



Office Automation Suite V 5.2

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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 materialized through the **Addovation** Tab in the office ribbon of each of the applications.

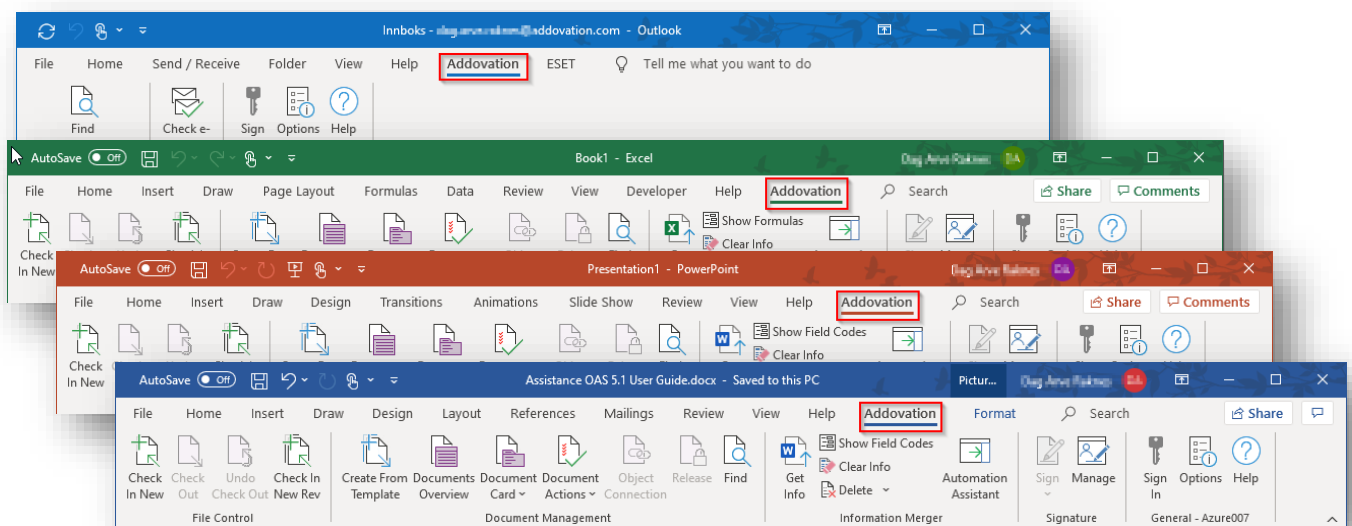


Figure 1 The dynamic Addovation Office ribbon tab in Office Applications

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.

In this guide, most examples are done from within Word unless explicitly shown. Most of these examples also apply to Excel and PowerPoint.

2 Connecting 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, namely the Sign In, Options and Help buttons:

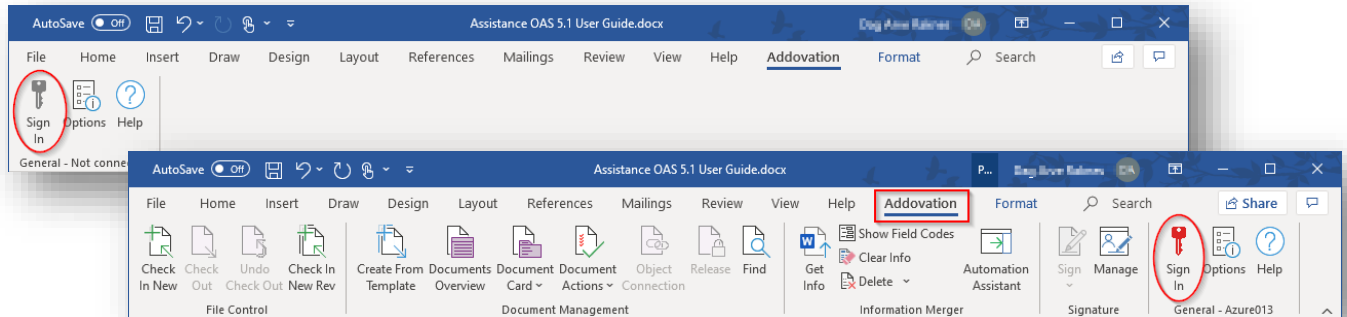


Figure 2 The dynamic Addovation Office ribbon tab

The Addovation ribbon will 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.

2.1 Environments

Environment is the terminology used for naming all configuration parameters needed to access a given IFS installation and its containing data. Environments are normally set up and defined by your companies' IT department.

Most companies are set up with a few Environments, like e.g., Test, Education and Production. Usually, a Production environment is set up as the default environment. If you sign into another environment, the key button (Sign in) on the ribbon will turn red to indicate that you are no longer signed in to your default environment.

2.2 Signing in

To sign into 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.

The two check boxes have the following effect:

- **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.

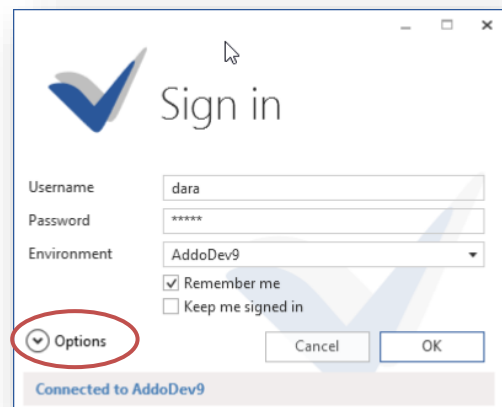


Figure 3 The Sign in dialog

The buttons:

- OK – by clicking this button, you log on to the selected environment. If success, the dialog will be closed. If not, you will receive an indication on why the sign in process failed. The dialog will remain open.
- Cancel – the Sign in dialog is simply closed, no action is taken.

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

The Ribbon button group General shows whether you are connected or not, and eventually which environment you are connected to.

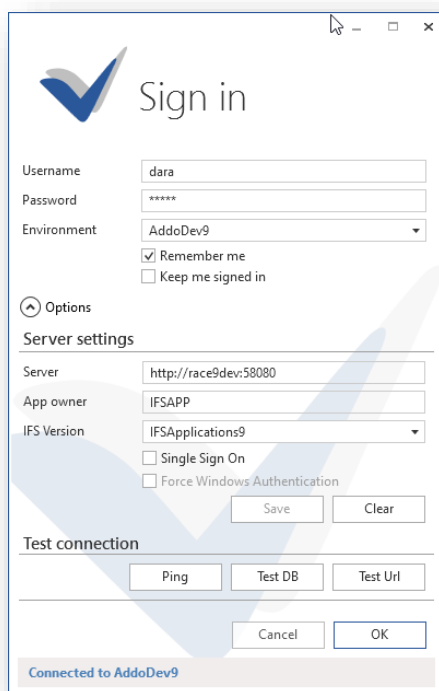
The image shows a Windows-style dialog box titled "Sign in" with the Addovation logo. It contains fields for Username (filled with "dara"), Password (masked with "*****"), and Environment (a dropdown menu showing "AddoDev9"). Below these are checkboxes for "Remember me" (checked) and "Keep me signed in" (unchecked). An "Options" button with an upward arrow is located below the checkboxes. The "Options" section is expanded, showing "Server settings" with fields for "Server" (http://race9dev:58080), "App owner" (IFSAPP), and "IFS Version" (IFSApplications9). There are checkboxes for "Single Sign On" and "Force Windows Authentication". "Save" and "Clear" buttons are at the bottom of the settings section. Below that is a "Test connection" section with "Ping", "Test DB", and "Test Url" buttons. At the very bottom are "Cancel" and "OK" buttons. A status bar at the bottom of the dialog says "Connected to AddoDev9".

Figure 4 Expanded 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 in the expanded area, the Environment field changes to *Custom* and the Save button gets enabled (provided you have entered values to all mandatory fields), and you can save environment which will be stored in the registry for later usage.

However, **we recommend** using the *Environment* page in the *Options* dialog to edit/configure the predefined environments or create new environments (see section 10.2.1 for a description on how to do this).

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 merge (include/utilize) information from IFS in the different applications in MS Office (Word/Excel/PowerPoint)

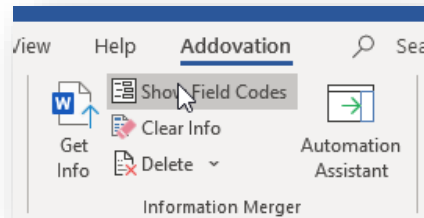


Figure 5 The Information Merger Ribbon button group

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. and thus utilizing information stored in IFS in your documents.

There are up to 4 different *pages (or tabs)* 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. *Grid Queries, Labels and Maligns* and *Document Blocks* are all depending on a purchased license to become visible.

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 utilizing IFS quick reports in your documents
- *Labels and mailings* – for creating and using/utilizing the mail merge functionality in Office
- *Document Blocks* – for building advanced, composite 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.

Note: 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).

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).

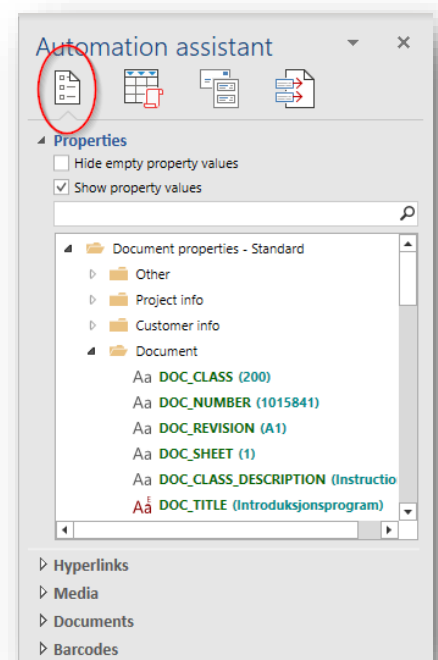


Figure 6 Automation Assistant - Properties page

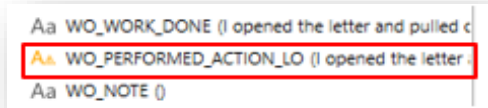


Figure 7 Property exceeding Word limit of 255 characters

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.

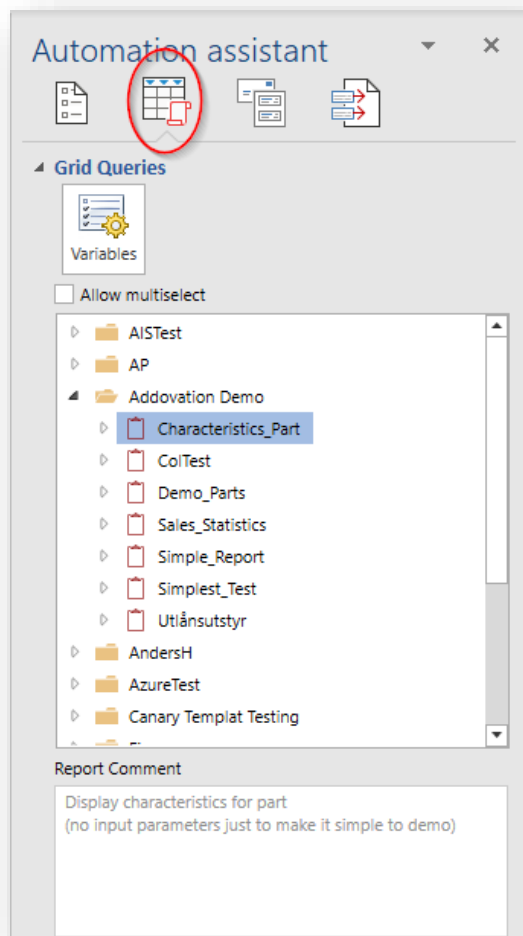
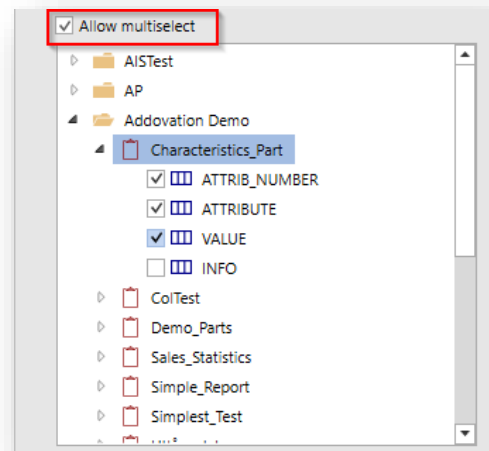


Figure 8 Grid queries navigation pane

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.



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.

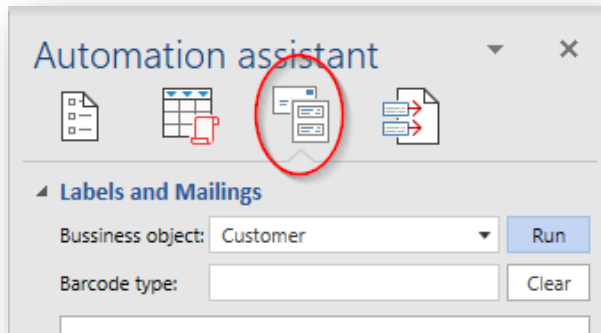


Figure 9 Labels and Mailings pane

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.

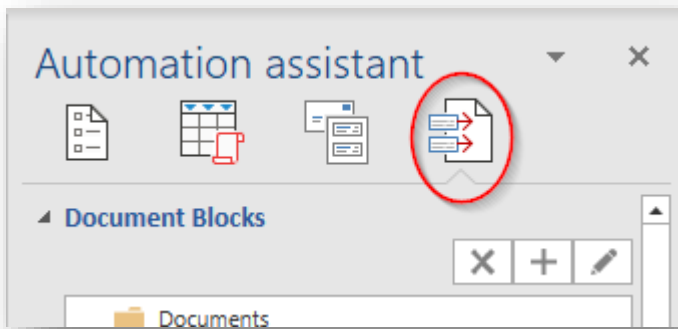


Figure 10 Document Blocks

3.2 How to create a template

In Office Automation Suite, you have a lot of template automation opportunities related to utilizing IFS information in your company documentation. 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. In the example below, we use Word. However, templates can be built using Excel and PowerPoint as well. When opening one of the Office applications, the 'Create From Template' button on the Addovation ribbon will find all template of the type corresponding to the Application you opened (Word, Excel or PowerPoint).

Steps to create a template:

1. Open **Word**
2. Click on the **Addovation** ribbon and log in with your standard IFS credentials. If you are targeting a single sign-on environment (or are using the Keep me signed in option), you will be logged on automatically.
3. Edit your template document and click **Check in new** to connect your document that is to be the new template to the correct class, format, and business object(s). Click the **Check In and Continue** button to get the document checked in to IFS, document number created and then checked out again.

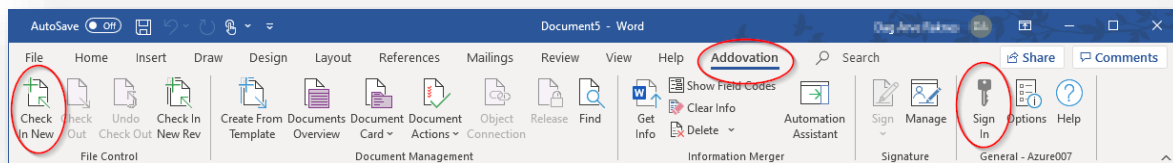


Figure 11 Addovation Ribbon



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 IFS information you would like to utilize in your template before you proceed building it.

- Click on the Automation Assistant (AA) ribbon button to open the AA task pane (see Figure 12). Once you have checked in your 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 Addovation ribbon.

- 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. A hidden place holder (Field code) for the information is stored in the document though. You can view the field codes by clicking the Field code button on the ribbon

- Do a quality check** of your document, before checking your template into IFS:
 - Click on **Show Field Codes**/ unclick **Show Field Codes**
 - Click on **Clear info**
 - Click on **Get info**
- IMPORTANT!** 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.

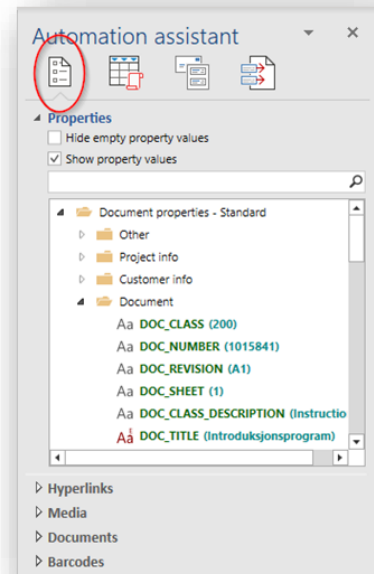


Figure 12 Properties task pane

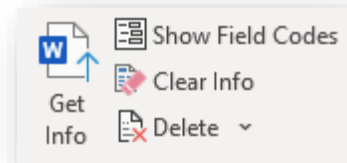


Figure 13 Information Merger ribbon buttons

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:

- Make sure your document is Checked in and out again and connected to the desired business object(s). This can be done using the **Object Connections** management dialog available from the ribbon.
- Open the Automation Assistant. The unsupported objects will now appear under the "Document properties – Custom" node (grey colored folders, see Figure 15). If it/they don't show up, click the Get Info button
- Right click on the object and select **Custom query** from the pop-up menu.

- In Simple mode (Simple tab) choose the Class/format wanted, or in the Advanced tab, add a Custom query

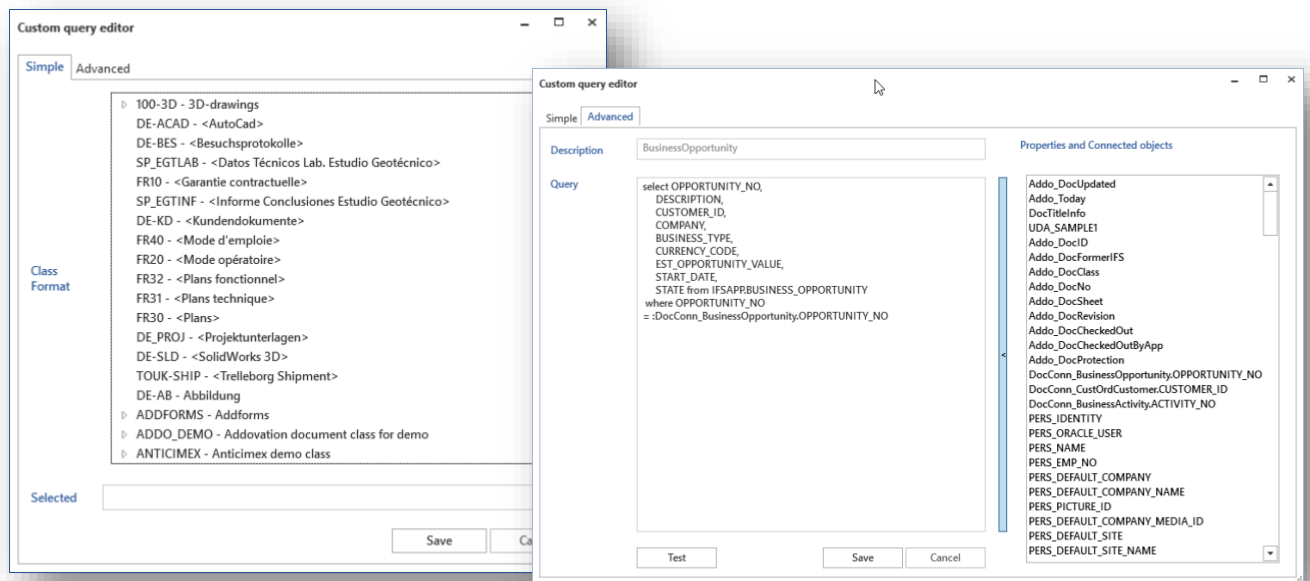
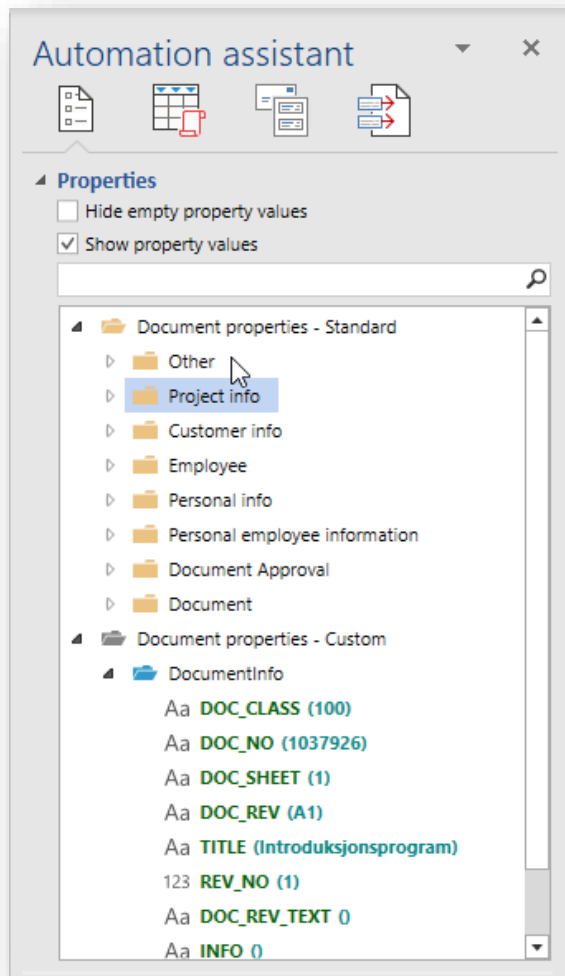


Figure 14 Custom query editor - two modes

- Click **Save**, the dialog closes.
- Press **Get Info** in the Addovation Ribbon
- 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 and used from the Automation Assistant.

Custom queries with modified query turn into blue (folders)

Figure 15 Properties after Custom query is defined and executed

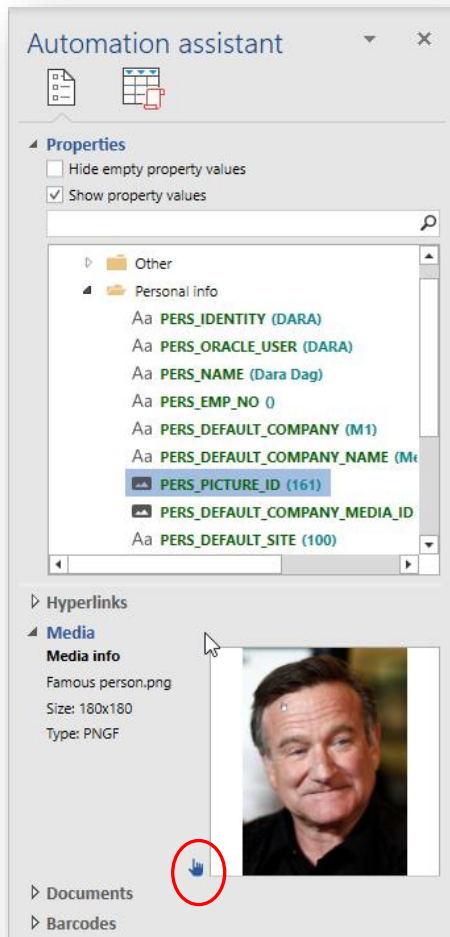


When a property is empty (no value) nothing is displayed in the document even though you have dragged the property into the document. To get all property placeholders displayed in the document, including empty properties, **hold the Ctrl key down while clicking the Get Info button** on the ribbon. By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

3.2.3 Adding pictures to the template

Using the AA in OAS 5, you can add pictures to your templates that will be updated automatically when the template is used. Examples where this function can be useful is product catalogs, CV's etc.

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



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.

Figure 16 Automation Assistant - Media

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:

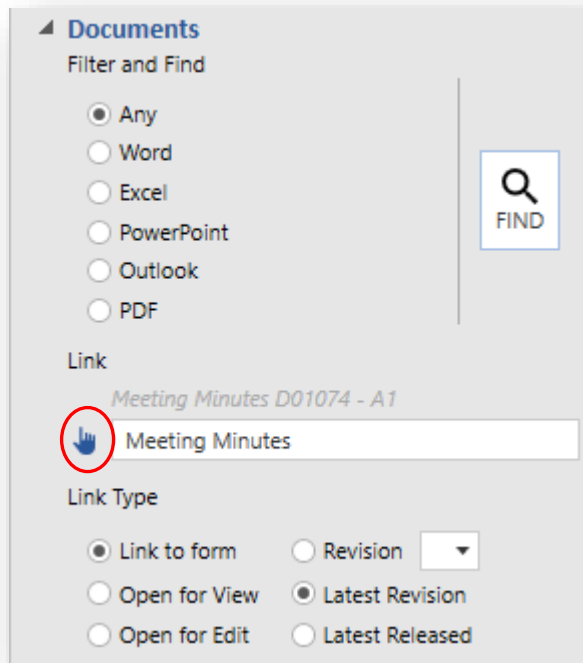


Figure 17 Documents Link

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.
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:

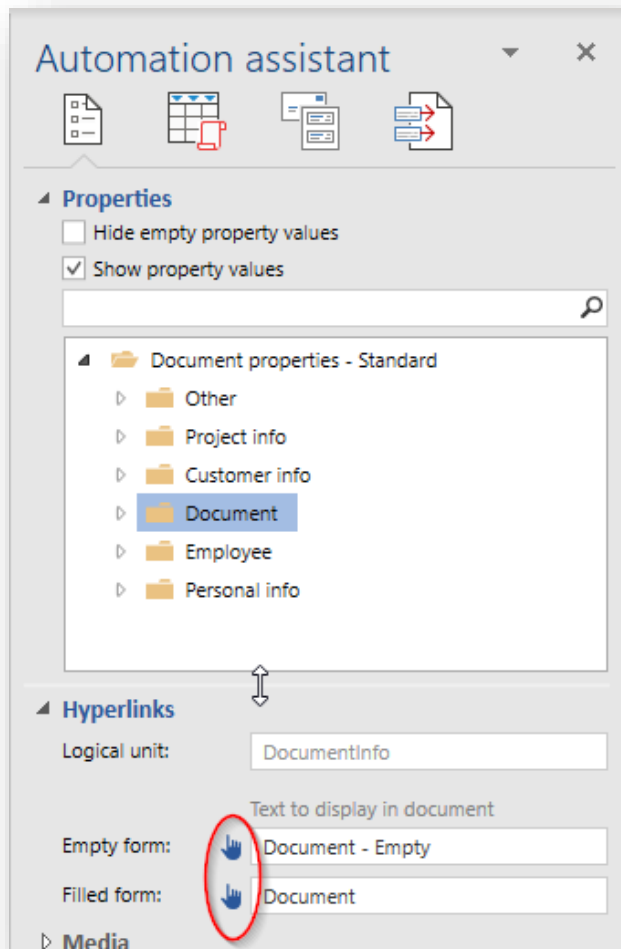


Figure 18 Hyperlinks section

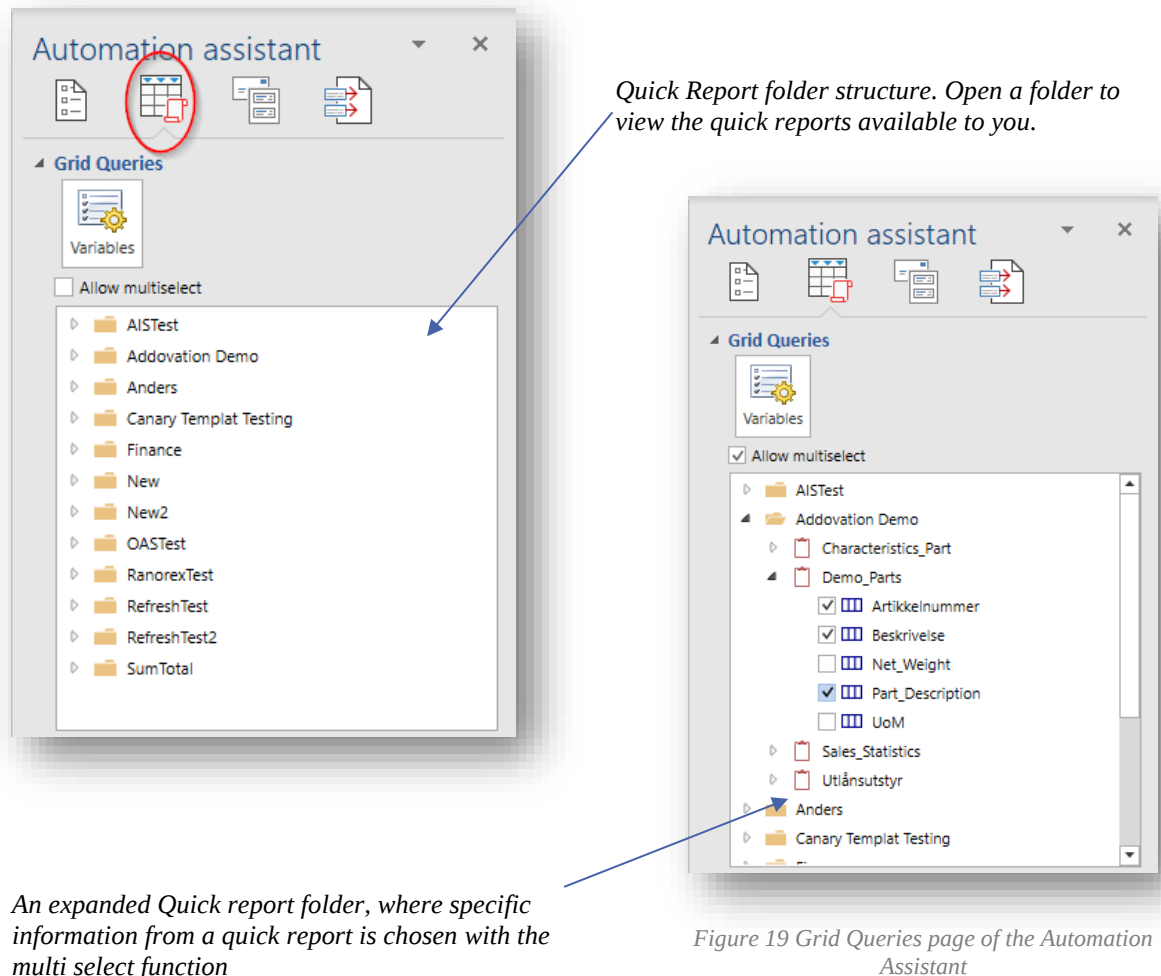
1. Click on / expand the **Hyperlink** section in the lower part of the Automation Assistant Properties page
2. In the properties tree view control, select the business object where the form you want to open is located
3. Edit the text to be displayed in the document in the textbox next to the hand symbols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

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.



3. By expanding the folders, you will see the available Quick Reports. By expanding the 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.

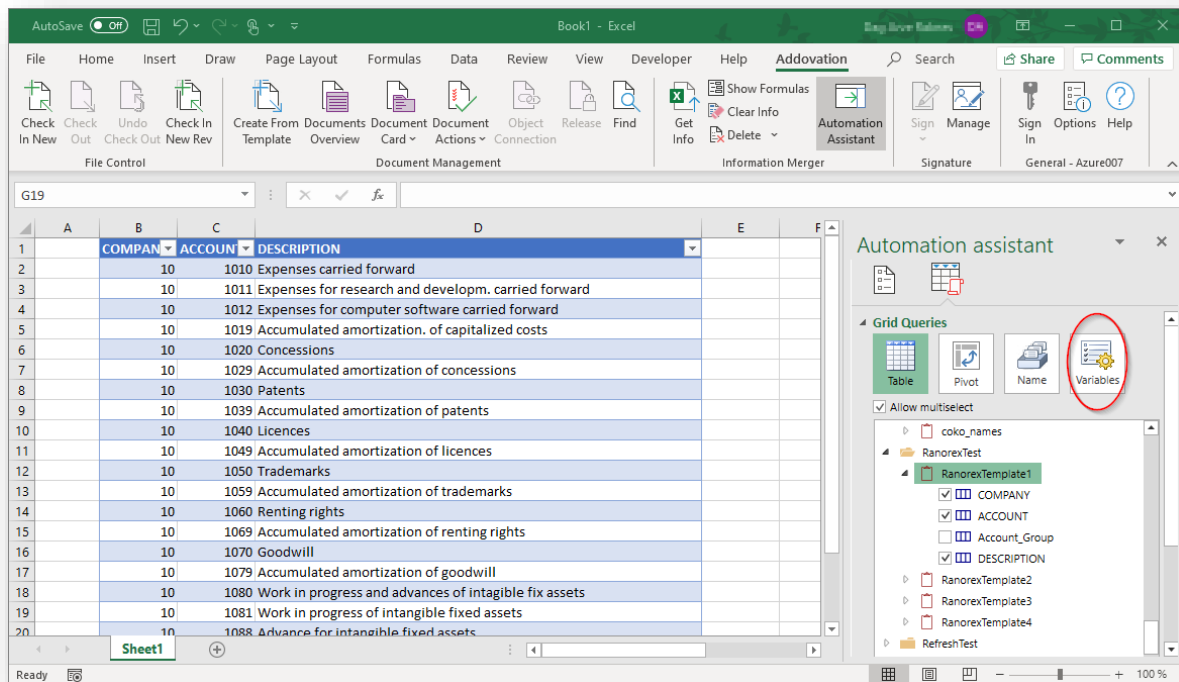
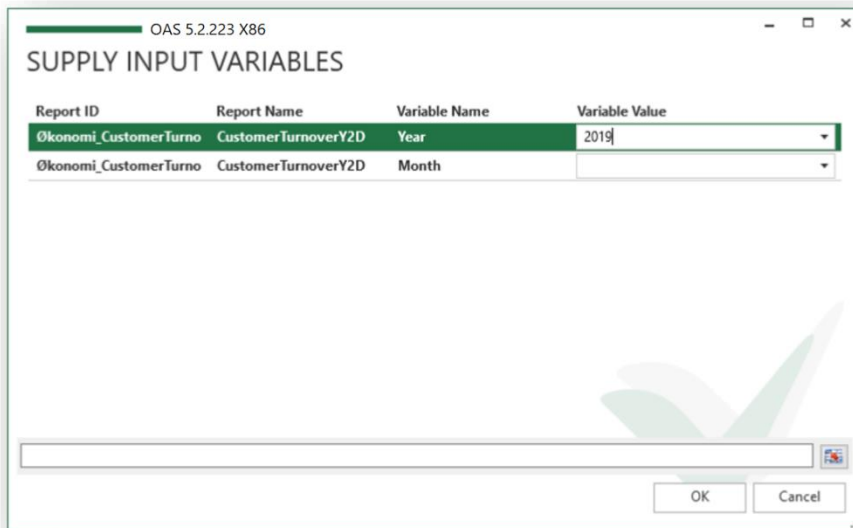


Figure 20 Quick reports into excel work sheet

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).



Report ID	Report Name	Variable Name	Variable Value
Økonomi_CustomerTurno	CustomerTurnoverY2D	Year	2019
Økonomi_CustomerTurno	CustomerTurnoverY2D	Month	

Figure 21 Grid query report Variable input dialog

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 20 Quick reports into excel work sheet)

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.

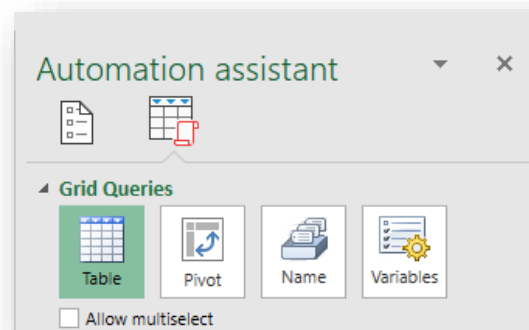


Figure 22 Table, Pivot and Name are available from the Automation Assistant

3.2.8 Named Variables

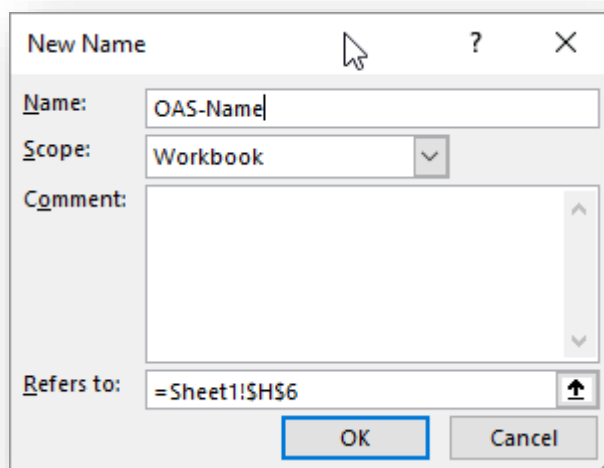


Figure 23 Define Name

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

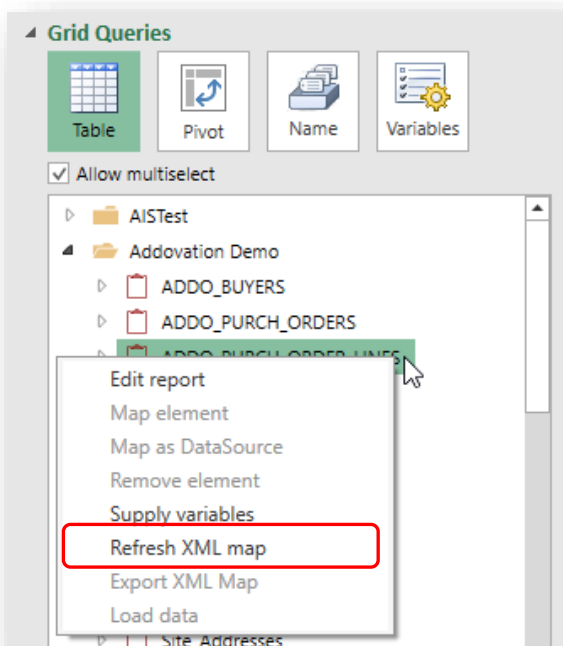


Figure 24 Grid Queries reports context menu

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 clicks on the report and select the **Refresh XML maps** menu item from the 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):

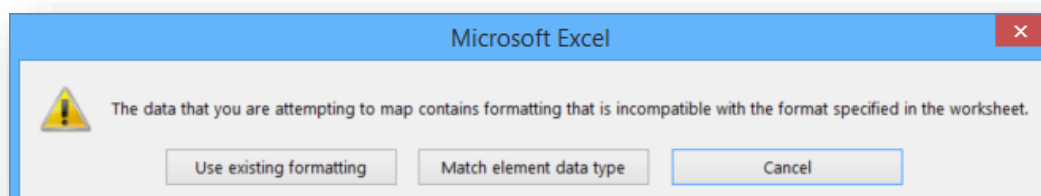


Figure 25 Dialog box

3.2.10 Document Blocks

The Document Blocks functionality represents a powerful addition to the Microsoft 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

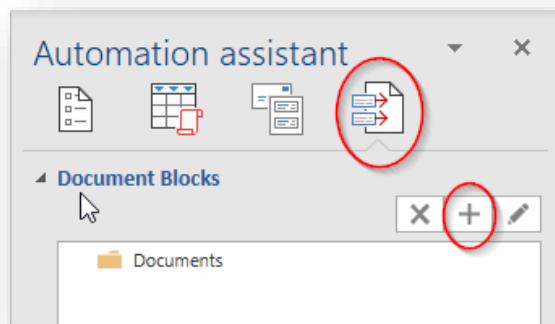


Figure 26 Automation Assistant

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

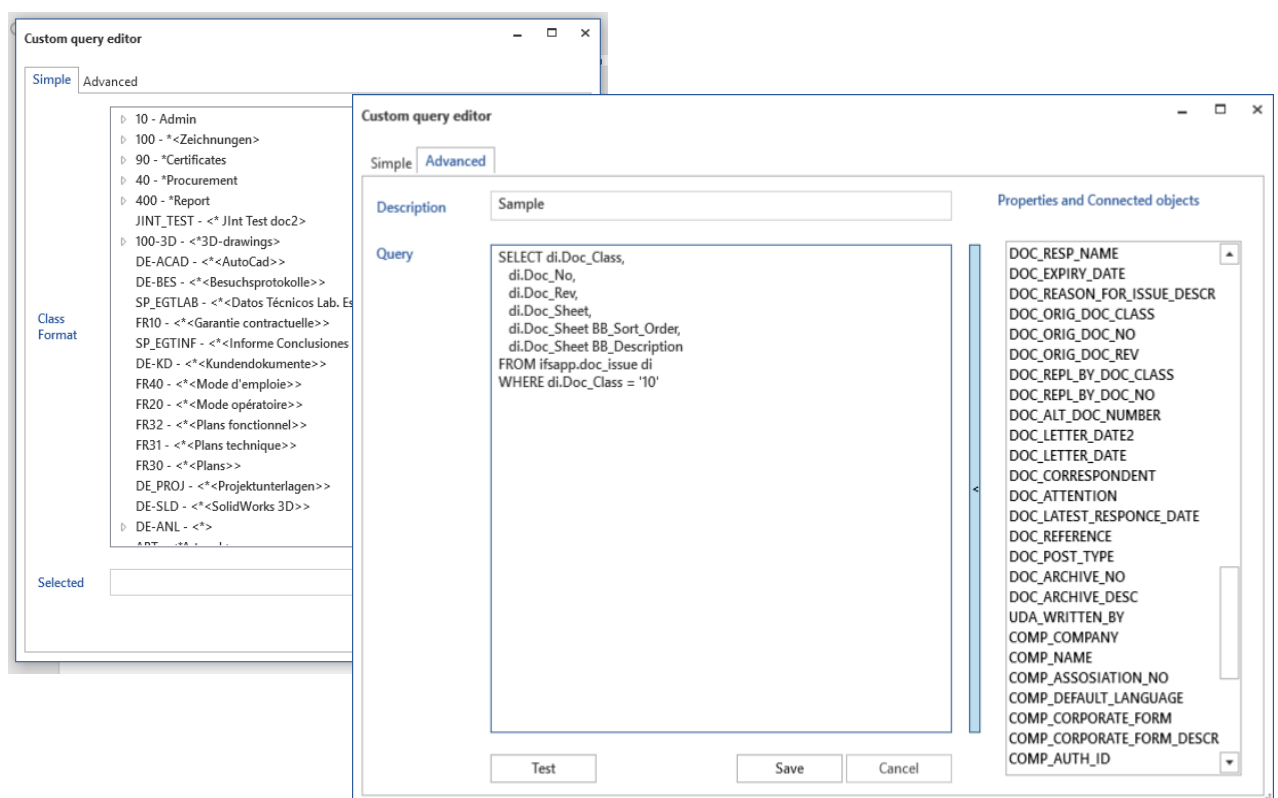


Figure 27 The query editor - Simple and Advanced mode

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

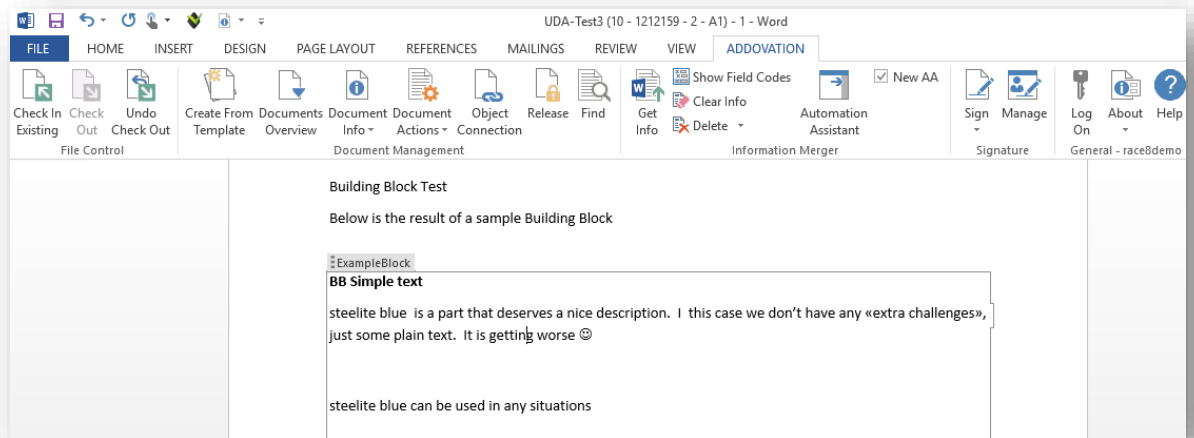


Figure 28 Document with a Document Block

3.2.11 Executing Macros

In OAS there is a built-in functionality to execute macros at two given points:

- Right before the **Get Info** code is executed, and
- Right after the **Get Info** code has been executed

The precondition for OAS to recognize that there are macros to be run, is the naming of the macros, which must be one of the following

- **AddoPreGetInfo** and/or
- **AddoPostGetInfo**

So, when you click the **Get Info** button, OAS first tries to execute the **AddoPreGetInfo** macro. If you have defined this in your document/workbook/presentation, it will be executed *before* any of the Get Info code is executed. And when the Get Info code has completed, OAS tries to execute the **AddoPostGetInfo** macro. If this macro is defined, it will be executed *after* all the activities during Get Info have been completed. That includes fetching property values, executing grid queries and loading any document blocks.

This functionality applies to *Word*, *Excel*, and *PowerPoint*.

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

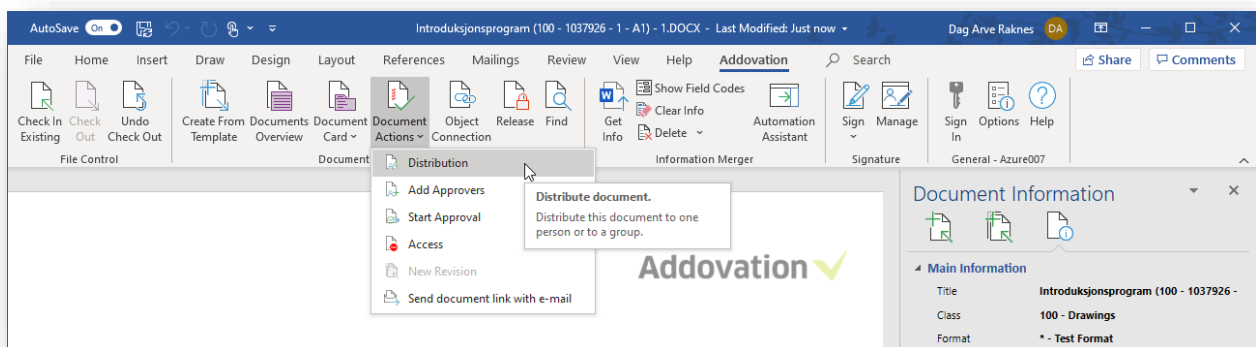


Figure 29 Document Actions available from OAS

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'

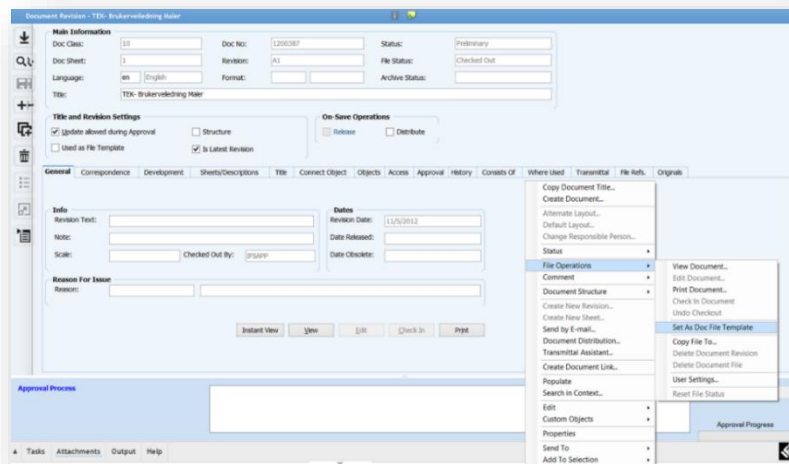


Figure 30 Document revision in IFS

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.
7. When you click the **Create Document ...** button, the CREATE DOCUMENT FROM TEMPLATE dialog will open, asking for metadata needed to create a new document (like e.g., Class/format, Object connections etc.). After the document has been created, it will then be opened in the appropriate Office Application.

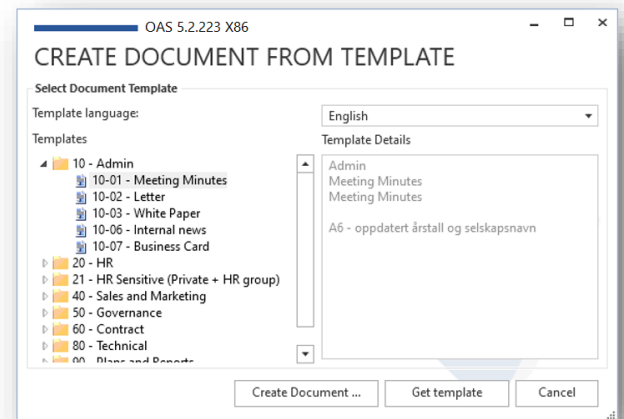


Figure 31 Create Document from Template dialog

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.

Using the Get template button, 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

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’

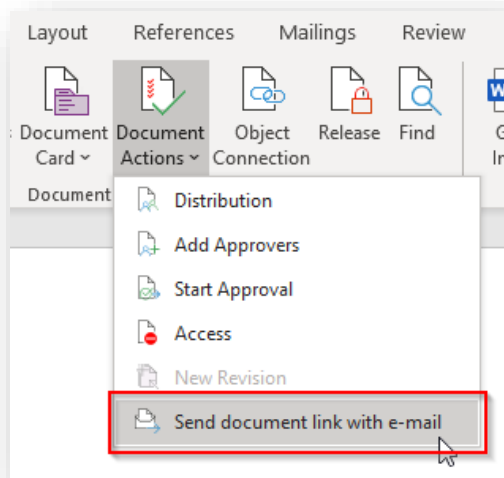


Figure 32 Send the document link

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

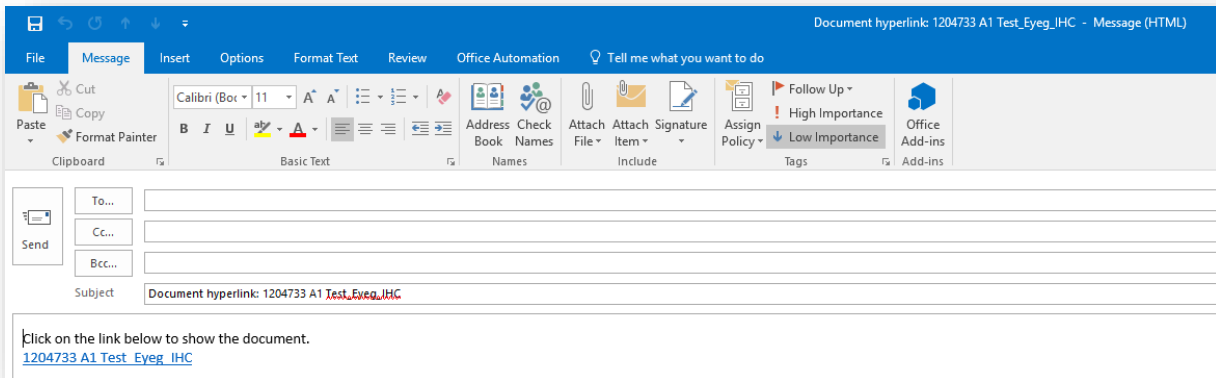


Figure 33 Mail item opened with link ready for sending

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:

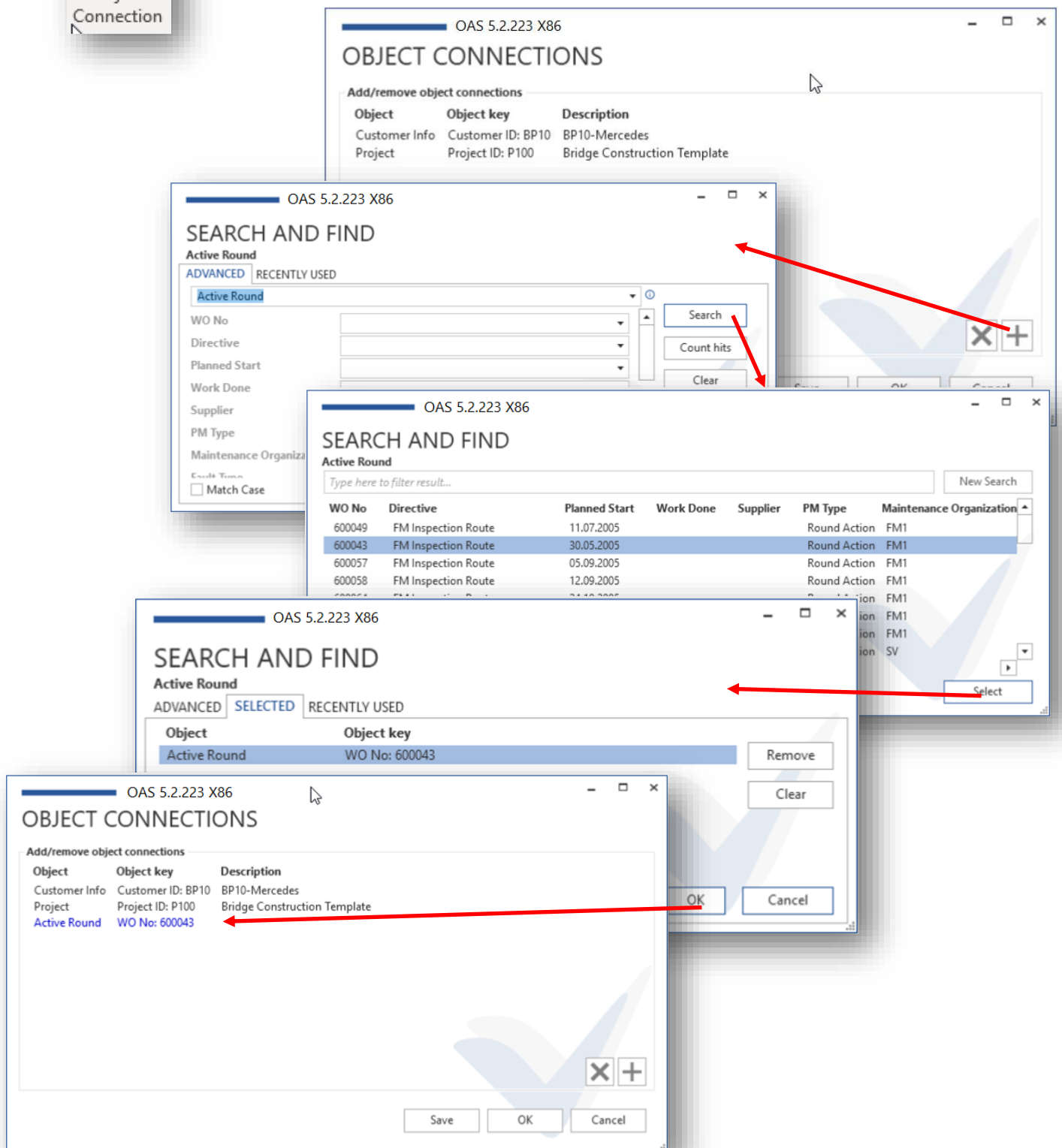


Figure 34 Object Connection process

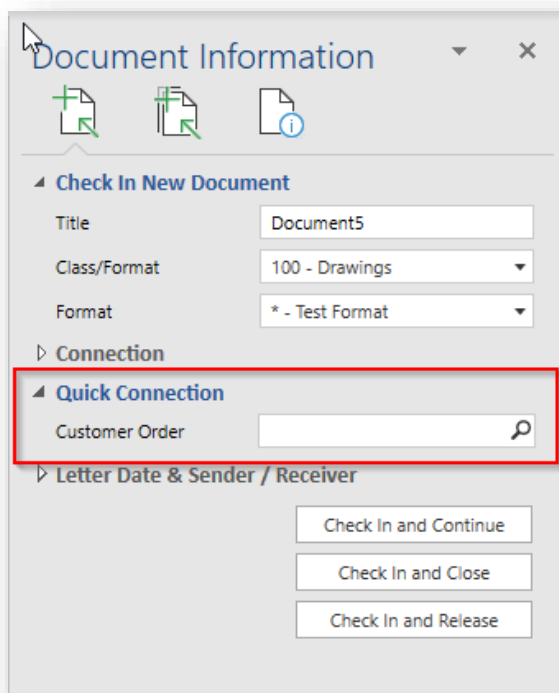
Steps to connect your document to a business object (See Figure 34 Object Connection process):

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



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 'Customer Order' quick connection within the class/format combination.

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

Figure 35 Quick Connections showing up in Check in New Document task pane

4.5.2 How to configure quick connections in IFS

Quick connections significantly simplify the process of connecting documents to the right business objects. They are configured in IFS, and in this section, we will show you the way to set up a quick connection.

1. 'Sign In' into 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.

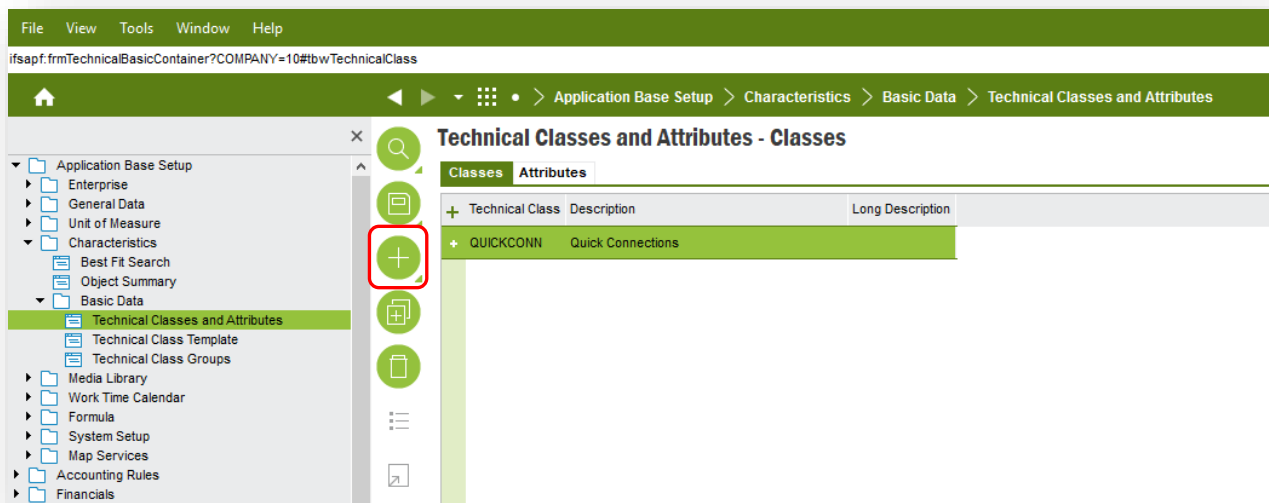


Figure 36 Configure Quick Connection

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, OBJCONN2 and 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

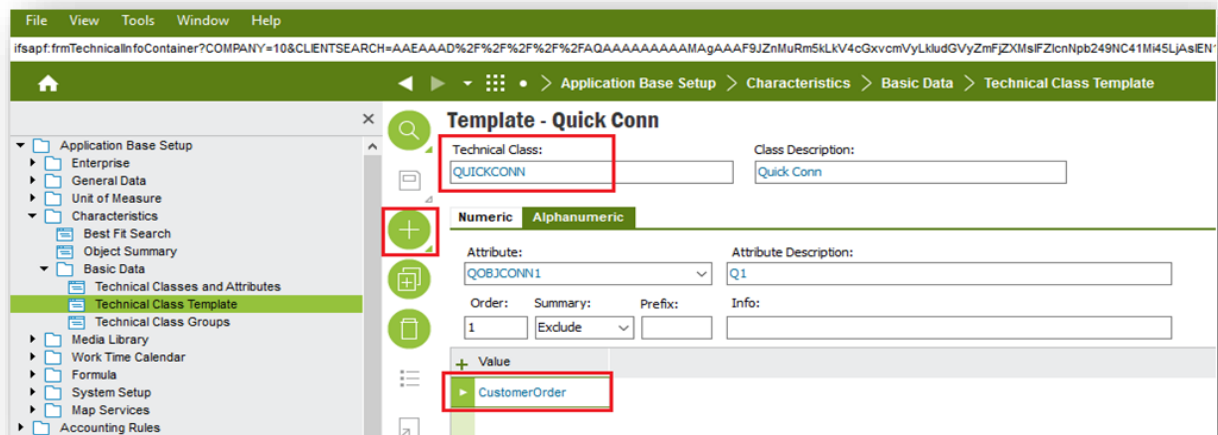


Figure 37 Template Quick Connection

- 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 to 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.
 - e) Remember to select the appropriate value as logical unit, e.g., “Customer Order” and Approve

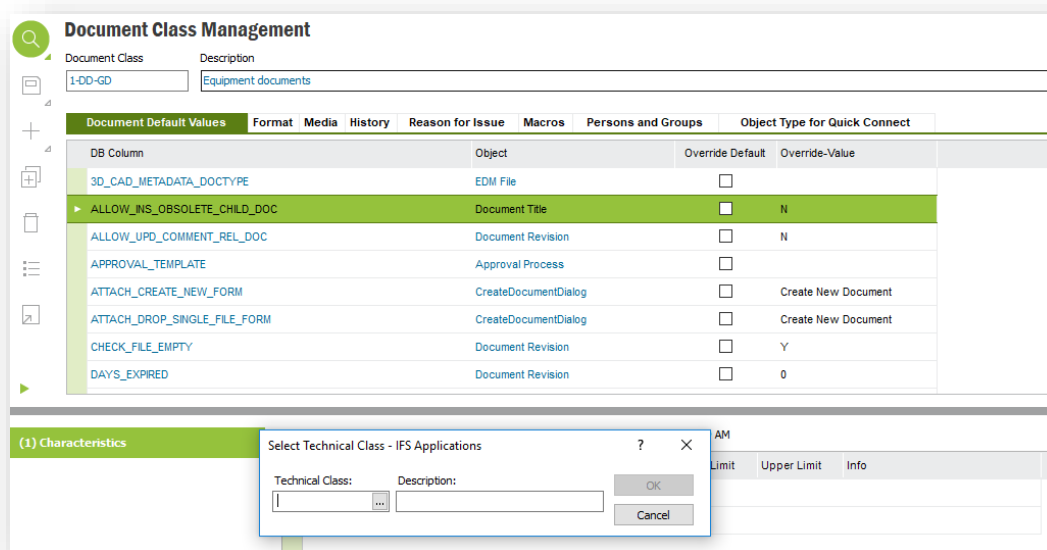


Figure 38 Document class management

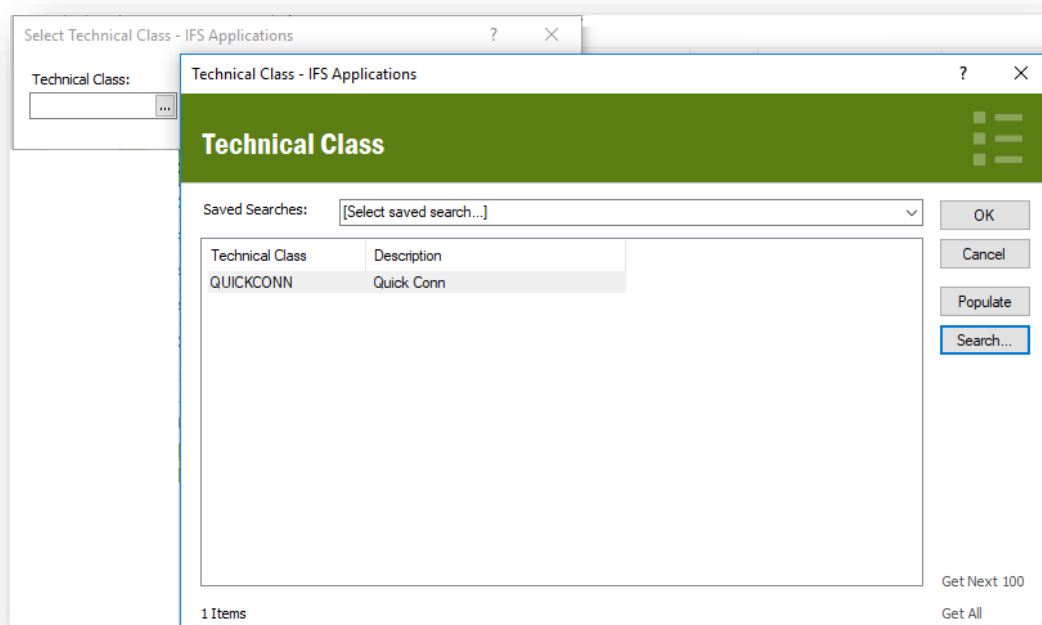


Figure 39 Select Technical Class

Document Management > Basic Data > Document Class Management

Document Class Management

Document Class: 1-DD-GD Description: Equipment documents

Document Default Values | **Format** | Media | History | Reason for Issue | Macros | Persons and Groups | Object Type for Quick Connect

DB Column	Object	Override Default	Override-Value
3D_CAD_METADATA_DOCTYPE	EDM File	☐	
ALLOW_INS_OBSOLETE_CHILD_DOC	Document Title	☐	N
ALLOW_UPD_COMMENT_REL_DOC	Document Revision	☐	N
APPROVAL_TEMPLATE	Approval Process	☐	
ATTACH_CREATE_NEW_FORM	CreateDocumentDialog	☐	Create New Document
ATTACH_DROP_SINGLE_FILE_FORM	CreateDocumentDialog	☐	Create New Document
CHECK_FILE_EMPTY	Document Revision	☐	Y
DAYS_EXPIRED	Document Revision	☐	0

(1) Characteristics

Technical Class: QUICKCONN, Quick Conn - Not Approved - ALAIN - 8/22/2018 7:51:25 AM

Attribute Description	Value	Technical UoM	Lower Limit	Upper Limit	Info
Anders2					
Q1					

Figure 40 Document class management

Document Management > Basic Data > Document Class Management

Document Class Management

Document Class: 1-DD-GD Description: Equipment documents

Document Default Values | **Format** | Media | History | Reason for Issue | Macros | Persons and Groups | Object Type for Quick Connect

Format	Description
*	Any format

(1) Characteristics

Technical Class: QUICKCONN, Quick Conn - Not Approved - ALAIN - 8/22/2018 7:52:46 AM

Attribute Description	Value	Technical UoM	Lower Limit	Upper Limit	Info
Anders2					
Q1					

Figure 41 Document class management - Format

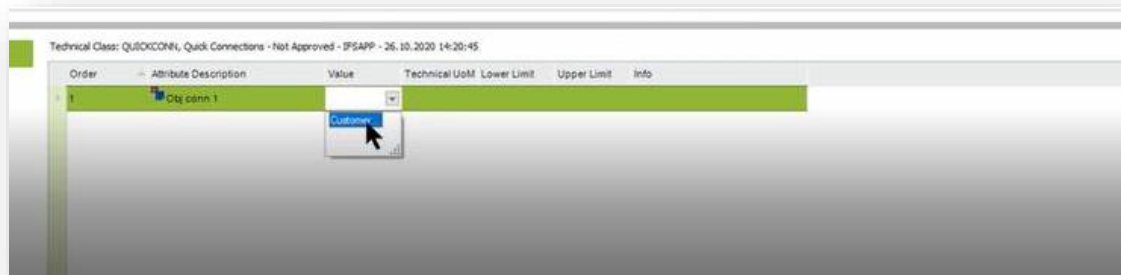


Figure 42 Select values

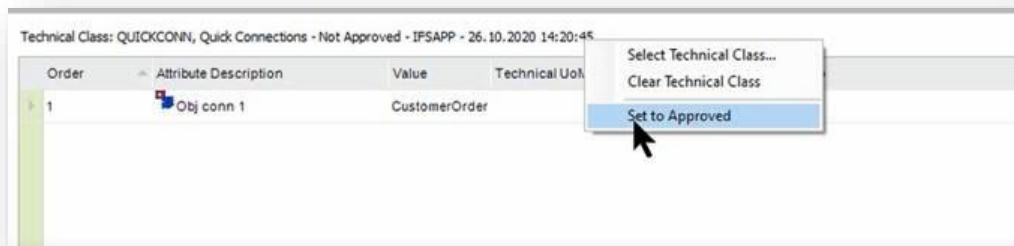


Figure 43 Set to Approved

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

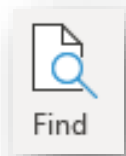


Figure 44 Find Button

Searching for 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.

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

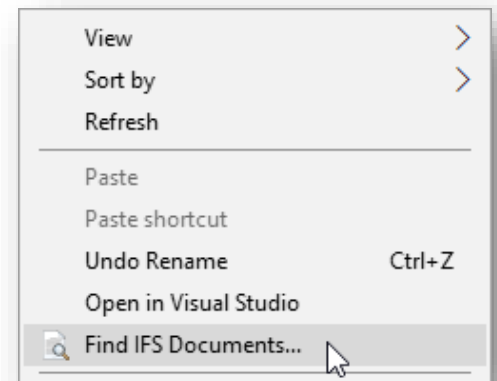


Figure 45 Desktop context

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 'SEARCH AND FIND' 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 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.

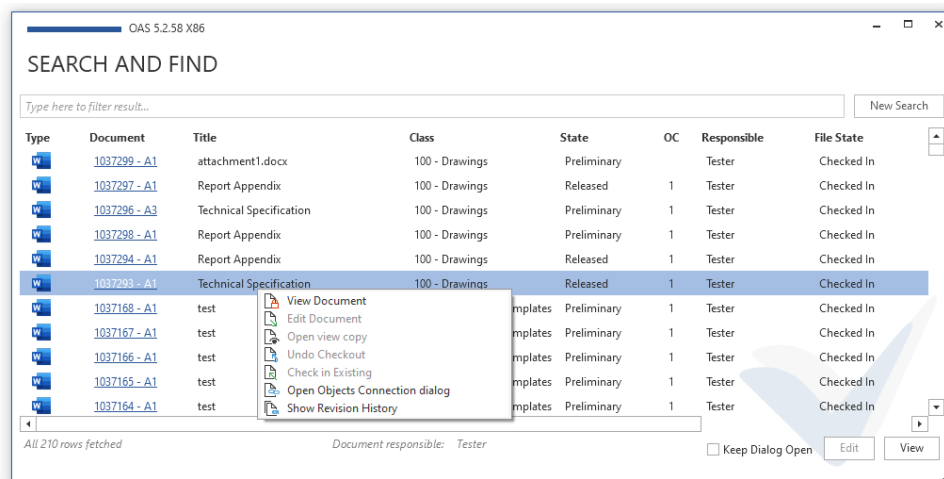


Figure 46 SEARCH AND FIND dialog - result mode context menu

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.

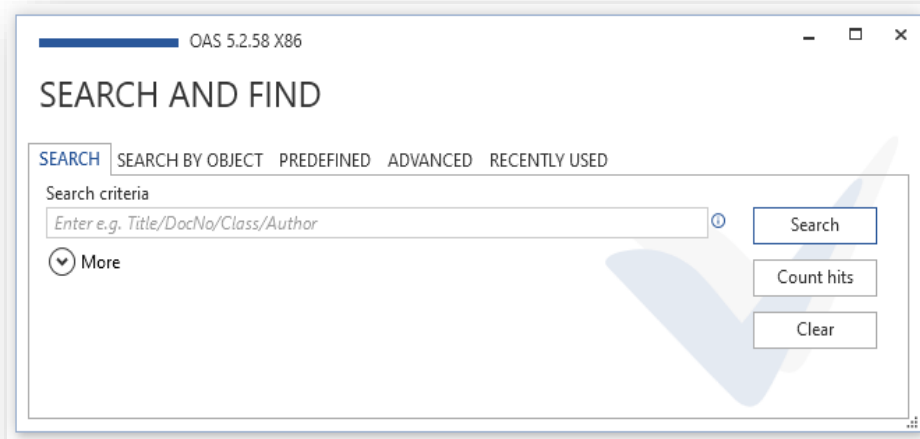


Figure 47 SEARCH AND FIND dialog in startup mode

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 *contain* the search text in the *title* of the document.

OAS 5.2.58 X86

SEARCH AND FIND

SEARCH | SEARCH BY OBJECT | PREDEFINED | ADVANCED | RECENTLY USED

Search criteria
Enter e.g. Title/DocNo/Class/Author

Search

Count hits

Clear

Document Content search
Enter document content search text...

Release level
Latest

My relation to document
☒ Only where I'm involved

From date *
08/17/2022

To date *
11/15/2022

☐ Any date *

* All dates refer to Modified date

Figure 48 SEARCH AND FIND dialog in expanded mode

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).

In expanded mode, you can select additional options:

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 checkbox.

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.

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).



TIP!

You can configure how the SEARCH AND FIND dialog opens by default. See the OAS Options | Preferences page section for details. You can tailor whether the dialog always opens in expanded mode and the 'Only where I'm involved' and 'Any Date' checkboxes are ticked or not by default.

Document Content search – this is a really powerful search option that enables you to search for document(s) which contains the search text *within the document itself*.

In order to use Document Content search, we need to synchronize corresponding Text Index in IFS (“DOCUMENT_CONTENT_TIX”) in regular intervals. ***This is normally an administrator task, so it should be included in the regular tasks that the IT department do.*** Anyway, 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.

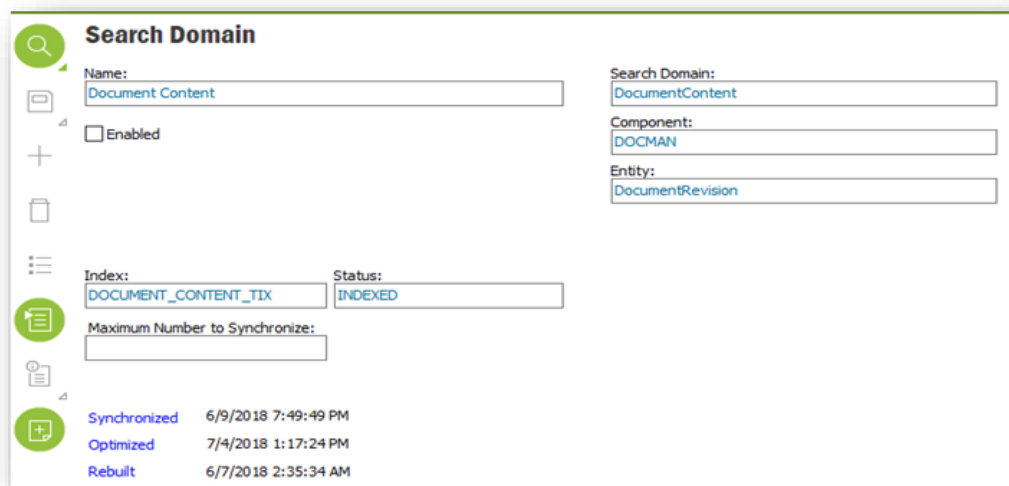


Figure 49 Synchronizing Indexes using Search Domains

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.

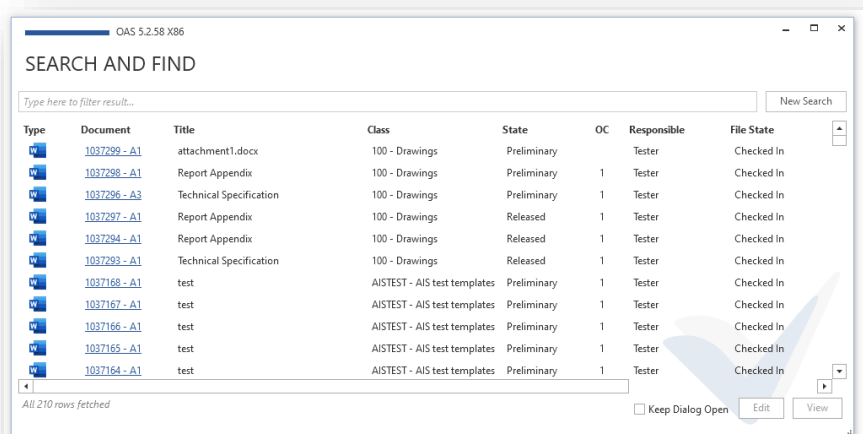


Figure 50 SEARCH AND FIND dialog in result mode

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).

By entering text in the input field, you can filter the result. E.g., in the example shown here, we entered the text “Case” in the *Type here to filter results...* field and thus narrowed the search as shown in Figure 51 SEARCH AND FIND result mode filtering

In the case that there are more than 200 rows in the result dialog, note that the text below the result list says, “200 rows fetched out of nnn” (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 an additional 500 rows as you approach the end of the list, until all rows matching the criteria has been loaded.

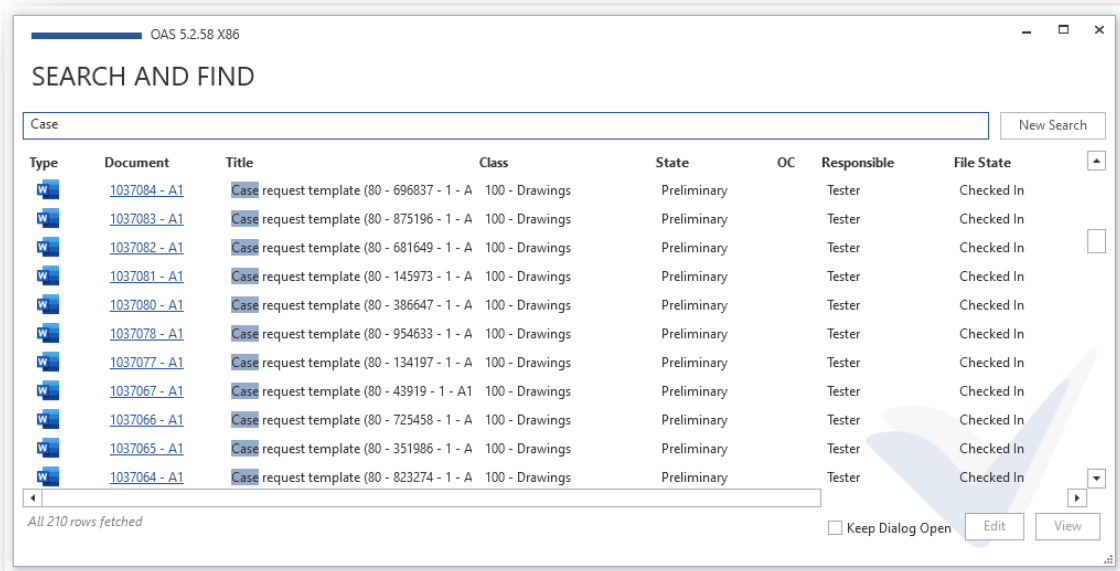


Figure 51 SEARCH AND FIND result mode filtering

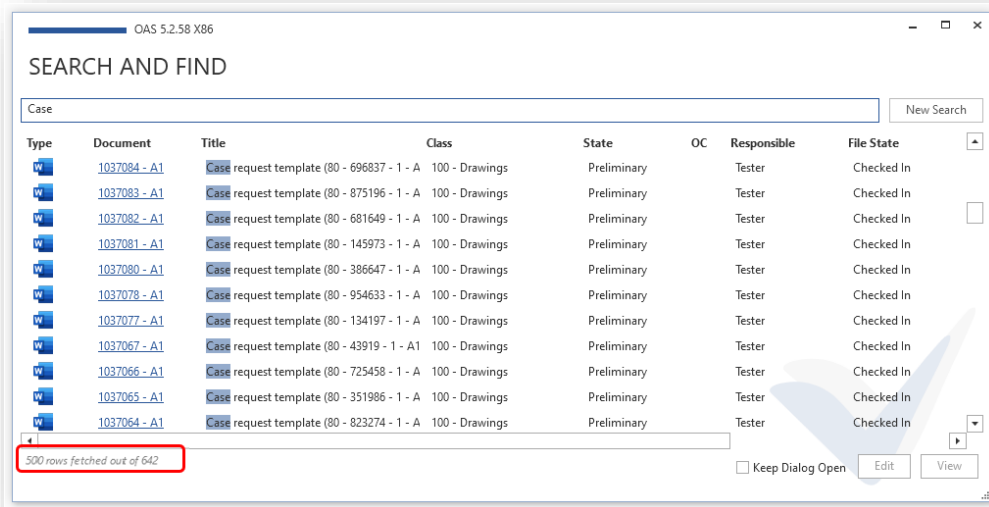


Figure 52 SEARCH AND FIND with partial result fetched



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. Consider narrowing your search criteria if this is the case.

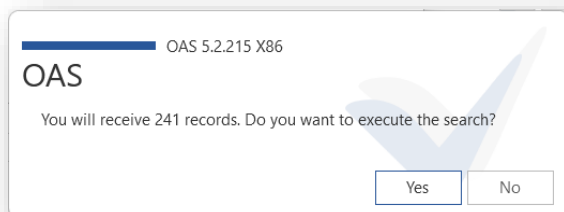


Figure 53 The Count hits result dialog

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 your 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.

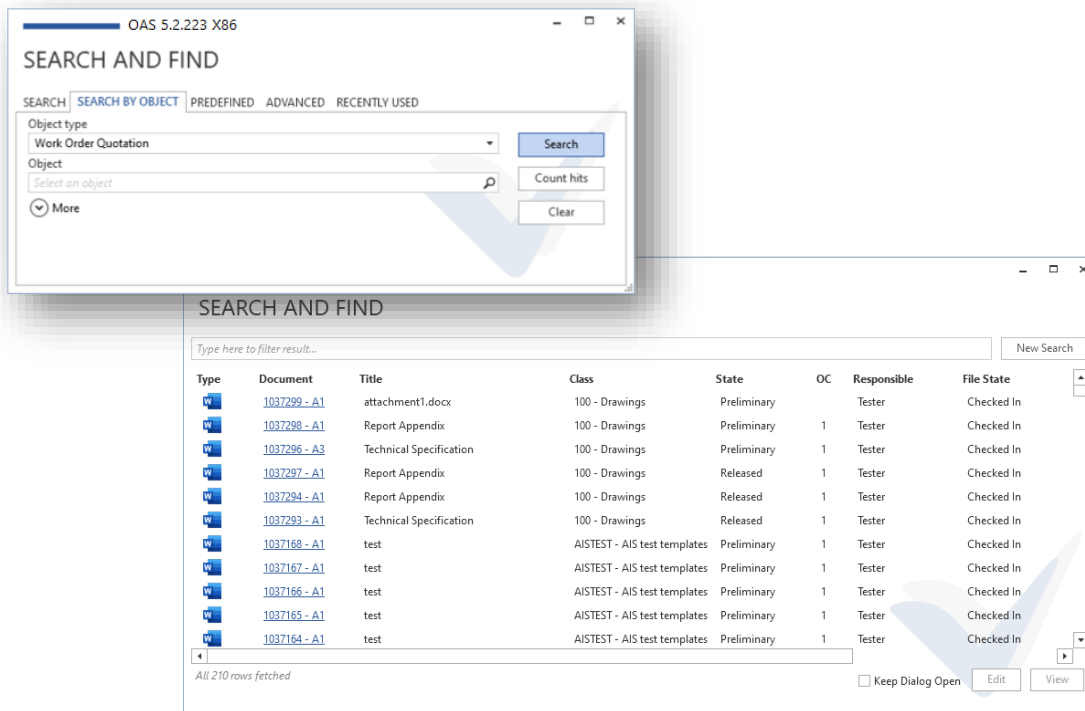
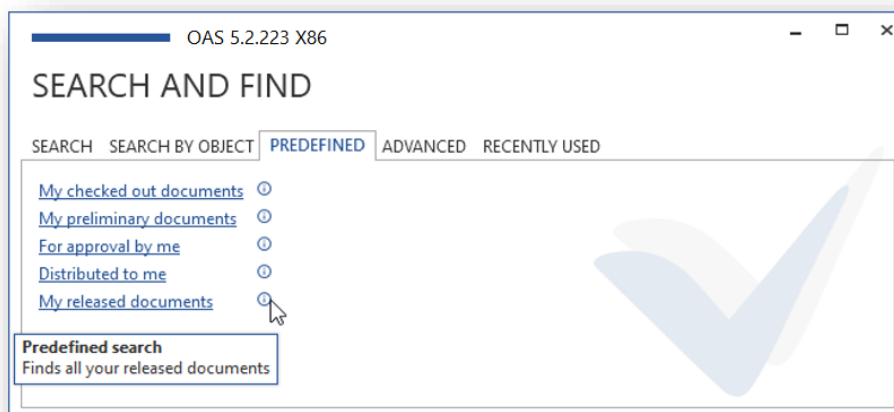


Figure 54 Search by Object

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 55 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 “100”, you may enter the string “%100%” into the Document Class field.

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

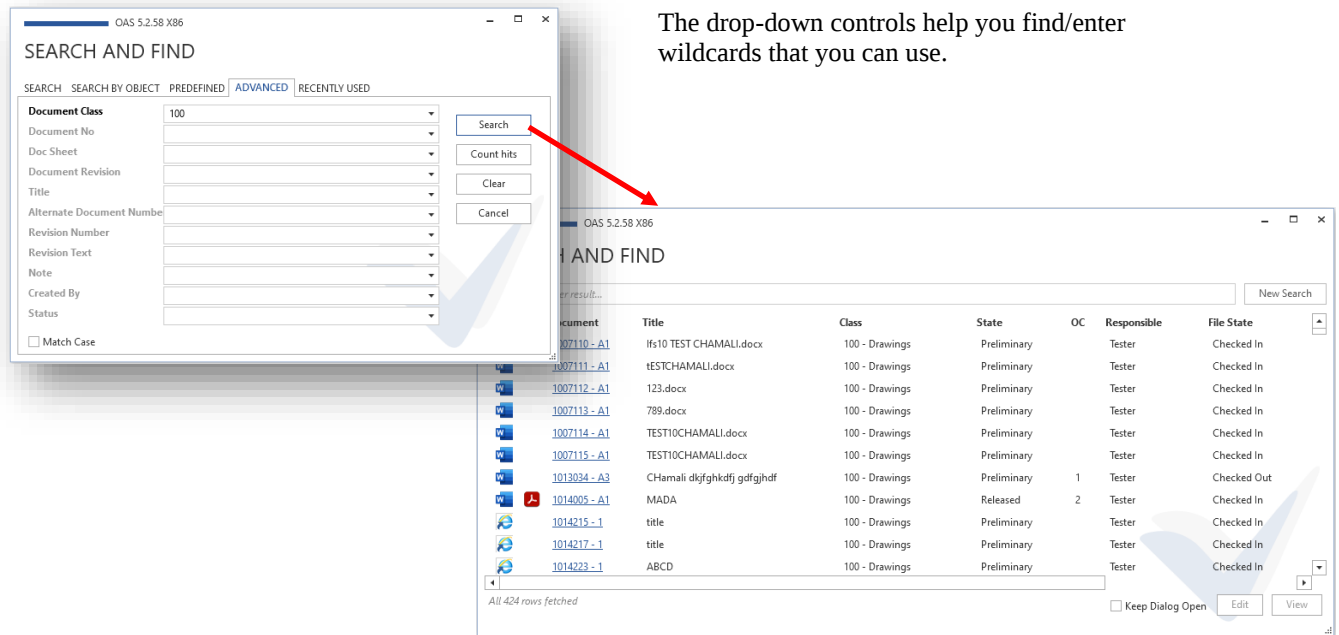


Figure 56 SEARCH AND FIND - ADVANCE tab

4.6.6 The RECENTLY USED tab

Using RECENTLY USED tab, 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.

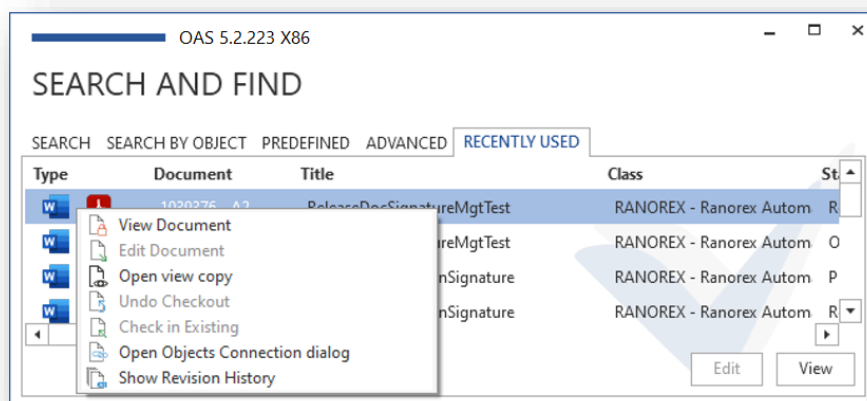


Figure 57 SEARCH AND FIND - RECENTLY USED tab

4.6.7 Options in SEARCH AND FIND Result mode

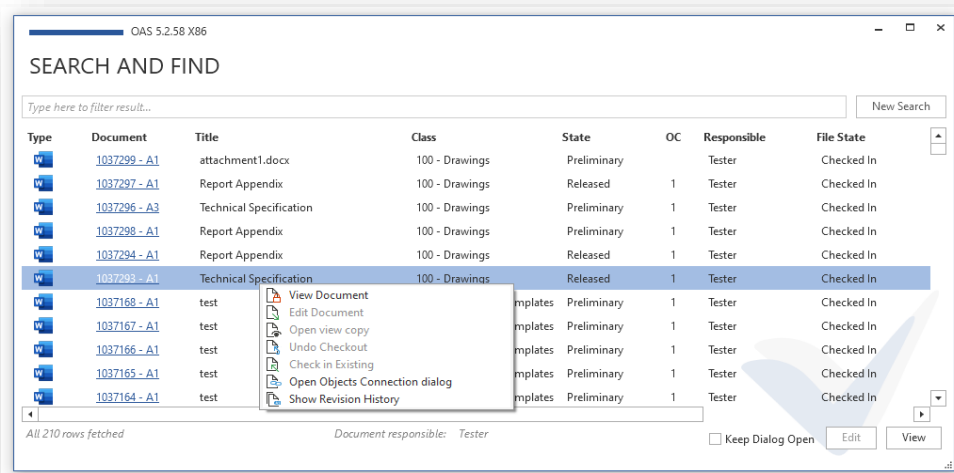


Figure 58 SEARCH AND FIND - Context menu in result view

When the SEARCH AND FIND dialog is in the result mode, there are several operations you can do to the listed documents. The two most used operations are edit and view document, which can be activated by the Edit and View buttons at the bottom of the dialog. They also appear in the context menu.

You can also double-click directly on the document icons to open a document for view:

- If you double-click on the Word icon, the original document is checked out with write protection and a prefix of “Copy of ...”.
- If you double-click on the Adobe icon, the view copy document will be opened.

In the Document column, the document number is listed as a hyperlink. Clicking 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 work the same as the Edit and View buttons.

Undo Checkout – this option becomes available if a document is already 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.

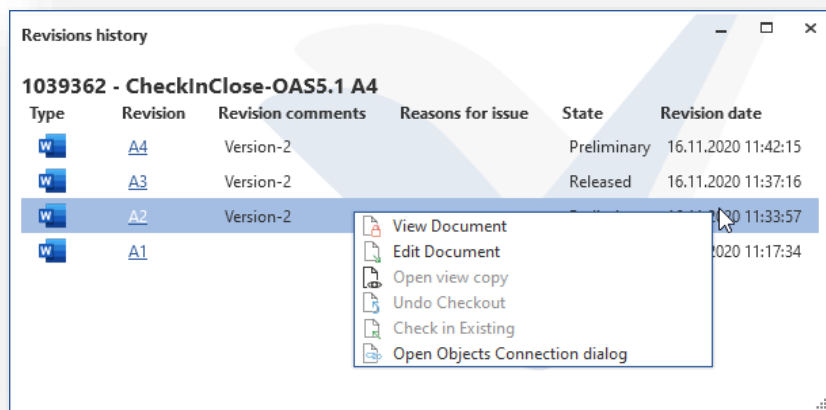


Figure 59 SEARCH AND FIND - Document revision history dialog

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(s). Both these fields have a magnifier button which opens the Search and find dialog – in BO mode.

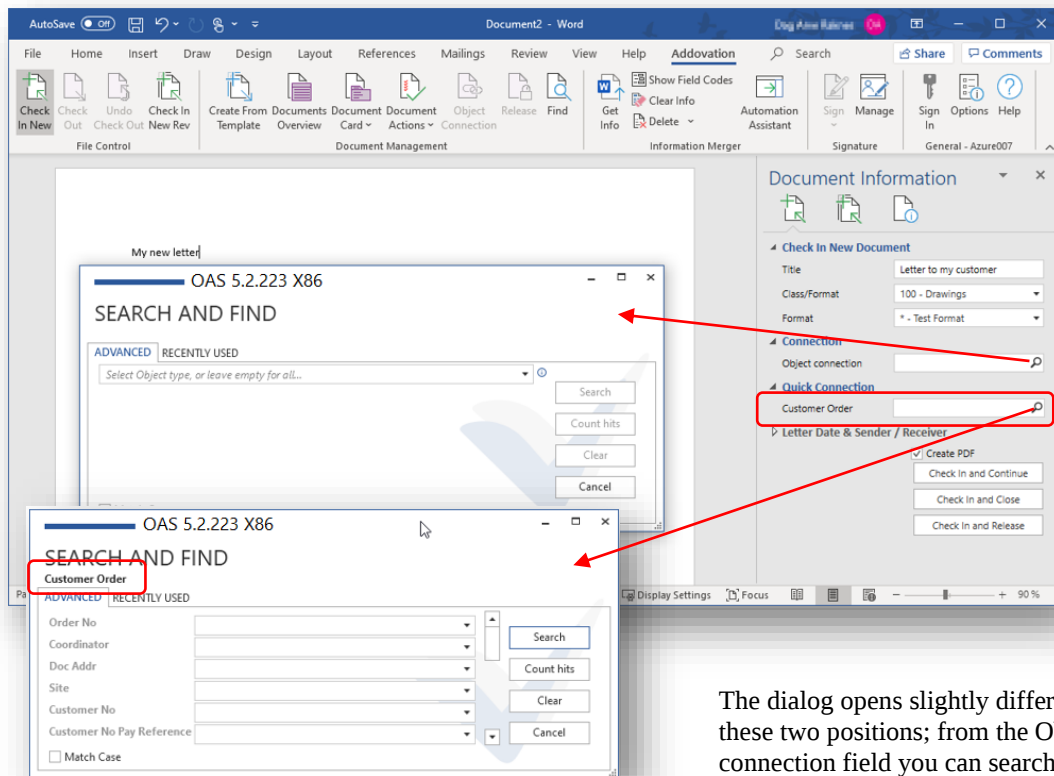


Figure 60 SEARCH AND FIND - Business Objects mode

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 Customer Order has already been selected, and you can only search for a BO of this type.

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.

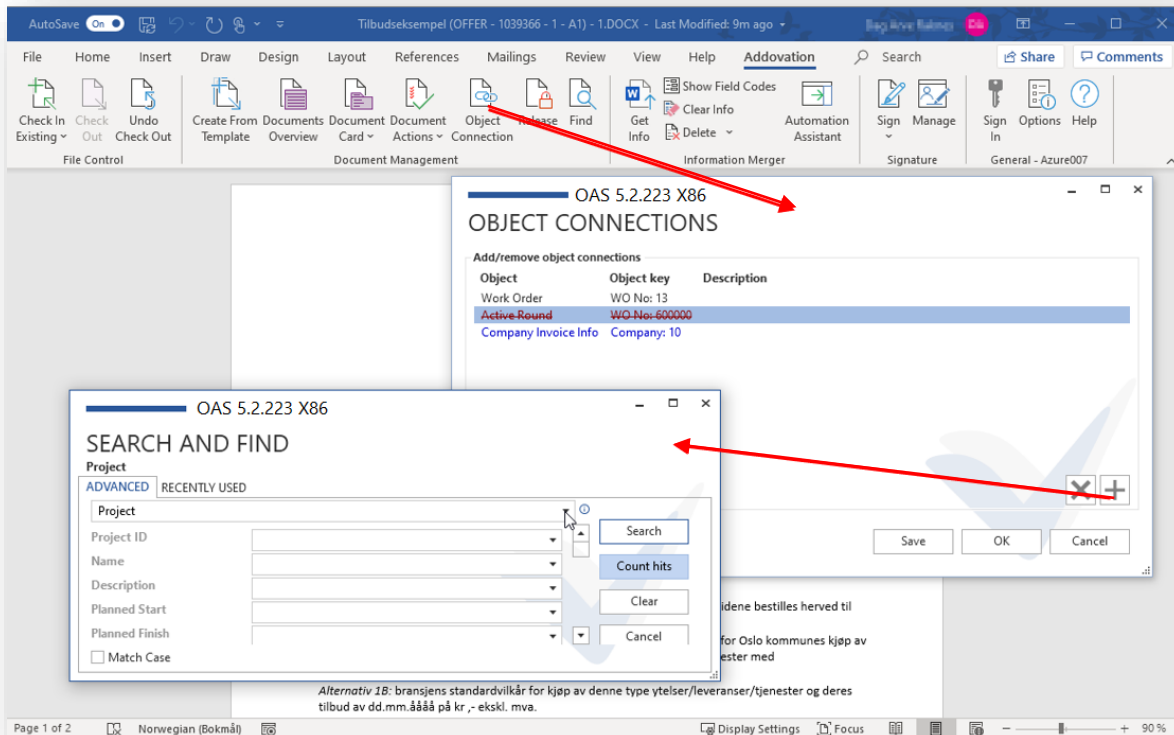


Figure 61 Object connection maintenance dialog

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 Figure 61 Object connection maintenance dialog.

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 SEARCH 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 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 Figure 62 SEARCH AND FIND - Business Objects mode)
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 business objects will be shown
5. Mark one of the business objects 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.

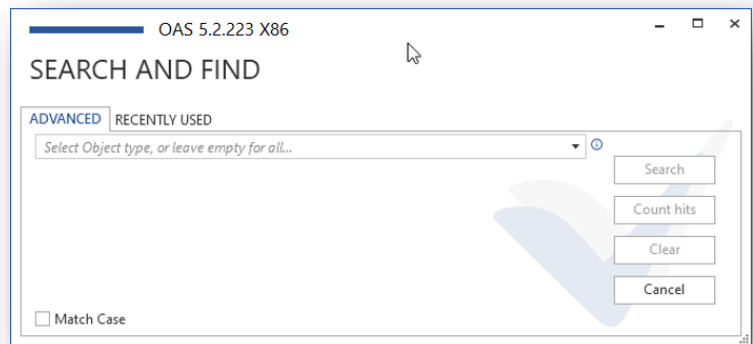


Figure 62 SEARCH AND FIND - any business object mode

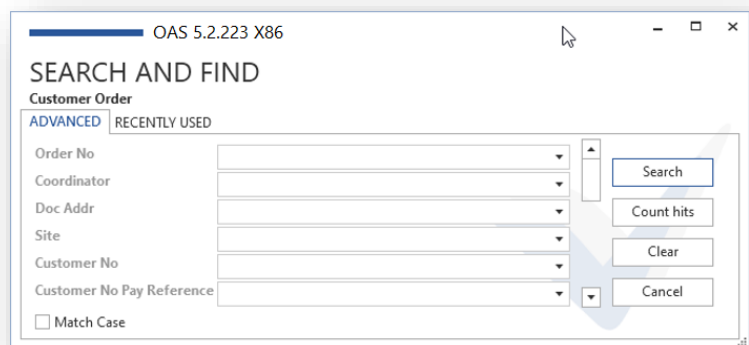


Figure 63 SEARCH AND FIND - predefined business object mode

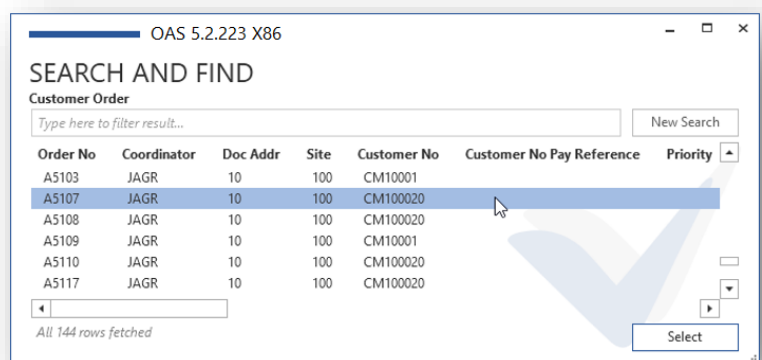


Figure 64 SEARCH AND FIND - Search result list

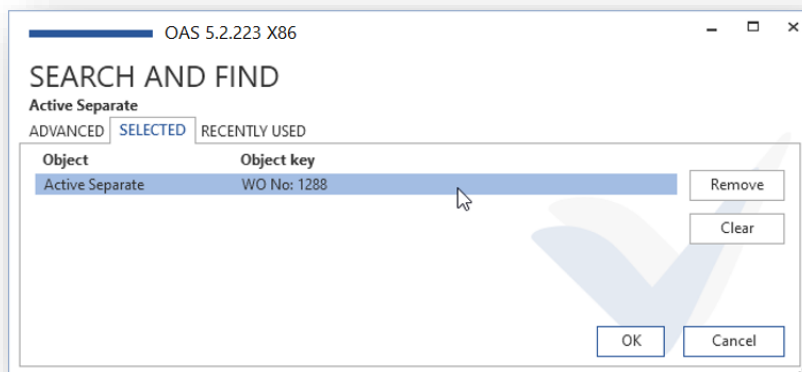


Figure 65 SEARCH AND FIND - SELECTED tab

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.

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 used recently 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.

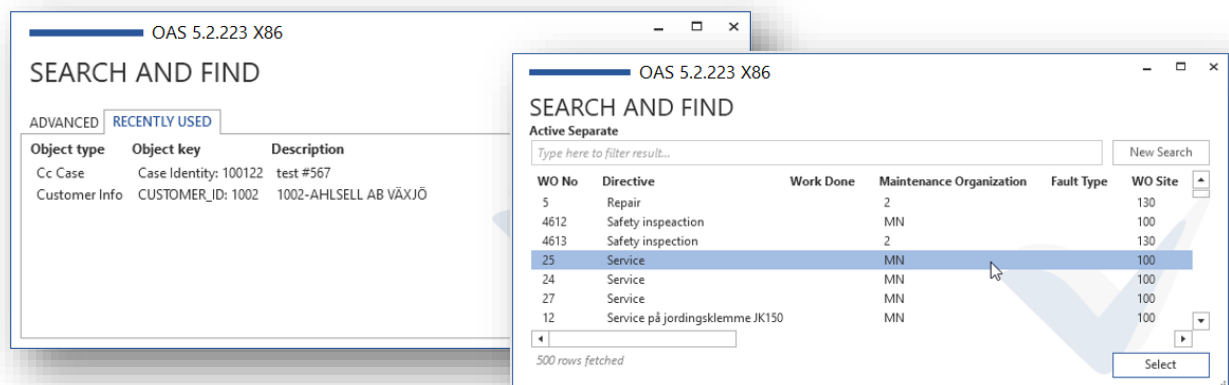


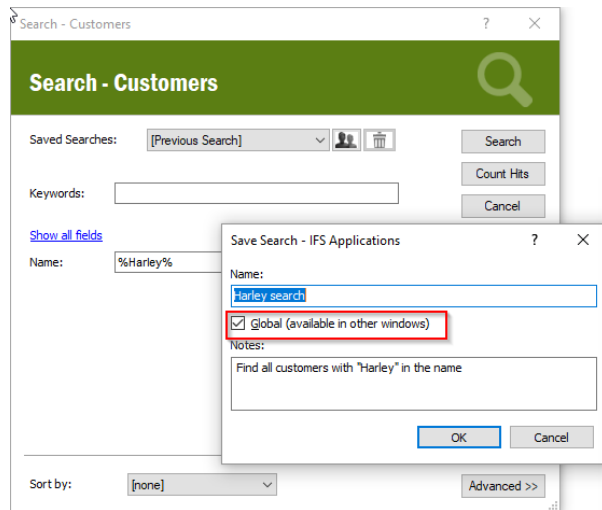
Figure 66 SEARCH AND FIND - RECENTLY USED tab without filtering (left) and with filtering (Active Separate)

There is a trick to be aware of though. When the dialog opens, it always opens with the ADVANCED tab active (see Figure 62 SEARCH AND FIND - any business object mode). 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 (Active Separate in the case above). You can further filter on the result by typing letters in the *Type here to filter result...* field.

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

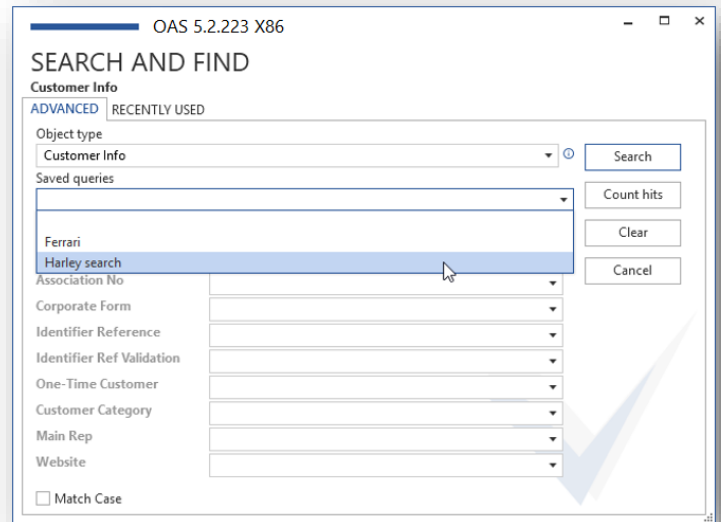


Figure 67 SEARCH AND FIND – Saved search for customers info



- 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 Check in Document dialog configuration options

Figure 68 Check in Document dialog – default look

The Check in Document dialog can to a certain extent be configured to your needs. The dialog – by default, and when used from Outlook – looks like shown below. If you are targeting an IFS 10 database (or higher) you can configure the following fields/default values

- The following fields can be configured to be blank at startup (hold no value)
 - Letter date
 - Sender/Receiver
 - Post Type
 - Security Class
- The following fields are hidden by default, but can be show individually (applies to both tabs)
 - Attention
 - Reference
 - Latest response date
 - Responsible person
 - Archive No
 - Archive Status

Figure 69 Check in Document dialog – configured look

If all fields are made visible, the dialog looks like this:

To configure these fields, go to the OAS Options dialog | Tools and tick appropriate checkboxes there:

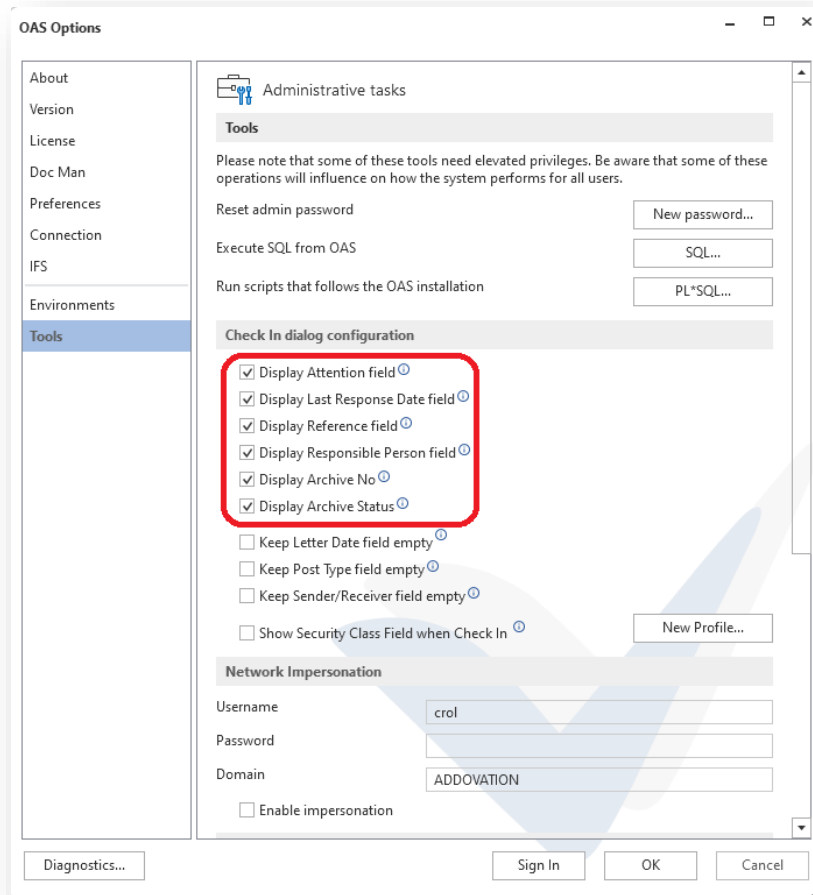


Figure 70 Check in Document dialog configurations

Note that to modify these settings, you need to know the password for the tools page in OAS Options. Normally these settings will (and should) be set during deployment of OAS from the IT department.

- Display Attention field: [Registry Key: FieldVisibleAttention, Value: True/False]
- Display Last Response Date field: [Registry Key: FieldVisibleLastResponseDate, Value: True/False]
- Display Reference field: [Registry Key: FieldVisibleReference, Value: True/False]
- Display Responsible Person field: [Registry Key: FieldVisibleResponsiblePerson, Value: True/False]
- Display Archive No: [Registry Key: FieldVisibleArchiveNo, Value: True/False]
- Display Archive Status: [Registry Key: FieldVisibleArchiveStatus, Value: True/False]
- Keep Letter Date field empty: [Registry Key: MailLetterDateEmpty, Value: True/False]
- Keep post Type field empty: [Registry Key: MailPostTypeEmpty, Value: True/False]
- Keep Sender/Receiver field empty: [Registry Key: MailSenderReceiverEmpty, Value: True/False]
- Show Security class field when check In: [Registry Key: SecurityClassEnabled, Value: True/False]

- Security Class option

The last check box enables usage of marking documents with a Security Class. This option requires that your database is prepared for it with Custom Fields and Security Class enumeration defined. If this is not the case, ticking this check box (and even entering the profile value) will have no effect.

The New Profile... button opens a dialog to create a new profile entry in the database. The 'Profile entry' SecurityClasses contains a SQL query used by OAS to retrieve all security class values defined in the database.

If you have any further questions regarding using Security Classes, contact Addovation.

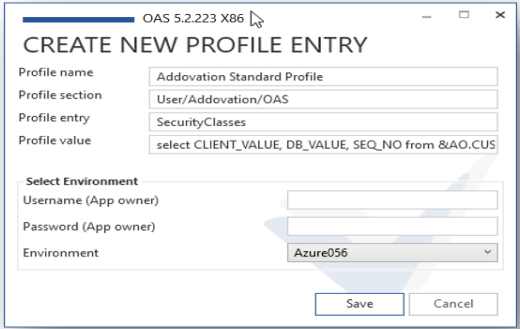


Figure 71 Create new profile entry dialog

4.8.1 General Field Usage

Leaving the fields empty at check in will have various effects on the result in IFS, depending on where you do the check in from (tab used).

- If checking in from the **Check In New Document** tab, the blank fields means that now value will be set in IFS
- If checking in from **Check In as New Revision** tab, leaving the fields blank means that the corresponding field values from the previous revision (the one you are going to replace) will be copied to the new revision;
 - If the field in the previous revision is blank, the same field in the new revision will be blank
 - If the field in the previous revision has a value, this value will be propagated to the next revision

If you enter a field value in the dialog, this value will be set in IFS, regardless of the value in the corresponding field value in the previous version.

4.9 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.

4.9.1 The Addovation ribbon buttons

In the Outlook main windows, Addovation ribbon tab looks like this:

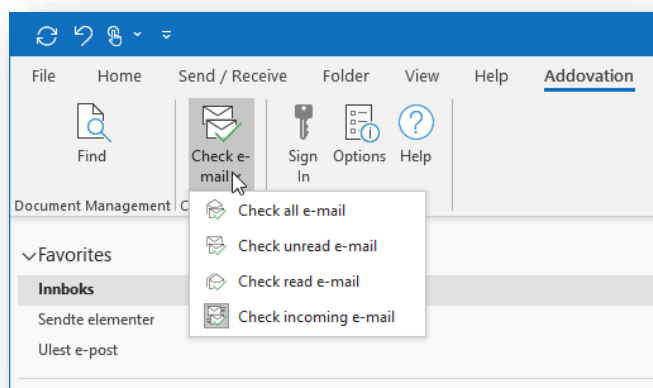


Figure 72 Check e-mail options

There are five available buttons (one split button):

- Find – opens the Search and Find dialog where you can search for mail messages stored in IFS.
- Check e-mail – This is a split-button with four optional buttons, by using these buttons you can start an operation to search through messages in your mailboxes for messages that has been checked into IFS. Messages that are checked into IFS normally are flagged with a purple square as shown in.
- Sign In – for signing into an IFS environment
- Options – opens the OAS Options dialog
- Help – opens the OAS Help landing page in your default browser

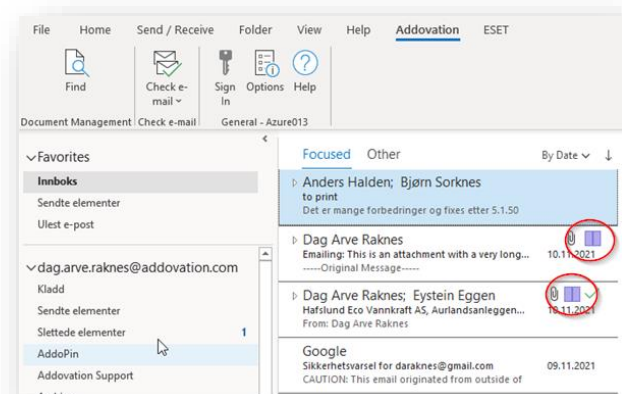


Figure 73 E-mail messages marked as checked in

In the Outlook message window, there is also an Addovation ribbon tab looking like shown below

The buttons are self-explanatory; in short

- **Check in New** – button to open the *Check In Document dialog* | *Check in new document* tab where you can check in the message and/or the attachment(s) in any combination
- **Check in New Rev** – button to open the *Check In Document dialog* | *Check in as new revision* tab where you can check in the message and/or the attachment(s) in any combination
- **Document info** – button to open the Document Properties window where information regarding the message is shown, which parts of the message are checked in and which are not. There are also links to open the document directly in IFS (links framed in red).
- The rest of the buttons are explained in previous section.

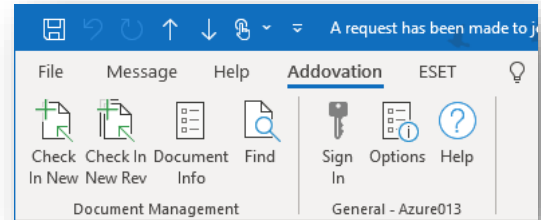


Figure 74 E-mail message window ribbon tab

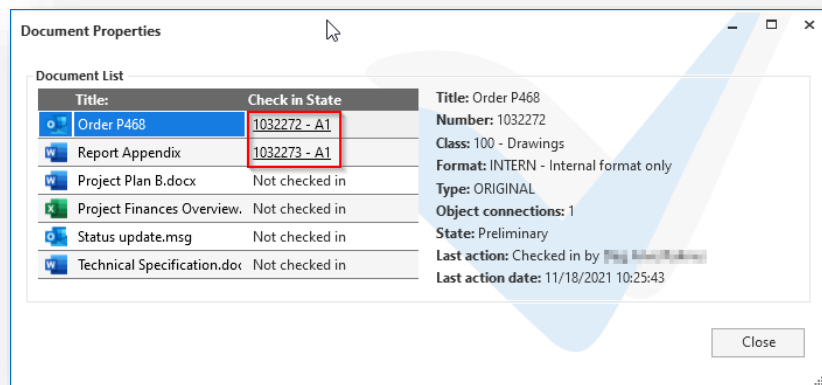


Figure 75 Document Properties windows sample

4.9.2 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 attachments 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
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

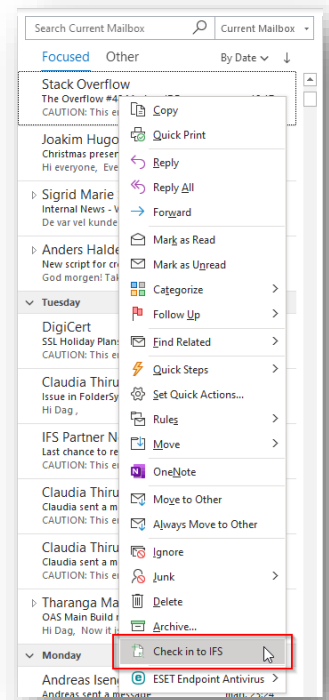


Figure 76 Outlook message list - context menu

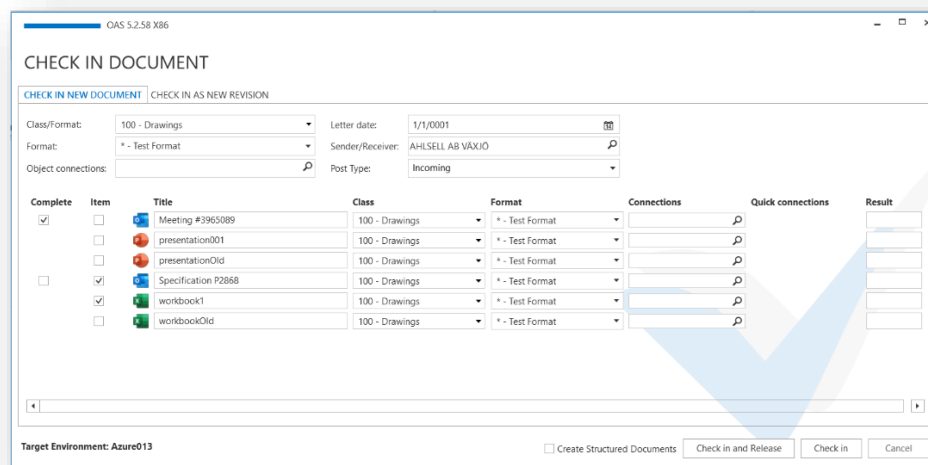


Figure 77 CHECK IN DOCUMENT dialog

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.

4.9.3 Check in files from file explorer

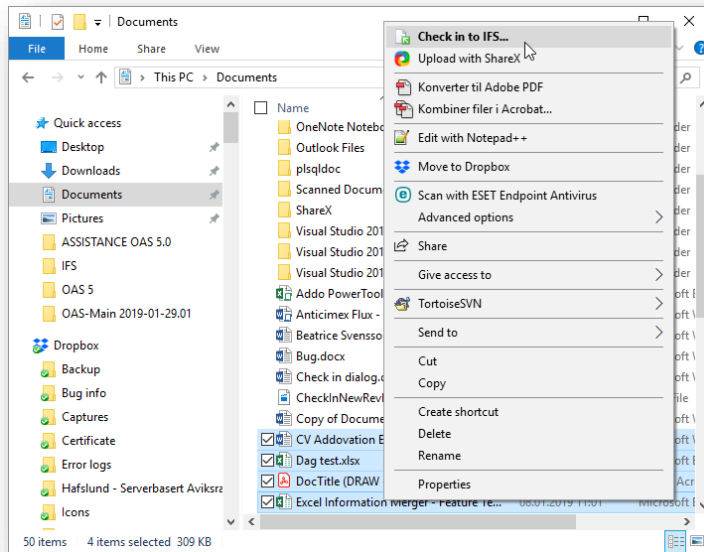


Figure 78 Checking in files from File explorer

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).

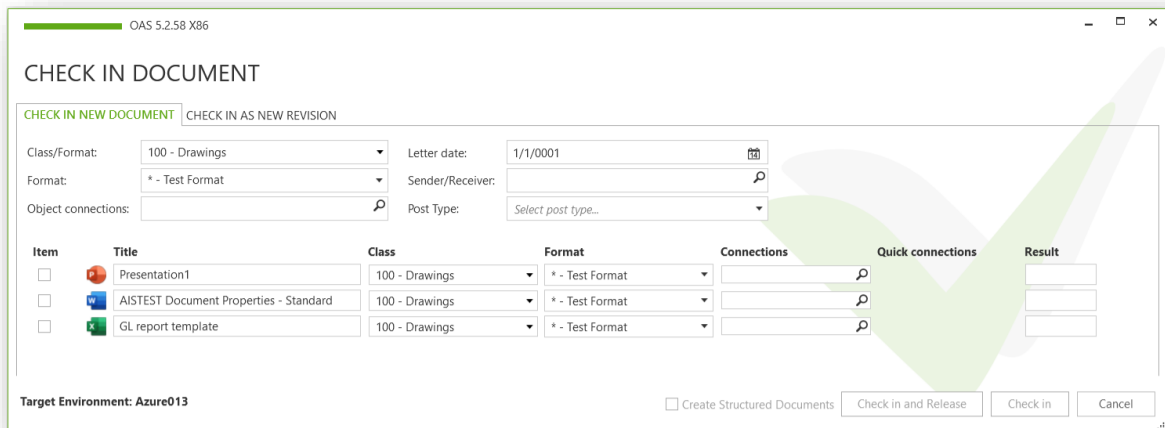


Figure 79 CHECK IN DOCUMENT dialog - file check-in

4.9.4 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. There is a Send & Check In button that opens a dialog for entering check in information.

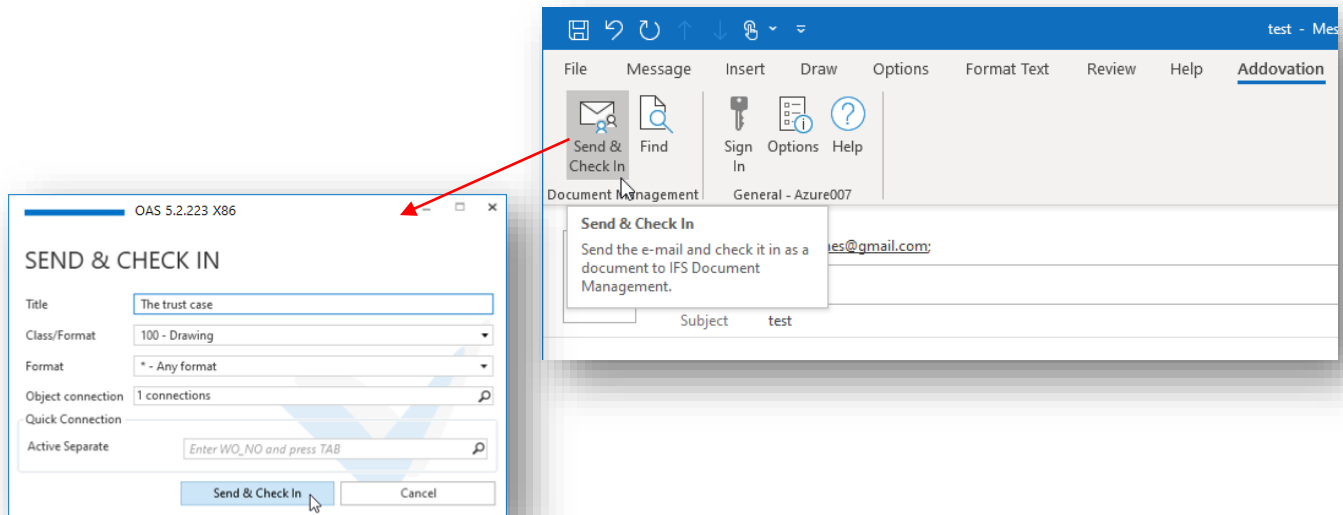


Figure 80 Send & Check In dialog

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.



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 connections can be configured for each Class/format

5 File Control

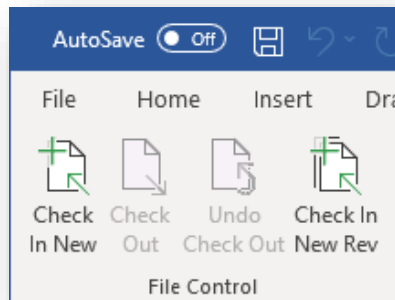


Figure 81 File Control ribbon button group

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 hidden. The button / button state shown in **Figure 81 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.

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.

The check in options you have is reflected by the dynamic check in buttons under the File Control button group.

If you are working on a new document that has never been checked in to IFS, the Check In New button will be shown.

If you have checked out the document from IFS and are editing it, the button group will look like shown.

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 82 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.

The Create PDF check box

This check box can be used if you want to create a PDF file before you check in the document. The effect of this will be that the PDF file will automatically be checked in as the view file for the document, provided IFS is configured to have PDF files as view copy:

- If IFS is configured with view file as mandatory, this check box will automatically be ticked and disabled. In this case the PDF file is created automatically and checked in as view copy.
- If not mandatory, it's up to you if you want to have a view copy; if you tick the check box, a PDF file is created and automatically checked in as view copy, if not, no action is taken.

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 into 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
6. Browse and find the document you want to replace
7. Mark it in the list (click the line)
8. Hit the Select button
9. The dialog closes and all relevant information like title, number, revision, and a proposal for new revision will automatically be filled in
10. Fill in the Revision text
11. When all mandatory fields are filled in with values, the check in buttons will become available
12. Check in choosing one of the buttons at the bottom of the task pane. They work the same as for Check in New.

Document Information

Check In as New Revision

Title

Number

Latest revision

Revision Properties

New revision

Revision text

Reason for issue

Letter date

Sender / receiver

Post Type

Attention

Reference

Last Response Date

Responsible Person

Archive No

Archive Status

☐ Create PDF

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 clear the document number field, click the trash bin

SEARCH AND FIND

Type here to filter result...

Type	Document	Title	Class	State
W	1014479 - A1	Create Document Demo	DEMO - Create Document D	Preliminary
W	1014469 - A1	Create Document Demo	DEMO - Create Document D	Preliminary
W	1014467 - A1	AstridWasHere	DEMO - Create Document D	Released
W	1014465 - A1	Create Document Demo	DEMO - Create Document D	Preliminary
W	1014464 - A1	Create Document Demo	DEMO - Create Document D	Preliminary
W	1014463 - A7	Create Document Demo	DEMO - Create Document D	Preliminary

All 489 rows fetched Document responsible: Addouser05

Figure 83 Check in as 'New revision'

- 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.

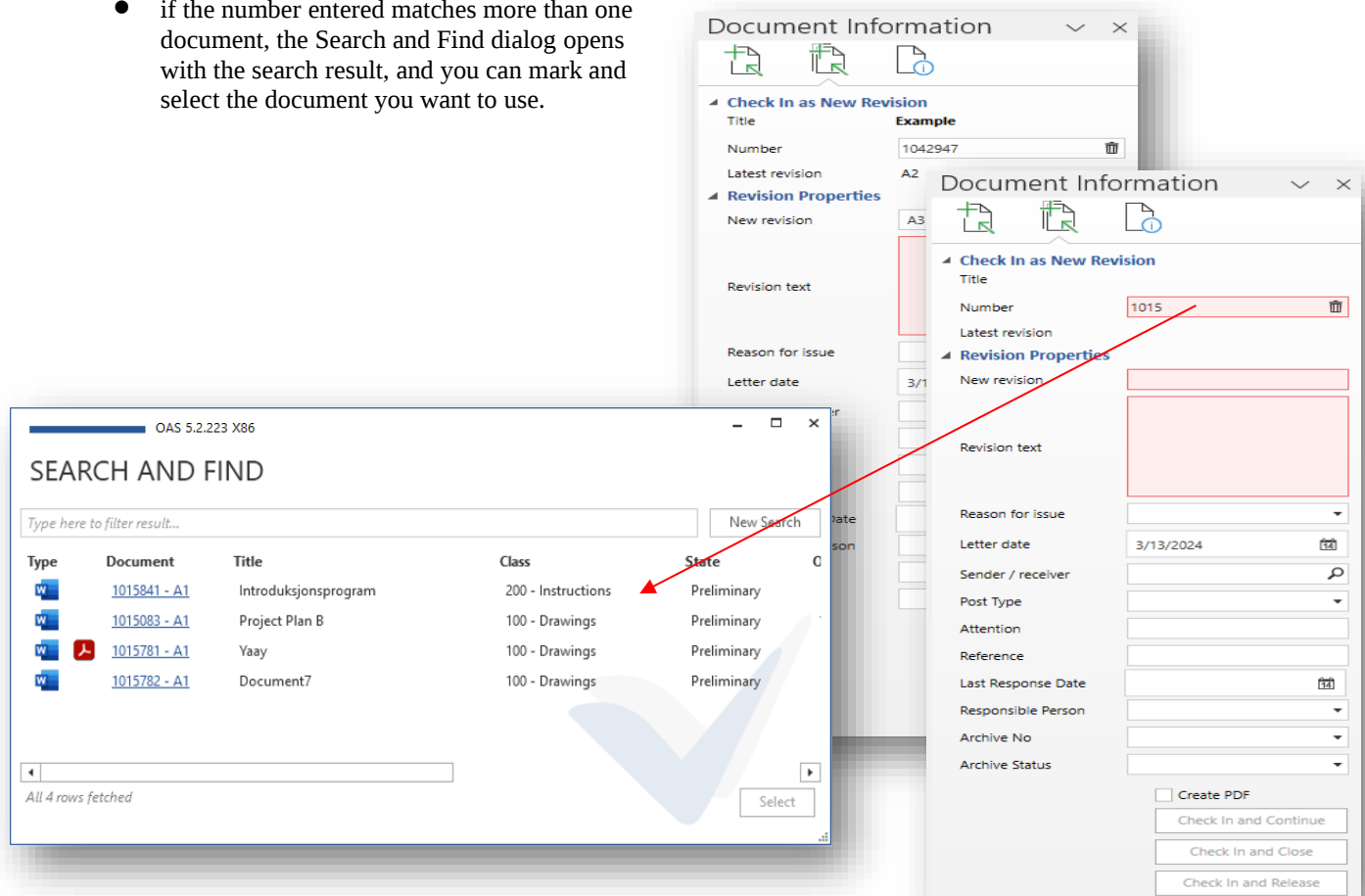


Figure 84 Check in as new revision, searching for document to replace

Replacing a document of one type with a document of another type



If the original file that is to be replaced is of another format than the document you are currently working with, you won't be able to search for it using the Search and Find dialog because this filters on document of the same type. E.g., Search and Find used from Word only find documents of type Word. If you are to replace e.g., an Excel document with a Word document, you need find the document number (e.g., by searching from desktop) and then paste the complete document number into the Number field and hit Tab. In this way you can replace one document type with another.

5.3 Check in existing

If you have checked out an existing document for edit, the document will normally be checked in again using the Check in Existing button. Through the split button you have the option to do an alternative check in operation:

Check In Existing – this simply checks in your document again using latest version that you have modified.

This option has logic associated with it that ensures updated information in IFS, meaning:

- If the document has a view file associated with it in IFS, checking in a modified version will cause a PDF file to be created and checked in along with the modified original so that the view file is updated according to the new original. This will happen regardless of whether view copy is mandatory or not for the class/format in question.
- If the document doesn't have a view copy associated with it, one of two actions will take place
 - If class/format results in view copy being mandatory, a PDF view copy file is created and checked in along with the original file as view copy file.
 - If view copy is not mandatory, the file will be checked in without any view copy file.

Create PDF and Check In – using this option OAS first creates a PDF file with the same name as the original file and then checks in the original file (Word file in this case) and then the PDF file as a view copy. This is done regardless of whether view copy is mandatory or not.

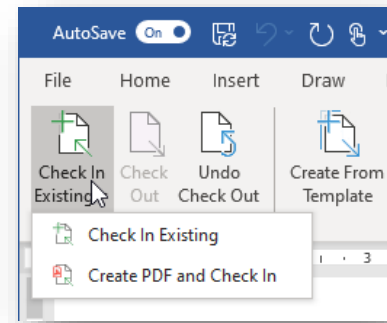


Figure 85 Check in Existing split button

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

How to create and utilize Document templates in IFS is described in detail in other sections in this document. This 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. Use the **Object connections** dialog to associate your document to any business object in IFS (like e.g., Customers, Suppliers, Work orders etc.)
 - f. Hit the **Get Info** button to populate the Automation Assistant
 - g. Use all the IFS information you want through the available properties, grid queries etc. by dragging the desired elements from the Automation Assistant and into your document.
 - h. Remember to click on **Clear Info** button before checking in the completed template!
2. From IFS
 - a. Sign In into IFS Applications.
 - b. Search for the document you just checked in from MS Office.
 - c. Update the status on the document to 'Released'.
 - d. Right click; choose 'File operations' and then press 'Use the document file template'.
 - e. 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 e.g. "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.

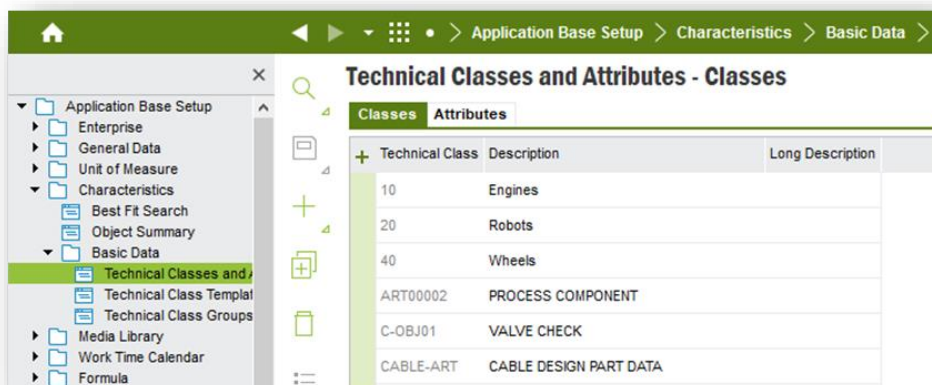


Figure 86 IFS EE - Technical Classes and Attributes page

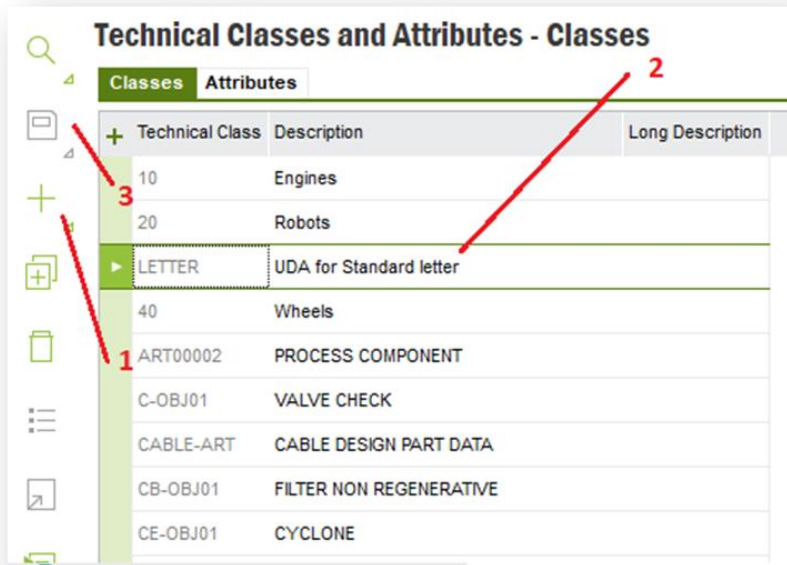


Figure 87 IFS EE - Technical Classes and Attributes

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.

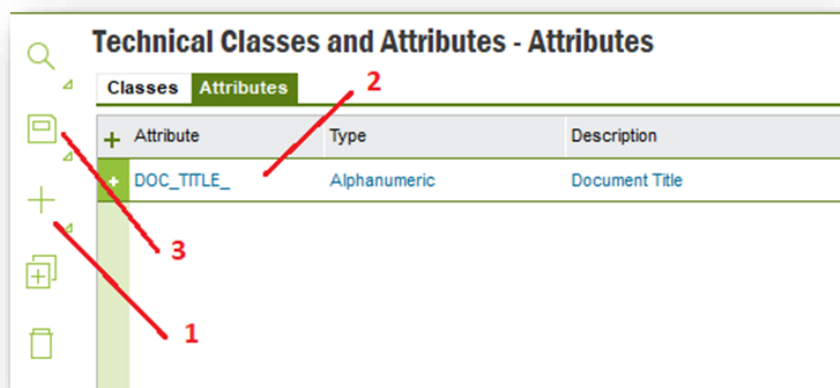
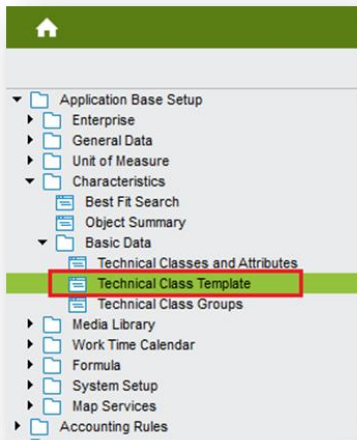


Figure 88 IFS EE - Create technical attributes

7.1.3 Step 3: Assign technical attributes to technical class



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 on the + sign to add a new record, then 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 89 IFS EE – Technical class Template

The screenshot shows the 'Template - UDA for Standard letter' window. It has a search icon in the top left. The 'Technical Class:' field contains 'LETTER' and the 'Class Description:' field contains 'UDA for Standard letter'. Below these are tabs for 'Numeric' and 'Alphanumeric'. The 'Attribute:' dropdown is set to 'DOC_TITLE_' and the 'Attribute Description:' field contains 'Document Title'. There are fields for 'Order:', 'Summary:', 'Prefix:', and 'Info:'. A table at the bottom has a header row with a '+' icon and the word 'Value'. Three red arrows point to specific elements: arrow 1 points to the 'Technical Class:' field, arrow 2 points to the 'Attribute:' dropdown, and arrow 3 points to the '+' icon in the table header.

Figure 90 IFS EE - Template - UDA for standard letters

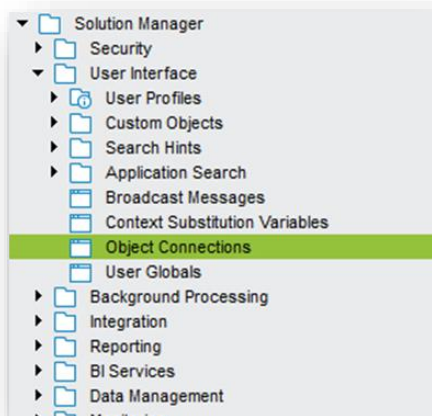


Figure 91 IFS EE – Navigator pane

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

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.

+	LU Name	View Name	Package	Method Name	Service List
	DocClass	DOC_CLASS	DOC_CLASS_API		TechnicalObjectReference^
	DocClassFormat	DOC_CLASS_FORMAT	DOC_CLASS_FORMAT_API		TechnicalObjectReference^

Figure 92 IFS EE – Object connections

7.3 Connecting Technical Classes to Document Classes or Formats

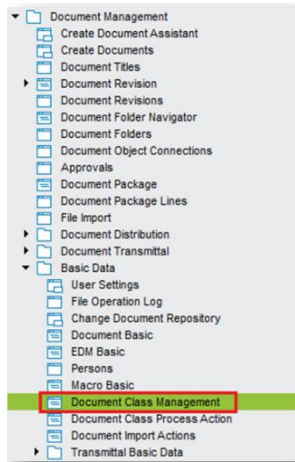


Figure 93 IFS EE – Document management

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 “i”.

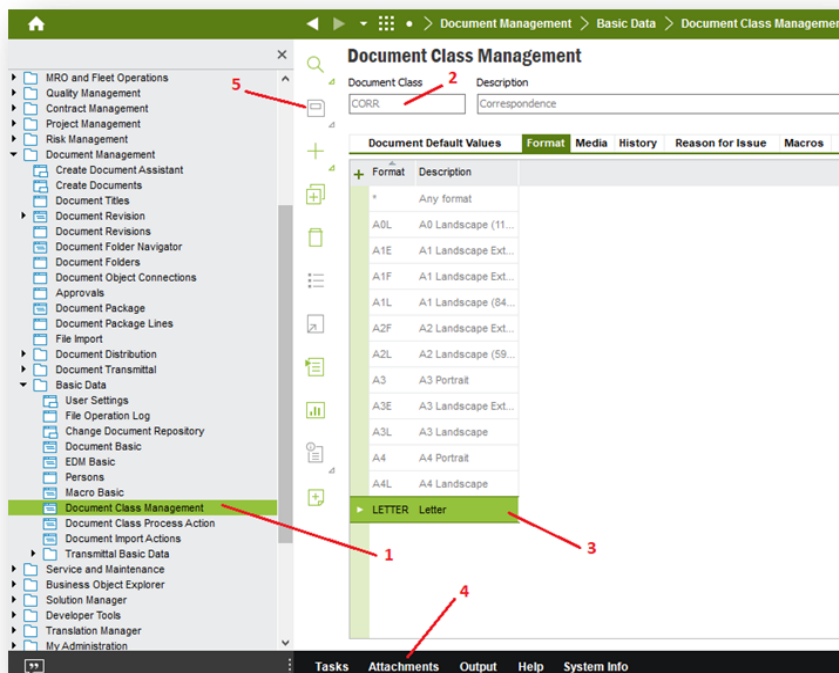


Figure 94 IFS EE – Document Class Management window

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:

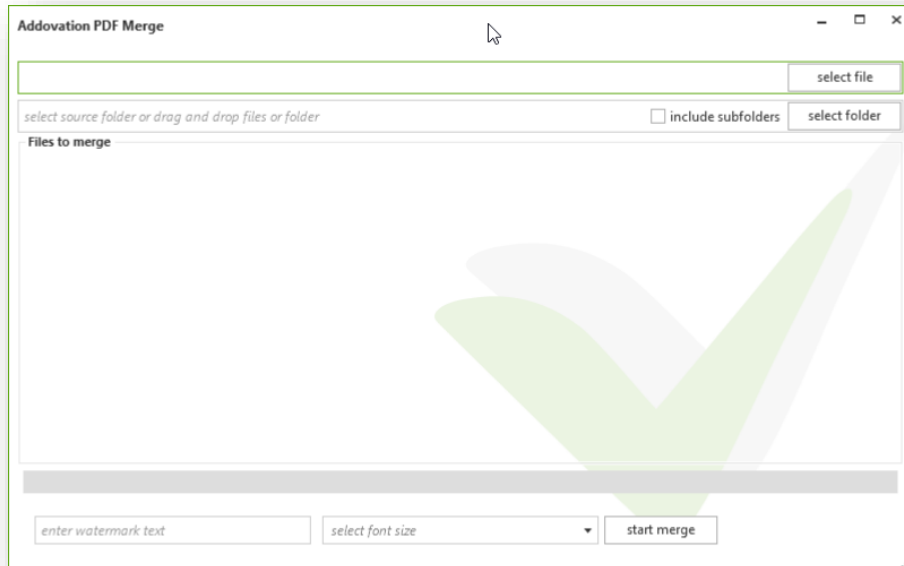


Figure 95 PDF Merge Window

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:

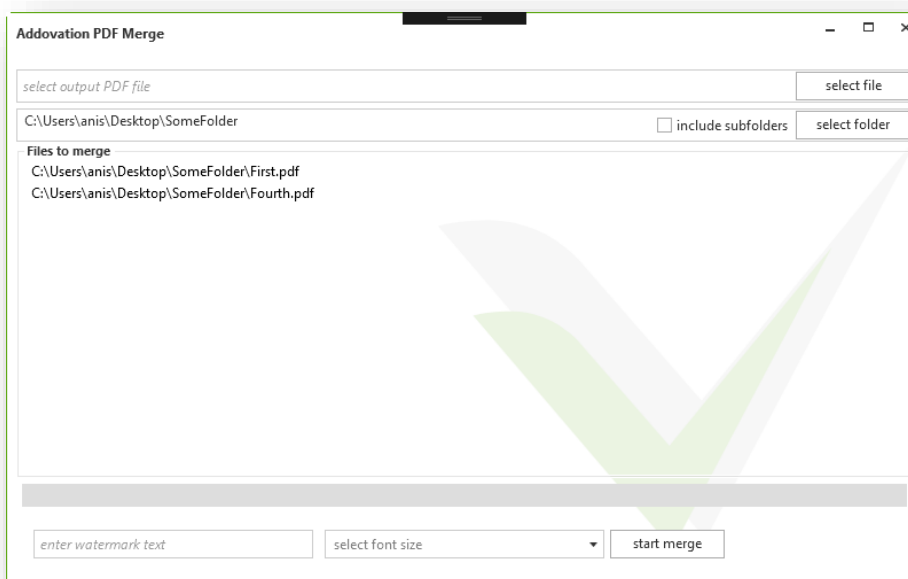


Figure 96 PDF Merge - Files to merge

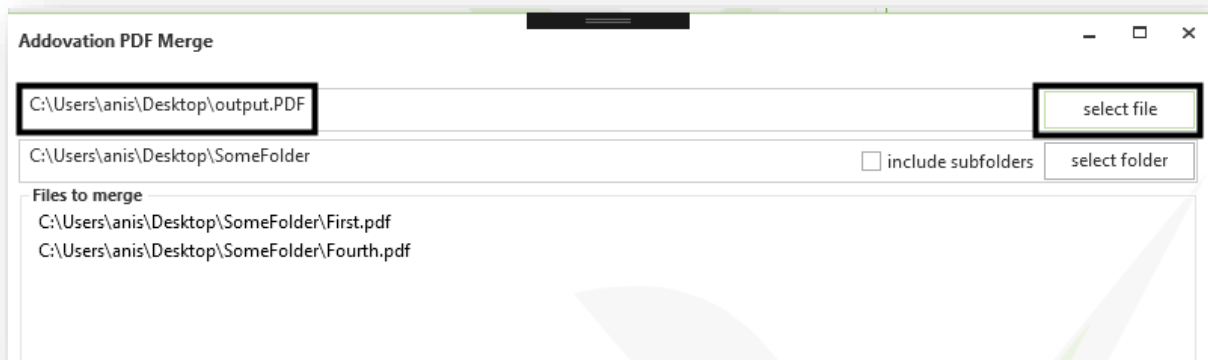


Figure 97 PDF Merge – Select Files to merge

After merge has been done, the result will be automatically opened for viewing:

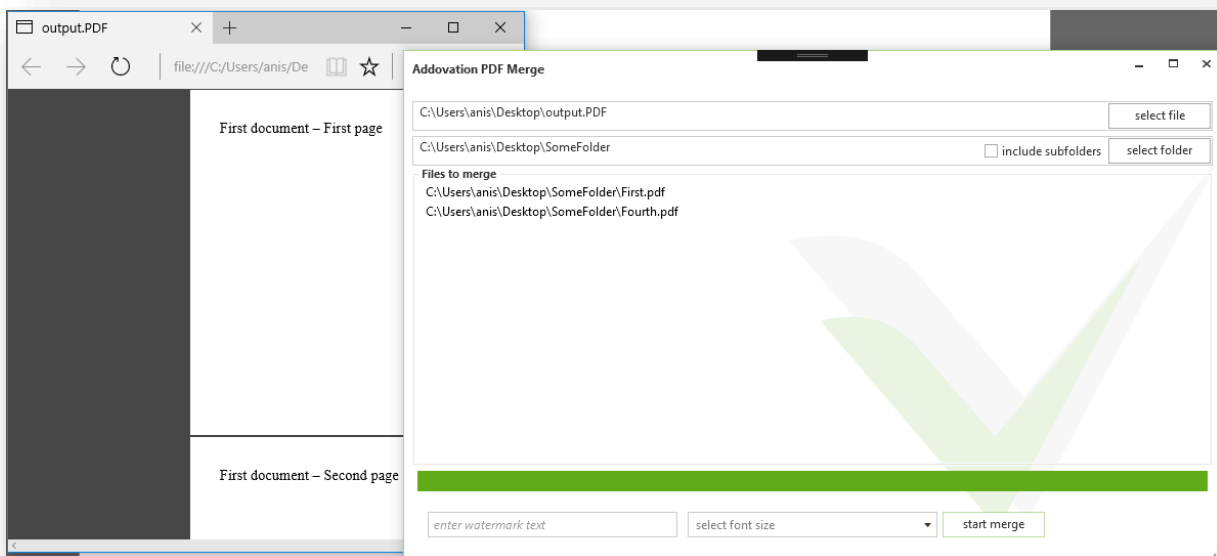


Figure 98 PDF Merge – View



Figure 99 PDF Merge – Add watermark

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:

Limitation: Images converted to PDF seems not be able to add watermarks while as documents exported to PDF from Word works fine.

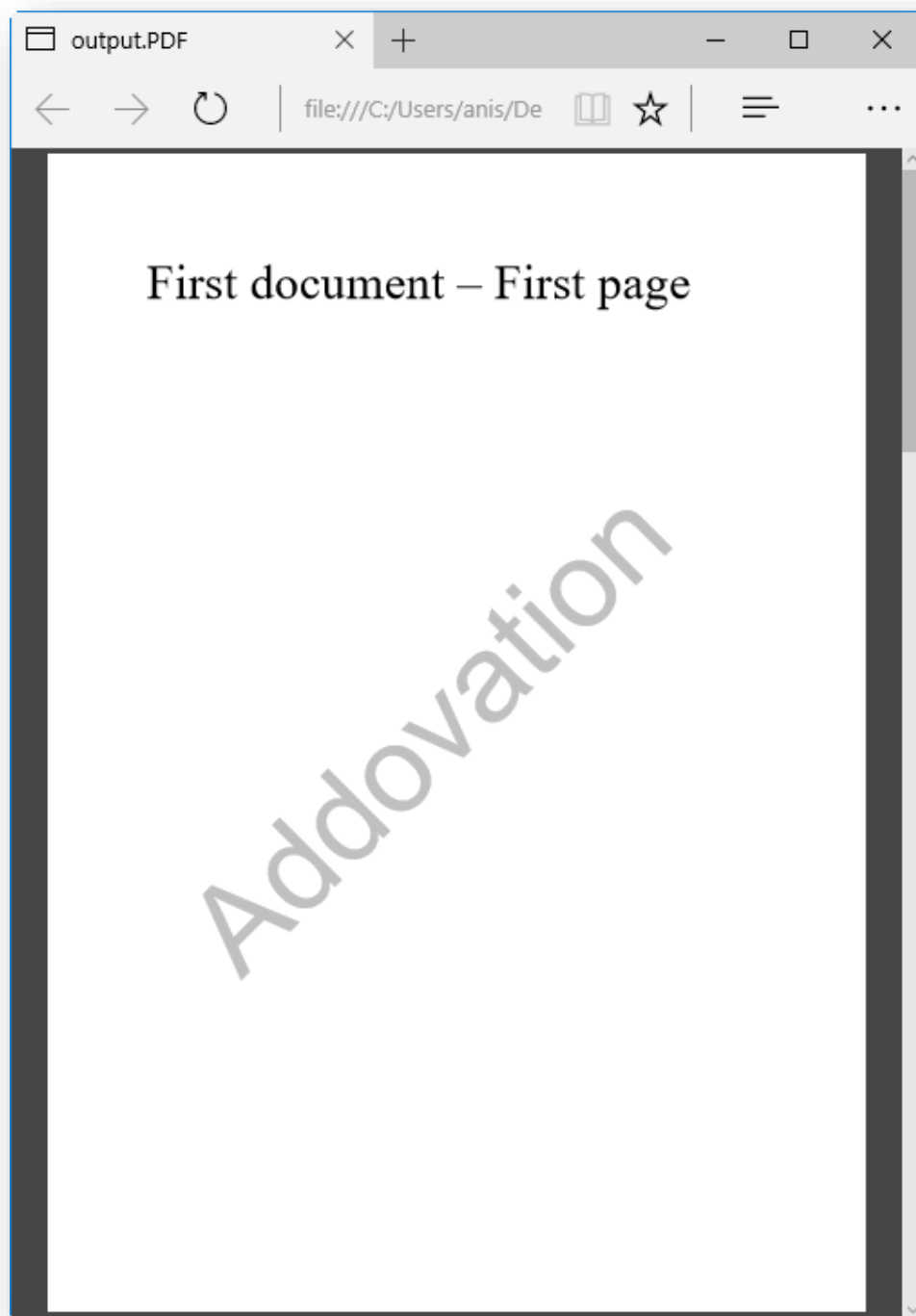


Figure 100 PDF Merge – Watermark

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.

After the Folder Sync is defined, you need to restart Outlook before any action takes place. See section 10.1.8 below for further details.

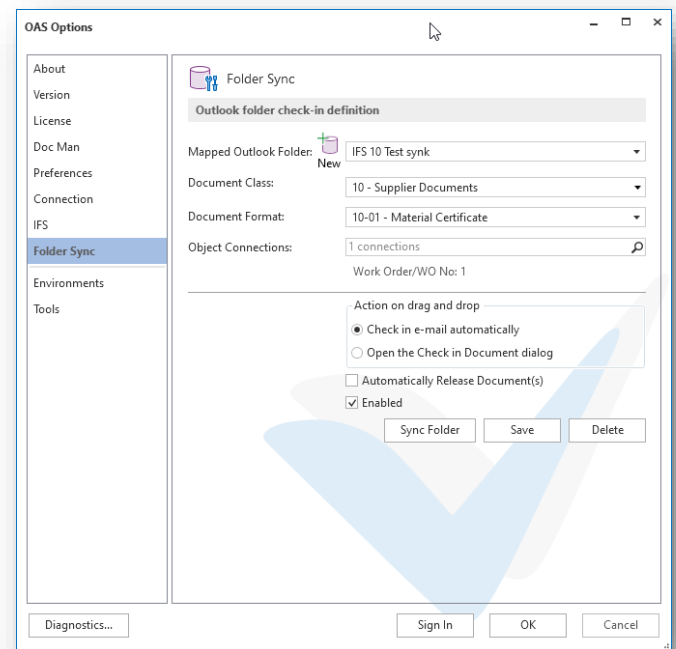


Figure 101 Folder sync config page

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:

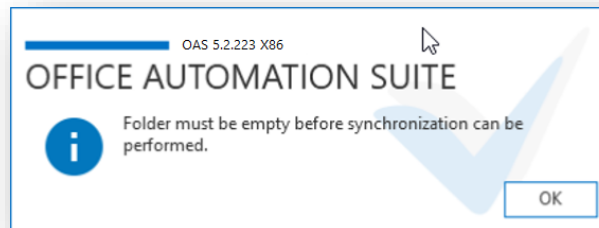


Figure 102 Message if folder is not empty

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.

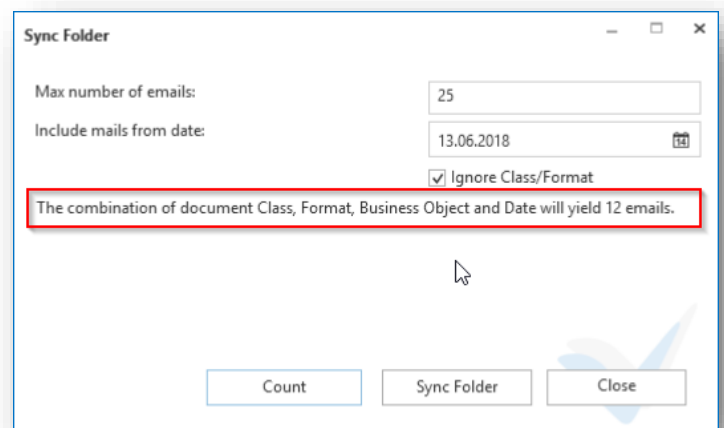


Figure 103 Sync folder dialog showing number of matching emails

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.

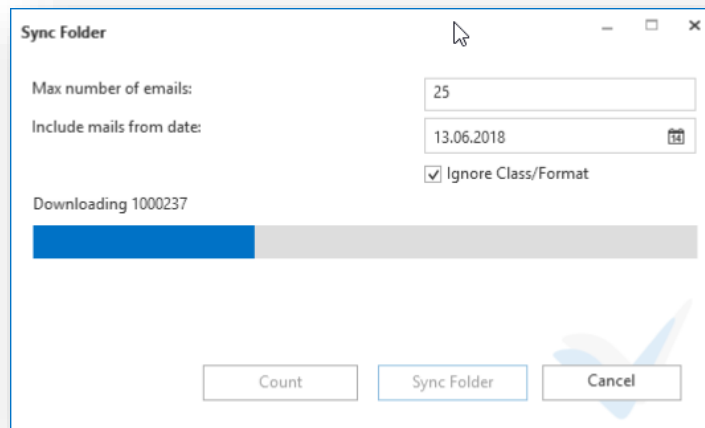


Figure 104 Sync folder dialog showing progress bar

9 OAS Client Gateway Utility

OAS also contains a Client Gateway Utility (CGU) as part of the Suite. 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
- Creating and sending emails (SEND_EMAIL and CREATE_EMAIL)
- Creating meeting requests (CREATE_MEETING)
- Requesting a template from IFS (GET_TEMPLATE)

The utility can be called from IFS applications through *custom context menu* items created and maintained in IFS. 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 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.

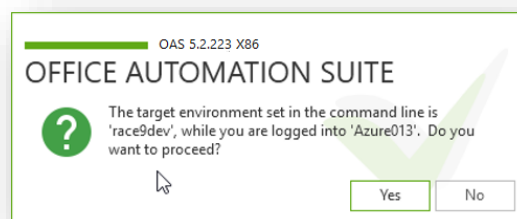


Figure 105 Target environment warning

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.

Not all command arguments are passed as command line arguments, some arguments are fetched directly from the IFS database using Profiles and Profile entries. Please see section 9.3.6 *Profile Parameters and sample commands* for more details.

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 match 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:

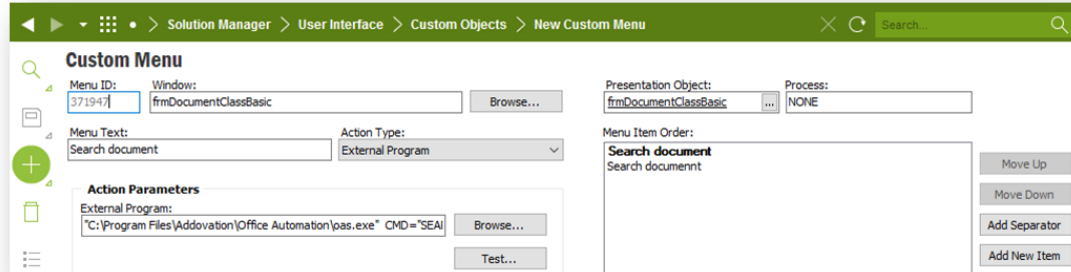


Figure 106 IFS EE - Custom menu definition

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

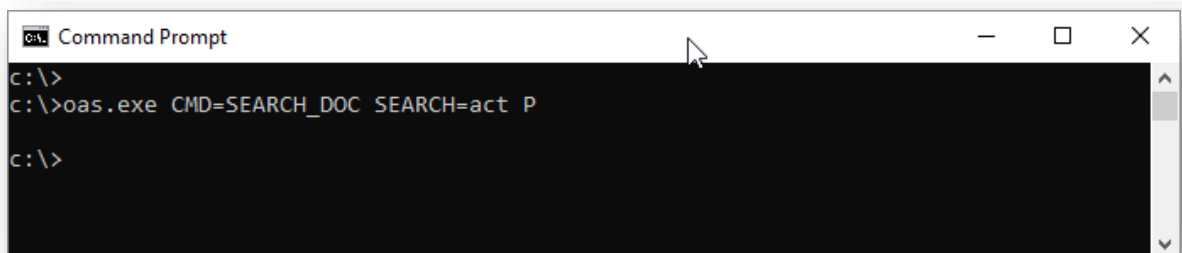


Figure 107 Search Doc – Command prompt

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

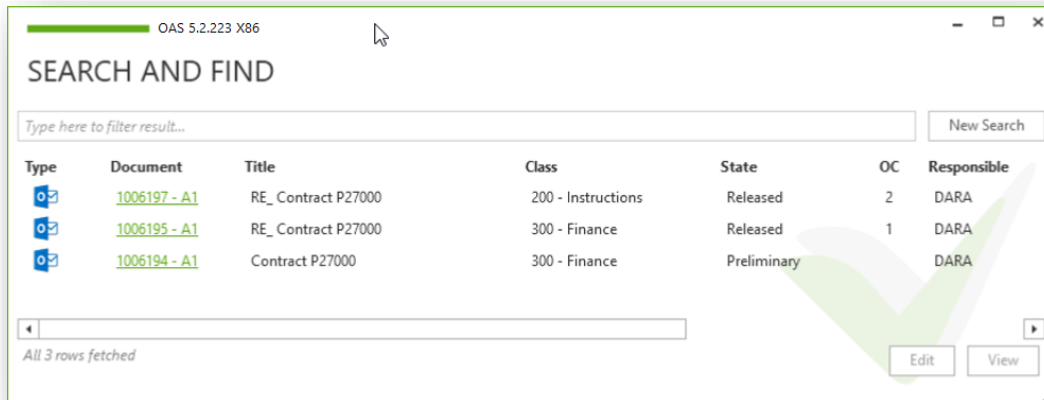


Figure 108 OAS SEARCH AND FIND result dialog

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 }

Use quotation marks!



Please note that although quotation marks (""") are not mandatory for the DOC_TITLE argument (or any other argument values for that matter), we strongly recommend to always enclose the title in quotation marks (as shown above). If the title has space(s) in it (like e.g. "This is my document title", the command will probably fail if not enclosed in quotation marks because, without them, oas.exe doesn't know where the title ends, and the next argument starts.

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.

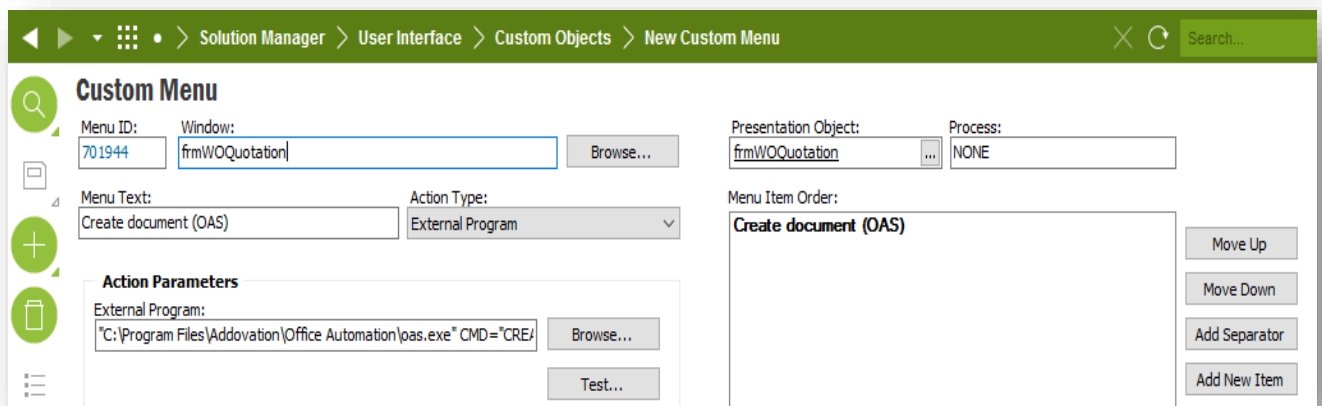


Figure 109 IFS EE - Custom Menu definition page

- 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)

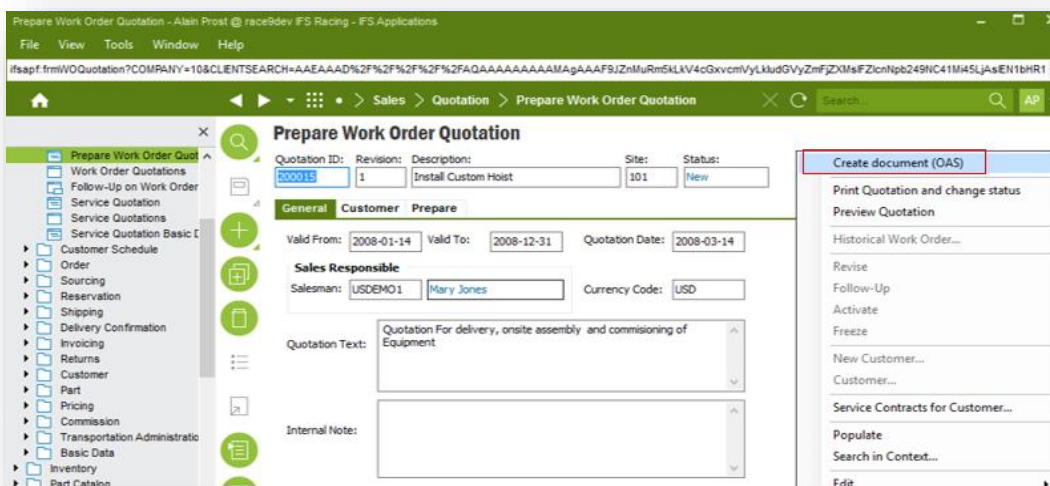


Figure 110 IFS EE - Custom Menu definition in context menu

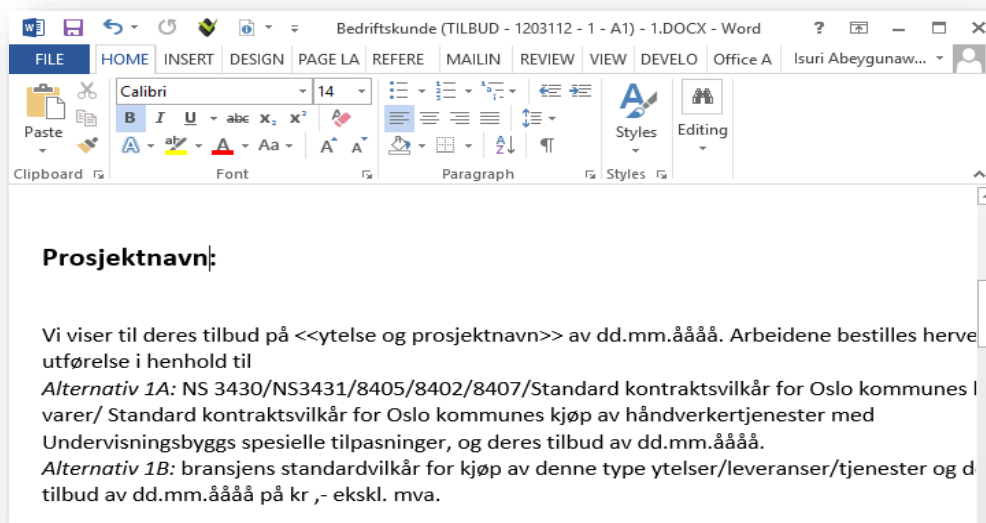


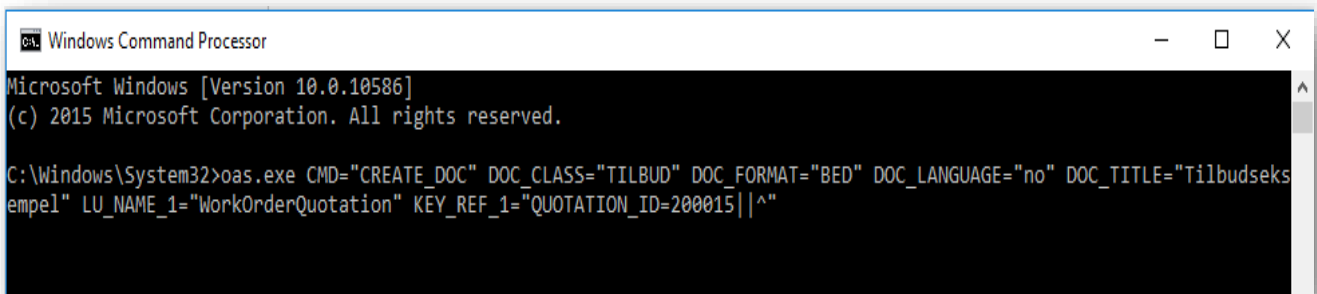
Figure 111 Created Word document

Step 3: The created document will open in MS Word

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



```
Windows Command Processor
Microsoft Windows [Version 10.0.10586]
(c) 2015 Microsoft Corporation. All rights reserved.

C:\Windows\System32>oas.exe CMD="CREATE_DOC" DOC_CLASS="TILBUD" DOC_FORMAT="BED" DOC_LANGUAGE="no" DOC_TITLE="Tilbudseks
empel" LU_NAME_1="WorkOrderQuotation" KEY_REF_1="QUOTATION_ID=200015|^"
```

Figure 112 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. }
 - UPDATEHISTORY = "False" { This parameter determines if the purchase order/lines should be updated. }
 - BCC="True" { Setting BCC to "True" means that recipient(s) will all be placed in the BCC field rather than the To field }

Sample command lines:

- 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="169"
BODY="ORDER_NO=169" BCC="True" UPDATE_HISTORY=false PROFILE=AlternativeProfile
SUBJECT="Mailing campaign"

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:

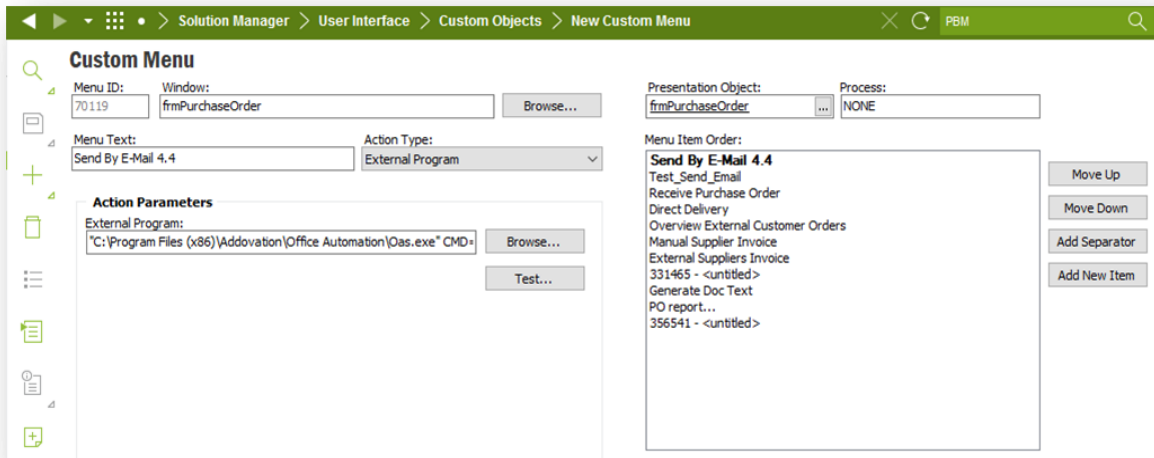


Figure 113 IFS EE - Custom menu definition for SEND_EMAIL

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)

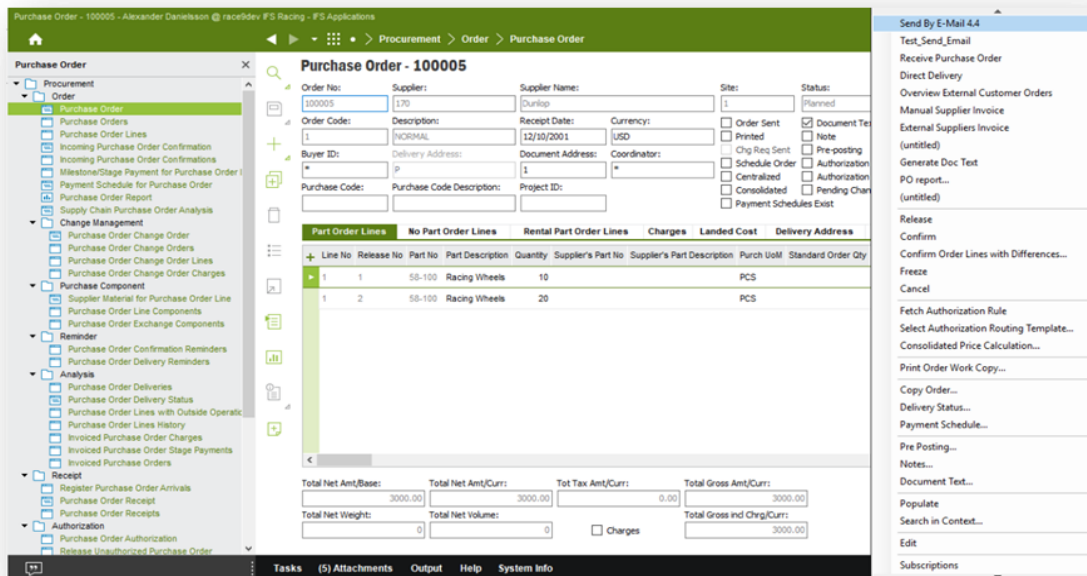


Figure 114 IFS EE - Custom menu option shown for Purchase Order

Step2: Select specific Order & click RMB -> Send by E-Mail

Step3: It will open the created mail in outlook

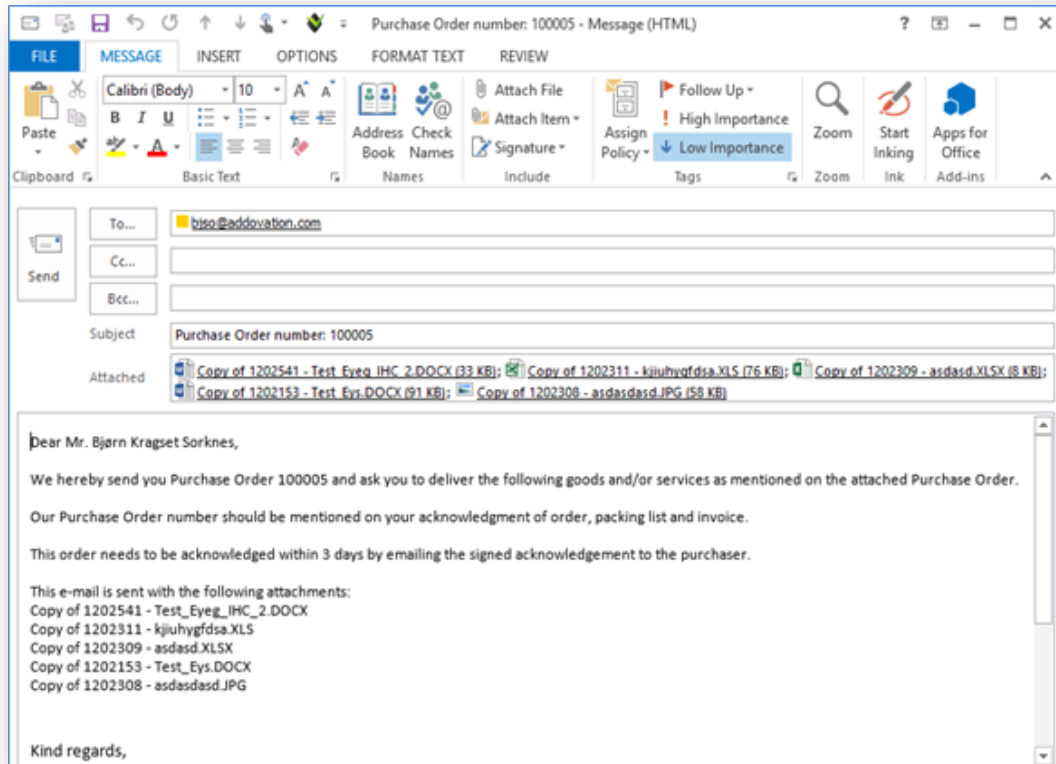


Figure 115 Created mail shown in Outlook

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"

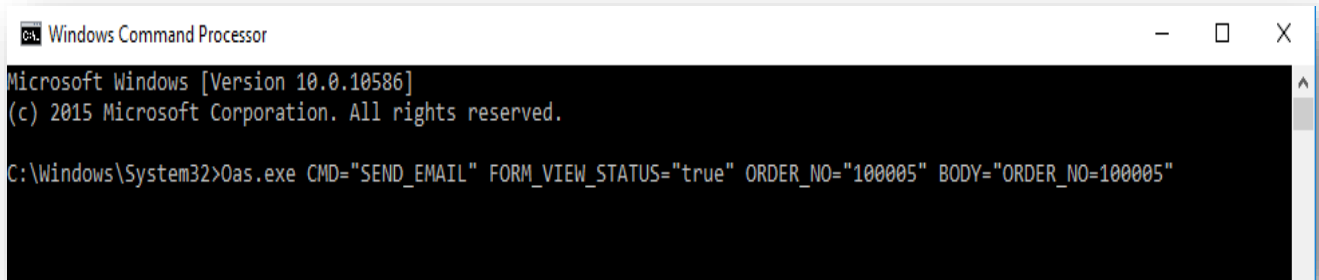


Figure 116 Send email using command prompt

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

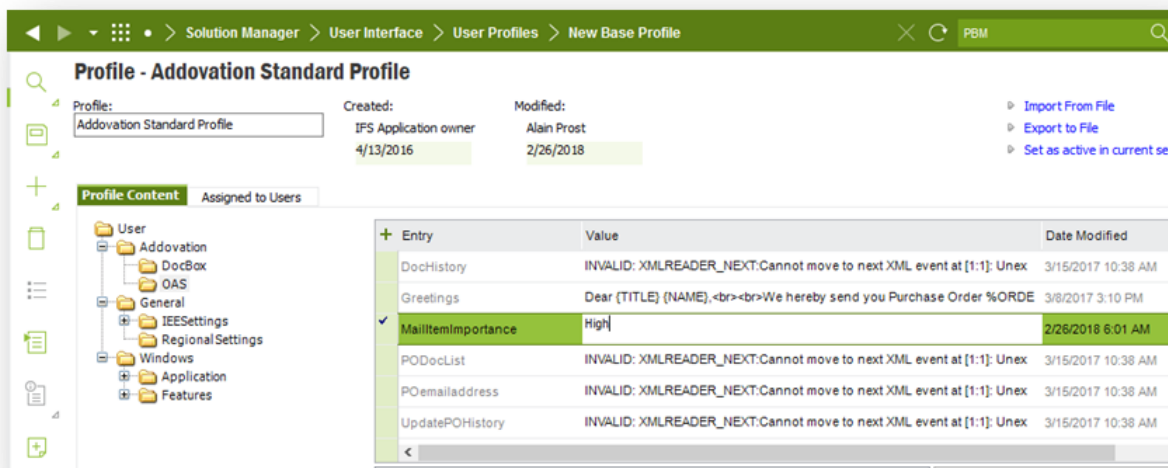


Figure 117 IFS EE - Setting up Profile values affecting Send email

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

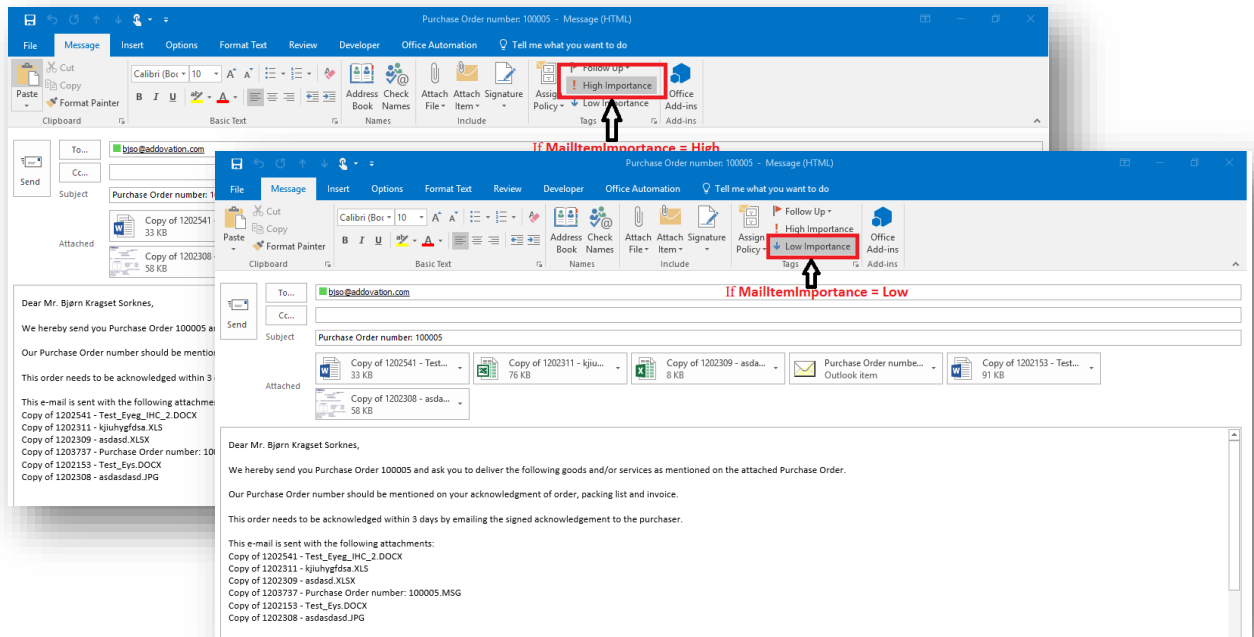


Figure 118 Mail Item Importance

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

9.3.6 Profile Parameters and 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:

The screenshot displays the IFS Profiles interface. The top section shows a table of profiles:

Profile	Modified By	Modified Date	Created By	Created Date	Owner
&profile_name	IFSAPP	08-Feb-17	IFSAPP	08-Feb-17	
AA	IFSAPP	23-Dec-16	IFSAPP	23-Dec-16	
Addovation Standard Profile	IFSAPP	06-Jan-20	IFSAPP	13-Apr-16	
Addovation Standard Profile2	IFSAPP	07-Feb-17	IFSAPP	07-Feb-17	
Addovation Standard Profile3	IFSAPP	08-Feb-17	IFSAPP	08-Feb-17	

The bottom section shows the details for the 'Addovation Standard Profile':

Profile: Addovation Standard Profile
 Created: IFS Application owner, 13-Apr-16
 Modified: IFS Application owner, 06-Jan-20

The 'Profile Content' tab is active, showing a tree view of the profile structure:

- User
 - Addovation
 - DocBox
 - OAS
 - General
 - IEESettings
 - RegionalSettings
 - Windows
 - Application
 - Features

The 'Assigned to Users' tab is also visible, showing a table of entries:

Entry	Value
DocHistory	INVALID: XMLREADER_NEXT:C
Greetings	Dearest {TITLE} {NAME},
MailItemImportance	LOW
PODocList	INVALID: XMLREADER_NEXT:C
POemailaddress	INVALID: XMLREADER_NEXT:C
UpdatePOHistory	INVALID: XMLREADER_NEXT:C

Figure 119 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"
```

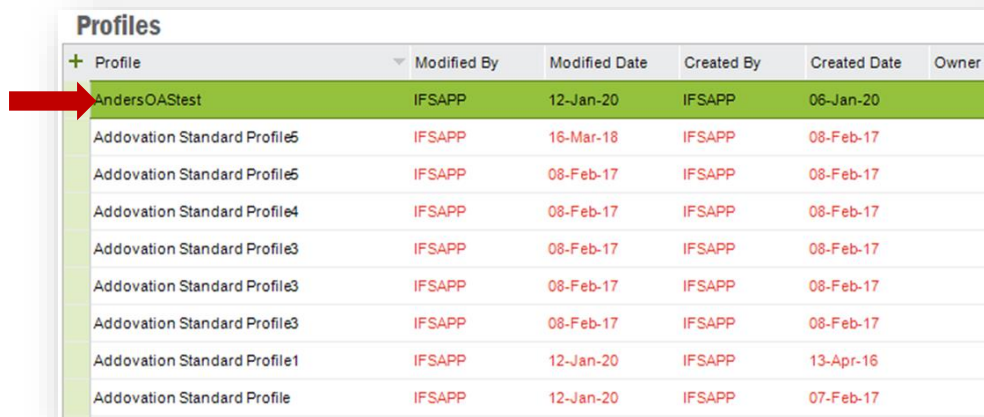
Set to 'False' to avoid updating lines/documents history:

```
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="AndersOASest"

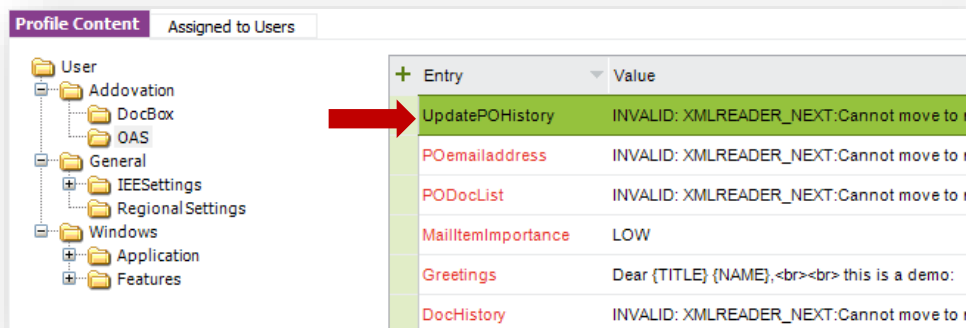


Profile	Modified By	Modified Date	Created By	Created Date	Owner
AndersOASest	IFSAPP	12-Jan-20	IFSAPP	06-Jan-20	
Addovation Standard Profile5	IFSAPP	16-Mar-18	IFSAPP	08-Feb-17	
Addovation Standard Profile5	IFSAPP	08-Feb-17	IFSAPP	08-Feb-17	
Addovation Standard Profile4	IFSAPP	08-Feb-17	IFSAPP	08-Feb-17	
Addovation Standard Profile3	IFSAPP	08-Feb-17	IFSAPP	08-Feb-17	
Addovation Standard Profile3	IFSAPP	08-Feb-17	IFSAPP	08-Feb-17	
Addovation Standard Profile3	IFSAPP	08-Feb-17	IFSAPP	08-Feb-17	
Addovation Standard Profile1	IFSAPP	12-Jan-20	IFSAPP	13-Apr-16	
Addovation Standard Profile	IFSAPP	12-Jan-20	IFSAPP	07-Feb-17	

Figure 120 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="AndersOASest"
 UPDATEHISTORY="False"



Entry	Value
UpdatePOHistory	INVALID: XMLREADER_NEXT:Cannot move to n
POemailaddress	INVALID: XMLREADER_NEXT:Cannot move to n
PODocList	INVALID: XMLREADER_NEXT:Cannot move to n
MailItemImportance	LOW
Greetings	Dear {TITLE} {NAME}, this is a demo:
DocHistory	INVALID: XMLREADER_NEXT:Cannot move to n

Figure 121 Profiles values configured in IFS

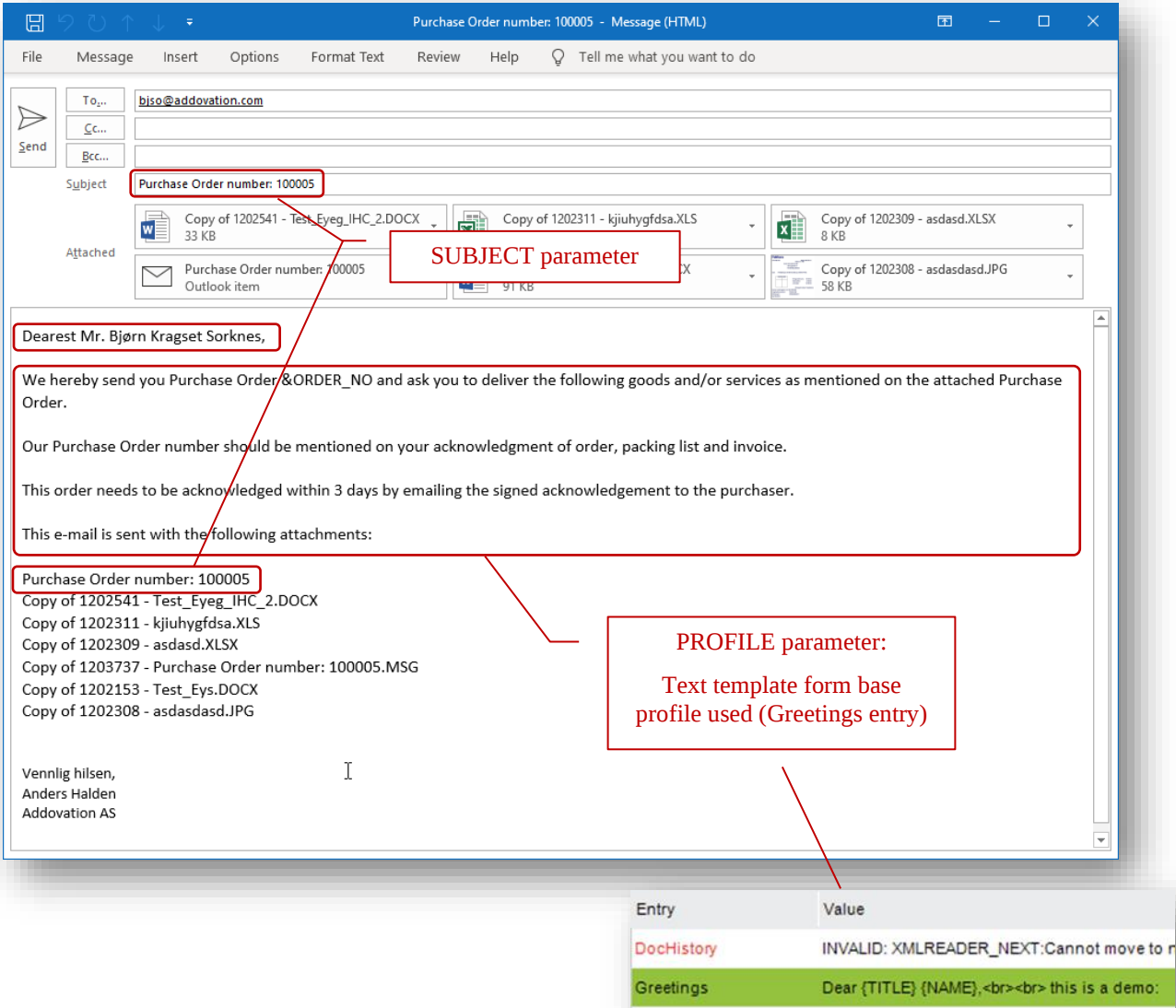


Figure 122 Sample E-mail created with the SEND_EMAIL command

9.4 The CREATE_MEETING command

9.4.1 General description

The CREATE_MEETING command opens a new Outlook meeting appointment window, ready to be modified and sent. The meeting appointment main input fields are filled in, values taken from the profile specified with the corresponding command argument.

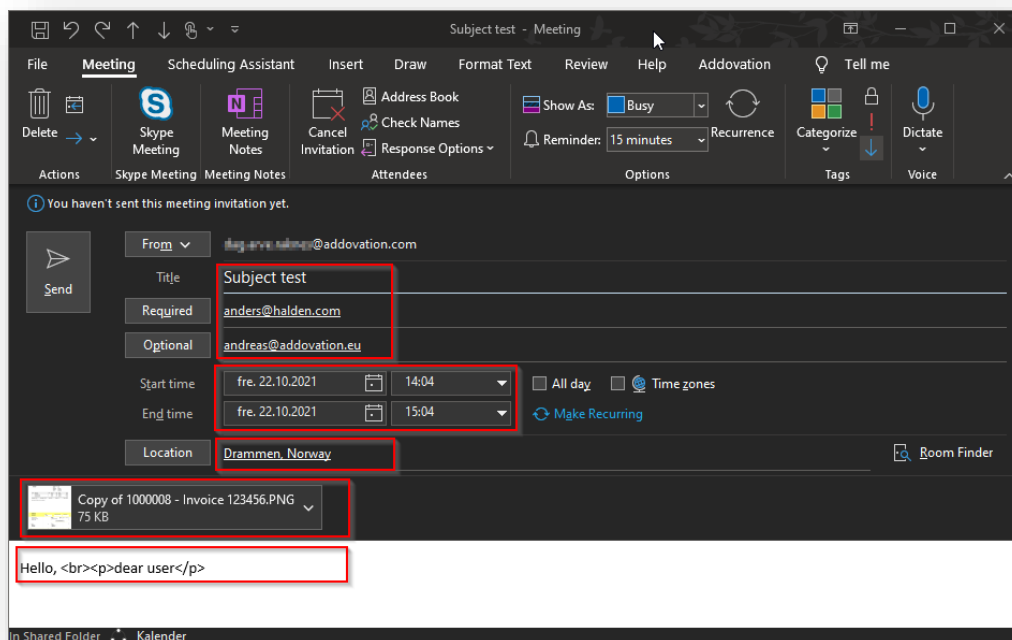


Figure 123 Meeting appointment window

Most of the values used to fill in the fields in the Meeting appointment window are fetched from IFS. The profile values can (and must) hold the SQL clause that in turn is executed to retrieve these values. The values fetched from the profile specified are

- **Body** – Holds the SQL to fetch the text to be inserted as the body of the Meeting appointment. If the result of the query return text which includes a “<Html>” tag, the text is treated as Html, the body converted to RTF format and the Message set as RTF format. If the text doesn’t contain the tag, text is treated as plain text and the Message format set correspondingly.
- **Contacts** – Holds an SQL to fetch the recipient(s) to be inserted into the Meeting appointment. May return multiple instances. Will be inserted into the *Required* field.
- **ContactsOptional** – Holds an SQL to fetch optional recipient(s) to be inserted into the Meeting appointment. May return multiple instances. Will be inserted into the *Optional* field.
- **DateTime** – Holds an SQL to receive the start and end time of the appointment, the dates must be in DateTime format.
- **PostRunUpdate** – Holds an SQL that is executed if the corresponding POST_RUN_UPDATE input parameter is set to “True”. If the parameter is not supplied or is set to “False”, the SQL will not be executed. If the profile value is empty, no action is taken whether the input parameters have any value or not.
- **Subject** – Holds an SQL to return the text to be inserted into the Title field of the appointment
- **Location** – Holds an SQL to return the text to be inserted into the Location field of the appointment
- **DocList** – Holds an SQL to return a list of documents that will be added as attachments to the meeting appointment. A list of 0 to many documents is accepted.
- **MailItemImportance** – May contain a “Low”, “High” or “Normal” value. Any other values will result in the “Normal” importance being set.

The only *mandatory* value here is the **Contacts** SQL which must return at least one recipient. If not, a warning is issued. The rest of the profile values might return blank result, which will leave the corresponding Meeting appointment field empty or with default values.

9.4.2 Command format

Main command argument is

- CMD = “**CREATE_MEETING**” { main command }
- Optional arguments
 - **PROFILE=MyProfile** { Provide base profile name as found in IFS Applications, used to store scripts and texts. Defaults to “Addovation Standard Profile” if not provided. }
 - **POST_RUN_UPDATE=True** { True means execute the SQL defined in the profile value PostRunUpdate. Defaults to False, i.e., by default the finalizing SQL will not be executed although it might be defined in the profile. If the SQL is blank, nothing is done, and no warning issued. }

Sample command line:

- oas.exe CMD="CREATE_MEETING" PROFILE=MyProfile POST_RUN_UPDATE=True



For more details on how to create and modify profile values, [please see section 9.3.6 Profile Parameters and sample commands.](#)

9.5 The CREATE_EMAIL command

9.5.1 General description

The CREATE_EMAIL command opens a new Outlook Mail item window, ready to be modified and sent. All the main input fields are filled in, values taken from the profile specified with the corresponding command argument.

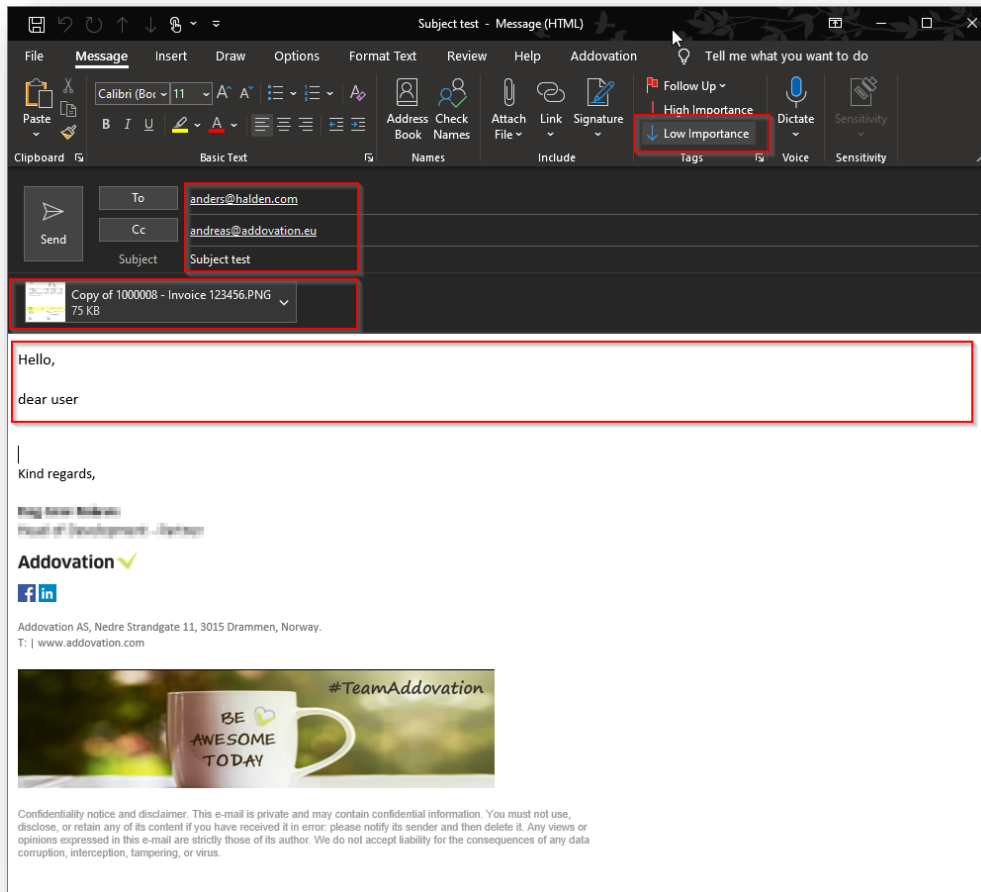


Figure 124 Mail item window

Most of the values used to fill in the fields in the Meeting appointment window are fetched from IFS. The profile values hold the SQL clause that in turn is executed to retrieve these values.

The values fetched from the profile specified are the same as for the CREATE_MEETING command (see previous section), apart from the **Location** and **DateTime** which only applies to Meetings.

Note that the **Contacts** will be the ones that is inserted into the **To** field and the **ContactsOptional** will be inserted into the **CC** field.

NOTE: The CREATE_EMAIL command is a supplement to the SEND_EMAIL command; it supports a more generic interface and more flexibility for entering values to the Mail item created. However, both commands are still supported.

9.5.2 Command format

Main command argument is

- **CMD = "CREATE_EMAIL"** { main command }
- Optional arguments
 - **PROFILE=MyProfile** { Provide base profile name as found in IFS Applications, used to store scripts and texts. Defaults to "Addovation Standard Profile" if not provided. }
 - **POST_RUN_UPDATE=True** { True means execute the SQL defined in the profile value PostRunUpdate. Defaults to False, i.e., by default the finalizing SQL will not be executed although it might be defined in the profile. If the SQL is blank, nothing is done, and no warning issued. }

Sample command line:

- `oas.exe CMD="CREATE_EMAIL" PROFILE=MyProfile POST_RUN_UPDATE=True`



For more details on how to create and modify profile values, please see [section 9.3.6 Profile Parameters and sample commands](#).

9.6 The GET_TEMPLATE command

9.6.1 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.

9.6.2 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 }

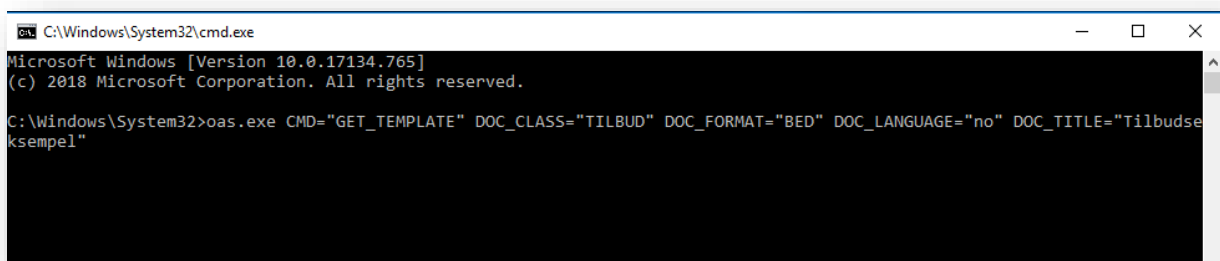
By entering the below command into a command prompt window, users can request a template without opening IFS applications. Note that the entered argument values must match the targeted environment.

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:



```

C:\Windows\System32\cmd.exe
Microsoft Windows [Version 10.0.17134.765]
(c) 2018 Microsoft Corporation. All rights reserved.

C:\Windows\System32>oas.exe CMD="GET_TEMPLATE" DOC_CLASS="TILBUD" DOC_FORMAT="BED" DOC_LANGUAGE="no" DOC_TITLE="Tilbudseksempel"
  
```

Figure 125 Get Template using command prompt

9.7 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:

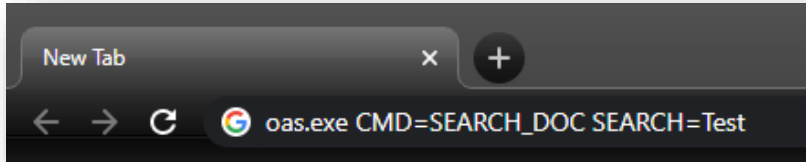


Figure 126 Chrome Command line before change

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

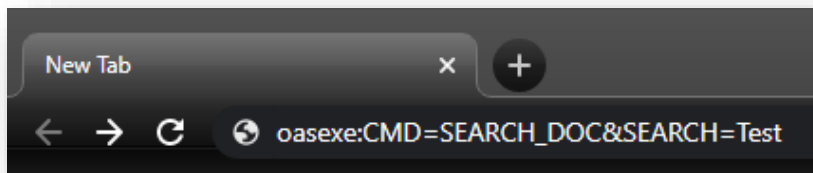


Figure 127 Chrome Command line before change

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:

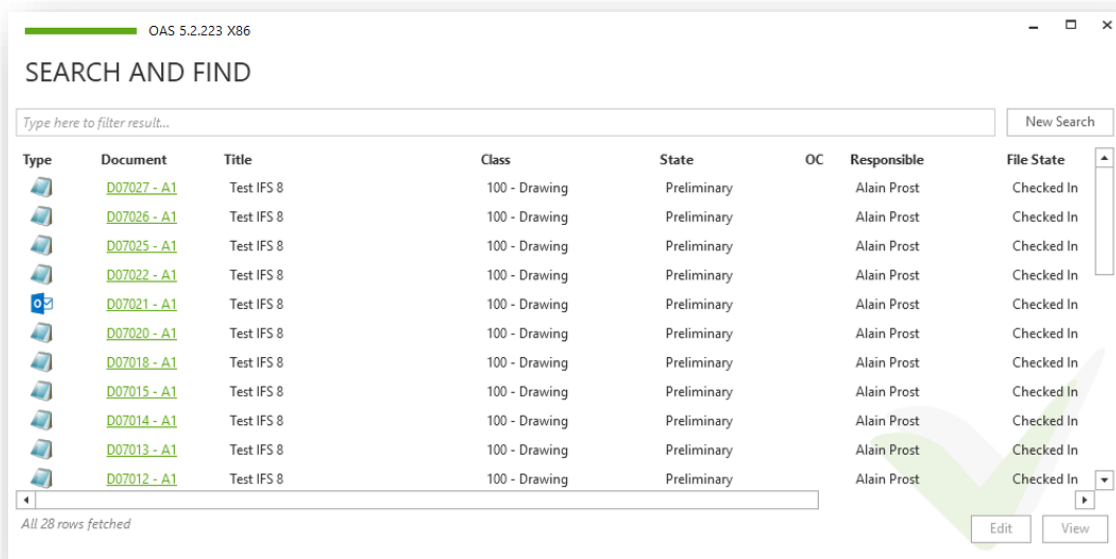


Figure 128 SEARCH AND FIND dialog appears

10 Configuration options



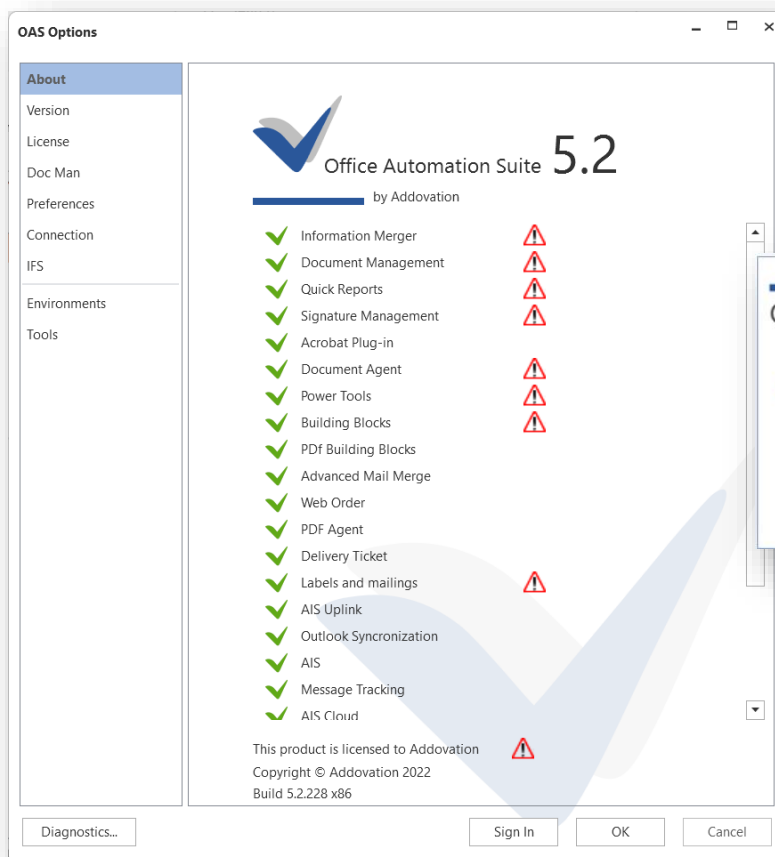
When you have installed the OAS, you will have the opportunity to view configuration settings and change / reconfigure the software if needed (post installation adjustments). This can be done by clicking on the 'Options' button in the Addovation ribbon, *General* button group.

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 Suite, 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 into IFS:



Figure 129 OAS Options – About page

10.1.2 Diagnostics

You can run diagnostics on your OAS installation, to see whether there can be any issues that causes problems for you. To run the Diagnostics, click the **Diagnostics...** button in the left-hand lower corner of the dialog. The report opens in your default browser, and the page look like this:

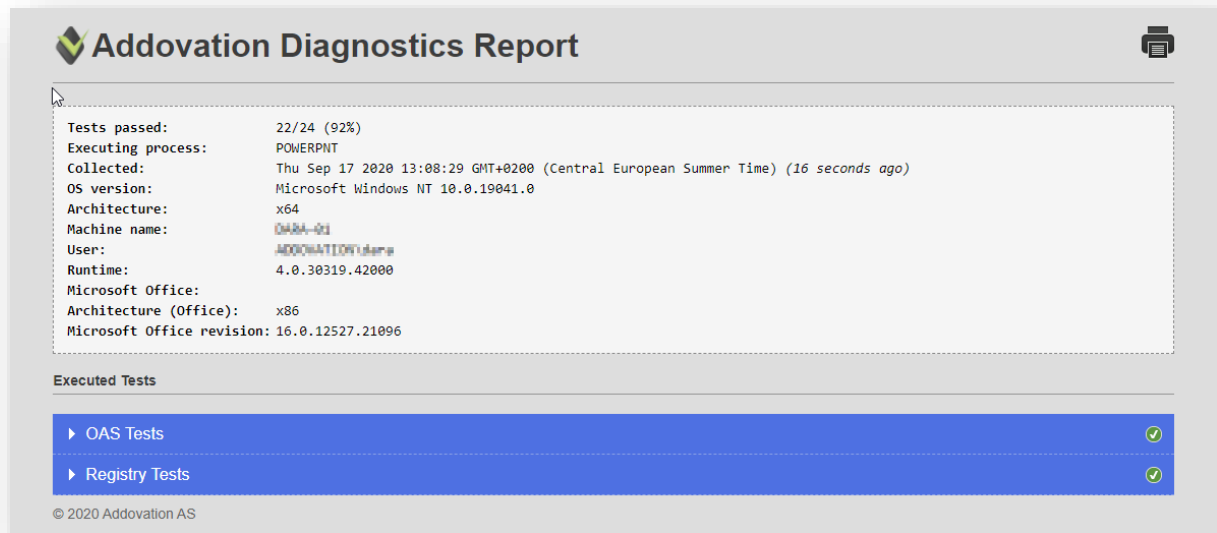


Figure 130 The Addovation Diagnostics Report

By expanding the sections (blue lines) you can inspect and get a lot of information.

If you encounter any problems using OAS, it is always a good idea to start running the diagnostics and inspect the result. The file can even be mailed as an attachment or added to a support case if applicable.

10.1.3 Version page

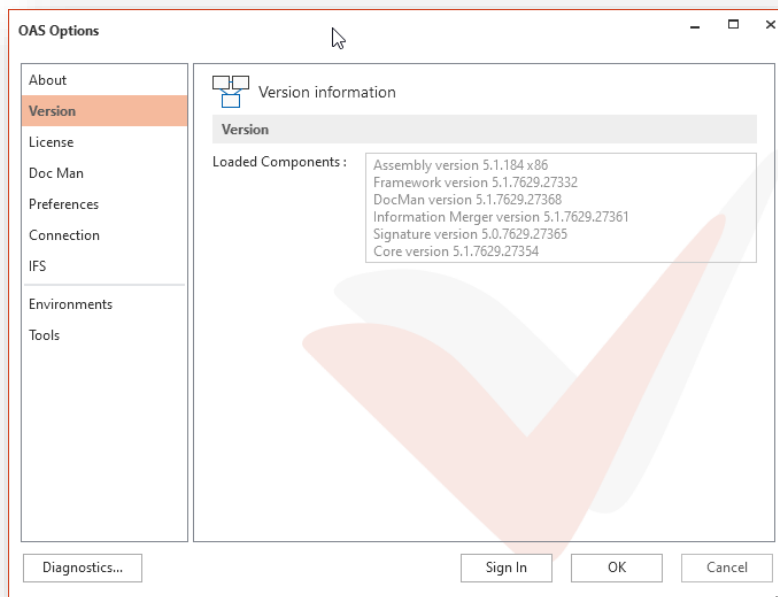


Figure 131 OAS Options – Version page

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.

10.1.4 License page

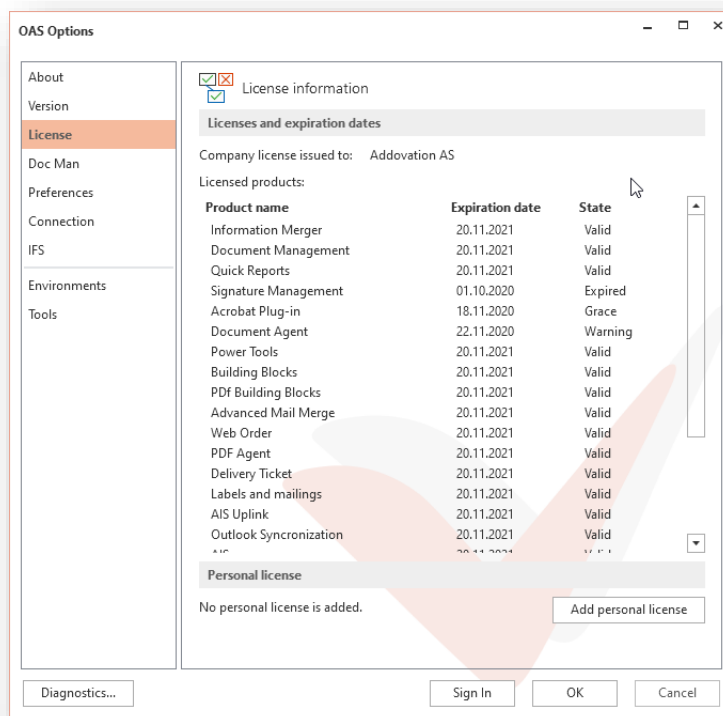


Figure 132 OAS Options – License page

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.

10.1.5 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.

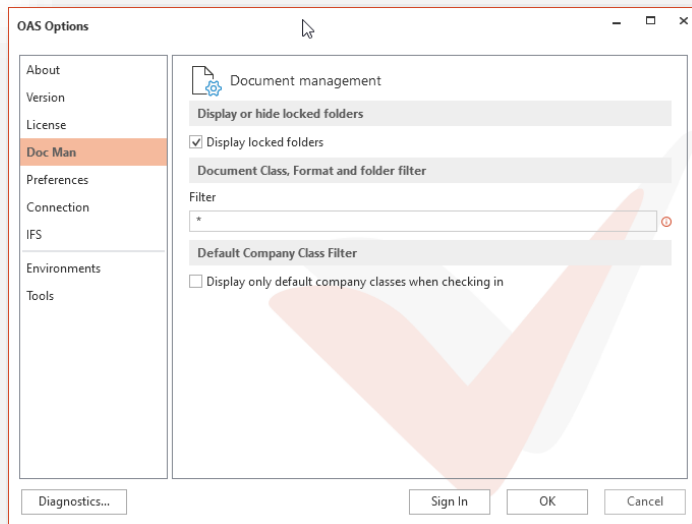


Figure 133 OAS Options – Doc Man page

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 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.

10.1.6 Preferences page

10.1.6.1 Language section

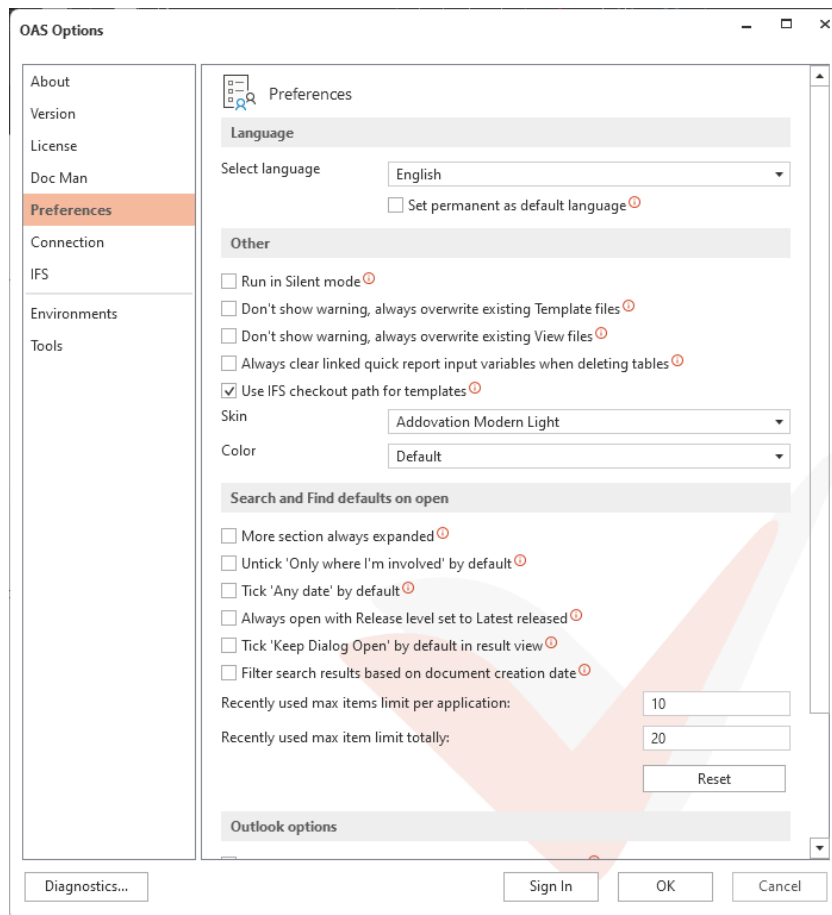


Figure 134 OAS Options – Preferences page

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.

10.1.6.2 Other sections

Run in Silent mode. If you tick this 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. [Registry Key: SilentSignon, Value: True/False]

Don't show warning... these two check boxes turn off 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. [Registry Key: DontShowWarnTemplateFile, Value: True/False], [Registry Key: DontShowWarnViewFile, Value: True/False]

Always clear linked quick report input variables when deleting tables. Tick this checkbox if you prefer that the variables stored for a table is cleared if you delete a table. If not ticked, the input variables will persist and appear if you create a new table and opens the Input variables dialog. [Registry Key: RemoveLinkedVariables, Value: True/False]

The **Use IFS checkout path for templates** checkbox allow users to checkout templates to IFS checkout path instead of user documents path. [Registry Key: UseDocCheckoutPathAlways, Value: True/False]

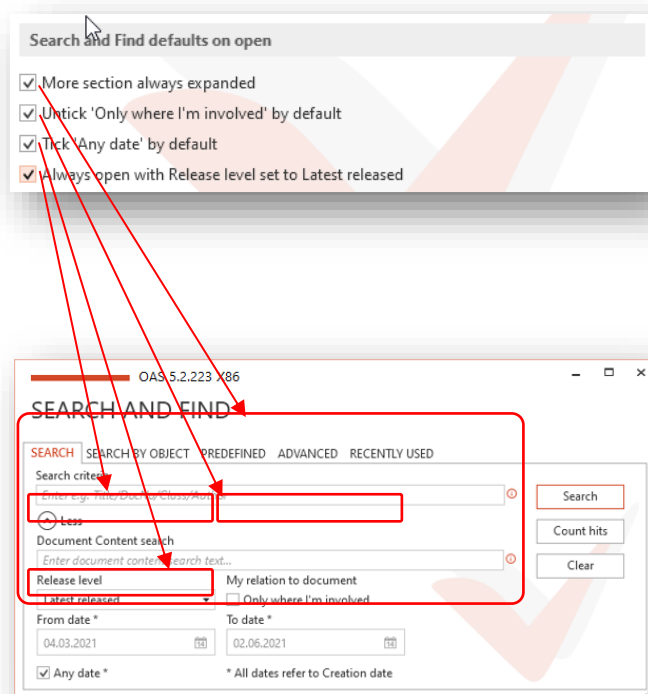
Skin. By changing the skin, the appearance of the background will change. We recommend running with standard Skin.

Color. By changing the color, 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.

10.1.6.3 Search and Find defaults on open section

This section configures how the SEARCH AND FIND dialog behaves on open.



More section always expanded. If this checkbox is ticked, the dialog will always open in expanded mode, like shown in Figure 135 Find dialog – opened according to configurations [Registry Key: MoreSection, Value: True/False]

Untick ‘Only where I’m involved’ by default. If this checkbox is ticked, the dialog opens with ‘Only where I’m involved’ unticked. This means that not only documents where you have been involved will be included in the search result. [Registry Key: UntickOnly, Value: True/False]

Tick ‘Any date’ by default. If this checkbox is ticked, the Any date checkbox in the dialog will always be ticked by default. [Registry Key: TickAnyDate, Value: True/False]

Figure 135 Find dialog – opened according to configurations

Always open with Release level set to Latest released.

If this checkbox is ticked, this will cause the Release level dropdown to be preselected Latest released option. [Registry Key: ReleaseLevel, Value: True/False]

Note that these settings are the default settings when opening the SEARCH AND FIND dialog, they can always be modified on the fly.

10.1.6.4 Keep dialog open

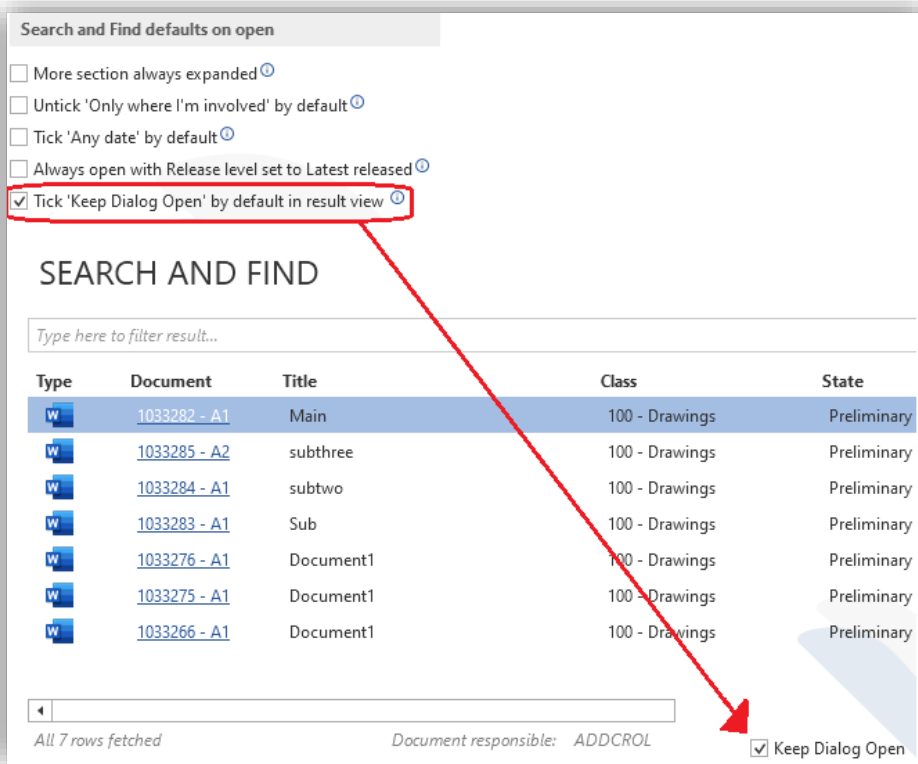


Figure 136 Keep dialog open

Tick 'Keep Dialog Open' by default in result view. If this checkbox is ticked, then you can open a document and the SEARCH AND FIND will stay open. If this checkbox is ticked, then the SEARCH AND FIND window will close after opening a document. It will work in both an office application and on the desktop. Keep in mind that using search and find from desktop will not be affected when performing actions in the office products. An example would when you use check in existing with 'keep window open' unticked. If you launched search and find from the office product it will close the search and find window. If you opened it from desktop, then it will not close. [Registry Key: KeepDocSearchOpen, Value: True/False]

10.1.6.5 Filter search results

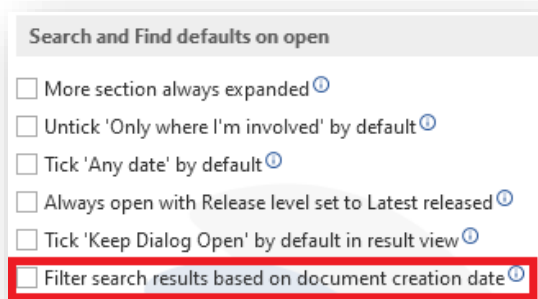


Figure 137 Filter results by creation date

Tick 'Filter search results based on document creation date'. If this checkbox is ticked, then Search and Find will filter results based on creation date of the documents. If it is left unticked which is the default it will filter results based on modified date. Both of them will be sorted based on last action.

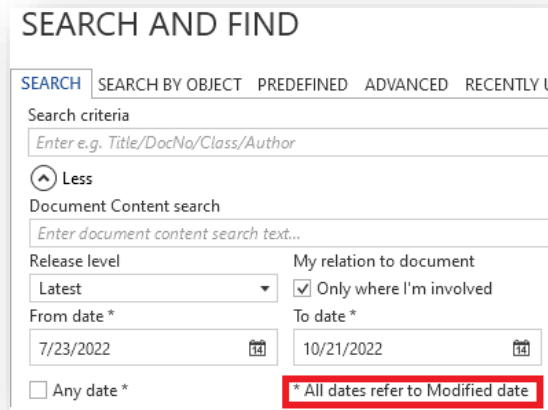


Figure 138 Filter results by modified date by default

If you click on more in the search and find window, then you will see the filter that will be used for the document search. [Registry Key: UseCreationSearch, Value: True/False]

10.1.6.6 Recently used max items

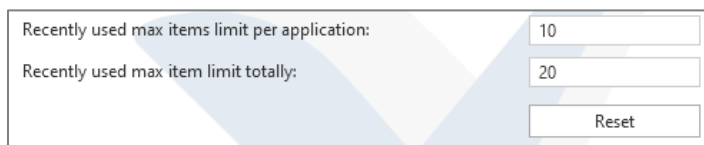


Figure 139 Recently used max items options

The numbers that are entered in these 2 boxes determines how many documents will display in SEARCH AND FIND recently used. **Recently used max items limit per application** controls how many documents will display in an office application under recently used documents. **Recently used max items limit totally** controls how many documents will display in SEARCH AND FIND from desktop. It will be a mixture of documents from different Office applications. Word, Excel, PowerPoint, Outlook and pdfs will also show up. The default values are 10 and 20 respectively. Pressing the **Reset button** will reset all values under **Search and find defaults on open section**. They will return to unticked.

[Registry Key: RecentlyUsedMaxCount, Value: 10]

[Registry Key: RecentlyUsedMaxCountTotal, Value: 20]

10.1.6.7 Outlook options

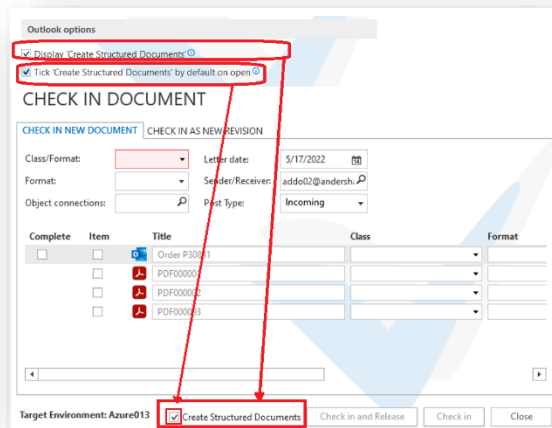


Figure 140 Check in dialog opened according to Create structured documents

Display ‘Create Structured Documents’. This option will allow you to display the ‘Create Structured Documents’ checkbox in Outlook to check in mails and attachments. This feature is hidden by default unless enabled from here. The attachments will be sub documents to the mail. The attachments will be placed in **consists of** in IFS under the mail. [Registry Key: StructuredDocumentsVisible, Value: True/False]

Tick ‘Create Structured Documents’ by default in open. This option can only be ticked after “Display ‘Create Structured Documents’” option above is selected. It ticks the ‘Create Structured Documents’ checkbox in Outlook by default when opening the Check in dialog. [Registry Key: StructuredDocuments, Value: True/False]

Preserve Full Title Display. By default, the checkbox is unticked, which removes all characters before the "colon" in the email title. When ticked, the full email title will be displayed. [Registry Key: PreserveFullTitle, Value: True/False]

Keep in focus. By default, the checkbox is ticked, which prevents the opening of Checked-In documents from IFS. If the checkbox is unticked, Users will be able to open the document while the Check-in dialog is still open. [Registry Key: KeepCheckInDialogFocus, Value: True/False]

10.1.6.8 Location of preferences in registry

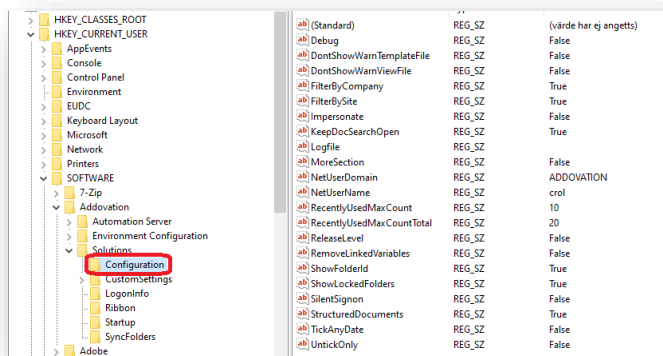


Figure 141 Location of preferences in registry

The registry settings for preferences are situated in HKEY_LOCAL_MACHINE and HKEY_CURRENT_USER. Most of their values are either set to False or True. During the installation of the OAS, these settings are not automatically added. However, they are incorporated when preferences are saved for the first time. In the absence of these values in the registry, OAS defaults to predetermined settings. OAS will be prioritizing HKEY_CURRENT_USER. If HKEY_CURRENT_USER is devoid of these values, the OAS will then search values in HKEY_LOCAL_MACHINE.

- Preferences registry paths can be
 - Computer\HKEY_CURRENT_USER\Software\Addovation\Solutions\Configuration
 - Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Addovation\Solutions\Configuration
 - Computer\HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\Addovation\Solutions\Configuration

10.1.6.9 Test and debug options section

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

From the Preference 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)

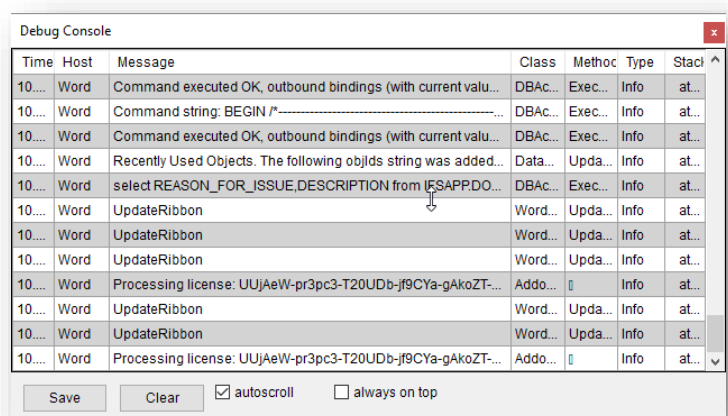
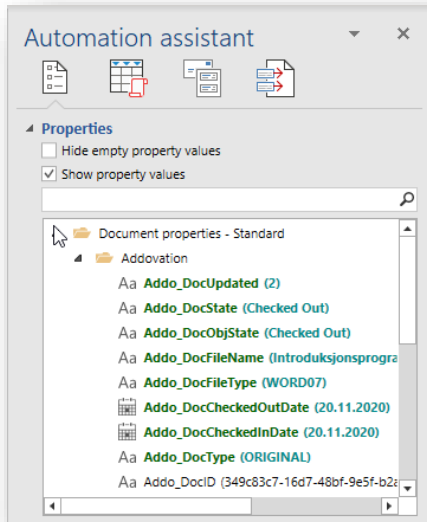


Figure 142 OAS Debug Console



Important! 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).

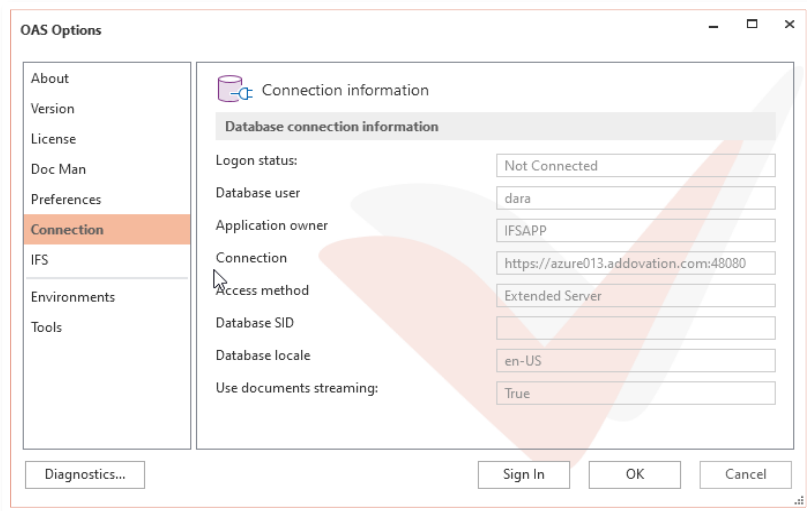
The log file is in CSV format which can be opened in Excel and/or sent to others for inspection.



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 143 AA - Addovation “hidden” properties displayed**

Figure 143 AA - Addovation “hidden” properties displayed

10.1.7 Connection page



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

Figure 144 OAS Options – Connections page

10.1.8 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 business objects (like e.g., customer orders, purchase orders, maintenance orders, project, and equipment objects etc.). 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 and manage.

Note that 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/OutlookSyncConfig; (see Figure 148 Folder Sync Details saved in IFS User Profile)

The configuration parameters in the Folder Sync page (ref. Figure 145 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.

After all required fields in the upper part of the page is entered, the *Action on drag and drop* sections will be enabled. From the lower part of the page, you can now define what actions should be taken when you drag and drop an e-mail item onto the sync folder configured:

- **Check in e-mail automatically** - If this option is selected, e-mail including attachments will be check in to IFS when dropped on the sync folder.

In addition, the option *Automatically Release Documents* will be made visible when this option is chosen. Note that if “Check in e-mail automatically” is selected, e-mails that have previously been checked into IFS will be ignored and another e-mails check in automatically.

- **Open the Check in Document dialog** – If this option is selected, the *Check in Document dialog* will open, and the user must manually check in the documents like shown below:

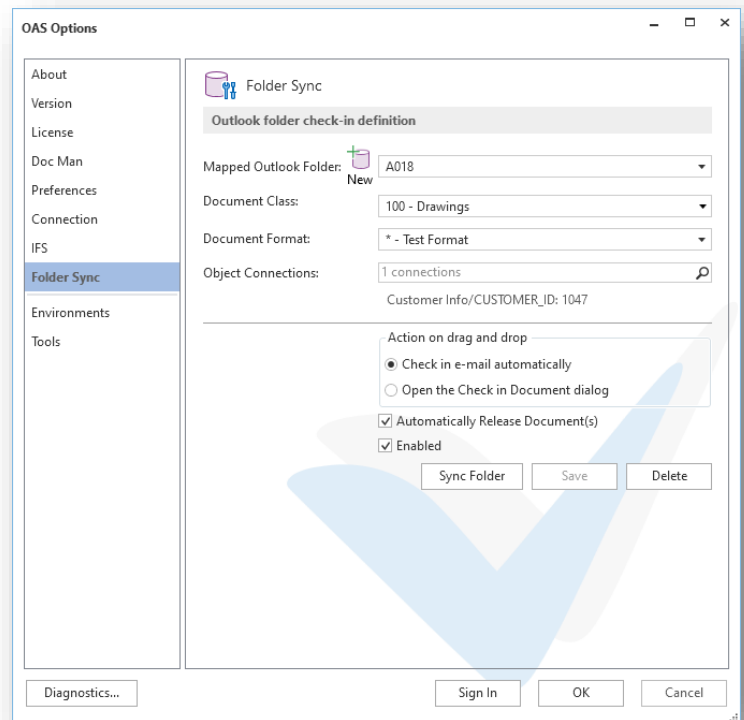


Figure 145 OAS Options – Folder Sync page

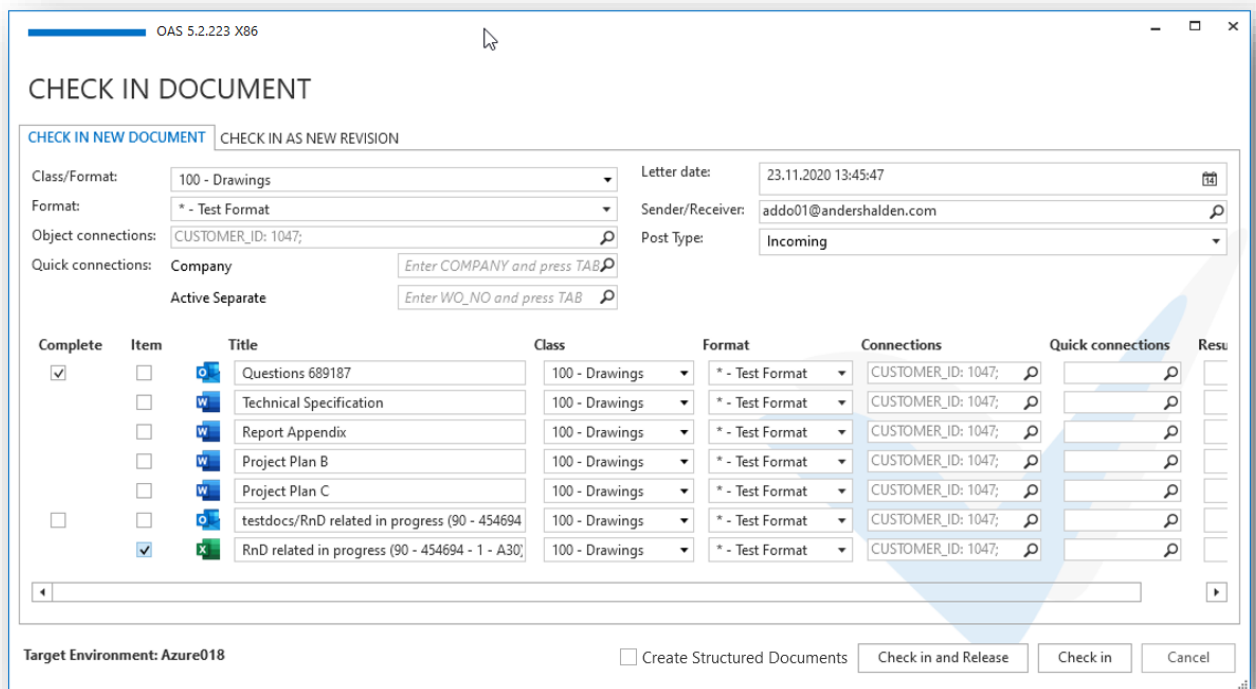


Figure 146 Check-in window pop ups when *Display the check in dialog on drag and drop* option is configured

- **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 into 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 146 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.

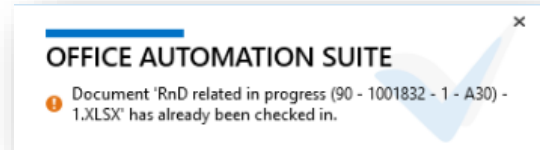


Figure 147 Notification pops-up when drag and drop detects an already checked in mail message



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 mail message is dragged and dropped into a sync folder in Outlook, check the level (a warning will be issued).

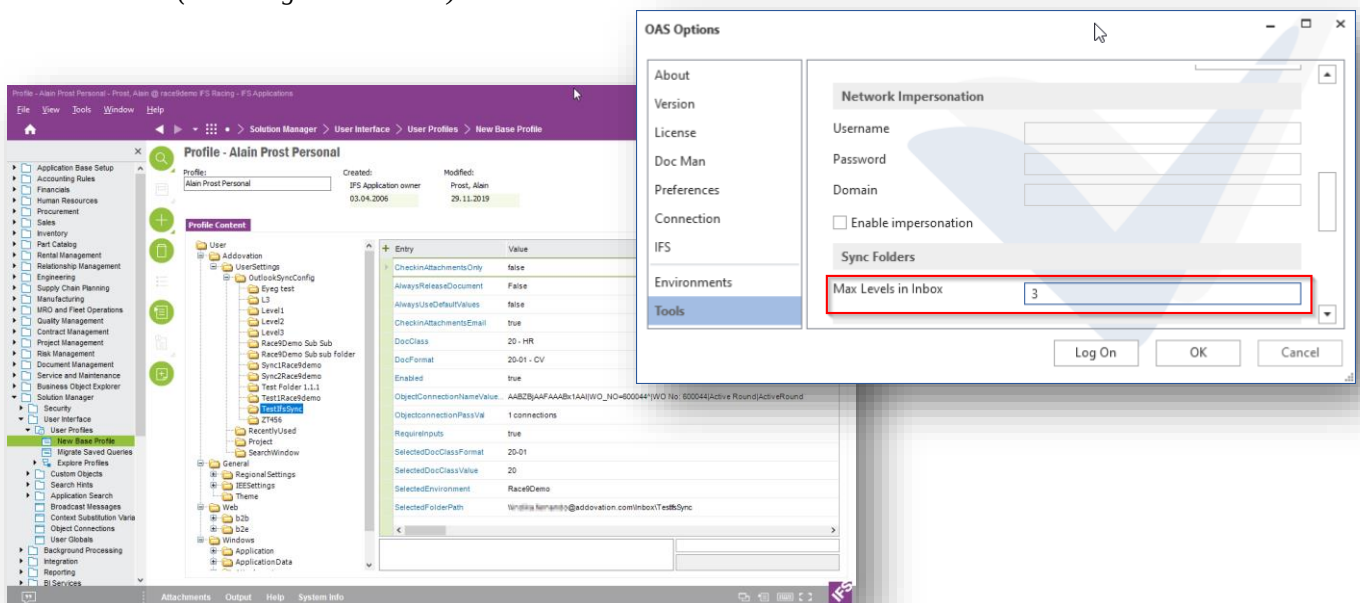
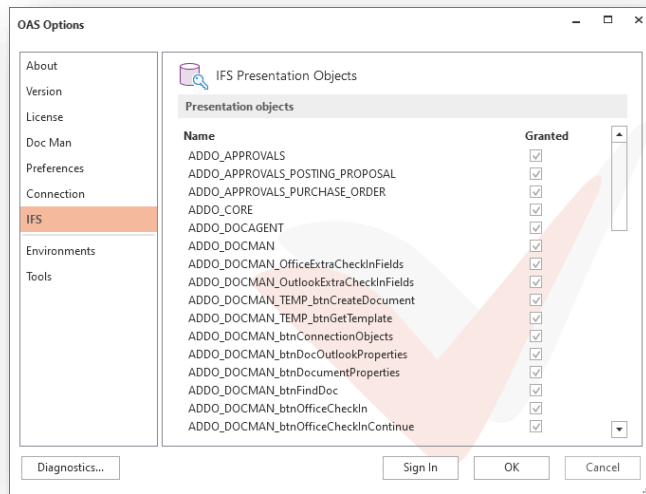


Figure 148 Folder Sync Details saved in IFS User Profile

10.1.9 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 149 OAS Options – IFS page

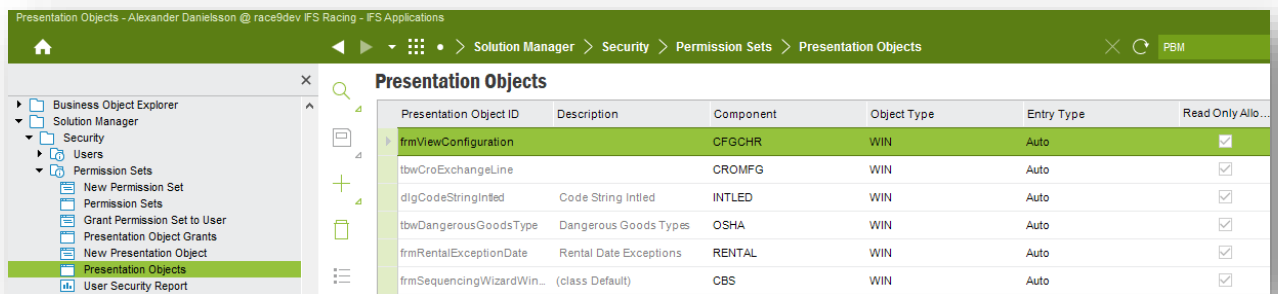


Figure 150 IFS EE - Presentation Objects

10.2 Advanced options

The two last Options pages, *Environments* and *Tools* requires elevated privileges to use, the *Tools* page even requires a password to enter.

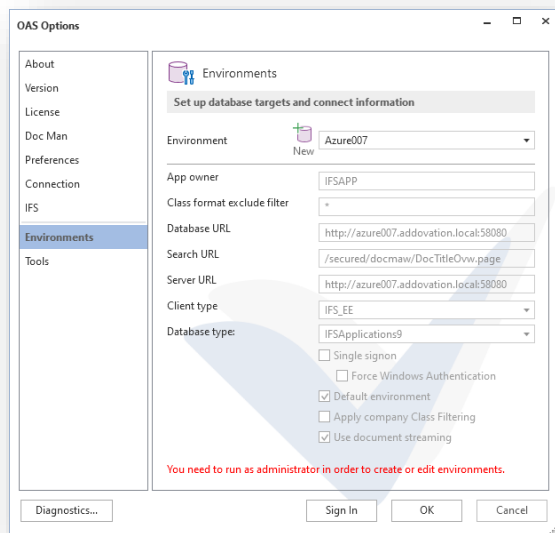


Figure 151 OAS Options – Environments page

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 Admin password to be entered to open for usage. 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 want to see/manage.

When the OAS options dialog is opened from e.g., Word (run as Administrator), after you click the *Edit* button and enter the correct password, the two buttons “*Save*” and “*Delete*” gets visible.

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

The configuration parameters framed in the picture are explained below.

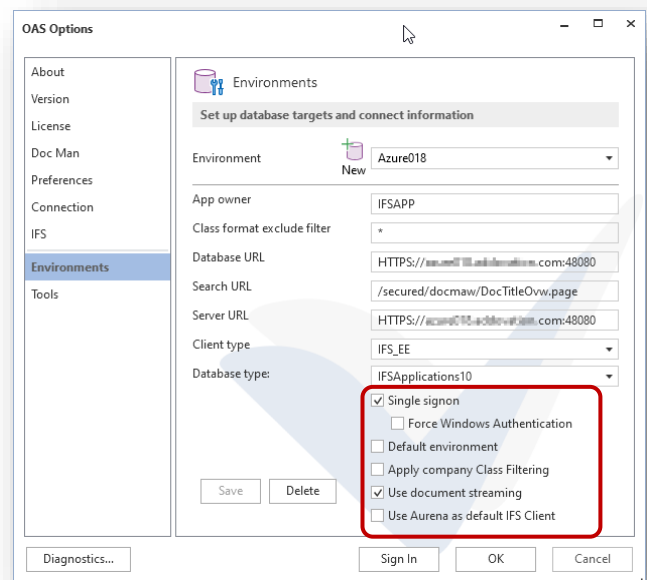


Figure 152 OAS Options - Environment page

- **Single sign on:** means that the that the environment you are targeting with this definition has been set up 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 10.1.5.
- **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.
- **Use Aurena as default IFS Client:** by ticking this check box, you tell OAS that all redirection to IFS pages should be done using the IFS Aurena client rather than the Enterprise explorer.

10.2.2 Tools page

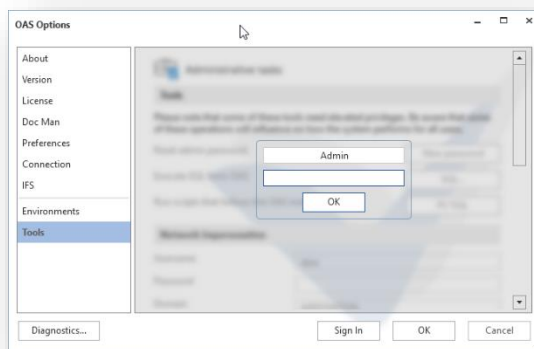


Figure 153 Tools access need password

From the Tools page, several powerful options can be reached. To get access to these options, you need to log in to the page. A password is required. If not modified, there is a default password that can be used.

10.2.2.1 Changing password

To change the password, you first need to log on to the Tools page. Then click the Password button. The RESET ADMIN PASSWORD dialog appears. Do the

following steps to change the Admin password for the tools page (this only affects access to this page, but you also need this password to enter the Environments page in Edit mode, there will be no other implications).

- Enter the new password along with the repeated password (they must match)
- Select Environment for which the password is to be set
- Enter the app owner’s username and password for the chosen Environment
- Click Save

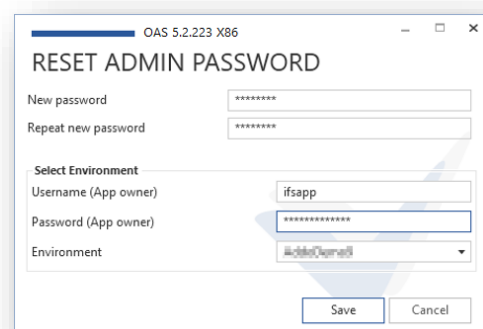


Figure 154 Admin password reset dialog

The password is stored in the IFS Profile section. If the password is completely forgotten, the corresponding Profile value can be deleted in IFS, and the password reverts to the ‘factory’ setting.

10.2.2.2 SQL execution

The **SQL...** button – Opens SQL Query Execution dialog for running simple SQL queries from within OAS

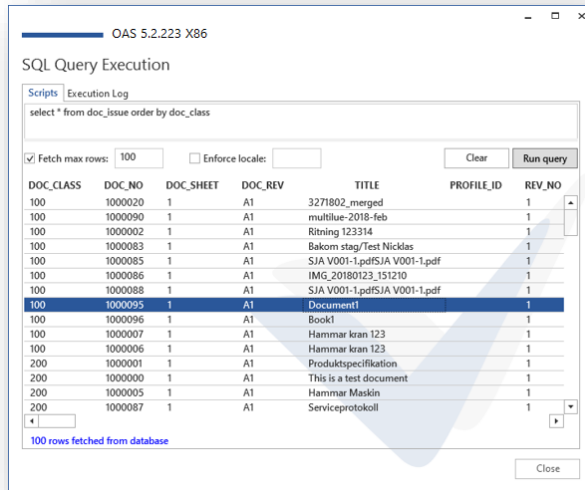


Figure 155 The SQL Query Execution dialog

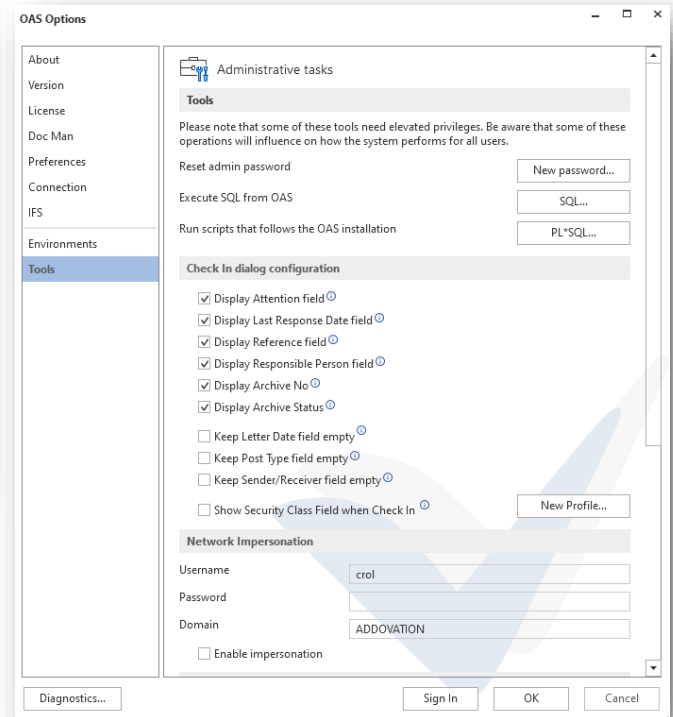


Figure 156 OAS Options - Tools page

10.2.2.3 PL*SQL script execution

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.

Enter Username and Password and target database before hitting the **Execute** button. The Single Sign On checkbox must be used when targeting a single sign on configured IFS installation.

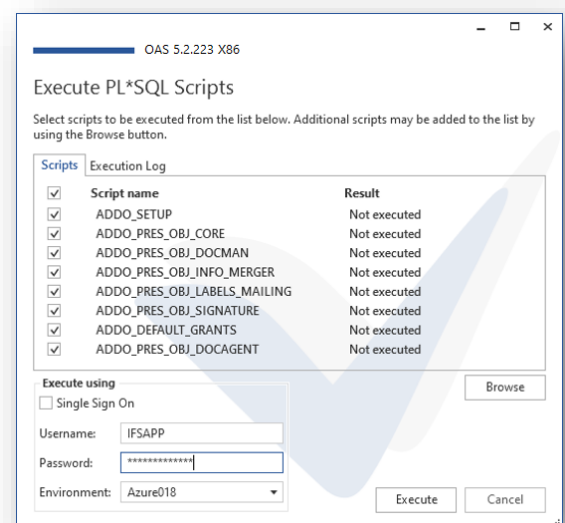


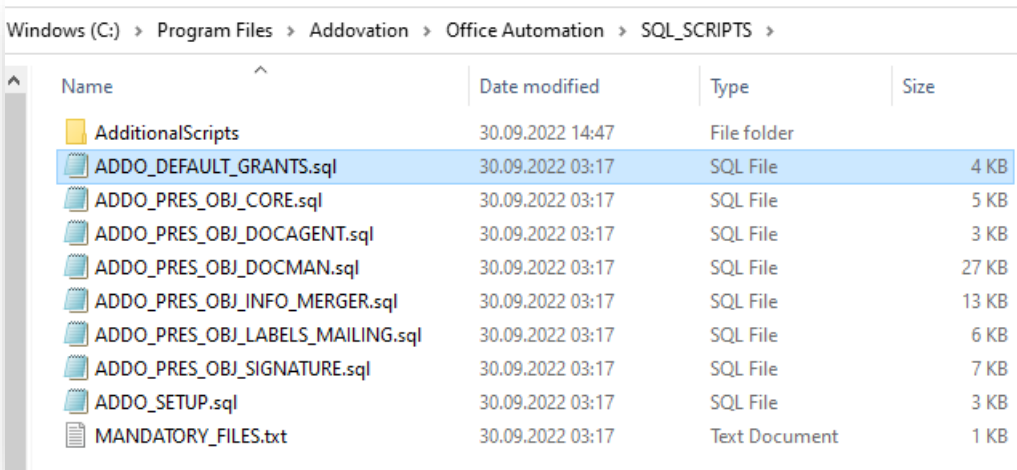
Figure 157 PL*SQL Scripts execution dialog

The scripts used by the OAS installation contain variables that have to be filled in when run manually:

&ProfileName

&ProfileSection

&ProfileValue



Name	Date modified	Type	Size
AdditionalScripts	30.09.2022 14:47	File folder	
ADDO_DEFAULT_GRANTS.sql	30.09.2022 03:17	SQL File	4 KB
ADDO_PRES_OBJ_CORE.sql	30.09.2022 03:17	SQL File	5 KB
ADDO_PRES_OBJ_DOCAGENT.sql	30.09.2022 03:17	SQL File	3 KB
ADDO_PRES_OBJ_DOCMAN.sql	30.09.2022 03:17	SQL File	27 KB
ADDO_PRES_OBJ_INFO_MERGER.sql	30.09.2022 03:17	SQL File	13 KB
ADDO_PRES_OBJ_LABELS_MAILING.sql	30.09.2022 03:17	SQL File	6 KB
ADDO_PRES_OBJ_SIGNATURE.sql	30.09.2022 03:17	SQL File	7 KB
ADDO_SETUP.sql	30.09.2022 03:17	SQL File	3 KB
MANDATORY_FILES.txt	30.09.2022 03:17	Text Document	1 KB

Figure 158 PL*SQL Scripts in OAS

Example:

ProfileName: "Addovation OAS Installation"

ProfileSection: "User/Addovation/OAS"

ProfileValue: "5.2.225" <the OAS BuildNumber, for example 5.2.225>

```

BEGIN
    select profile_id into ProfileId_ from &AO..Fndrr_Client_Profile WHERE PROFILE_NAME = 'Addovation OAS Installation';

    EXCEPTION
        WHEN NO_DATA_FOUND THEN
            ProfileId_ := NULL;
END;

IF ProfileId_ is null THEN
    &AO..Fndrr_Client_Profile_Api.Create_Base__(ProfileId_, 'Addovation OAS Installation');
END IF;

&AO..Fndrr_Client_Profile_Value_Api.Set_Value__(ProfileId_, 'User/Addovation/OAS', 'ADDO_DEFAULT_GRANTS', '5.2.225');
COMMIT;
END;
    
```

Figure 159 Example values for parameters

10.2.2.4 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 does have these rights. Enter username, password, and domain, and tick the “Enable impersonation” to do so.

10.2.2.5 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 an overview of the documents being used as templates in IFS/OAS.

Sync Folders

Max Levels in Inbox: 3

Import/Export EDM Templates

Environment: AddoDev9

Username: dara

App owner: IFSAPP

Database locale: en-US

Working Directory:

☒ Extract from IFS
☐ Refresh Xml
☐ Validate
☐ Insert to IFS

Execute

Figure 160 Import/Export EDM Template

Language Co.	Default Language	Format	Description	Template Class	Document No	Doc Sheet	Revision	Title	Document File Template Description
sa	Afar	TST-01	Testing datatable t...	TEST	1203014	1	A2	XMLERROR	CORRUPTED
ab	Abkhazian	TST-01	Testing datatable t...	TEST	1203015	1	A1	QIVER1	
en	English	TST-01	Testing datatable t...	TEST	1203010	1	A3	HeaderFooterTest	OK
en	English	TEST-0	AISTEST Super Size	TEST	1203871	1	A1	AIS with Aapok...	
en	English	TEST-9	ADDO_MEDIA_BR...	TEST	1204071	1	A1	Addo_Media_Br...	
en	English	TSTMG	Image Size Test	TEST	1204347	1	A1	AIS Image Size ...	
sv	Swedish	TST-01	Testing datatable t...	TEST	1203012	1	A1	BSPORTEST	OK
sv	Swedish	TEST-0	MERGEFORMAT Test	TEST	1203776	1	A1	Mergetformat Test	Mergetformat new-line limitation test

Figure 161 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.

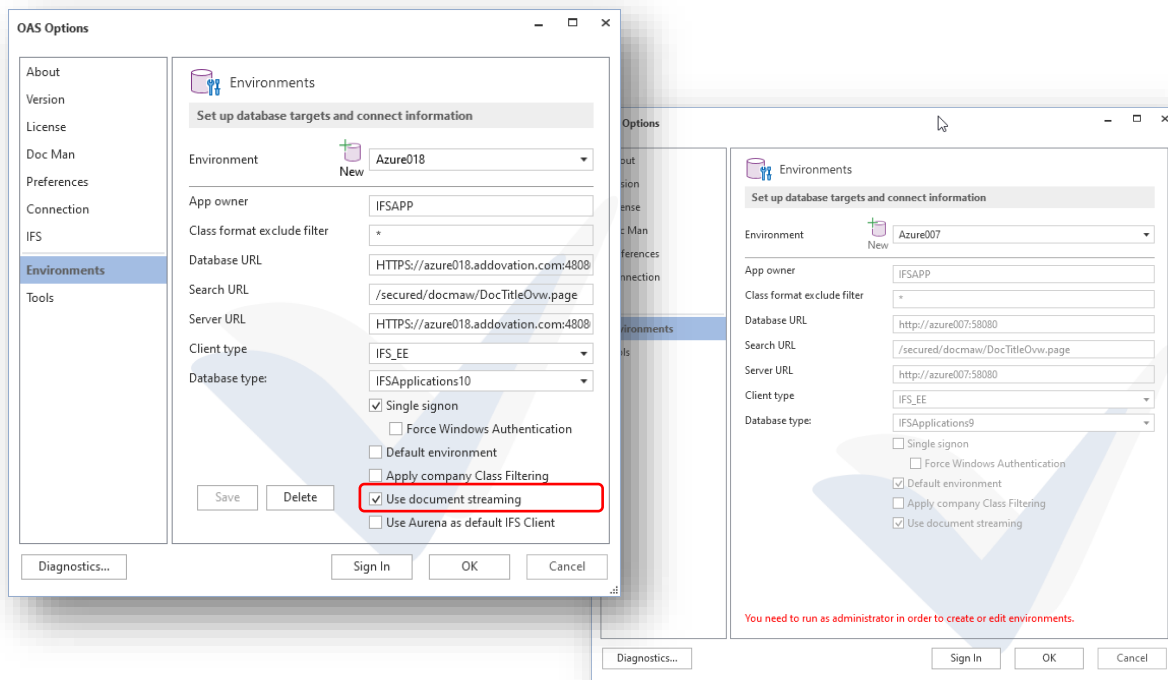


Figure 162 OAS Options - Environments configuration, to the left, Word opened by **Run as administrator**

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).

In this chapter we show what functionality and buttons that can be governed by PO's and explains how to do this. Presentation objects must be granted by a system administrator and is done from within IFS or by running scripts.

12.1.1 Presentation Objects (PO)

The concept of IFS 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. The benefit of using PO for OAS as well, is that you can have different access levels in different environment. In a training database for example you might want to allow more access than in a production environment. By using PO's, the access levels are stored in the database itself.

12.1.2 The standard permission set

The OAS installation comes with a standard permission set called ADDO_OFFICE_AUTOMATION_STD which grant access to all PO to the users, which means that all buttons will be visible and accessible for the user granted this permission set.

To alter this, the permission set can be modified (in IFS). By removing access to a PO, a button can be made invisible to the users. Note that doing this in the standard permission set will affect all users granted the permission set.

To give a user (or a group of users) access to the specific buttons, you can create new permission set containing the PO in question, and then grant this permission set to the users who should have access to the functionality accessible through these buttons.

A typical scenario would be where you want most users not have access to (nor see the buttons for) the information merger functionality (all except for the Get Info button), while a limited group of users working with creating corporate templates should have access. In this case you would remove the access (visibility) in general:

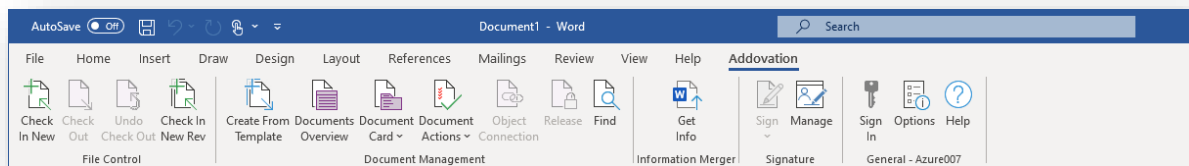


Figure 163 Addovation tab with hidden Information Merger buttons

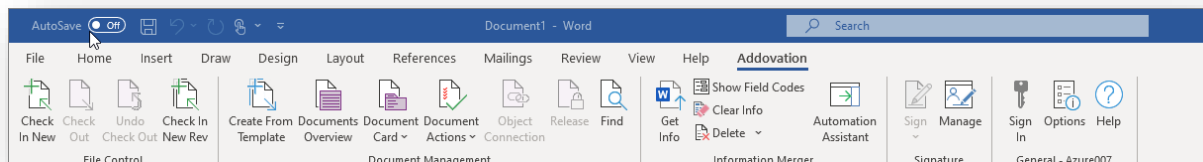


Figure 164 Addovation tab with displayed Information Merger buttons

Then you would create a new permission set with all the PO's needed to show the buttons to the group of users that need access to all the Information merger functionality, like this:

12.2 OAS functionality in general

The functionality in OAS is organized into modules, all of which are governed by 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:

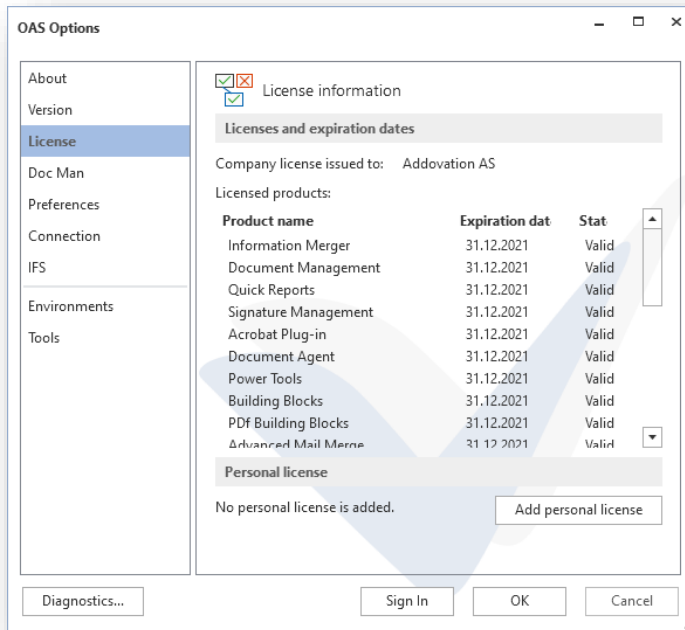


Figure 165 OAS Options - License information page

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

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

12.3 MS Office Ribbon

When you have installed the Addovation Add-ins to Microsoft Office, the ribbon tab **Addovation** becomes visible in the Office ribbon. When you sign in into IFS Applications (using the Sign 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 into IFS, all available button groups will appear like shown in the figure below (in this case MS Word).

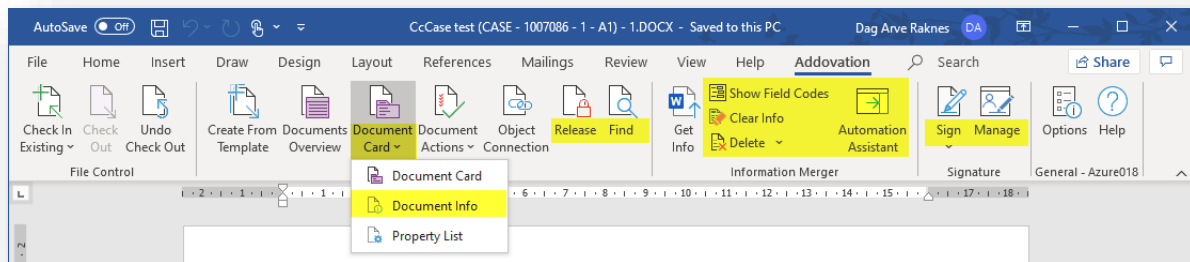


Figure 166 ADDOVATION Ribbon tab

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 167 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 as New Revision** task pane are controlled via the same PO's as listed for the Check in new document in the table above, which means that if hided in one task pane, it will be hided also in the other task pane.

The task pane looks like this:

Document Information

Check In as New Revision

Title: Test document

Number: 1007737

Latest revision: A1

Revision Properties

New revision: A2

Revision text:

Reason for issue:

Letter date: 23.11.2020

Sender / receiver:

Post Type:

Create PDF

Check In and Continue

Check In and Close

Check In and Release

Figure 168 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.

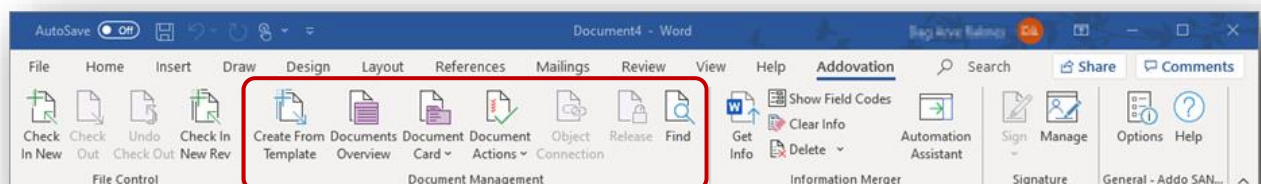


Figure 169 Document Management button group

12.3.2.1 Create from Template

The first button is the Create from Template, and access to it / visibility it can be controlled using a PO.

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

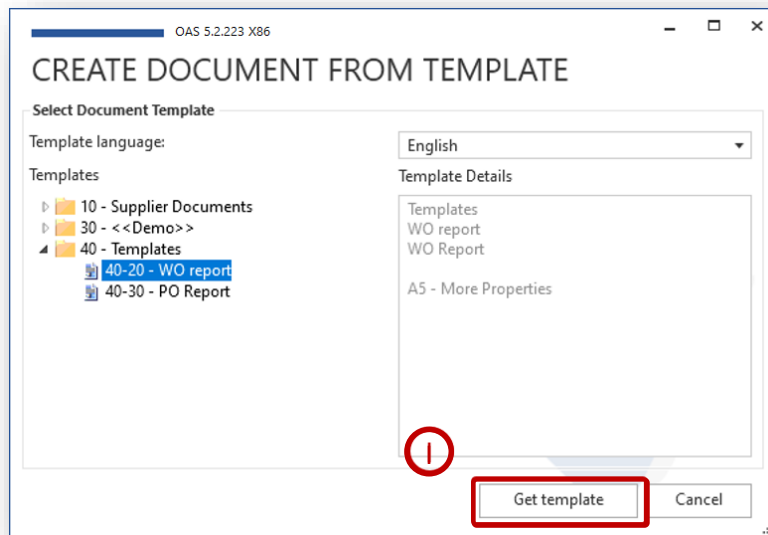


Figure 170 Create from Template

#	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

Table 2 Presentation Objects - Get template

12.3.3 Information Merger

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

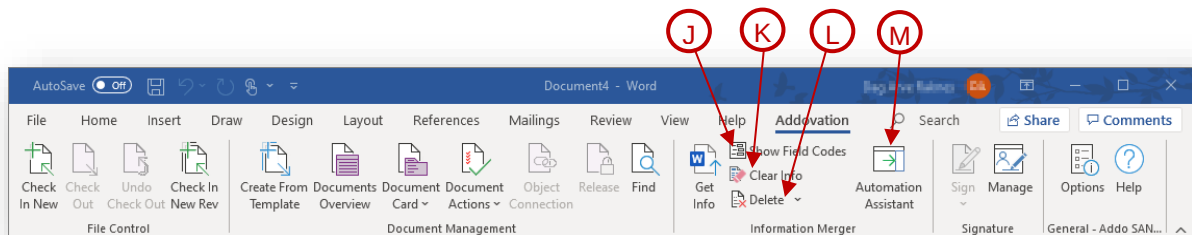


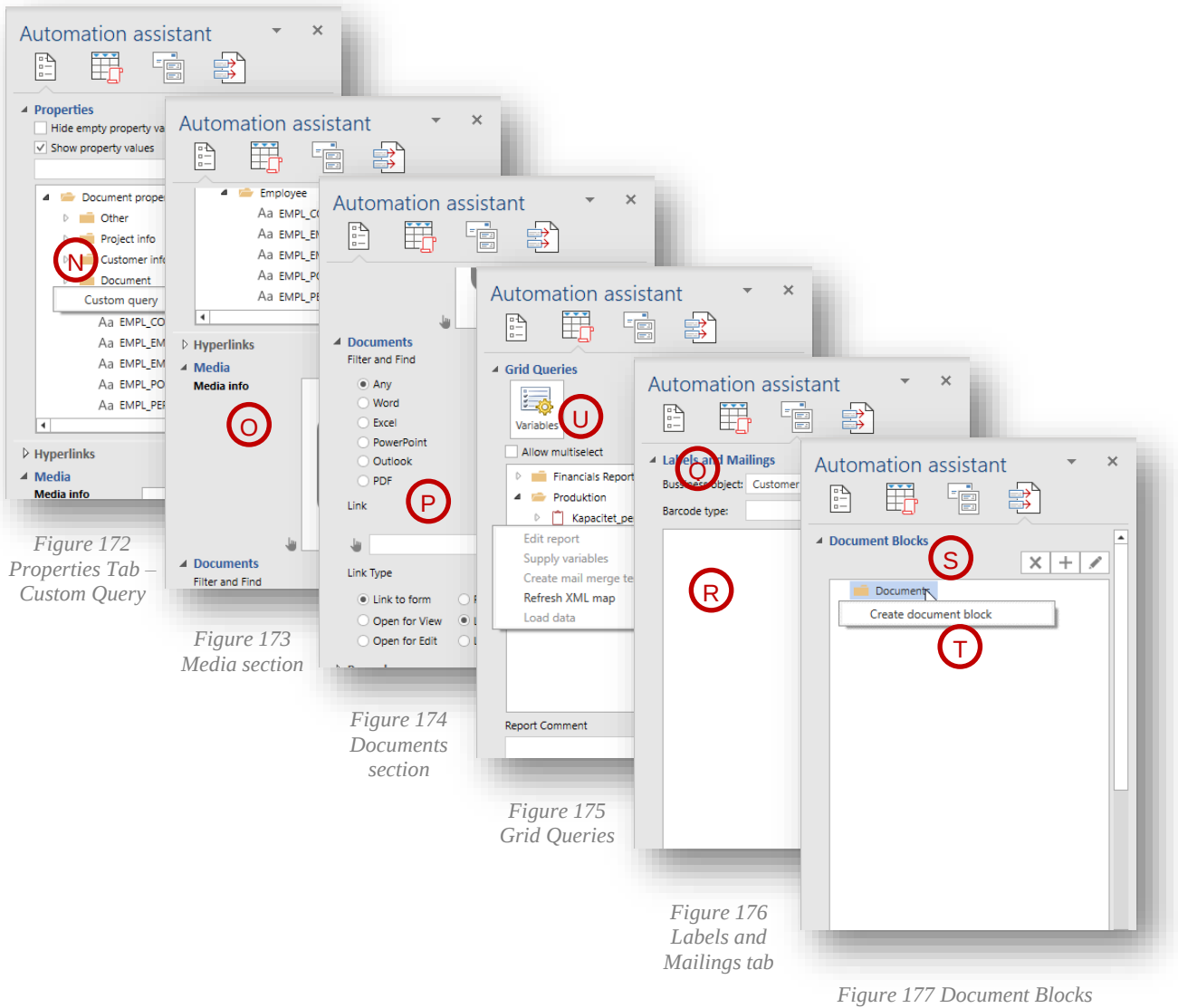
Figure 171 Information merger buttons

#	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_btnDeleteProperties	Controls the display of the "Delete Properties" button in Office Automation Information Merger button group
M	Automation Assistant	ADDO_INFORMATION_MERGER_btnAutomationAssistant	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 are controlled via PO's.



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
Q	Labels and Mailings tab	ADDO_INFORMATION_MERGER_tabMailingsAndLabels	Controls the display of the "Mailings and Labels" tab in Automation Assistant
R	Labels and mailings	ADDO_INFORMATION_MERGER_menuMailingsAndLabels	Controls the display of the "Create mailings" menu in Automation Assistant
S	Document Blocks	ADDO_INFORMATION_MERGER_tabBuildingBlocks	Controls the access to Document Blocks tab in the Automation Assistant
T	Document Blocks	ADDO_INFORMATION_MERGER_menuBuildingBlocks	Controls the access to Document Blocks menu items in the Automation Assistant
U	Grid Queries	ADDO_INFORMATION_MERGER_tabGridQueries	Controls the access to Grid Queries tab in the Automation Assistant

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:

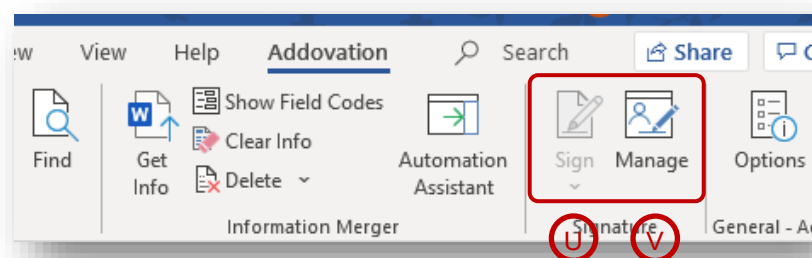


Figure 178 Signature Buttons group

#	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

Table 5 OAS Objects – PO's controlling Signing group buttons

12.3.5 Other ribbon buttons

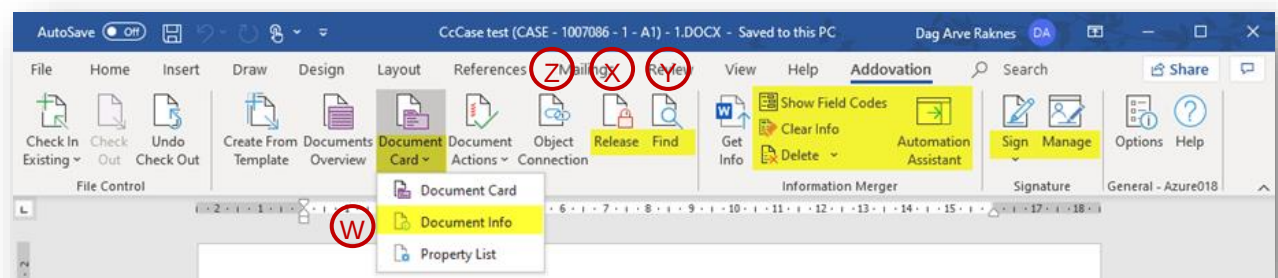


Figure 179 Configurable Document Management buttons

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/hidden by using the corresponding PO's associated with them.

Here are the corresponding Presentation Objects

#	OAS Objects	Presentation Object	Description
W	Document Info	ADDO_DOCMAN_btnDocumentProperties	Controls the display of the "Document Info" 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

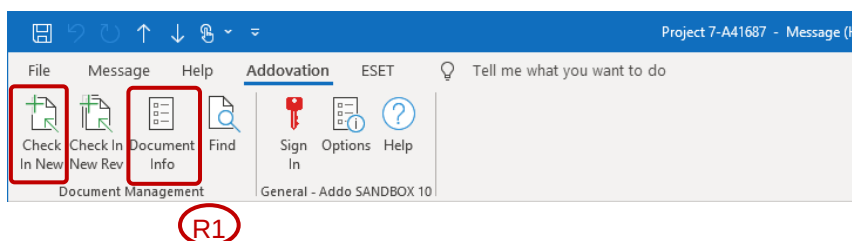


Figure 180 Configurable Outlook Message buttons

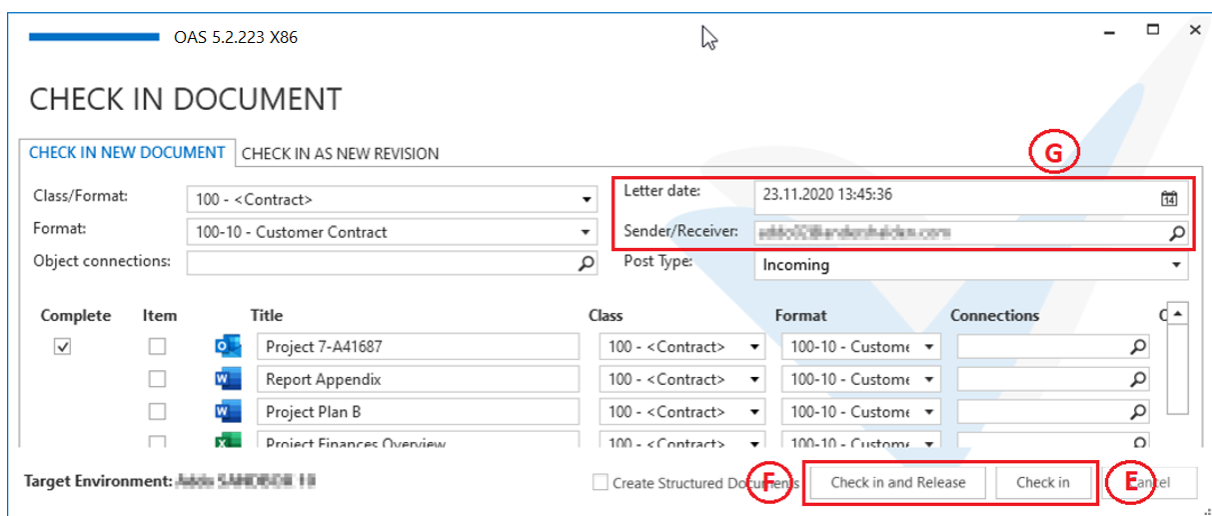


Figure 181 Configurable CHECK IN DOCUMENT dialog buttons

#	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

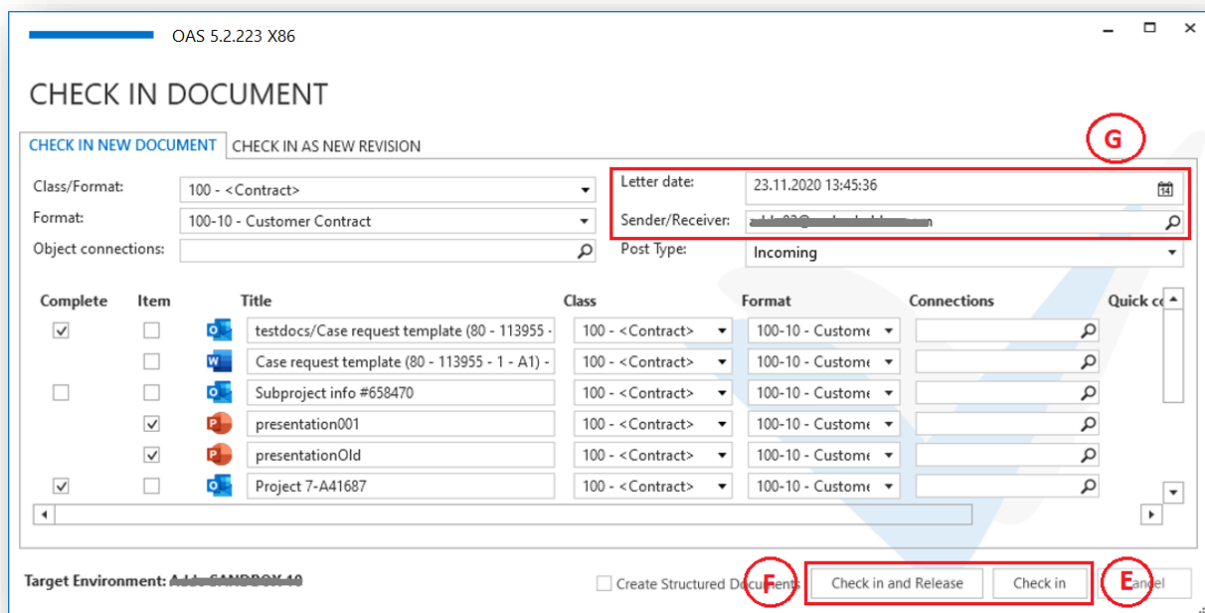


Figure 182 Check in Multiple e-mails dialog buttons

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

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

12.4.4 Structured documents feature

The structured documents option allows a user to connect an e-mail's attachment to the main. How it works is that the attachments are connected to the main e-mail as sub documents via consists of in IFS. This feature should first be enabled in options to use it. It can then also be turned on by default via options or toggled in the check in window. It supports preliminary and release. This feature can be used with both single check in and multiple check in.

12.4.5 Structured documents check in new document complete

We can check in a complete e-mail and the e-mail will have the attachments in the e-mail itself and the attachments will also be checked in separately and they will become sub documents of the main e-mail.

CHECK IN DOCUMENT

CHECK IN NEW DOCUMENT | CHECK IN AS NEW REVISION

Class/Format: 100 - Drawings | Letter date: 6/1/2022
 Format: * - Test Format | Sender/Receiver: addo01@andersshalden.com
 Object connections: | Post Type: Incoming

Complete	Item	Title	Class	Format	Connections	Quick connections	Result
☒	☐	Questions #1930222	100 - Drawings	* - Test Format			
	☐	PDF000001	100 - Drawings	* - Test Format			
	☐	PDF000002	100 - Drawings	* - Test Format			
	☐	PDF000003	100 - Drawings	* - Test Format			

Target Environment: Azure013

☒ Create Structured Documents | Check in and Release | ☒ Check in | Cancel

Complete	Item	Title	Class	Format	Connections	Quick connections	Result
☐	☐	Questions #1930222	100 - Drawings	* - Test Format			1034298
	☐	PDF000001	100 - Drawings	* - Test Format			1034299
	☐	PDF000002	100 - Drawings	* - Test Format			1034300
	☐	PDF000003	100 - Drawings	* - Test Format			1034301

Document Revision - Questions #1930222

Main Information

Doc Class: 100 | Doc No: 1034298 | Status: Preliminary
 Doc Sheet: 1 | Revision: A1 | File Status: Checked In
 Language: sv | Swedish | Format: * | Test Format | Alt Doc No:
 Title: Questions #1930222

Title and Revision Settings

☐ Update Allowed During | ☐ Structure | ☐ Restricted Access
☐ Used as File Template | ☒ Is Latest Revision

On-Save Operations

☐ Release | ☐ Distribute

General	Correspondence	Development	Connect Object	Objects	Access	Title	Approval	Sheets/Descriptions	Consists Of
Document Class	Document No	Doc Sheet	Revision	Title	Number of Subdocuments	Relative Path	Document Status		
100	1034299	1	A1	PDF000001	0		Preliminary		
100	1034300	1	A1	PDF000002	0		Preliminary		
100	1034301	1	A1	PDF000003	0		Preliminary		

Figure 183 Check in complete structured documents

12.4.6 Structured documents check in new document main + attachments

You can check in the main e-mail and the attachments separately. If you only check in the mail(not complete) then the attachments will not be in the e-mail. Each one of attachments that are checked in when create structured documents is selected will be a sub document. You can either check in the main e-mail and the separate attachments at the same time or come back later to check in the attachments. It will produce the same result.

CHECK IN DOCUMENT

CHECK IN NEW DOCUMENT | CHECK IN AS NEW REVISION

Class/Format: 100 - Drawings | Letter date: 5/30/2022
 Format: * - Test Format | Sender/Receiver: addo02@andershalden.com
 Object connections: | Post Type: Incoming

Complete	Item	Title	Class	Format	Connections	Quick connections	Result
☐	☒	Review meeting 902081	100 - Drawings	* - Test Format			
☐	☒	workbook1	100 - Drawings	* - Test Format			
☐	☒	workbookOld	100 - Drawings	* - Test Format			

☒ Create Structured Documents | Check in and Release | **Check in** | Cancel

Document Revision - Review meeting 902081

Main Information

Doc Class: 100 | Doc No: 1034294 | Status: Preliminary
 Doc Sheet: 1 | Revision: A1 | File Status: Checked In
 Language: sv | Swedish | Format: * | Test Format | Alt Doc No:
 Title: Review meeting 902081

Title and Revision Settings

☐ Update Allowed During | ☐ Structure | ☐ Restricted Access
☐ Used as File Template | ☒ Is Latest Revision

On-Save Operations

☐ Release | ☐ Distribute

General	Correspondence	Development	Connect Object	Objects	Access	Title	Approval	Sheets/Descriptions	Consists Of
+	Document Class	Document No	Doc Sheet	Revision	Title	Number of Subdocuments	Relative Path	Document Status	
▶	100	1034295	1	A1	workbook1	0		Preliminary	

Figure 184 Check in main e-mail and attachment

Important Note: This feature will not available if you check in a single e-mail without attachments or an attachment without an e-mail selected or already checked in. This is true in both create new document and create new revision.

Complete | **Item** | **Title** | **Class** | **Format** | **Connections** | **Quick connections** | **Result**

☒ | ☐ | Task 26765 - Test - #15094 - Extension 1 - Creal | | | | |

☐ | ☒ | Supplier P23871 | | | | |

☐ | ☒ | workbook1 | | | | |

☐ | ☒ | workbookOld | | | | |

☐ Create Structured Documents | Check in and Release | **Check in** | Cancel

Figure 185 Create structured document unavailable

12.4.7 Structured documents check in new revision complete

You can create a new revision with the structured documents option. When you check in and create a new revision by selecting complete then the main e-mail will be the latest revision and the attachments will be checked in and become sub documents of the new revision. Older sub documents from the previous revision will follow to the new revision thanks to existing IFS functionality.

Document Revision - Review meeting 902081

Main Information

Doc Class: 100

Doc No: 1034294

Status: Preliminary

Doc Sheet: 1

Revision: A1

File Status: Checked In

Language: sv Swedish

Format: * Test Format

Alt Doc No:

Title: Review meeting 902081

Title and Revision Settings

☐ Update Allowed During

☐ Structure

☐ Restricted Access

☐ Used as File Template

☒ Is Latest Revision

On-Save Operations

☐ Release

☐ Distribute

Figure 186 Old revision.

Complete	Item	Title	Doc Number	Revision	New Revision	Revision Text	Reason for issue	Result
☒	☐	Supplier P23871	1034294	A1	A2	New revision		
	☒	workbook1						
	☒	workbookOld						

☒ Create Structured Documents

Figure 187 Documents that are checked in with structured documents option.

Document Revision - Review meeting 902081 · 1 (2)

Main Information

Doc Class: 100

Doc No: 1034294

Status: Preliminary

Doc Sheet: 1

Revision: A2

File Status: Checked In

Language: sv Swedish

Format: * Test Format

Alt Doc No:

Title: Review meeting 902081

Title and Revision Settings

☒ Update Allowed During

☐ Structure

☐ Restricted Access

☐ Used as File Template

☒ Is Latest Revision

On-Save Operations

☐ Release

☐ Distribute

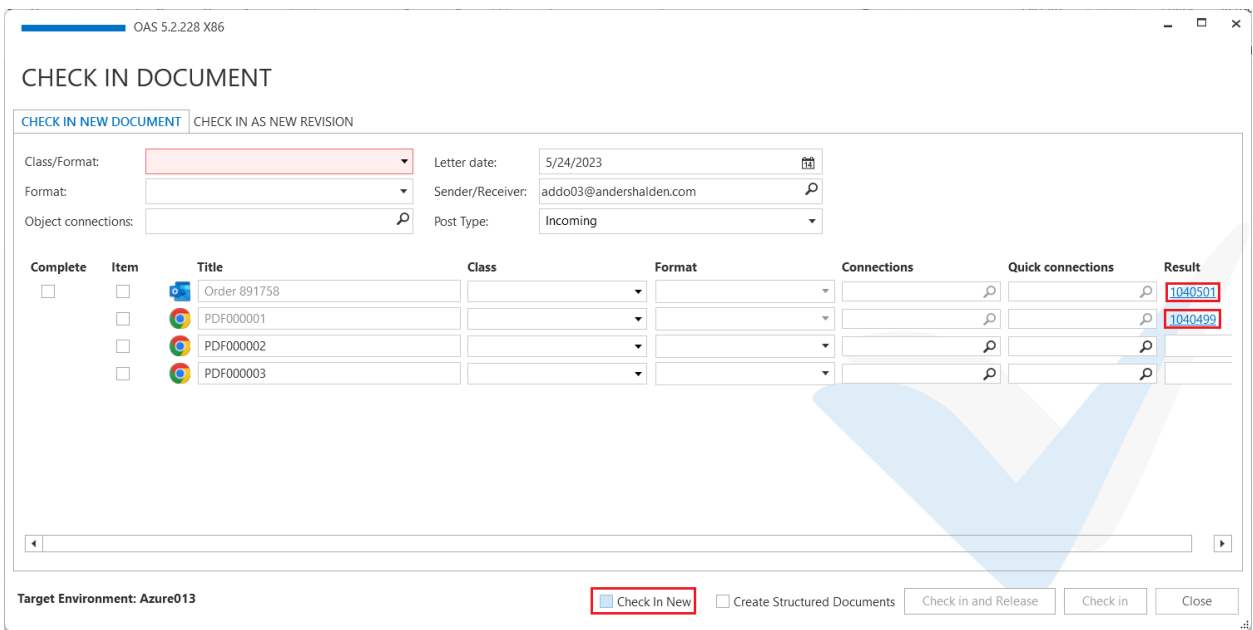
Figure 188 The new revision checked in with attachments as sub documents.

12.4.8 Structured documents check in new revision attachment

Important note: This feature is not officially implemented. It is possible to create a new revision of an attachment that is a sub document and have it connected to the same main document as the previous revision when using structured documents option. This option is not enabled but it is possible to access the option if the main e-mail (not complete) that is the parent of the attachment that you want to create a new revision with is checked in.

12.4.9 Check In New feature

The “Check in New” feature allows you to check in same e-mails and attachments multiple times in IFS. The Checkbox will only be visible, soon after a successful check-in. This option has been facilitated only in Check in New Document tab.



OAS 5.2.228 X86

CHECK IN DOCUMENT

CHECK IN NEW DOCUMENT | CHECK IN AS NEW REVISION

Class/Format: Letter date: 5/24/2023 

Format: Sender/Receiver: addo03@andershalden.com 

Object connections: Post Type: Incoming

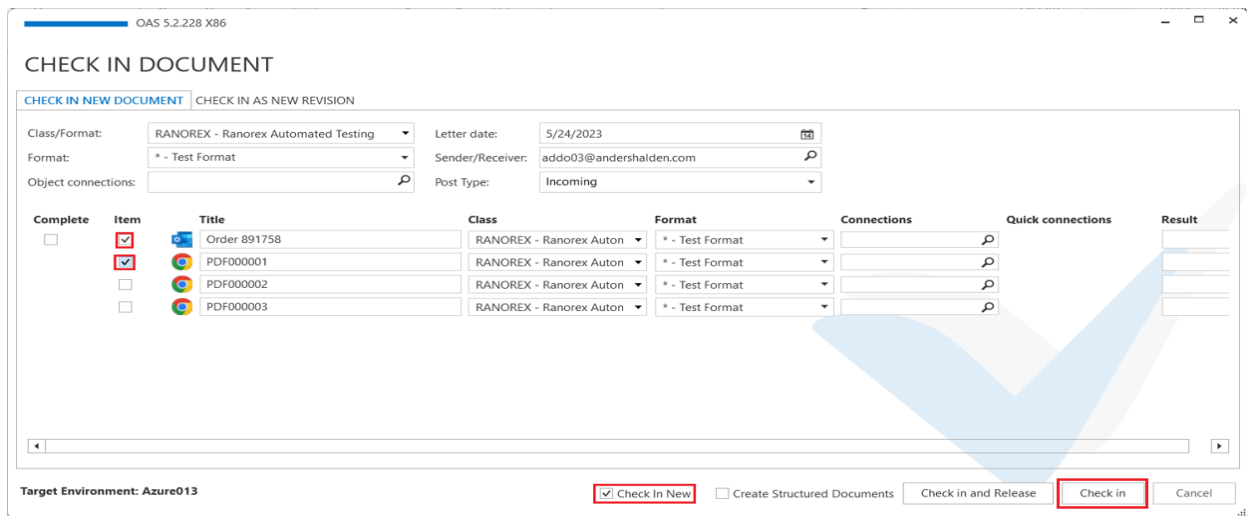
Complete	Item	Title	Class	Format	Connections	Quick connections	Result
☐		Order 891758					1040501
☐		PDF000001					1040499
☐		PDF000002					
☐		PDF000003					

Target Environment: Azure013

☒ Check In New ☐ Create Structured Documents

Figure 189 Check In New check-box appears for checked-in items.

Existing Document Numbers in result column can be emptied by enabling the checkbox 'Check In New' and continue re check In. Result column will always display the latest document numbers.



CHECK IN DOCUMENT

CHECK IN NEW DOCUMENT | CHECK IN AS NEW REVISION

Class/Format: RANOREX - Ranorex Automated Testing | Letter date: 5/24/2023

Format: * - Test Format | Sender/Receiver: addo03@andershalden.com

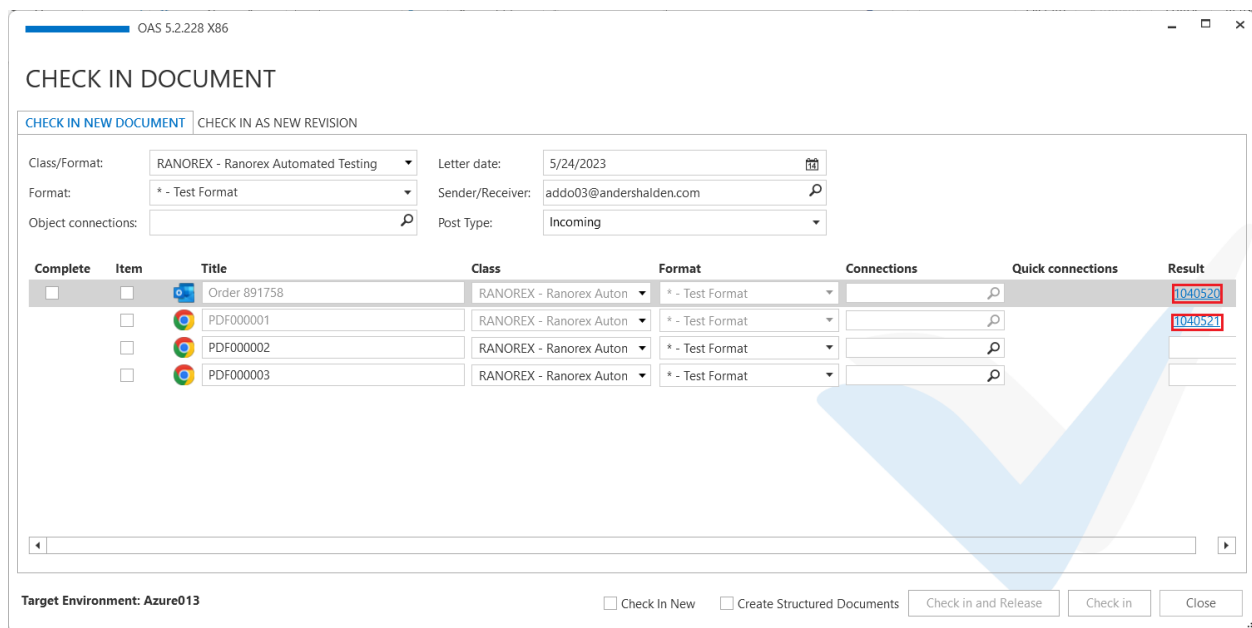
Object connections: | Post Type: Incoming

Complete	Item	Title	Class	Format	Connections	Quick connections	Result
☐	☒	Order 891758	RANOREX - Ranorex Auton	* - Test Format			
☐	☒	PDF000001	RANOREX - Ranorex Auton	* - Test Format			
☐	☐	PDF000002	RANOREX - Ranorex Auton	* - Test Format			
☐	☐	PDF000003	RANOREX - Ranorex Auton	* - Test Format			

Target Environment: Azure013

☒ Check In New | ☐ Create Structured Documents | Check in and Release | **Check in** | Cancel

Figure 190 Enabling Check In New, selecting relevant items and re check-in.



CHECK IN DOCUMENT

CHECK IN NEW DOCUMENT | CHECK IN AS NEW REVISION

Class/Format: RANOREX - Ranorex Automated Testing | Letter date: 5/24/2023

Format: * - Test Format | Sender/Receiver: addo03@andershalden.com

Object connections: | Post Type: Incoming

Complete	Item	Title	Class	Format	Connections	Quick connections	Result
☐	☐	Order 891758	RANOREX - Ranorex Auton	* - Test Format			1040520
☐	☐	PDF000001	RANOREX - Ranorex Auton	* - Test Format			1040521
☐	☐	PDF000002	RANOREX - Ranorex Auton	* - Test Format			
☐	☐	PDF000003	RANOREX - Ranorex Auton	* - Test Format			

Target Environment: Azure013

☐ Check In New | ☐ Create Structured Documents | Check in and Release | Check in | Close

Document Revision - Order 891758

Main Information

Doc Class: RANOREX | Doc No: 1040520 | Status: Preliminary

Doc Sheet: 1 | Revision: A1 | File Status: Checked In

Language: SV | Swedish | Format: * | Test Format | Alt Doc No:

Title: Order 891758

Title and Revision Settings

☐ Update Allowed During | ☐ Structure | ☐ Restricted Access

☐ Used as File Template | ☒ Is Latest Revision

On-Save Operations

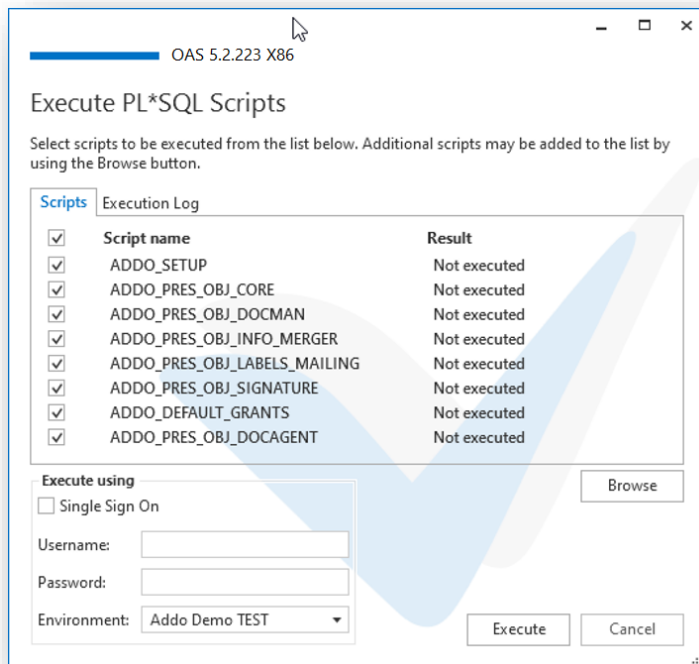
☐ Release | ☐ Distribute

Figure 191 New document nos displayed after re check-in is done.

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 192 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 username in Find User and click the → button
4. Expand the Security Settings node under the User Settings tab:

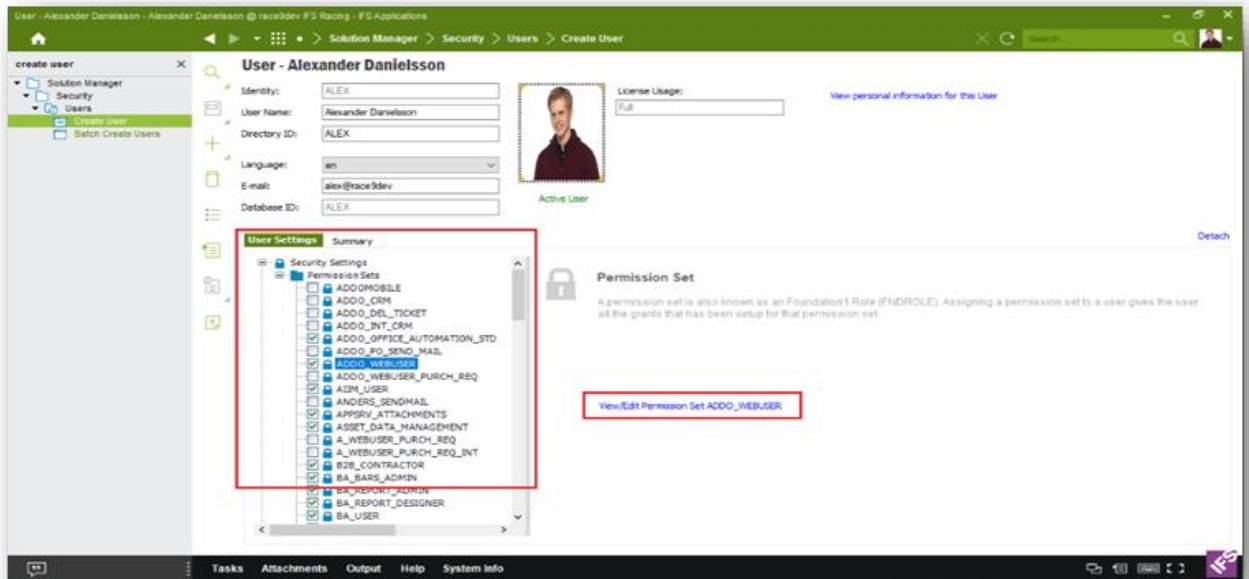


Figure 193 IFS EE - Grant user access

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:

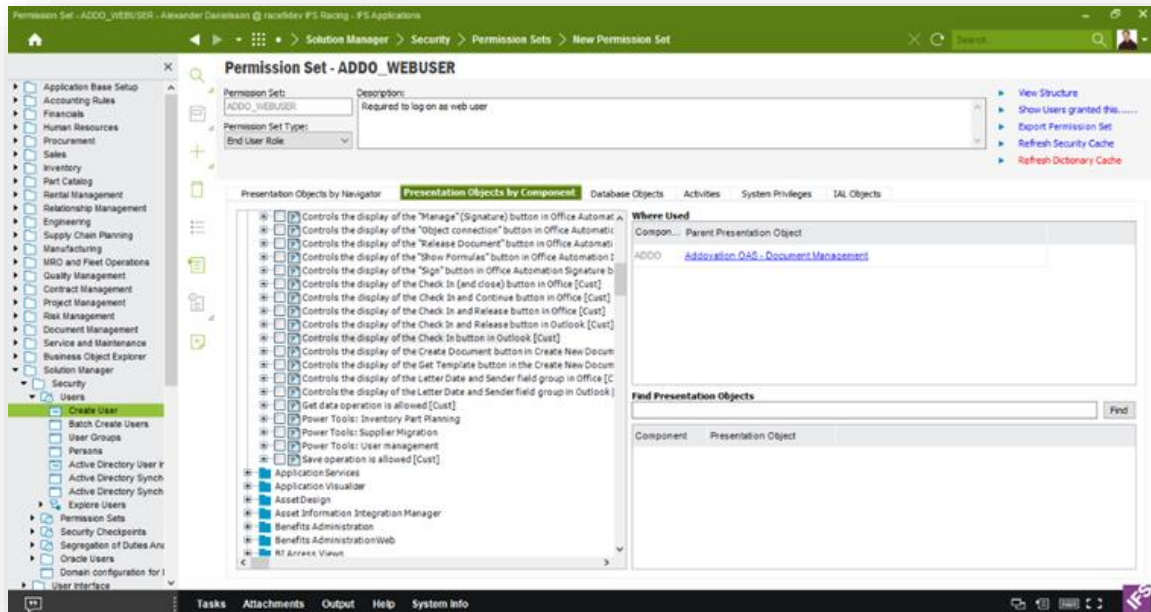


Figure 194 IFS EE - Grant user permissions

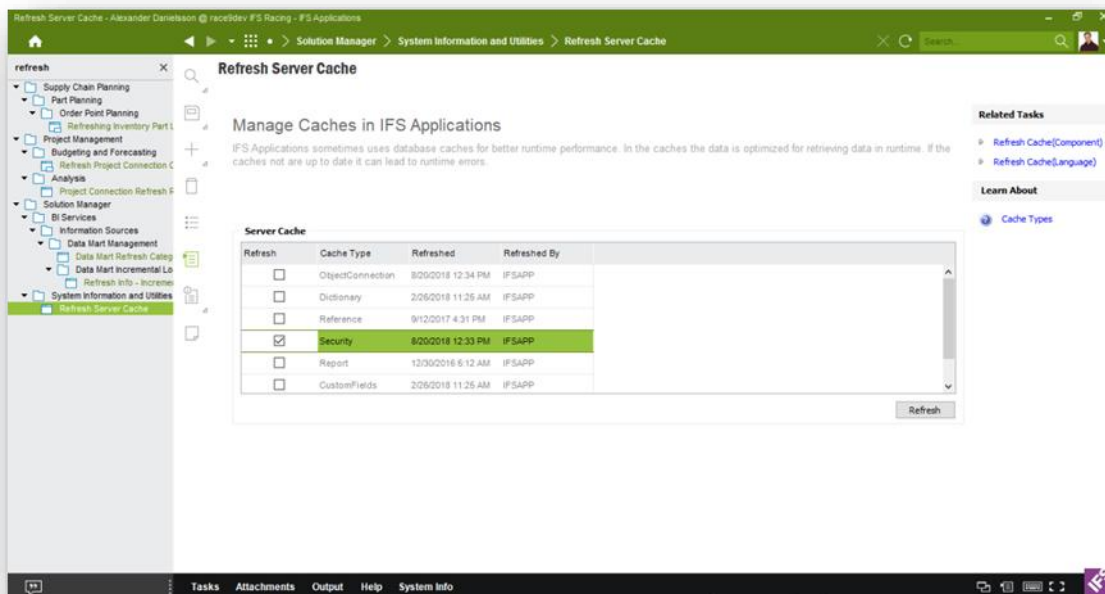


Figure 195 IFS EE – Refresh Security Cache

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 illustrate 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, document blocks etc.

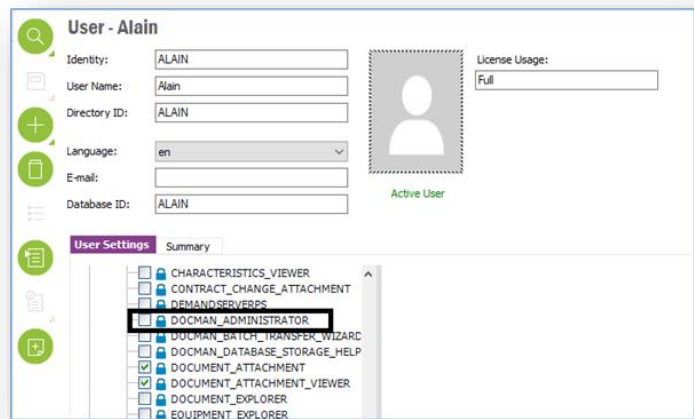


Figure 196 IFS EE – DOCMAN ADMINISTRATOR

13 Troubleshooting

13.1 Tips to avoid Quick report errors

- If the end user got below 'No data found' error message while executing quick report, make sure IFS contains relevant data

ADDO_CASES

Error : Error Message - No data found for report. If not correct, contact your OAS administrator.

 Error : Error Message - Report execution failed

 GET INFO COMPLETE

- If the end user got below 'RefreshXMLMap must be performed' error message, quick report has been modified in IFS and need to do a refresh XML map on the template OR someone has to check-in the template again after a Refresh XML.

ADDO_CASES

Error : Error Message - Report failed

RefreshXmlMap must be performed first because report is different than in the database

 Error : Error Message - Report execution failed

- Perform Refresh XML Refresh on mapped Quick report

