Presentation Object | Description |
|---|---|---|---|
| J | Show Field Codes | ADDO_INFORMATION_MERGER_btnShow Formulas | Controls the display of the "Show Formulas" button in Office Automation Information Merger button group |
| **K** | Clear Info | ADDO_INFORMATION_MERGER_btnClear Info | Controls the display of the "Clear info" button in Office Automation Information Merger button group |
| **L** | Delete | ADDO_INFORMATION_MERGER_btnDelet eProperties | Controls the display of the "Delete Properties" button in Office Automation Information Merger button group |
| **M** | Automation Assistant | ADDO_INFORMATION_MERGER_btnAuto mationAssistant | Controls the display of the "Automation Assistant" button in Office Automation Information Merger button group |

*Table 3 OAS Objects – PO's controlling Information merger buttons*

### 12.3.3.2 Automation Assistant

The Automation Assistant has several UI elements that you can control via PO's.



Figure 133 Properties Tab – Barcode Tab

Figure 134 Media

Figure 135 Documents

Figure 136 Grid Queries

Figure 137 Label and Mailings

Figure 138 Buildings Blocks
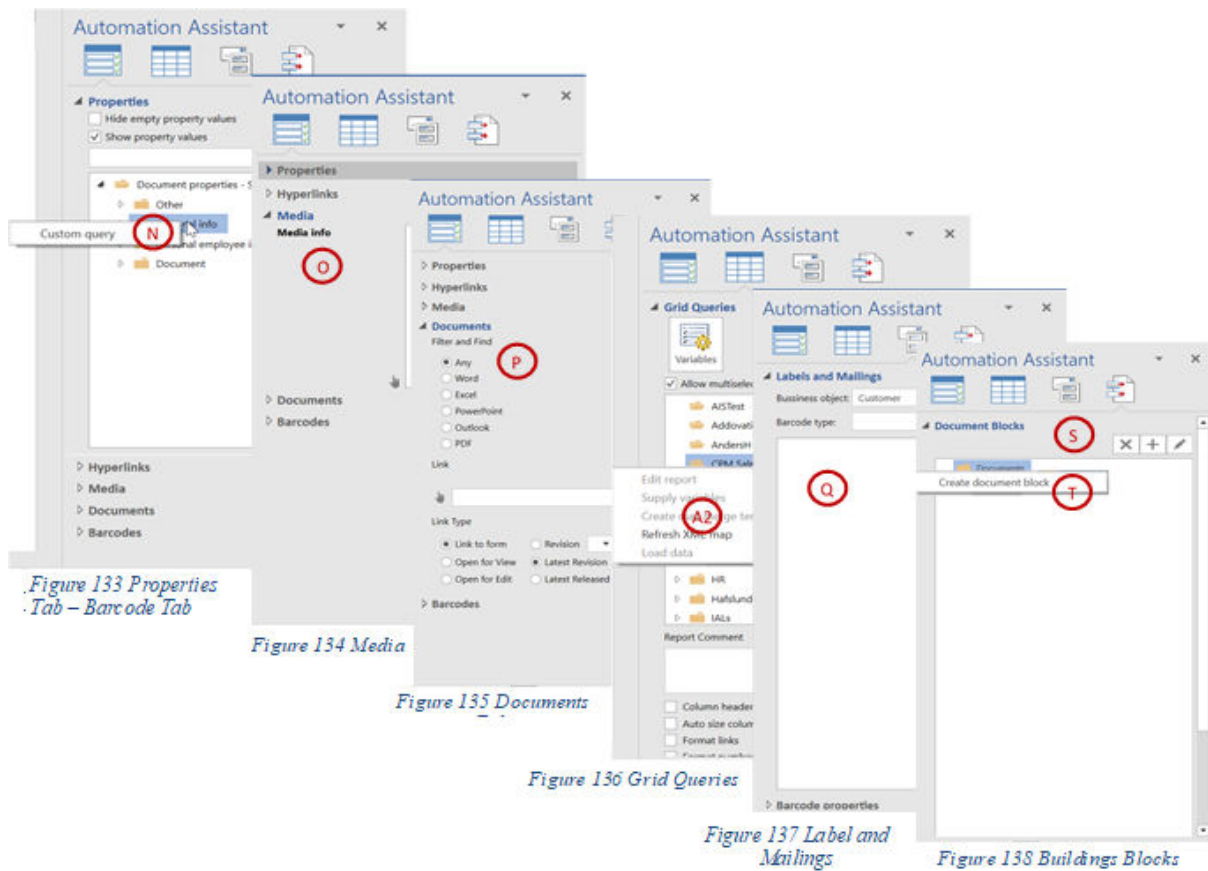
First is the "main" PO that let you control whether you want the Automation Assistant to show at all; we mentioned this in the previous section.

Then there are several elements as shown it the figures above and the corresponding PO names described in the table below.

| # | OAS Objects | Presentation Object | Description |
|---|---|---|---|
| N | Properties | ADDO_INFORMATION_MERGER_menuCustomQuery | Controls the access to Custom Query menu item in the Automation Assistant |
| O | Media | ADDO_INFORMATION_MERGER_tabAutomationAssistantMedia | Controls the access to Media tab in the Automation Assistant |
| P | Documents | ADDO_INFORMATION_MERGER_tabDocuments | Controls the access to the tab Documents tab in the Automation Assistant |

| R | Barcode | | Controls the access to Barcode tab in the Automation Assistant |
|---|---|---|---|
| Q | Labels and mailings | ADDO_INFORMATION_MERGER_menuMailingsAndLabels | Controls the display of the "Create mailings" menu in Automation Assistant - Grid Query |
| S | Building Blocks | ADDO_INFORMATION_MERGER_tabBuildingBlocks | Controls the access to Building Blocks tab in the Automation Assistant |
| T | Building Blocks | ADDO_INFORMATION_MERGER_menuBuildingBlocks | Controls the access to Building Blocks menu items in the Automation Assistant |
| A1 | Labels and Mailings tab | ADDO_INFORMATION_MERGER_tabMailingsAndLabels | Controls the display of the "Mailings and Labels" tab in Automation Assistant |
| A2 | Grid Query | ADDO_INFORMATION_MERGER_menuMailingsAndLabels | Controls the display of the "Create mailings" menu in Automation Assistant - Grid Query |

*Table 4 OAS Objects – PO's controlling Information merger options*

### 12.3.4 Signature management

Both the buttons in the Signature button group (Office ribbon ADDOVATION tab) are controlled by POs.
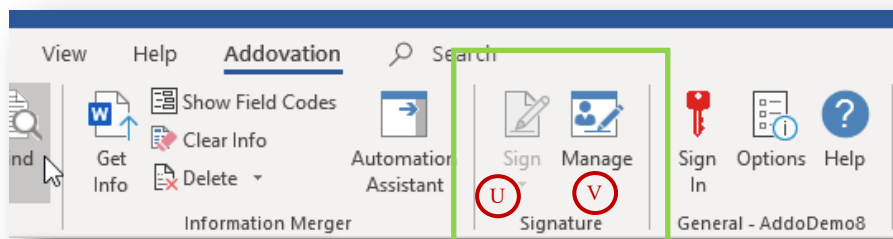Here is the POs associated with the signature module:



*Figure 150 Signature Buttons group*

| # | OAS Objects | Presentation Object | Description |
|---|---|---|---|
| U | Sign | ADDO_SIGN_btnSignDocument | Controls the display of the "Sign" button in Office Automation Signature button group |
| V | Manage | ADDO_SIGN_btnManageSignature | Controls the display of the "Manage" (Signature) button in Office Automation |

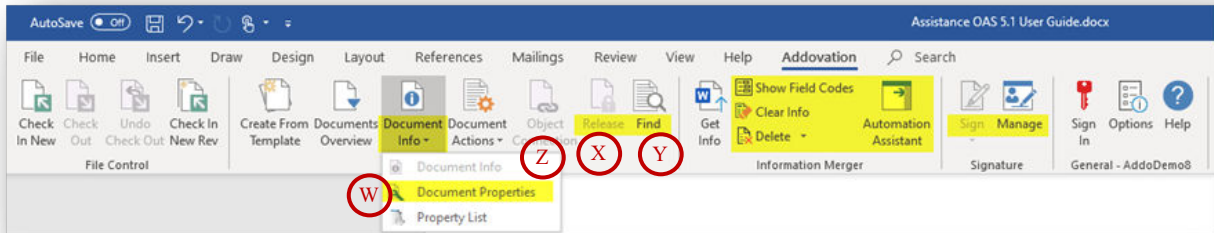| | | | Signature button group |
|---|---|---|---|
| | | | |

### 12.3.5 Other ribbon buttons



*Figure 151 Configurable Document Management buttons*

There are a few of buttons that is not covered by PO's.  The figure below it is marked which are covered, i.e. which buttons can be displayed/hided by using the corresponding PO's associated with them.

Here are the corresponding Presentation Objects

| # | OAS Objects | Presentation Object | Description |
|---|---|---|---|
| W | Document Properties | ADDO_DOCMAN_btnDocumentProperties | Controls the display of the "Document Properties" button in Office Automation Document Management button group |
| X | Release | ADDO_DOCMAN_btnReleaseDocument | Controls the display of the "Release Document" button in Office Automation Document Management button group |
| Y | Find | ADDO_DOCMAN_btnFindDoc | Controls the display of the "Find" button in Office Automation Document Management button group |
| Z | Object Connection | ADDO_DOCMAN_btnConnectionObjects | Controls the display of the "Object connection" button in Office Automation Document Management button group |

*Table 6 OAS Objects – PO's controlling Document management buttons*

## 12.4 Outlook

### 12.4.1 Check in New (Outlook)

In Outlook, you can check in E-mails in two ways:

- Single check in
- Multiple check in

### 12.4.2 Single check in

Single check in can be done from an opened mail item, and appears as shown below, and the framed functions can be controlled by PO', as shown in the table below
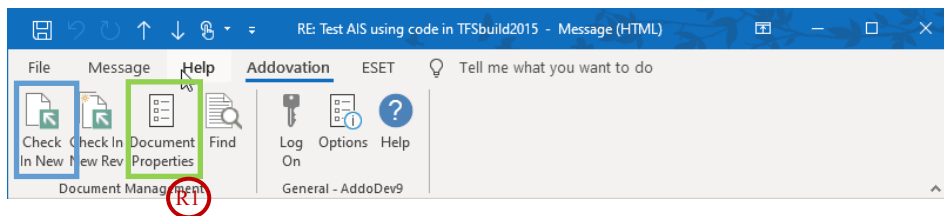


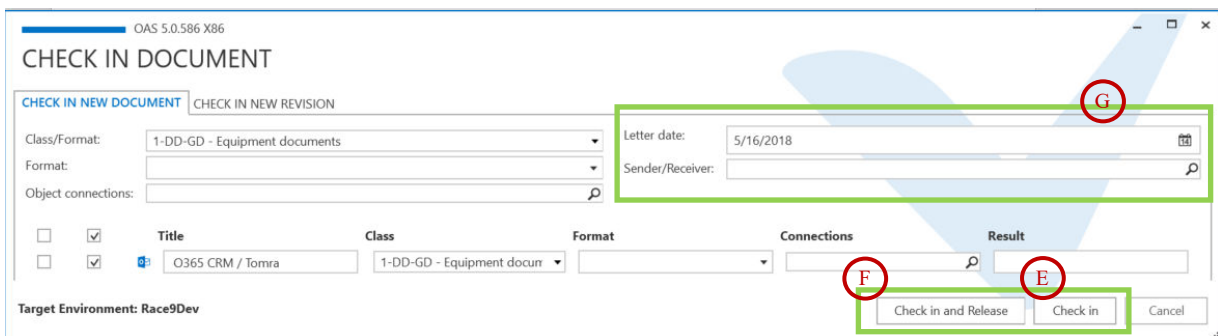*Figure 152 Configurable Outlook Message buttons*



*Figure 153 Configurable CHECK IN DOCUMENT dialog buttons*

| # | OAS Objects | Presentation Object | Description |
|---|---|---|---|
| E | Check In | ADDO_DOCMAN_btnOutlookCheckIn | Controls the display of the Check In button in Outlook |
| F | Check In and Release | ADDO_DOCMAN_btnOutlookCheckInRelease | Controls the display of the Check In and Release button in Outlook |

| G | Letter Date Sender/receiver | ADDO_DOCMAN_OutlookExtraCheckInFields | Controls the display of the Letter Date and Sender field group in Outlook |
|---|---|---|---|
| **R1** | Document Properties | ADDO_DOCMAN_btnDocOutlookProperties | Controls the display of the "Document Properties" button in Office Automation Document Management button group in MS Outlook application |

*Table 7 PO's used for Outlook*

**Check in as new revision** task pane looks like single check in task pane, and the same PO's can be used to control the same task pane elements.

### 12.4.3 Multiple check in

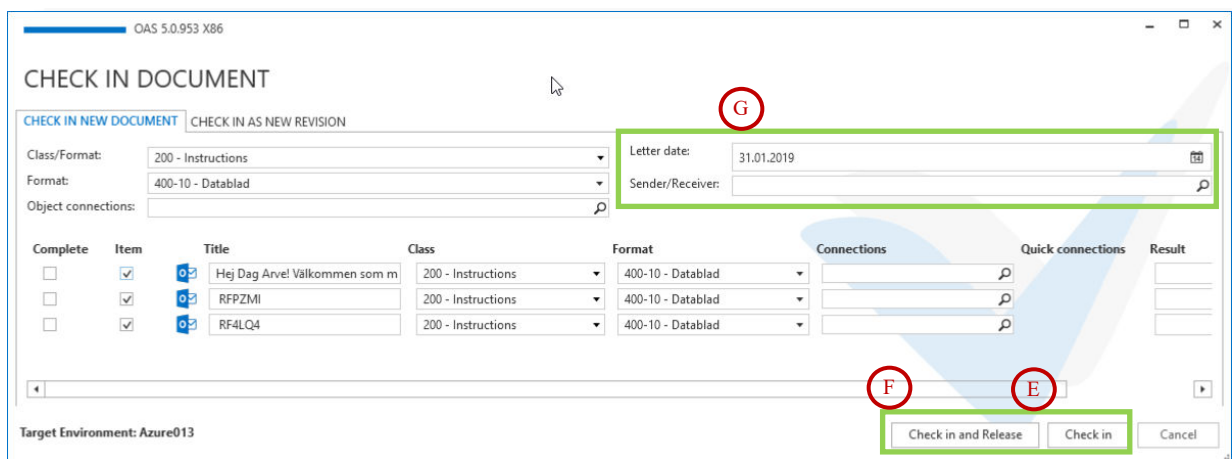When you mark several mail items and click Check in to IFS, a dialog appears that looks like this:



*Figure 154 Check in Multiple mails dialog buttons*

You can control the (framed) GUI elements here as well, according to Table 4 (see above table).

## 12.5 Presentation objects in IFS

PO's are part of the IFS solution. Addovation has created a set of POs' aimed at governing access to different parts of the Addovation functionality. These PO's must have been created before the Addovation solutions can be used for the user. It is the administrator's task to create these PO's, and this is normally done at installation time.

If upgrading from an older version of OAS to a new release, it might be needed (and it is a good practice) to update the presentation objects. The OAS installer has support for doing this. All default scripts need to be executed as shown below. Here are the steps:
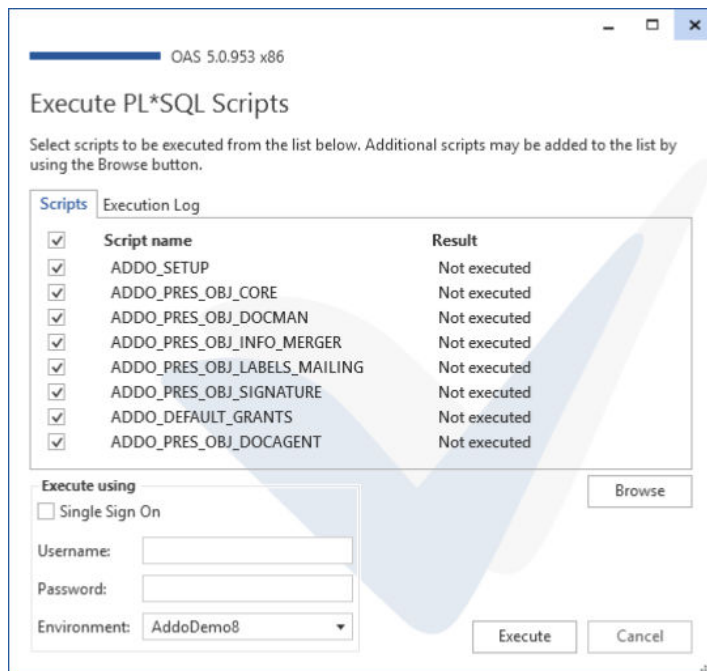


1. Open the **OAS Options** dialog from the Addovation ribbon
2. Select the **Tools tab**
3. Enter password for admin
4. Click the **PL*SQL** button
5. The dialog to the left opens
6. Select the PO scripts you want to run
7. Enter username and password and select Environment
8. Click the **Execute** button

*Figure 155 PL SQL scripts*

Presentation object definition files are located under the folder

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

### 12.5.1 How to grant PO's to users

To modify what PO's a user is granted

1. Open the (IFS Enterprise Explorer) IEE and Navigate to Solution Manager | Administration
2. Click **Users** node
3. Enter user name in Find User and click the → button
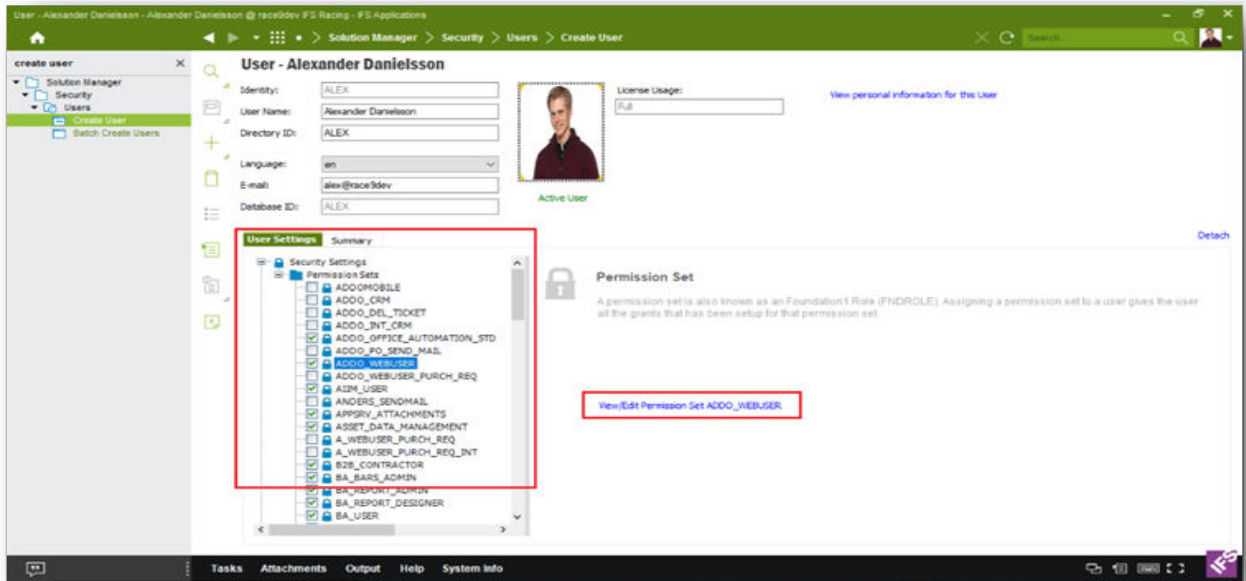4. Expand the Security Settings node under the User Settings tab:

*Figure 156 IFS EE - Grant user access*

Here you can see the permission sets granted to the user. By selecting a Permission Set, clicking the link on the right-hand side and selecting the Presentation Objects by Module, you can define what access a user granted this permission set shall have by ticking/unticking all appropriate PO's:
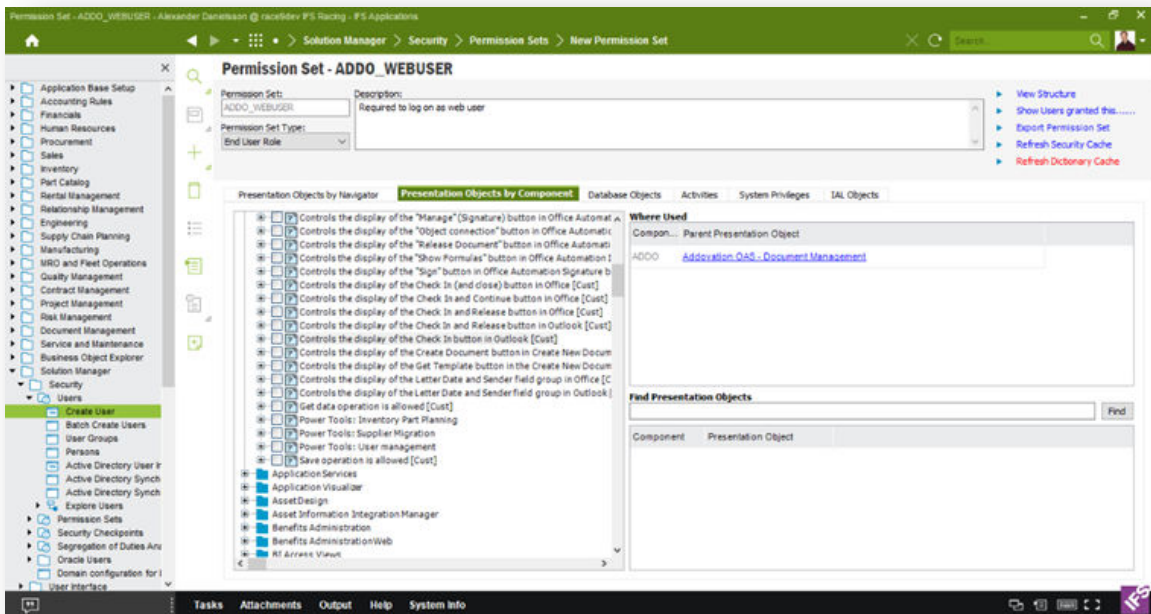


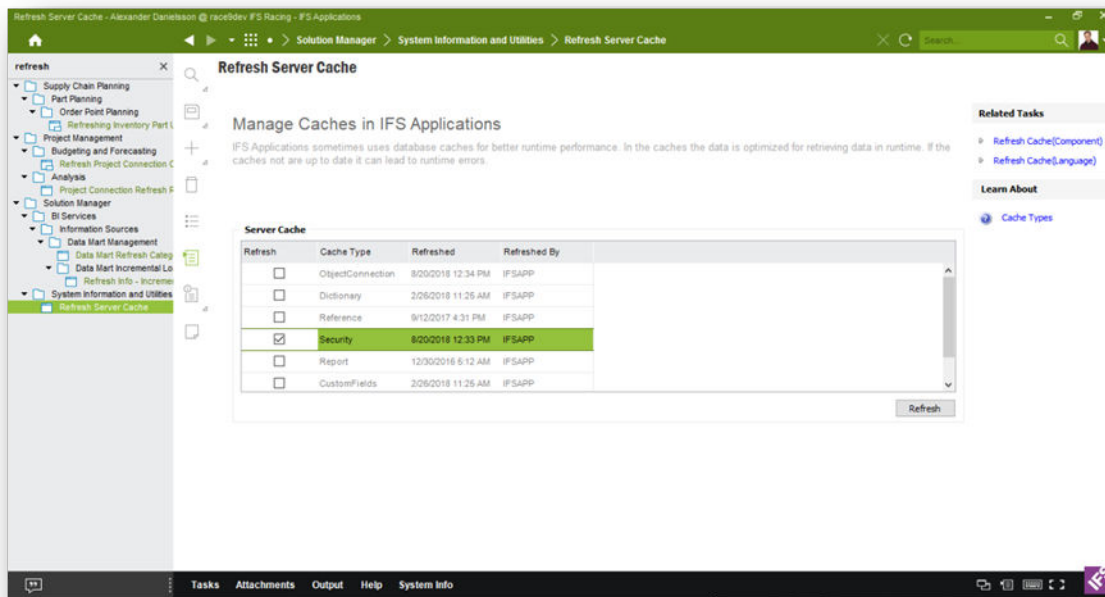*Figure 157 IFS EE - Grant user permissions*

*Figure 158 IFS EE – Refresh Security Cache*


Be aware that you might need to **Refresh Security Cache** to make the change effective. You do this by using IEE, navigating to the Solution Manager | Administration | Refresh Server Cache and do as illustrated in the screen shot below (tick the Security cache and click the Refresh button).

### 12.5.2  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.

When it comes to document access, we solely rely on document access controlled using IFS document access control and thus not take DOCMAN_ADMINISTRATOR permission set into account for our queries:
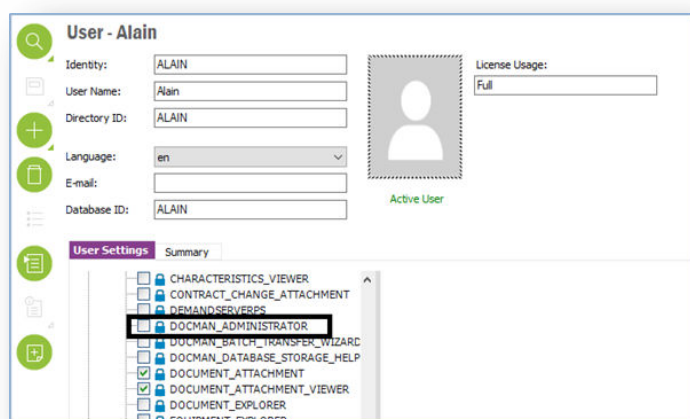


This affects queries such as search, building blocks etc.

*Figure 159 IFS EE – DOCMAN ADMINISTRATOR*