Setup Guide Automation AIS-Create Document Service v2.1

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## 1 Installation Guide

#### **1.1 Pre-installation instructions**

Before the module is uninstalled, changed, or repaired, make sure that config files in the Directory and web config file with related message Tracking folder in inetpub are backed up properly.



Figure 1 – Setup WIzard

The Automation Server with all the modules is normally installed through an MSI package. Run the .msi file and follow the installation wizard. It can also be directly deployed as a virtual application in IIS using just a zip file but then manual steps are required such as adding the license in the registry hive. The following steps are when using MSI installation:



*Figure 2 – End-User License Agreement* 



## **1.2 Environmental Configuration**

🛃 AutomationServer 2.1.34252.34252 x86 Setup 🛛 🗙					
Environment configuration	Addovation 🗸				
Select configuration:          JotronDev1 <ul> <li>JotronDev2</li> <li>Jotun Dev</li> <li>Jotun QA</li> <li>Loomis</li> <li>Loomis Prod</li> <li>Loomis Frod</li> <li>Loomis Test</li> <li>Race75 SP2</li> <li>Race75 SP6</li> <li>Race75 SP2</li> <li>Race85P2</li> <li>Race85P2</li> <li>Race85P2</li> <li>Race85P2.2 (default)</li> <li>✓</li> </ul>	Environment configurations govern access to available databases and ease the task of switching between them. Use the buttons below to add, remove or edit existing environments.				
	Back Next Cancel				

*Figure 3 – Environmental Configuration* 

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

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

## **1.3 Configuration Settings**

The configuration settings allow you to customize your installation.

AutomationServer 2.1.34252.34252 x86 Setup							
Configuration settings	Addovation 🗸						
Set up configuration parameters here to fit your particular installation. If needed, the settings can be changed later by restarting the installation wizard, using the "Change" option.							
Configuration name	Use server URL's						
jrace9dev	IFS Enterprise Explorer						
Use as Default	◯ SharePoint						
Use single signon							
	IFS version						
	IFSApplications9 $\checkmark$						
	Back Next Cancel						



Figure 4 - Configuration Settings

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

Server URLs: Select the server URL of your choice

**IFS Version:** Choose your IFS version

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

To add a new environment, you need to specify the address to IFS Extended Server (e.g. server1:58080), the Application owner (e.g. IFSAPP) and the IFS portal (e.g. <u>http://race75sp6:58080/</u>).

AutomationServer 2.1.34252.34252 x86 Setup	×							
Data access information	Addovation 🗸							
Enter database connection string, application owner and portal Url.								
Database connection (e.g. 'server1:58080'):								
race9dev:58080								
App owner (e.g. 'IFSAPP'):								
IFSAPP								
IFS Enterprise Explorer (e.g. 'http://server1:58080	):							
http://race9dev:58080								
В	ack Next Cancel							
В	ack Next Cancel							

Figure 5 - Data Access Information

The Database connection must use the prefix HTTP or HTTPS (in lower-case).

Addovation V



Figure 6 - Data Access Information

🛃 AutomationServer 2.1.34252.34252 x86 Setup	×						
Data access information	Addovation 🗸						
Enter database connection string, application owner and portal Url.							
Database connection (e.g. 'server 1:58080'):							
http://race9dev:58080							
App owner (e.g. 'IFSAPP'):							
IFSAPP							
IFS Enterprise Explorer (e.g. 'http://server1:58080')	:						
http://race9dev:58080							
Ba	ck Next Cancel						

Figure 7 - Data Access Information



## **1.4** Additional Settings

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

HautomationServer 2.1.34252.34252 x86 Setup	×
Additional settings	Addovation 🗸
Display only default company classes when checking in Exclude classes and formats where description contains:	n
*	
Document search URL:	
/secured/docmaw/DocTitleOvw.page	
Back	Next Cancel

Figure 8 – Additional Settings



## 1.5 License Key

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

×
Addovation 🗸
Next Cancel

Figure 9 - License and custom settings

In the Help URL field, you can specify what the help symbol in the AIS will point to. Included in the AIS is an online user documentation. The link is normally already filled in, so if you don't want to provide your own information, you can leave it as is.

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



Here AutomationServer 2.1.34252.34252 x86 Setup X								
License key validation.		Addovation	~					
The license key entered entitles you access to the listed modules. Click the "Get Batch" button to create a batch installation file or "PL*SQL" button to execute database scripts (e.g. access granting scripts).								
Product name	Exp. date	License state	_					
AIS Uplink AIS Message Tracking AIS Cloud Office365 Create Document Serv Document Agent Plugin Executer	10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021 10/9/2021	Valid Valid Valid Valid Valid Valid Valid Valid						
Get Batch PL*SQL Back Next Cancel								

Figure 10 – License key validation

## **1.6** Simple distribution – 'Get batch'

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

H AutomationServer 2.1.34252.34252 x86 Setup X								
License key validation.		Addovation 🗸						
The license key entered entitles you access to the listed modules. Click the "Get Batch" button to create a batch installation file or "PL*SQL" button to execute database scripts (e.g. access granting scripts).								
Product name	Exp. date	License state						
AIS Uplink	10/9/2021	Valid						
Message Tracking AIS Cloud	10/9/2021	Valid Valid						
Office365 Create Document Serv	10/9/2021 10/9/2021	Valid Valid						
Document Agent Plugin Executer	10/9/2021 10/9/2021	Valid Valid						
Get Batch PL*SQL	Back	Next Cancel						

Figure 11 – Get Batch

When you click on the button 'Get Batch', a .bat file is created, which will launch the .msi using the settings you defined in the current installation.

Observe the following with generating the batch file:

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



1 🗎	> This PO	> Documents	0	Search Documen	nts	0
1 📖			~		16.0	
Irganize 👻 Nev	v folder				855 💌	
This PC	^ I	Vame	D	ate modified	Туре	
3D Objects		Adobe	20	017-03-01 12:25	File folder	
Desktop		Altova	20	016-07-27 2:24 PM	File folder	
A Documents	11.1	Any Video Converter	20	016-11-08 12:01	File folder	
Develanda		Any Video Converter Professional	20	016-11-08 12:12	File folder	
Downloads		FeedbackHub	20	017-10-10 1:14 PM	File folder	
J Music		Graphics	20	016-09-30 10:33	File folder	
Pictures		IFS	20	018-02-02 10:21	File folder	
Videos		IfsDocsTemp	20	018-02-01 4:02 PM	File folder	
Local Disk (C:)		IISExpress	20	016-08-16 11:06	File folder	
Local Disk (D:)		Integration Services Script Component	20	016-11-09 3:17 PM	File folder	
	~ <					)
File name:	Automa	tionServerInstall_2.1.34252.34252.bat				_
Save as type:	Batch files	; (*.bat)				

Figure 12 – Save batch file

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

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

Addovation  $\checkmark$ 

# **1.7** Automatic installation of scripts – PL\*SQL

If this is the first time you run the AIS installation, you need to run the PL\*SQL function.

AutomationServer 2.1.34252.34252	2 x86 Setup		X				
License key validation.		Addovation	~				
The license key entered entitles you access to the listed modules. Click the "Get Batch" button to							
create a batch installation file or "PL*SC scripts).	QL" button to execute d	atabase scripts (e.g. access g	rantin				
Addovation							
Product name	Exp. date	License state	-				
AIS Uplink	10/9/2021	Valid					
AIS	10/9/2021	Valid					
Message Tracking	10/9/2021	Valid					
AIS Cloud	10/9/2021	Valid					
Office365	10/9/2021	Valid					
Create Document Serv	10/9/2021	Valid					
Document Agent	10/9/2021	Valid					
Plugin Executer	10/9/2021	Valid					
Get Batch RI *SOI	Back	Next					
occodition in a boge	DOCK	Caller					

Figure 13– PL\*SQL script

✓ Addovation Automation Server 2.1.34252.34252 x86 ×				
Execute PL*SQL scripts	Addovation 🗸			
Scripts to be executed: ADDO_SETUP ADDO_DEFAULT_GRANTS ADDO_PRES_OBJ_CORE				
Execute using Username: Password: Environment: Race8SP2-2	Execute Close			

Figure 14 – Execute PL\*SQL scripts

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

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



## 1.8 Customized setup

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

🖟 AutomationServer 2.1.34252.34252 x86 Setup		_		×
Choose Setup Type Choose the setup type that best suits your needs	Add	lova	tion	~
Typical Installs all add-ins covered by your license. Re	ecommende	d for most	users.	
Custom Allows users to choose which program feature they will be installed. Recommended for advar	es will be ins nced users.	talled and	where	
Complete All program features will be installed. Note tha space, and potentially slows down Application	at this requir startup.	res the mo	st disk	
Back	Ne	xt	Cance	el

Figure 15 – Setup Types



🖟 AutomationServer 2.1.34252.34252 x86 Setup	– 🗆 X
Custom Setup Select modules to be installed.	Addovation 🗸
Choose how modules are to be installed on your tree below.	computer by clicking the icons in the
Plugin Executer	Core files
Addovation Cloud Addovation Uplink Addovation Uplink Message Tracking Create Documents	This feature requires 158KB on your hard drive.
Location: C:\Program Files (x86)\Addova	ation\Automation Server\ Browse
Reset Disk Usage	Back Next Cancel

Figure 16 – Custom Setup

#### Components

- IFS to SQL Server Plugin
- Plugin Executor
- Document Agent
  - Reads files or emails from configured folder or mailbox and does stuff like create work orders or other IFS items.
- Addovation Cloud
- Addovation Uplink
- Message Tracking
- Create Documents
- M365 CRM Sync
- Create Document Azure Consumer

#### Location

Always try to use default location if possible. It's easier to find the folders if they are where they should be.



# **1.9 Disk Space Requirements**

According to the selected features in the above step, disk space requirement is calculated and displayed in the Required Column. You can see this by pressing the Disk Usage.

i 😽	AutomationServer 2.1.34252.34	252 x86 Setup		×
C	Disk Space Requirements The disk space required for the installation of the selected Reatures Ovation V			
	Highlighted volumes do not have e can either remove some files from different destination drives.	enough disk space a 1 the highlighted volu	vailable for selected umes, install fewer f	d features. You features, or select
	Volume	Disk Size	Available	Required
	⊜c:	442GB	224GB	380MB
	₽s:	1999GB	227GB	0KB
	<b>,</b> ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	1999GB	227GB	0KB
	<b>⊋</b> v:	1999GB	227GB	ОКВ
	<			>
				OK

Figure 17 – Disk Space Requirements



Create Documents Service is not be able to install/upgrade without IIS. Setup will exit after giving below warning message.

📲 Autor	mationServ	ver 2.1.34252.34252 x86 Setup				×
Insta 2.1.3	Installing AutomationServer 2.1.34252.34252 x86		Add	lova	tion	<b>~</b>
Please	wait while	the Setup Wizard installs Automat	ionServer 2.1.3	4252.34252	x86.	
Statu	Warning				×	
		Please install IIS feature before Service	installing Cre	ate Docum	ents	
				C	К	
		В	ack Ne	ext	Cance	el

Figure 18 - IIS requirement



## 1.10 Ready to Install

After adjusting the disk space as per the need in your local machine you can complete the installation

HautomationServer 2.1.34252	2.34252 x86 Setup	_		×
Ready to install Automa 2.1.34252.34252 x86	tionServer	Addova	ition	<b>~</b>
Click Install to begin the insta installation settings. Click Ca	allation. Click Back to revie ncel to exit the wizard.	ew or change any of yo	bur	
	Back	Install	Cance	el
	Figure 19 - Install			
AutomationServer 2.1.3425	2.34252 x86 Setup Completed the A 2.1.34252.3425 Click the Finish button to	– AutomationServ 2 x86 Setup Wi o exit the Setup Wizard	er zard	×
EU GDPR COMPLIANT				

View User Guide (Recommended)

Back

Finish

Cancel



Figure 20 - Finish

# 1.11 Configure the web service on IIS

• Once the create document module is installed, 'CreateDocuments' folder will be created in the 'inetpub' folder.

🔥 > This PC >	Windows (C:)	> inetpub > CreateDocuments		ٽ ~	Search CreateDocuments	Q
	^	Name ^	Date modified	Туре	Size	
55		h bin	2/26/2019 12:16 PM	File folder		
	<u> </u>	- CVC	2/26/2019 12:16 PM	File folder		
IS	*	Resources	2/26/2019 12:16 PM	File folder		
ts	*	Aspose.Words.lic	2/13/2019 10:37 AM	License	1 KB	
	*	CreateDocumentService.svc	2/13/2019 10:37 AM	WCF Web Service	1 KB	
		🖓 packages.config	2/13/2019 10:37 AM	XML Configuratio	1 KB	
		🖓 Web.config	2/26/2019 11:24 AM	XML Configuratio	5 KB	
ïles						
cuter						
s						
ts						
le le						
15						
	$\checkmark$					
selected 144 byte	s					

Figure 21 - Create Document in 'inetpub' Folder

• IIS configuration to host WCF Service



onnections	WSvc CreateDocuments Home	Actions
		Explore
CHPR-01 (ADDOVATION\chpr)     Application Pools     Sets     Of Default Web Site     MobileActionWebAdmin     MobileActionWebAdminRefactor     MobileActionWebAdminRefactor     MotileActionWebAdminRefactor     Wiste MessageTrackingSite     Wiste CreateDocuments	Filter       Image: Construction of the second	Edit Permissions Edit Site Bindings Basic Settings View Applications View Virtual Directories Manage Website & Restart I Start
	IIS       ASP       Authentic       CGI       Compression       Default       Directory       Error Pages       Handler         MSP       Authentic       CGI       Compression       Default       Directory       Error Pages       Handler         HTTP       ISAPI Filters       Logging       MIME Types       Modules       Output       Request       SSL Settings         Management       Configurat       Editor       Editor       SSL Settings       Authentic       Authentic	<ul> <li>Stop</li> <li>Browse Website</li> <li>Browse :8061 (http)</li> <li>Advanced Settings</li> <li>Configure</li> <li>Limits</li> <li>Add FTP Publishing</li> <li>Help</li> </ul>

Figure 22 - IIS with installed site

• If the service is installed successfully service can be browsed as depicted below.

Figure 23 - Browse service

## **1.12 IFS Applications - IFS integration configuration**

• Web config file should be modified by providing values to point the service to the correct IFS Applications instance as depicted below.



Figure 24 - Create Document Web Config file

"ifsAccessProviderUrl"	Point to the application server hosting IFS Applications.
"ifsUser"	The integration user used in accessing IFS Applications. The database access authorization rights generated under the subheading "Generate database access authorization script" should be granted to this user.
"ifsPassword"	The password for the "ifsUser".
"appowner"	The name of the application owner for the IFS Application instance
"tempFolder"	A temporary folder to store temporary files. This location should be cleaned regularly.
"debugFolder"	Folder where debug information will be stored
"isDebugEnabled"	has the options Off, Light and Full
	Off – No debug information will be created
	Light – Details related to performance will be generated



	Full – Details related to performance as well as other information on the tasks performed will be stored in order to assist in debugging
"dbLocale"	DB local of the database.
"numberConnections"	Number of concurrent connections created to access the database for certain activities.
"ifsVersion"	The major version of IFS Applications.
"templateCacheDuration"	The duration that the templates will be cached in memory.

# **1.13** IFS Cloud - IFS integration configuration

For IFS Cloud, some new web.config parameters has been introduced. In web.config, in order to configure URL and integration user, the following keys need to be set:

Standard Quote EN jaon 12 He Web.comfig 12				
<pre>1 <?xml version="1.0" encoding="utf-8"?></pre>				
2 E <configuration></configuration>				
3 🛱 <appsettings></appsettings>				
4 Connection details for IFS Applications				
5 <u><!--IFSAccessProviderUrl, define</u-->s the access point for the IFS applications instance that the serv.</u>	ice should comm			
6 <add ifstokenendpoint"="" key="ifsAccessProviderUrl" value="/auth/realms/page: protocol/openid-connect/token"></add>				
9 Folder in where mapping files between template and data resides				
10 <add key="mappingFolder" value="C:/Addovation/20220613"></add>				
11 <pre><!-- As registered in IFS Cloud21R2, disregarded if IFS Applications 10--></pre>				
12 <add key="ifsClientId" value="ifkloocedkhtcoc"></add>				
13 As registered in IFS Cloud21R2 and encrypted, disregarded if IFS Applications 10				
14 <add """"""""""""""""""""""""""""""""""<="" key="ifsClientSecret" td="" value=""><td>Conference and the second s</td></add>	Conference and the second s			
15 <add key="ifsUser" value=""></add>				
16 📮 Use \$/Utilities/DecryptAddo to encrypt the password since passwords</td <td></td>				
17 - should be encrypted now. Use the IFS User as the salt value>				
18 <add key="ifsPassword" value=""></add>				
19 📮 Typical value for Appowner is IFSAPP. THis may change depending on</td <td></td>				
20 - the installation of IFS Applications>				
21 <add key="appowner" value=""></add>				
22 🕴 tempFolder is used as a repository to hold all temporary files used</td <td></td>				
23 by the service>				
24 <add key="tempFolder" value="C:/Addovation"></add>				
25 Debug settings				
26 debugFolder defines the folder where debug log files will be stored				
27 <add key="debugFolder" value="C:/Addovation"></add>				

ifsAccessProviderUrl	The URL to the system, normally it is https://someurl.com.
ifsTokenEndPoint	The token end-point that has been configured for the IFS Cloud instance.
mappingFolder	The folder in where all mapping files are being kept and maintained.
ifsClientId	As defined in IFS Cloud IAM.
ifsClientSecret	As defined in IFS Cloud IAM and encrypted using Addovation Encryption.

The following keys can be omitted when going against an IFS Cloud instance: ifsUser, ifsPassword, appowner.

Last, we need to tell the service that this is an IFS Cloud instance:



📔 C:\inetpu	ib\wwwroot_ais\pagcloudtest\20220613\Web.config - Notepad++
File Edit	Search View Encoding Language Settings Tools Macro Run Plugins Window ?
🕞 😑 🗄	\$\$  \$  \$  \$  \$  \$  \$  \$  \$  \$  \$  \$  \$
🔚 Standard (	Quote EN json 🗵 🔚 Web.config 🗵
34	lightDebugDateTimeFormat uses a C# date time formate to formate</th
35	<pre><add key="lightDebugDateTimeFormat" value="yyyyMMddHHmmssffff"></add></pre>
36	<add key="logToFile" value="True"></add>
37	<add key="dbLocale" value="en-US"></add>
38	<pre><!--ifsVersion defines the version of IFS applications that the ser</pre--></pre>
39	<pre><!--add key="ifsVersion" value="IFSApplications9"/--></pre>
40	<pre><add key="ifsVersion" value="IFSCloud21R2"></add></pre>
41	<pre><add key="cacheDuration" value="5"></add></pre>
42	<pre><add key="ifsConnectionRetryCount" value="0"></add></pre>
43	<add key="aisVersion" value="1.0.0"></add>
44	<add key="buildNumber" value=""></add>
45	<add key="licenseKey" value=""></add>
46	<add key="addoServiceFile" value="IncidentService.addo"></add>
47	<pre></pre>
10 0	

Note: Even though the IFS Cloud instance is running IFS Cloud 22R1, "IFSCloud21R2" can and must be used. IFS Cloud 21R2 and IFS Cloud 22R1 is using the same authentication flows.

Addovation V

# 1.14 Trigger Service request using WcFTestClient

• Run WcFTestClient resides in visual studio root folder.

Appl	lication To	DOIS IDE			n (haint giù phile nu na 11 - Albanhai	- 🗆 X	
File Home Share View Manage $\checkmark$ 🕜							
← → ✓ ↑ 📙 « Program Files (x86) →	Micros	oft Visual Studio > 2017 > Enterprise > Co	mmon7 > IDE	~ Ö	Search IDE	م	
Pictures *	^ □	Name	Date modified	Type	Size	^	
		🔊 vssln.dll	10/11/2018 3:48 PM	Application extens	154 KB		
AIG2		VSTestConfig	10/11/2018 3:48 PM	Application	31 KB		
AISZ		P VSTestConfig.exe.config	10/11/2018 3:48 PM	XML Configuratio	1 KB		
CreateDocuments		stlbinf.dll	10/11/2018 3:48 PM	Application extens	174 KB		
OAS Reg files		💐 VSWebHandler	10/11/2018 3:48 PM	Application	102 KB		
ineDrive		🔀 VSWebLauncher	10/11/2018 3:48 PM	Application	188 KB		
		SWerHandler.dll	10/11/2018 3:48 PM	Application extens	85 KB		
This PC		SWizard.dll	10/11/2018 3:48 PM	Application extens	395 KB		
3D Objects		VsWizards.manifest	10/11/2018 3:48 PM	MANIFEST File	5 KB		
Desktop		😭 WcfSvcHost	10/11/2018 3:48 PM	Compiled HTML	40 KB		
Documents		💣 WcfSvcHost	10/11/2018 3:48 PM	Application	267 KB		
Downloads		P WcfSvcHost.exe.config	10/11/2018 3:48 PM	XML Configuratio	1 KB		
b Music		💕 WcfTestClient	10/11/2018 3:48 PM	Compiled HTML	38 KB		
E Dicturer	-	WcfTestClient	10/11/2018 3:48 PM	Application	413 KB		
		Context Client.exe.config	10/11/2018 3:48 PM	XML Configuratio	1 KB		
Videos		WindowsFormsIntegration.Design.dll	10/11/2018 3:48 PM	Application extens	135 KB		
Windows (C:)		WindowsFormsIntegration.Package.dll	10/11/2018 3:48 PM	Application extens	60 KB		
chpr (\\addovation101) (S:)		WinFxBrowserApplicationTemplateWi	10/11/2018 3:48 PM	Application extens	29 KB		
式 public (\\addovation101) (U:)		WinFxCustomControlTemplateWizard	10/11/2018 3:48 PM	Application extens	31 KB		
素 development (\\addovation101) (V:)		I XDesProc	10/11/2018 3:48 PM	Application	99 KB		
-	$\checkmark$	¥≟ XDesProc.exe.config	10/11/2018 3:48 PM	XML Configuratio	2 KB	~	
336 items 1 item selected 412 KB							

Figure 25 - WcFTestClient

• Provide the address of endpoint service

		ALC: NOT	and the second second second	Contraction of the local division of the loc	ALC: NO. OF TAXABLE PARTY.
🖼 WCF Test Client			—		$\times$
File Tools Help					
My Service Projects	Start Page				
Add Service	To add a service: . Select "Add Service" from the File menu or the context . Enter the service metadata address in the input area, a To test a service operation:	t menu of the and click "Of X	e "My Sen K" t pane	vice Projec	ts"
Please enter the endp	Ca	OK ancel	e		
http://localhost:8061/	Lreate Document Service.svc	~			
Ready					

Figure 26 - Add service address



🖼 WCF Test Client				х
File Tools Help	Start Page			
CreateDocumentSevicePortType (Ba CreateDocumentReport() CreateDocumentReportAsync() Config File	To add a service: . Select "Add Service" from the File menu or the context menu of . Enter the service metadata address in the input area, and click To test a service operation: . Double click the operation you want to test from the tree on the . A new tab page will appear on the right pane . Enter the value of parameters in the Request Area of the right p . Click "Invoke" button	the "My Serv "OK" left pane ane	ice Projec	ts"
Service added successfully.				



• Double click on CreateDocumentReport() related to given service

B WCF Test Client			-		×
File Tools Help					
⊡- 🚾 My Service Projects	CreateDocumentReport				
CreateDocumentServicePortType (BasicHttpBinding_ICreateDo	Request				
CreateDocumentReport()	Name	Value	Туре		
Config File	<ul> <li>request</li> <li>DocumentRequested</li> </ul>	CreateDocumentReportRequest (null)	CreateDocumentReportRequest DocumentType		
	Response		Start a new proxy	Invoke	e
	Name	Value	Туре		
Service added successfully	romatted Avit				
serve sade saceshary.					

Figure 28 - Created service



• Provide the values for document type and 'invoke' the request.

				_	×
WCF lest Client			-		~
File Tools Help					
My Service Projects     Argential Projects     Argential Projects     Costed Document Service avc     Orested Document Service Port Type (Basic HttpBinding_]Create Document Se     Orested Document Report()     Orested Document Report Async()     Config File	CreateDocumentReport  Request  Name  request  CreateDocumentRequested DocCass DocFomat DocLanguage LuName KeyReference DocStatus CreateVewCopy DocumentObjects Signature	Value CreateDocument Report Request Document Type AISTEST en WorkOrder Wo_NO=10 Toto Toto Preliminary False length=0 (null)	Type CreateDocumentReportRequest DocumentType System.String System.String System.String System.String DocStatusType System.Soliean DocumentObjectConnection[] System.String		
< >	Response Name	Value	Start a new proxy	Invok	c
Service added successfully					

Figure 29 - Invoke Request

• Result will be displayed with the information of checked-in details.

WCF Test Client			– o ×
File Tools Help			
My Service Projects     D=     My Service Projects     D=     M thp://addovation017:88/createdocuments/CreateDocumentService.svc     D=         "© ToreateDocumentServicePotType (BasicHtpBinding_)CreateDocumentServicePotType     )	CreateDocumentReport Request		
CesteDocumerRepot()	Name	Vale CreateDocumentReportRequest DocumentType AISTEST *** WorkOoder WorkOoder WOO.NO-6 Test Onamali Palenaay Fale Iength-0 (rull)	Tipe CreateDocumentReportRequest DocumentType System:Simg System:Simg System:Simg System:Simg System:Simg Doc9atin:Type System:Simg Doc9atin:Type System:Simg System:Simg
1	Response		Start a new proxy Invoke
	Name I electronic Food info id collepony	Value OK "Oneckin NewRevisionFile AISTEST-1007255-1-A3" (ckl) OTHER	Type CreateDocumertReportResponse Result Result Type System Int 32 System Simo NulDOpect EnroCategory Type
٢	Formatted XML		
Service invocation completed.			

Figure 30 - Response



• Created document revision in IFS Applications.

Document Revision - testing again - Tester @ RnD IFS10 UPD	I - FS Applications	- & ×
		d √ () + 1 +
Select Document Type t ? X Document Type View Copy Original Document Name Files Using Document Title and Name Original File Name	Used as File Template       Is Latest Revision         Consists Of       Where Used       Transmittal       File Refs.       Originals       History       Export Contro         General       Correspondence       Development       Connect Object       Objects       Access       Title       Approval       Sheets/Descriptic         Responsible Person:       NASU       Nalin       Info       Revision Date:       2/26/2019       Dates         Note:       Date Released:       Date Selecte:       Date Selecte:       Date Selecte:       Date Selecte:	
External Viewer Application OK Cancel	Reason For Issue Reason: Instant View Edit Check In Print	ي ب ب ب

Figure 31 - Created Document Revision

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#### **1.15** IFS Applications – Mapping data to templates

For templates that is used in IFS Applications, Addovation Office Automation Suite is required to create templates. Information on how to create these templates exists in the user guide for Office Automation Suite.

#### **1.16 IFS Cloud – Mapping data to templates**

Mapping data to templates for IFS Cloud is different and does not require Addovation Office Automation Suite to be installed. The mapping consists of basically 3 parts:

- The Microsoft Word document that will be used as a template.
- EDM basic data in IFS Cloud that defines the document class, format size and language to be used for the template.
- A newly introduced mapping file between the template and data in IFS Cloud.
  - A default mapping file will be generated the first time service is being used and then throw an error.

For IFS Cloud, there are mainly 2 types of data that will be injected into a Word document:

- 1. Document properties.
  - a. Properties are singular information such as details for a Customer Order.
  - b. Properties can be used as variables for quick report tables.
  - c. Additional singular document properties can also use quick reports.
- 2. Tables.
  - a. Tables are multiple rows of information such Customer Order Line.
  - b. Data source is quick reports.

For document properties, all names must be unique and correspond with what IFS Cloud delivers. For tables, the content control ID must be unique.

#### 1.16.1 Mapping file explained

The newly introduced mapping file(s) is JSON file(s) that maps data between an EDM template and IFS Cloud data. Upon first time use of the service, a single default JSON file be generated must be modified using some appropriate editor such as notepad++. The location of these folders is being set in the web.config.

The names of the files does not matter, as long as they end with ".json" and the file can be deserialized into the used format. Good practice is to keep 1 file per template:

🔄 | 🛃 🗖 🖛 | 20220613 Share View Home ✓ ↑ → This PC → Local Disk (C:) → Addovation → 20220613 √ ∂ Name Date modified Size Type Ouick access Standard Quote EN.json 2022-06-23 10:52 JSON File 2 KB Desktop \* Totals Quote EN.json 2022-06-21 20:21 JSON File 1 KB 👃 Downloads \* Documents \* Pictures 20220613 Addovation Deploy 🏪 Local Disk (C:)



When it comes to editing these files, it might look like this:



As we can see here, both singular document properties and table information has been mapped into a given EDM template. Available variables are being mapped by using the &-character in front of the property name. Then they will be replaced in the request. Variables can also be hardcoded here if needed.

Description	Some simple description to make it easier for maintenance.
EdmDocumentClass	The EDM template document class as defined in IFS Cloud.
EdmLanguageCode	The EDM template language code as defined in IFS Cloud.
EdmFormat	The EDM template format size as defined in IFS Cloud.
DocumentProperties	Additional quick reports that will fetched as singular document properties.
Tables	The Microsoft Word content control ID that shall be mapped against a quick report.

These files (and the template itself) are being cached on the server so it is vital to clear the IIS cache before testing any changes in the mapping or the template. Please also note that all information and mapping has to be precise (a character wrong will cause failure to merge accurate information).

#### 1.16.2 Mapping singular document properties – standard

For singular document properties, there are two types of default entity sets that is being injected into the document automatically:

- All fields from entity set Doclssue.
- All fields from the current logical unit default entity set.

#### Doclssue fields

What fields that is being returned depends on the customer installation (since it can be configured or customized). The RESTful invoke is being done against: DocumentRevisionHandling.svc/DocIssueSet.

One can use either Postman or IFS API Explorer to see exactly what fields that is being returned in your installation / IFS Cloud instance:



	Get entities f	rom DoclssueSet	GET /DocIssueSet
Q Search	AUTHORIZATIONS:	OpenId AND basicAuth	Response samples
NewRevInfoSet	> QUERY PARAMETERS		200 404 500
NewSheetGeneralInforVirtual.	L > Stop	integer >= 0 Example (Example)	Content type application/ison
NewSheetDocReferenceObje.	2_ >	Show only the first n items, see OData Paging - Top	
FileTemplateSet	> Sakip	Integer [>= 0] Skip the first n items, see OData Paging - Skip	Copy Expand all Collap
DocClassLovQuerySet	> - Scount	boolean	- {     "@odata.etag": "It is a Text",
SelectDocSet	>	include count of items, see obata count	"luname": "It is a Text",
ParentDocSet	> \$filter	string Filter items by property values, see OData Filtering	"Objgrants": "It is a Text", "Durflass": "It is a Text",
ApprovalRoutingSet	> - Sorderby	Array of strings unique	"DocNo": "It is a Text",
ConectObjHeadVirtualSet	>	nems Erwin "vojstate" "vojstate desc" "vocilass" "vocilass desc" "vocino" "vocilo desc" "Docšheet" "Docšheet desc" "Dockev" "Dockev desc" "Title" "Title desc" "AlternateDocsheentNumber" "AlternateDocmentNumber desc" "Ficilield "ProfileId	"Dockeet: "It is a fext", "Dockeet: "It is a Text", "Tible", "It is a Text",
ReleasedDocHeads	>	deso" "Revilo "Revilo deso" "DocRevText" "DocRevText deso" "DtDocRev" "DtDocRev deso" "LanguageCode" "LanguageCode deso" "Info" "Info deso" "DtDocRev	"AlternateDocumentNumber": "It is a Text", "Durdőlatá", "It is a Text",
DocmanExportControlSet	>	"DocRespDept desc" "DocRespSign" "DocRespSign desc" "NoOfSheets" "NoOfSheets desc" "DtReleased" "DtReleased desc" "DtObsolete" "DtObsolete desc" "DocStatus"	"Revio": 1, "DocherText": "It is a Text".
ParentDocumentSet	>	"DocStatus deso" "DtPlannedFinish" "DtPlannedFinish deso" "DtActualFinish" "DtActualFinish deso" "DtPlannedStart" "DtPlannedStart deso" "FormatSize"	"DDDocRev": "2019-10-10", "LanguageCode": "It is a Text".
AddDocHeadVirtualSet	>	"FormatSize desc" "DtChg" "DtChg desc" "DerSign" "DerSign desc" "DtCre" "DtCre desc" "DserCreated" "UserCreated desc" "DaysExpired" "DaysExpired"	"Info": "It is a Text", "DocRespond": "It is a Text".
JocTransmittalIssueDocume	- >	"Amesourcr.sour" "Amesourcr.sour dead" "Approvaliphate" "Approvaliphate dead" "SheetOrder" "SheetOrder dead" "Description!" "Description! dead" "Description2" "Description2 dead" "Description3 dead"	"DocRespSign": "It is a Text", "NOO'Sherts": ).
PdfArchiveSet	>	"Description4 desc" "Description5" "Description6 desc" "Description6" "Description6 desc" "NextDocSheet" "NextDocSheet desc"	"DtReleased": "2019-10-10", "DtObsoleta": "2019-10-10",
EdmFileSet	>	"IslatestRev" "IslatestRev desc" "Correspondent" "Correspondent desc" "PartyType" "PartyType desc" "Attention" "Attention desc" "LetterDate" "LetterDate desc"	"DocStatus": 1, "DocStatus": 1, "DtPlanodinich": "2019-10-01701-01:012".
DocIssueSet	~	"CloseBy" "CloseBy desc" "Reference" "Reference desc" "DocArchStatus" "DocArchStatus desc" "DocArchNio" "DocArchNio desc" "DocPostType" "DocPostType	"OtActualFinish": "2019-10-01T01:01:012", "DtPlanoditet", "2019-10-01T01:01:012",
Get entities from DocIssueSet		deso" "OriginalCreator" "OriginalCreator deso" "OriginalCreationDate" "OriginalCreatinDate deso" "AsstrictedAccess" "RestrictedAccess deso" "DocClaseDescription" "BooClaseDescription deso" "141" "141 deso" "142" "142	"formatize": "It is a text", "Dtchg": "2019-10-01101:01:012",
		desc" "BookingList" "BookingList desc" "LanguageDesc desc"	"UserSign": "It is a Text",

In order to use any of these fields in a Word template, simply create a new document property for the template. It is important though that the name of the property corresponds with what IFS Cloud delivers.

In order to create a new document property in the template, go to the File tab and Info and then Properties and Advanced Properties as following:

			Do	cument1 - Word
©	Info			
🕜 Home				
Document Management	<u> </u>	Protect Document Control what types of changes people can make to this document.	Properties ~	Provention
🗋 New	Protect Document ~		See more of properties	locument
			Total Editing Time	0 Minutes
Info	<b>S</b> 1	Inspect Document	Title	Add a title
Save	Check for Issues ~	eerore publishing this tile, be aware that it contains: Document properties and author's name	lags Comments	Add a tag Add comments
Save As			Related Dates	
		Version History	Last Modified	
Print		View and restore previous versions.	Created	Today, 08:08
Share	Version History		Last Printed	
Export			Related People	
Transform	Manage	Manage Document	Author	Andreas Isengaard Add an author
Close	Document ~		Last Modified By	Not saved yet

In our example, let's add DocNo so we enter the exact name as a new document property:



Document1 P	Properties	? ×
General Su	mmary Statistics Contents Custom	
Name:	DocNo Checked by Client Date completed Department Desportment Disposition	Add
Type:	Text 🗸	
Value:	Link to	content
Properties:	Name Value Typ Addo_Do 000b72d2 Tex	ct
	OK	Cancel

Add a space or something else as default value (because Microsoft Word has a limitation that requires always a value) and then press Add. Now you should have something like this:

Documer	nt1 Prop	erties			?	$\times$
General	Summa	ry Statistics	Contents	Custom		
Name: Type:		Checked by Client Date completed Department Destination Disposition Text	< >	ſ	Add Delete	
Value:				Link to	content	
Propert	ies:	Name Addo_Do DocNo	Value 000b72d	Тур 2 Тех Тех	e .t .t	
				ОК	Car	ncel

In order to use this property now in the document, click OK and head back to Microsoft Word. Go to the Insert tab and select Quick Parts and Field as such:

AutoSave 💽 🗑 🤟 👻 🤜	Document1 - Word	⊃ Sea	arch (Alt+Q)		Andreas Isengaard  🧌
File Home Insert Draw De	sign Layout References Mailings Review	View Developer Help Add	lovation		
Cover Blank Page Table Pictures St Page Page Break Table Table Fictures St	apes Icons 30 SmartArt Chart Screenhot Models *	Get Add-ins W My Add-ins Vikipedia Online Videos	Link Bookmark Cross- reference Comment Hea	der Footer Number ~ Number ~ Cap ~	iignature Line * TT O Date & Time Dbject * Equation Symbol
Pages Tables	Illustrations Reuse Files	Add-ins Media	Links Comments	Header & Footer 🦾 AutoText	> Symbols
				Document Property	>
				⊫i <u>F</u> ield	<b>N</b>
				Building Blocks Organiz	zer
				Save Selection to Quick	: Part Gallery
	Document numb	ber:			
		1			

Scroll down to DocProperty field names, select the newly created DocNo as field property and then press OK:



#### Document number:

lease choose a field	Field properties	Field options
Categories: (All) Eield names: BarCode Bibliography BidiOutline Citation Comments Compare CreateDate Database Date Date Catible EditTime Eq FileName Eq FileName Edit FileName Edit Edit FileName Edit Edit FileName Edit Edit FileName Edit Fil	Property:  Addo_DocID Author Bytes Category Characters CharactersWithSpaces Comments Company CreateTime DocNo HyperlinkBase Keywords LastPrinted LastSavedBy LastSavedTime	No field options available for this fiel
FileSize Fill-in GoToButton GreetingLine escription: Insert the value of the pro	y perty chosen in Options	Preserve formatting during updates

Now you should have something like this in the Word template:



By using Alt + F9 one can toggle showing property placeholders on and off in Microsoft Word. Now, last steps are to:

- 1. Update EDM template in IFS Cloud.
- 2. Refresh the application in IIS or simply reset whole IIS.
- 3. Test the new template by running the request as explained previously using WCF Test Client.

Then one should see something like this:





Now we see that the document property was injected into the document upon creation in IFS Cloud.

#### Dynamic fields from the logical unit

In addition to DocIssue, fields from the object connection are also being added into the document. The service follows same logic as IFS Cloud when it comes to extracting information and fields. The source for information in IFS Cloud is DocumentRevisionHandling.svc/\$metadata. If the logical unit has been setup properly in object connections, there will be something called a dynamic reference in the metadata set:



If we are to connect against e.g. the logical unit OrderQuotation, we can see what fields that will be returned from IFS Cloud using Postman:

GET https:// Params Authorization 
Headers (8) Body Pre-request Script Tests Settings Host (i) <calculated when request is sent> User-Agent ④ PostmanRuntime/7.29.0 Accept \*/\* Accept-Encoding gzip, deflate, br Connection keep-alive Key Body Cookies (1) Headers (18) Test Results Pretty Raw Preview Visualize XML ~ 异 %?xml version='1.0' encoding='UTF-8'?> 1 <edmx:DataServices> <Member Name="AdminAccess" Value="0"/>
<Member Name="EditAccess" Value="1"/>
<Member Name="ViewAccess" Value="2"/> 8 <Member Name="NoAccess" Value="3"/> </EnumType> 10 11 12 <EnumType Name="EdmScriptLanguage" IsFlags="false" UnderlyingType="Edm.Int32"> <Member Name="JavaScript" Value 13 <Member Name="VBScript" Value="1"/> 14 15 </EnumType> <EnumType Name="FndUserType" IsFlags="false" UnderlyingType="Edm.Int32"> <Member Name="SystemUser" Value="0"/>
<Member Name="ServiceUser" Value="1"/> 16 17 18 <Member Name="EndUser" Value="2"/> 19 </EnumType> <EnumType Name="FndUserTypeUsersSubset" IsFlags="false" UnderlyingType="Edm.Int32"> 20 <Member Name="ServiceUser" Value="0"/> <Member Name="EndUser" Value="1"/> 21 22 23 </EnumType> 24 <EnumType Name="SourceType" IsFlags="false" UnderlyingType="Edm.Int32"> 25 <Member Name="Person" Value=" 26 <Member Name="Group" Value="1"/>

After that, search for "DynLov\_<LogicalUnit>" so what we are looking for then is "DynLov\_OrderQuotation" in this case we have something like this:

Body	Cookies (1)	Headers (18) Test Results	Status: 200 OK Time: 268 ms Size: 702.32 KB	Save Response 🗸
Pretty	r Raw	Preview Visualize XML ~ =		ΓQ
6594				
6595		<entitytype name="DynLov_OrderQuotation"></entitytype>	DynLov_OrderQuotation Aa Abi _* 5 of 8	$\wedge \uparrow = \times$
6596		<key></key>		
6597		<propertyref name="QuotationNo"></propertyref>		
6598				
6599		<property maxlength="4000" name="keyref" type="Edm.String"></property>		
6600		<pre><property maxlength="12" name="QuotationNo" type="Edm.String"></property></pre>		
6601		<property name="RequestReceivedDate" type="Edm.Date"></property>		
6602		<property name="AnsweringDate" type="Edm.Date"></property>		
6603		<pre><property name="RevisionNo" precision="130" scale="130" type="Edm.Decimal"></property></pre>		
6604		<pre><property maxlength="200" name="ClosedStatus" type="Edm.String"></property></pre>		
6605		<pre><property maxlength="200" name="Printed" type="Edm.String"></property></pre>		
6606		<property maxlength="200" name="JinsuiInvoice" type="Edm.String"></property>		
6607		<pre><property maxlength="20" name="ForwardAgentId" type="Edm.String"></property></pre>		
6608		<pre><property maxlength="15" name="FreightMapId" type="Edm.String"></property></pre>		+
6609		<pre><property maxlength="15" name="ZoneId" type="Edm.String"></property></pre>		
6610		<property maxlength="10" name="FreightPriceListNo" type="Edm.String"></property>		
6611		<pre><property maxlength="200" name="ApplyFixDelivFreight" type="Edm.String"></property></pre>		
6612		<pre><property name="FixDelivFreight" precision="130" scale="130" type="Edm.Decimal"></property></pre>		
6613		<property maxlength="20" name="VendorNo" type="Edm.String"></property>		
6614		<pre><property maxlength="200" name="FreeOfChgTaxPayParty" type="Edm.String"></property></pre>		
6615		<pre><property maxlength="200" name="CIntervalUnit" type="Edm.String"></property></pre>		
6616		<pre><property maxlength="200" name="CUnit" type="Edm.String"></property></pre>		
6617		<property maxlength="10" name="CProjectId" type="Edm.String"></property>		
6618		<property maxlength="20" name="State" type="Edm.String"></property>		
6619				
<pre></pre>		A skik free test there there an and so the skie states to set to		

Here we see all the additional fields and properties that we can use as variables or directly in our Word template.

#### 1.16.3 Mapping singular document properties – using quick reports

Sometimes, one needs to have additional document properties. This can be achieved by using quick reports with or without input variables.

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In order to proceed make sure you have a quick report ready and uses any of these input variables and that the integration user has access to it. If we want to have this quick report mapped in our Word template, we note the projection name, the column name in the quick report result (here we see "SUM") and the variable name (case sensitive):

Ad-hoc Reporting $>$ Quick Report Detail $\square$	Select sum(IFSAPP.Order_Quotation_Line_API.Get_Sale_Price_Total(quotation_no,
Quick Report Detail       OAS - Set-up & One-Time Costs SUN         «       •	line_no, rel_no, line_item_no) "SUM" FROM IFSAPP.ORDER_QUOTATION_LINE T, IFSAPP.PART_CATALOG U
Basic Details	where <u>t_catalog_no</u> = <u>u_part_no</u> AND <u>c_product_type_id</u> IN ('Setup')
Report Title Type	AND <u>t.guotation_no</u> = <sup>(*</sup> &Quotation_id')
OAS - Set-up & One-Time Costs SUM SQL Statement	
Projection Name QuickReport71919	
Query Details	
Query	
Select sum(IFSAPP.Order_Quotation_Line	
Comment Details	
Comments	

Make sure also that a Word document property exists in the template with the name "SUM".

Next step is to add it to the mapping file. The mapping file exists locally on the server in where the AIS CreateDocumentService has been installed as previously explained. RDP to the server and start to edit the mapping file.

Add a new definition as following:

C:\Addovation\Standard Quote EN.json - Notepad+	÷		
File Edit Search View Encoding Language Se	ettings <sup>·</sup>	Tools N	Aacro Run Plugins Window ?
🕞 🚽 🖶 🖻 🕞 🕒 🖌 🖬 🛅 🤉 C	iii 🍃	<b>Q</b>	:   🖫 🖼   🎫 1 📲 🐺 🌃 🕼 😰 📨 🔍 🔍 🔍 🔍 🔛 🕅 🕅
JSON Viewer 🔀	Hosts	× Hs	tandard Quote EN ison 🔀
JSON	1	ΠI	• = 1
Description : Template for standard quote in English	2	T'	"Description". "Template for standard quote in English"
EdmDocumentClass : ADDO_TEST	3		"Educorument Class". "ADDO UPST"
- EdmEargdageCode . en	4		"Eduplored Code". "on"
DocumentProperties	5		"Edmanguagecode . en ,
	6	L.	"Document Properties".
	7	H	
	8	T	"OuickReport", "OuickReport 363670(Ouotation id='sOuotationNo!)"
	ğ		L.
	10	L.	
	11	Т	"OuickReport", "OuickReport 618095(Ouotation Id='sOuotationNo!)"
	12		L.
	13	L.	
	14	T	"OuickReport", "OuickReport 71919(Ouotation Id='sQuotationNo')"
	15	-	
	16	-	
	17	H	"Tables": [
	1.8	E	

If multiple variables are being used, then use IFS Cloud debug console to see how several variables are being set in the request URL.

After editing has been done, then clear the IIS cache and re-test to see the result.



#### 1.16.4 Mapping tables

Mapping of tables requires usage of rich text content controls in Microsoft Word. Continue by adding a new rich text control like so using the Developer tab (it is not enabled by default so one must enable it in Microsoft office):



Then it will create a place holder for the table as such, after that click the Properties in order to give it a unique name that we will map against a quick report:

AutoSave 💽 🗄 りょく	) =	Document1 - Word			✓ Search (Alt+Q)
File Home Insert D	raw Design Layout	References Mailings Revie	ew View Dev	veloper Help	Addovation
Visual Macros Basic	Add- Word COM ins Add-ins Add-ins	Aa     Aa     Image: Second s	XML Mapping Pane A	Block Restrict Authors ~ Editing	Document Template
Code	Add-ins	Controls	Mapping	Protect	Templates
		Elick or tap l	nere to ente	r text.	

In our example, we will call it "LINES\_OT" and press OK (it is crucial that we enter the name in the Title field):



Ξ

Click or tap here to enter text.	Content Control Properties ? X
	General <u>Title:</u> LINES_OT <u>Tag:</u> Show as: Bounding Box ↓ <u>Color:</u> ▲ ↓ <u>Use a style to format text typed into the empty control</u> <u>Style:</u> Default Paragraph Font ↓ <u>A<sub>L</sub> New Style.</u>

Next step is to add the table itself within the content control. Click on the Insert tab in Microsoft Word and select the number of columns you desire to have and always make it 2 rows (1 row for columns and 1 row for the data itself to be repeated in):



In our example, we want to have 5 columns from the quick report – so we simply add 5 columns with 2 rows:



AutoSave 👓 🗄 り~ ひ:						
File Home Insert Draw	Design Layout References	Mailings Review View	Developer Help Adde	ovation Table Design Layout		
Header Row First Column Total Row Banded Rows Banded Columns					Shading	Border Styles v IV2 pt v
Table Style Options			Table Styles			Borders

Now we add the different column names that will be mapped against the quick report. We will add a display value that can be anything and then convert it into a plain text content control that will be used for mapping.

Continue to add all the display values as following, for instance:


Next step is to select the first header, in this case "Article Number" and convert it into a plain text content control:

AutoSave 💽 🗄 🍤 V	÷	Document1 - Word		,	⊃ Search (Alt+Q)		
File Home Insert Drav	w Design Layout	References Mailings Revie	w View	Developer Help	Addovation	Table Design L	ayout
Visual Macros Basic Code	Add- Word COM ins Add-ins Add-ins Add-ins	Aa Aa 🖎 🛱 🔛 Design Mode Design Mode Properties Controls	XML Mapping Pane Mapping	Block Restrict Authors ~ Editing Protect	Document Template Templates		
		LINES_OT					
		+±+					
		Article Num	nber S	Service name	QTY		Unit Price

After that, click on Properties and we will here map it against the column name in the quick report (in our example the column name in the quick report is "PART NUMBER"):



LINES_OT		Content Co	ntrol Properties	?	×	1
		General				
Article Number	Comico nomo	<u>T</u> itle:	PART NUMBER			rico
	Service name	T <u>ag</u> :				rice
		<u>S</u> how as:	Bounding Box 🧹			
		<u>C</u> olor:	<u>&gt;</u> -			
		Use a s	tyle to format text typed into th	e empty c	ontrol	
		<u>S</u> tyle:	Default Paragraph Font 🧹			
		A <sub>+</sub> <u>N</u>	ew Style			
		<u>R</u> emov	e content control when content	s are edit	ed	
		Locking				
		Conter	nt control cannot be <u>d</u> eleted			
		Conter	nts cannot be <u>e</u> dited			
		Plain Text Pr	operties			
		Allow	carriage returns (multiple paragi	aphs)		
			ОК	Can	cel	

Next press OK and repeat the process with all column names. Last step we will format the table and make it look a bit prettier, for instance:

w Design Layout	References Mailings Revie	w View De	eveloper Help	Addovation	Table Design	Layout			
Add- Word COM ins Add-ins Add-ins	Aa     Aa     Image: Base of the second sec	XML Mapping Pane	Block Restrict Authors ~ Editing	Document Template					
Add-ins	Controls	Mapping	Protect	Templates					
Set-up & One-Time Costs									
	Article Number	Service	Name			QTY	Unit Price	Total	

Now, head to the mapping file and add the newly created content control:

1	무 {						
2		"Description": "Template for standard quote in English",					
3		"EdmDocumentClass": "ADDO_TEST",					
4		"EdmLanguageCode": "en",					
5		"EdmFormat": "AD-001",					
6	¢	"DocumentProperties": [					
7	þ	{					
8		"QuickReport": "QuickReport_363670(Quotation_id='&QuotationNo')"					
9	-	},					
10	白	{					
11		"QuickReport": "QuickReport_618095(Quotation_Id='&QuotationNo')"					
12	-	},					
13	白	{					
14		"QuickReport": "QuickReport_71919(Quotation_Id='&QuotationNo')"					
15	-	}					
16	-	],					
17	皁	"Tables": [					
18	卓	{					
19		"DocumentContentControlID": "LINES_OT",					
20		"QuickReport": "QuickReport_360402(Quotation_id='&QuotationNo')"					
21	F	} <i>,</i>					
22	中	{					



Here we enter the word content control and it's title "LINES\_OT" and then what quick report it should be mapped against and any eventual parameters and input variables. Save the file on the server and then refresh the cache. Check in all appended changes for the EDM template and test the template. If everything was done correct you should now see the results as:



In order to delete the content control if no data has been found on need to set the following value in the mapping file:



This applies to scenarios in where want to have more dynamic tables.

# 2 Upgrade notes

# 2.1 Upgrading old versions to Automation Server 2.1. 33715 or higher from older versions.

While performing an upgrade, environments and license key should be added again, since previously configured environments won't be available during and after the upgrade.