Configuration Setup Guide Automation AIS-Document Agent v2.1

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Addovation \checkmark

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.

😹 AutomationServer 2.1.34252.34252 x86 Setup — 🗌 🗙			×	
	Welcome to the Automat 2.1.34252.34252 x86 Se The Setup Wizard allows you to char AutomationServer 2.1.34252.34252 installed on your computer or to rem computer. Click Next to continue or 0 Wizard.	ionServ tup Wi ge the wa x86 featu ove it from Cancel to e	ver zard ^{yy} res are your exit the Se	etup
COMPLIANT				
	Back Nex	(t	Cano	el

Figure 1 – Setup Wlzard

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



HautomationServer 2.1.34252.34252 x86 Setup –	×
End-User License Agreement Please read the following license agreement carefully Addovatio	on 🗸
LICENSE TERMS FOR ADDOVATION SOFTWARE These license terms are an agreement between Addovation and you. They apply to the Addovation Software, and any accompanying documentation.	^
1. ACCEPTANCE BY INSTALLING THE SOFTWARE, YOU ACCEPT THESE TERMS. IF YOU DO NOT AGREE TO ALL OF THE TERMS OF THIS AGREEMENT, YOU MUST NOT INSTALL, USE, OR COPY THE SOFTWARE	
 2. INSTALLATION AND USE RIGHTS. You may install and use the software for agreed named users, or computers. or other unit of measure that are agreed between you and 	¥
✓ I accept the terms in the License Agreement	
Print Back Next C	ancel

Figure 2 – End-User License Agreement



1.2 Environmental Configuration

HautomationServer 2.1.34252.34252 x86 Setup				
Environment configuration	Addovation 🗸			
Select configuration: JotronDev1 JotronDev2 Jotun Dev Jotun QA Loomis Loomis Prod Loomis Test Race75 SP2 Race75 SP6 Race75sp2Centura	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.			
Race8Dev Race8SP2 Race8SP2-2 (default)	Add new Delete Modify			
	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.

Addovation V

1.3 Configuration Settings

The configuration settings allow you to customize your installation.

HautomationServer 2.1.34252.34252 x86 Setup				
Configuration settings	Addovation 🗸			
Set up configuration parameters here to fit be changed later by restarting the installation	your particular installation. If needed, the settings can on wizard, using the "Change" option.			
Configuration name	Use server URL's			
race9dev	IFS Enterprise Explorer			
Use as Default	◯ SharePoint			
Use single signon				
	IFS version			
	IFSApplications9 V			
	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>).



H AutomationServer 2.1.34252.34252 x86 Setup	×
Data access information	Addovation 🗸
Enter database connection string, application owner an	d 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	
Ba	ck Next Cancel

Figure 5 - Data Access Information

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

记 AutomationServer	2.1.34252.3	34252 x86 Setup >	<		
Data access infor	mation	Addovation 💊			
Enter database connect	tion string,	application owner and portal Url.			
Database connection	n (e.g. 'serv	ver 1:58080'):			
race9dev:58080					
App owner (e.g. 'IFS	SAPP'):				
IFSAPP					
IFS Enterprise Explorer (e.g. 'http://server1:58080'):					
http://race9dev:580	080				
[Warning		×		
		Please use the prefix http or https (in lower-case) for the Database connection.			
		ОК			

Figure 6 - Data Access Information



HaltomationServer 2.1.34252.34252 x86 Setup				
Data access information	Addovation 🗸			
Enter database connection string, application owner and p	portal Url.			
Database connection (e.g. 'server1:58080'):				
App owner (e.g. 'IFSAPP'):				
IFSAPP				
http://race9dev:58080				
Back	Next Cancel			

Figure 8 - 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.

AutomationServer 2.1.34252.34252 x86 Setup	×
Additional settings	Addovation 🗸
Display only default company classes when checkir	ng in
Exclude classes and formats where description contain	ns:
*	
Document search URL:	
/secured/docmaw/DocTitleOvw.page	
Bac	k Next Cancel

Figure 9 – 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 10 - 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.



HautomationServer 2.1.34252.34252 x86 Setup						
License key validation.		Addovati	ion 🗸			
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 grantin scripts). Addovation						
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 11 – 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.

HatomationServer 2.1.34252.34252	2 x86 Setup		\times		
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 grant 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 12 – 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.



> - 🛧 🔝	> This	s PC > Documents ~	Ö	Search Documer	nts	P
Organize 👻 Ne	w folde				855 -	8
This PC	^	Name	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	
		Any Video Converter	20	016-11-08 12:01	File folder	
Develoade		Any Video Converter Professional	20	016-11-08 12:12	File folder	
- Downloads		EedbackHub	20	017-10-10 1:14 PM	File folder	
Music		Graphics	20	016-09-30 10:33	File folder	
Pictures		IFS 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:	Autor	mationServerInstall_2.1.34252.34252.bat				2
Save as type:	Batch f	iles (*.bat)				
				1		

Figure 13 – 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.

记 Aut	omationServer 2.1.34252.34252	2 x86 Setup	>
Lice	nse key validation.		Addovation 💊
The lic create scripts	ense key entered entitles you ac a batch installation file or "PL*SC).	cess to the listed modu QL″ button to execute o	les. Click the "Get Batch" button to database scripts (e.g. access granti
Addo	ovation Product name	Exp. date	License state
	AIS Uplink AIS Massage Tracking	10/9/2021 10/9/2021 10/9/2021	Valid Valid
	AIS Cloud Office365 Create Document Serv	10/9/2021 10/9/2021 10/9/2021 10/9/2021	Valid Valid Valid Valid
	Document Agent Plugin Executer	10/9/2021 10/9/2021	Valid Valid
Get	Batch PL*SQL	Back	Next Cancel

Figure 14 – PL*SQL



✓ 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 15 – 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.

HattomationServer 2.1.34252.34252 x86 Setup		_		Х
Choose Setup Type Choose the setup type that best suits your needs	Addo	ova	tion	~
Typical Installs all add-ins covered by your license. Re	commended	for most	users.	
Custom Allows users to choose which program feature they will be installed. Recommended for advar	s will be insta nced users.	lled and	where	
Complete All program features will be installed. Note that space, and potentially slows down Application	t this require startup.	s the mo	st disk	
Back	Next		Cance	el

Figure 16 – Setup Types

🖟 AutomationServer	2.1.34252.34252	x86 Setu	р		_		×
Custom Setup Select modules to b	oe installed.			A	ddova	tior	~
Choose how modul tree below.	les are to be insta	alled on yo	ur co	mputer by o	clicking the icor	ns in the	
Plu	ugin Executer ocument Agent Idovation Cloud		^	Core files			
	Idovation Uplink essage Tracking eate Documents 365 CRM Sync			This featu hard drive	ure requires 15 e.	i8KB on yo	ur
	eate Document A	zure Con	~				
Location: C:\Program Files (x86)\Addovation\Automation Server\ Browse							
Reset	Disk Usag	je		Back	Next	Cano	el

Figure 17 – 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.

HautomationServer 2.1.34252.34	252 x86 Setup		×			
Disk Space Requirements The disk space required for the installation of the selected reatures.						
Highlighted volumes do not have e can either remove some files from different destination drives.	enough disk space a the highlighted volu	vailable for selected imes, install fewer f	features. You Teatures, or select			
Volume	Disk Size	Available	Required			
@C:	442GB	224GB	380MB			
	1999GB	227GB	0KB			
🚽 🗐 🖵 U:	1999GB	227GB	OKB			
₽ v:	1999GB	227GB	ОКВ			
<			>			
			OK			

Figure 18 – Disk Space Requirements



1.10 Ready to Install

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



Figure 19 - Install



Figure 20 - Finish

2 Document Agent – Configure business logic

✓ Start by copying an existing business logic MFD-file e.g.

iffice Automation > Automation Server > DocumentAgent > Dependencies > Examples 🗸 🖑					
Name ^	Date modified	Туре	Size		
📾 document.xsd	2016-06-21 09:48	W3C XML Schema	2 KB		
📾 filedefinition.xsd	2016-06-01 10:33	W3C XML Schema	1 KB		
👦 map_basic.mfd	2016-06-01 10:33	Altova MapForce	16 KB		

Figure 21 - Copy business logic

✓ To a new file with a sensible naming:

Office Automation > Automation Server > DocumentAgent > Dependencies > Examples						
Name ^	Date modified	Туре	Size			
✓ ➡ addo_project.mfd	2016-06-01 10:33	Altova MapForce				
📾 document.xsd	2016-06-21 09:48	W3C XML Schema				
🜆 filedefinition.xsd	2016-06-01 10:33	W3C XML Schema				
🐻 map_basic.mfd	2016-06-01 10:33	Altova MapForce				

Figure 22 - New file

- ✓ Open it in Altova Mapforce, left hand side represents the file on disk e.g.
- ✓ After it has been saved from e-mail account
 - Whole e-mail or only attachments can be selected
- ✓ After file has been dropped in a folder on disk





Figure 23

✓ The right-hand side represents all document management views in IFS document management which can be used e.g.



Figure 24

- ✓ The views can be DOC_TITLE, EDM_FILE, EDM_FILE_STORAGE and DOC_ISSUE.
- ✓ The ADDO_CHECK_IN is a Boolean that controls whether we should try to process the file further or if its only rubbish (because then we don't need to logon towards IFS):





Figure 25

 ✓ Classic example is if we are looking for a certain prefix in file name, if it exists, we proceed otherwise we only move file to:



Figure 26



✓ The ADDO_QUERY:



Figure 27

is a Boolean but has the power to run a SQL statement towards IFS, classic is that we check whether a work order number actually exists, if true then we try to check in file with all parameters otherwise we only move file to folder defined in ADDO_MOVE_TO.

✓ We can also execute custom procedures e.g. approve or release a revision by defining one or more ADDO_PROCEDUREnn:





Figure 28

- ✓ We can basically run any PLSQL-statement here.
- ✓ If something goes wrong, ADDO_QUERY is false etc we can trigger 2 events:



Figure 29

- ✓ Classic example is that e.g. file extension did not exist in IFS and then trigger the fail event. If document was successfully checked in, we trigger success event.
- ✓ Now, create a subfolder e.g. Xslt so we can export XSLT file to there:



Figure 30- Export XSLT



Figure 31 select folder

✓ Verify that a file was created:



⊽ Xslt Home Share Vi	ew			
→ 👻 🚹 > This PC	> OS (C:) > Do	cAgentDemo > XsIt		
Quick access	^	Name ^	Date modified	Туре
Desktop	*	🖲 DoTransform.bat	2016-10-03 13:48	Windows I
Downloads	*	MappingMapTodocument.xslt	2016-10-03 13:48	Extensible
Documents	*			
Scan	*			
TES	*			

Figure 32 - Saved XSLT

2.1 Document Agent – Create new revision

One can create a new revision by supplying document class and document number of any given document. Query can be used in order to fetch / select a document number. If the document class and number combination does not exist, it will try to create a new document given that number.



Figure 33 - Create New Revision

If the object connection already exists, DocAgent will not add it. DocAgent will also move object connections if the document class has been properly setup in IFS Applications.

3 Document Agent – Setup new channel

3.1 Document Agent configuration settings

Document Agent configuration settings should be done in the below client window.

This PC > Windows (C:) > Program Files (x86) > Addovation > Automation Server > Document Agent					
Name	Date modified	Туре	Size		
Examples	2/5/2019 3:41 PM	File folder			
IFSAP7	2/5/2019 3:41 PM	File folder			
IFSAP8	2/5/2019 3:41 PM	File folder			
IFSAP9	2/5/2019 3:41 PM	File folder			
IFSAP10	2/5/2019 3:41 PM	File folder			
🤸 Addo.AlS.DocAgent.Configuration	2/5/2019 9:53 AM	Application	109 KB		
🤸 Addo.AlS.DocAgent.Service	2/5/2019 9:53 AM	Application	103 KB		
Addo.Fnd.Base.dll	2/5/2019 9:53 AM	Application extens	364 KB		
Addo.Fnd.DataAccess.dll	2/5/2019 9:53 AM	Application extens	59 KB		
Addo.Fnd.DataAccess7.dll	2/5/2019 9:53 AM	Application extens	84 KB		
Addo.Fnd.DataAccess8.dll	2/5/2019 9:53 AM	Application extens	95 KB		
Addo.Fnd.DataAccess9.dll	2/5/2019 9:53 AM	Application extens	95 KB		
Addo.Fnd.DataAccess10.dll	2/5/2019 9:53 AM	Application extens	95 KB		
Addo.Fnd.Globals.dll	2/5/2019 9:53 AM	Application extens	181 KB		
Addo.Fnd.GUI.dll	2/5/2019 9:53 AM	Application extens	4,146 KB		
Addo.Fnd.Library.dll	2/5/2019 9:53 AM	Application extens	43 KB		
Addo.Fnd.Logic.dll	2/5/2019 9:53 AM	Application extens	1,123 KB		
Addo.Fnd.Mail.dll	2/5/2019 9:53 AM	Application extens	64 KB		
Addo.Fnd.Office.dll	2/5/2019 9:53 AM	Application extens	63 KB		

Figure 34 - Doc Agent Configuration file



Source folder path: Folder which source files reside	\checkmark Create configuration $ \Box$ \times
	File Help
Log folder path: For the log files.	Basic Source folder path:
Use method : Whether to read a shared folder or an incoming email.	Log folder path:
XSLT file : XSL transformation file.	Use method: FOLDER ~ XSLT file:
Unpack ZIP files : Decide if to automatically unpack ZIP files.	Unpack ZIP files: False ~
Folder Settings:	
Top Directory Only: True/False. Defines the directory level to be	Folder settings: Top directory only: True ~
synceu	Mail settings
Mail Settings: mail host,	Hostname:
username, password, port, whether to save only the	Username:
attachments, whether to use Secure Socket Layer (SSL) and	Password:
mail format related to the email.	Port:
Message Tracking Settings:	Save attach. only: False
	Use SSL: False ~
Message Category, Message	MailFormat: EML ~
Type: This is to categorize Document Agent service	Message Tracking Settings
messages	Message Category:
	Message Type:
Message Tracking	MessageTracking Connectionstring:
Connectionstring: This is for the	
Connection string which we can track down the messages from	Status: Disconnected
the relevant cloud.	

Figure 35 - Information for create configuration



Choose file -> Connect

✓ Create configuration	ı	-		×
File Help				
Basic Source folder path:				
Log folder path:				
Use method: F XSLT file:	FOLDER	\sim		
Unpack ZIP files: F	False		`	<u> </u>
Folder settings:				
Top directory only: 1	True		``	-
Mail settings Hostname:				
				_
Username:				
Password:				
Port:				
Save attach. only: F	False	~		
Use SSL: F	False	~		
MailFormat: F	EMI	~		
Message Tracking Se	ettings			
Message Category:				
Message Type:				
MessageTracking Co	onnectionstring:			
Status: Disconnected				



Login to the IFS database.

✓ Log on database		\times
User information		
Username:		
Password:		
Environment:	Race8SP2-2 ~	
	Remember password	
Options >>	Cancel OK	
Not connected to database	2	

Figure 37 - Log on to IFS



Specify the folders that you will use. These folders are used for demonstration, any folder can be used. You can also write the e-mail server that will be used.

🧹 Create configuratio	on	_	×
File Help			
Basic Source folder path:			
Log folder path:			
Use method: XSLT file:	FOLDER	~	
Unpack ZIP files:	False		~
Folder settings: Top directory only:	True		~
Mail settings Hostname:			
Username:			
Password:			
Port:			
Save attach. only:	False	~	
Use SSL:	False	~	
MailFormat:	EML	~	
Message Tracking	Settings		
Message Category:			
Message Type:			
MessageTracking (Connectionstring:		
Status: Disconnected			

Figure 38 - Create Configuration



After you are done choose File -> Save As and save it in the Document Agent folder.

📙 🛃 📙 🖛 DocumentAger	nt				
File Home Share \	View				
\leftarrow \rightarrow \checkmark \uparrow \square \rightarrow This PC	> OS (C:) > Pro	gram Files (x86) > Addovation > Automation Server > D	ocumentAgent →		
📌 Quick access	^	Name ^	Date modified	Туре	Size
Desktop	*	IFSAP7	2016-10-03 13:17	File folder	
Downloads	*	IFSAP8	2016-10-03 13:17	File folder	
		IFSAP9	2016-10-03 13:17	File folder	
	<u>^</u>	Addo.Fnd.Base.dll	2016-09-28 11:55	Application extens	346 KB
Scan	*	Addo.Fnd.DataAccess.dll	2016-09-28 11:53	Application extens	54 KB
TFS	*	Addo.Fnd.DataAccess7.dll	2016-09-28 11:53	Application extens	91 KB
Pictures	*	Addo.Fnd.DataAccess8.dll	2016-09-28 11:53	Application extens	95 KB
Projects	*	Addo.Fnd.DataAccess9.dll	2016-09-28 11:53	Application extens	95 KB
DocAgentDemo		Addo.Fnd.Globals.dll	2016-09-28 11:53	Application extens	166 KB
Documentation		Addo.Fnd.GUI.dll	2016-09-28 11:53	Application extens	4,045 KB
		Addo.Fnd.Library.dll	2016-09-28 11:55	Application extens	35 KB
		Addo.Fnd.Office.dll	2016-09-28 11:53	Application extens	57 KB
Source		Addo.MessTracking.DataCollection.dll	2016-09-14 16:37	Application extens	30 KB
📃 Desktop		ADDO_DOC_FAILURE.sql	2016-09-14 16:36	SQL-Document	3 KB
ด OneDrive		ADDO_DOC_FAILURE_EVENT_ACTION.sql	2016-09-14 16:36	SQL-Document	5 KB

Figure 39 - Save as

Important is that you save file as **config**-something.**xml** and u can change the middle part e.g. config-RACE9DEV-Workorder.xml

cAge	_	~	 System.Windows.Interactivity.xml	2010-05-2	5 19:12 XI	ML File	61 KB	*
_	File name:	config	-RACE8DEMO xml					~
r sotti	Save as type:	XML Fi	les (*.xml)					~
irector	∧ Hide Folders				k		Save	Cancel



3.2 Register DocAgent COM Server

Before starting the Addovation DocAgent service, DocAgent COM Server should be registered.

Addovation	Þ	Addovation Create Document Consumer 🔸	
Classic Shell	Þ	Cloud	
ESET	×	DocumentAgent	✓ Addovation DocAgent Configuration
IIS	•	MessageTracking	🔚 Addovation Document Agent Service
	•	O365CRMSync	🗸 Map Example
Microsoft Azure	×	Services	🥨 Register and start DocAgent service
Microsoft Office Tools	×	Uplink 🕨	🥨 Register DocAgent COM server
Microsoft Silverlight	•	🔀 Visual Studio 2017 (2)	Unregister and stop DocAgent service
Hicrosoft SQL Server 2008	•	刘 Visual Studio 2019	Unregister DocAgent COM server

Figure 41 - DocAgent COM Server



3.3 Addovation DocAgent Service

Start Addo.AIS.DocAgent.Service.exe and make sure it finds config file:



Figure 42 - Start the service

Now, drop a file in the in-folder and file is being checked in to IFS after processing:



Figure 43 - Drag and drop



Results will be presented as depicted.

```
-----
Date: 3/2/2019 11:41:59 AM Type: Information
Event message:
ADDO DOC SUCCESS
$NEW:FULLNAME=C:\Addovation\docagent\in\testfile2.txt
$NEW:FOLDERNAME=C:\Addovation\docagent\in
$NEW:FILENAME=testfile2.txt
$NEW: ADDO CHECK IN=true
$NEW:ADDO_FREE_TEXT=Dokument
$NEW: ADDO DOC SUCCESS=ADDO DOC SUCCESS
$NEW: ADDO DOC FAILURE=ADDO DOC FAILURE
$NEW:ADDO LU NAME=DocIssue
$NEW:INFO=some info
$NEW:ADDO_MOVE_TO=C:\DocAgent\Out\testfile2.txt
$NEW:DOC CLASS=100
$NEW:USER FILE NAME=C:\Addovation\docagent\in\testfile2.txt
$NEW:TITLE=Test IFS 9 diud
$NEW:DOC TYPE=ORIGINAL
$NEW:FILE NAME=testfile2.txt
$NEW:FILE_TYPE=TEXTFILE
$NEW:REV NO APP=1
$NEW:STRUCTURE=0
$NEW:COPY FLAG=OK
$NEW-SURVEY LOCKED ELAG-Unlocked
```

Figure 44 - Result output

Emails will be logged to IFS automatically for the specified email in the config same as the folder option.

Addovation V

3.4 Support for Oauth2 to DocAgent

To make Oauth2 work with DocAgent **Email Method** you will need to specify values in the configuration file or create a new one with DocAgent configuration.

✓ Create configurat	tion	_	\times
File Help			
Basic			
Source loider path			
Log folder path:			
Use method: XSLT file:	FOLDER	~	
Unpack ZIP files:	False	 	 ~
Folder settings:			
Top directory only:	True		~
Mail settings	_		
Hostilaille.			
Username:			
Password:			
Port:			
Save attach. only:	False	~	
Use SSL:	False	~	
MailFormat:	EMI	~	
	EML	 	 _
Use OAUTH:	False	~	
Client ID:			
Tenant ID:			
Redirect URL:			
Use interactive:	False	~	
		-	





CARACTERION="1.0" encoding="uti-6"/2
(SORE DETHOD) EMAIL() (SE_METHOD)
<pre><sourcefolder>C: UbcAgent (Incoming</sourcefolder></pre>
<topdirectory_only>True</topdirectory_only>
<unpack_zip>False</unpack_zip>
<xslt>C:\DocAgent\Xslt\config-TEST.xslt</xslt>
<log_folder>C:\DocAgent\Log</log_folder>
<pre><ifs_username> ***Add encrypted IFS username*** </ifs_username></pre>
<pre><ifs_password> ***Add encrypted IFS password*** </ifs_password></pre>
<pre><ifs_appowner> ***Add encrypted IFS appowner*** </ifs_appowner></pre>
<pre><ifs_extserver> ***Add encrypted IFS access point*** </ifs_extserver></pre>
<pre><mail_saveattachmentsonly>True</mail_saveattachmentsonly></pre>
<pre><mail_hostname> ***Add encrypted POP mail server hostname*** </mail_hostname></pre>
<pre><mail_username> ***Add encrypted mail account username*** </mail_username></pre>
<pre><mail_password> ***Add encrypted mail account password*** </mail_password></pre>
<pre><mail port=""> ***Add encrypted mail port*** </mail></pre>
<mail usessl="">True</mail>
<mail format="">msg</mail>
<pre><use oauth="">True</use></pre>
<pre><client id=""> ***Add client id*** </client></pre>
<pre><tenant id=""> ***Add tenant id*** </tenant></pre>
<pre><redirect url="">https://login.microsoftonline.com/common/oauth2/nativeclient</redirect></pre>
<pre></pre>
<pre><ifs_version>IFSApplications10</ifs_version></pre>
<pre><message_tracking> </message_tracking></pre>
<pre><message_tracking_category></message_tracking_category></pre>
<message_tracking_type></message_tracking_type>

Figure 46 – xml file

USE_OAUTH: This will use Oauth2 to login to the mailbox of the emails given in the configuration.

USE_INTERACTIVE: At first this should be set to **True**, and it will allow you to login with an interactive login screen. You will have to provide the user account and password for the first time. After that it should be set to **False**, and it will login automatically in the background.

CLIENT_ID: This is the ID of the application in Azure. (Customer will need an app registration details in Azure to configure values. Refer section 4 for more information).

TENANT_ID: This is the ID of the Azure tenant that DocAgent will login to.

REDIRECT_URL: A value that is used to help Azure find back to the application.

IMPORTANT!

1. When you use DocAgent with Oauth2 for the first time, you need to use interactive login. Microsoft has a policy where interactive login needs to be used first time. Try to login to regular mailbox with interactive once by setting it to **True** and then you can switch back to automatic login by setting USE_INTERACTIVE to **False**.

2. If you change the password for the mailbox you need to change it in the config file.

3. If the customer creates a custom Redirect URL, then they need to inform us, or we will just assume that they will be using https://login.microsoftonline.com/common/oauth2/nativeclient

3.5 Setup multi-channel

Setup Multi channel

Several configuration files containing different mail accounts in the document agent folder can be used simultaneously with the service. One xml config file should contain details relevant to one mail account.

5	PC > Windows (C:) > Program Files (x86)	> Addovation > Automatic	on Server > Document A	Agent
•	│ Name	Date modified	Туре	Size
	microsoft.once.nterop.woru.ui	10/ 14/ LULL L. TU MIVI	мррисации ехтен	212 NU
	MimeKit.dll	10/14/2022 2:17 AM	Application exten	984 KB
	MsgKit.dll	10/14/2022 2:16 AM	Application exten	322 KB
	office.dll	10/14/2022 2:16 AM	Application exten	447 KB
	🗟 stdole.dll	3/9/2021 8:00 AM	Application exten	25 KB
	System.Windows.Interactivity.dll	10/14/2022 2:16 AM	Application exten	39 KB
	V File folder (5)			
	Examples	10/14/2022 2:05 PM	File folder	
	IFSAP7	10/14/2022 2:05 PM	File folder	
	IFSAP8	10/14/2022 2:05 PM	File folder	
	IFSAP9	10/14/2022 2:05 PM	File folder	
	IFSAP10	10/14/2022 2:05 PM	File folder	
	∨ INST File (1)			
	AltovaXML.inst	10/14/2022 2:17 AM	INST File	1 KB
	VXML File (5)			
	Config-DEV-docagent.xml	10/20/2022 2:51 PM	XML File	2 KB
	config-DEV-docagent1.xml	10/20/2022 2:51 PM	XML File	2 KB
	Config-DEV-docagent2.xml	10/20/2022 2:51 PM	XML File	2 KB
	📓 config-DEV-docagent3.xml	10/20/2022 2:52 PM	XML File	2 KB
	prove and a second seco	10/00/0000 0 50 01/	VI. 01. 171	0.140

Figure 47 – Document Agent Folder

It is recommended to create several folders for each configuration file/each channel in the incoming "IN" folder and "Log" folder.

This	s PC → Windows (C:) → DocAgent → Incoming →			`
				🔲 🔚 - 👌
^	Name	Date modified	Туре	Size
	📙 In01	10/21/2022 3:53 PM	File folder	
-	In02	10/20/2022 11:27 AM	File folder	
	In03	10/20/2022 11:26 AM	File folder	
	In04	10/20/2022 11:25 AM	File folder	
	In05	10/20/2022 11:24 AM	File folder	

Figure 48 – Incoming Folder

4 Azure AD configuration for OAuth2

The following configuration is to be done in the Azure Portal (<u>www.portal.azure.com</u>) and global administration rights for the tenant is required.

Step1: Register the Application

Go to: Azure Active Directory > App registrations > New registration



Figure 49 – New registration

On the registration pane, provide a name and click register. Select the account type. Select "Public client/native (mobile & desktop)" platform and provide the below redirect URL: https://login.microsoftonline.com/common/oauth2/nativeclient.



Figure 50 – Register an application



Application (client) ID and Directory (tenant) ID will be displayed on Overview, and it will be required later for configuring the service for Oauth2.

Home >	
OAuth2AppReg	\$
₽ Search	« 📋 Delete 🜐 Endpoints 🐼 Preview features
Overview	Got a second? We would love your feedback on Microsoft identity platform (previously ,
🗳 Quickstart	
🚀 Integration assistant	
Manage	Display name : OAuth2AppReg
🔤 Branding & properties	Application (client) ID :
Authentication	Object ID :
	Directory (tenant) ID :
Certificates & secrets	Supported account types : My organization only
Token configuration	

Figure 51 – Overview

Step2: Authentication

Under authentication, enable "Allow public client flows" as below.

OAuth2AppReg Au Au	uthentication 🖈 …
	A ² Got feedback?
Overview	Accounts in any organizational directory (Any Azure AD directory - Multitenant) Accounts in any organizational directory (Any Azure AD directory - Multitenant)
🗳 Quickstart	Halp the decide
💉 Integration assistant	neip me decide
Manage	
Branding & properties	accounts for an existing registration. If you need to enable personal accounts, you can do so using the manifest
Authentication	euror. <u>Learn more about mese resultuons.</u>
📍 Certificates & secrets	Advanced settings
Token configuration	Allow public client flows ^①
API permissions	'
🙆 Expose an API	Enable the following mobile and desktop nows:
🔣 App roles	App collects plaintext password (Resource Owner Password Credential Flow) Learn more No keyboard (Device Code
28 Owners	SSO for domain-joined Windows (Windows Integrated Auth Flow) Learn more
🍰 Roles and administrators	App instance property lock $^{\odot}$
III Manifest	Configure the application instance modification lock. Learn more 🗗 Configure
Support + Troubleshooting	
7 Troubleshooting	Save Discard
• · · · -	

Figure 52 – Authentication



Step3: Setup API permission

On the same app registration, grant admin consent for users on the API. Following API permissions should be granted.

	🕐 Refresh 🕴 🖗 Got feedb	ack?				
Overview	Successfully granted admin	onsent for the req	uested permissions.			
🗳 Quickstart	not reflect the value in your	organization, or in	organizations where this app will be used. Learn more			
🚀 Integration assistant						
Manage	Configured permissions					
🔤 Branding & properties	Applications are authorized to cal all the permissions the application	I APIs when they n needs. Learn mo	are granted permissions by users/admins as part of the co ore about permissions and consent	nsent process. The list of con	figured permissions should inc	lude
Authentication	+ Add a parmirsion Cra	nt admin concept	tor Addruction DSD			
	Add a permission V Gra	ni aunin conseni				
📍 Certificates & secrets	API / Permissions name	Type	Description	Admin consent requ	Status	
Certificates & secrets Token configuration	API / Permission v Gra	Туре	Description	Admin consent requ	Status	
Certificates & secrets Token configuration API permissions	API / Permissions name	Type Delegated	Description View users' email address	Admin consent requ	Status Granted for Addovation,	
Certificates & secrets Koken configuration API permissions Expose an API	API / Permission V Gra	Type Delegated Delegated	Description View users' email address Maintain access to data you have given it access to	Admin consent requ No No	Status Granted for Addovation Granted for Addovation	··· ···
Certificates & secrets Token configuration API permissions Expose an API App roles	API / Permission V Gra API / Permissions name Microsoft Graph (4) email offline_access POP.AccessAsUser.All	Type Delegated Delegated Delegated	Description View users' email address Maintain access to data you have given it access to Read and write access to mailboxes via POP.	Admin consent requ No No No	Status Granted for Addovation, Granted for Addovation, Granted for Addovation Granted for Addovation	···· ···
 	API / Permission V Gra API / Permissions name Microsoft Graph (4) email offline_access POP.AccessAsUserAll User.Read	Type Delegated Delegated Delegated Delegated Delegated	Description View users' email address Maintain access to data you have given it access to Read and write access to mailboxes via POP. Sign in and read user profile	Admin consent requ No No No	Status Granted for Addovation,,,	···· ··· ···
Certificates & secrets Token configuration API permissions Expose an API Apr roles Owners Roles and administrators	API / Permission V Gra API / Permissions name Microsoft Graph (4) email offline_access POP.AccessAsUserAll User.Read	Type Delegated Delegated Delegated Delegated	Description View users' email address Maintain access to data you have given it access to Read and write access to mailboxes via POP. Sign in and read user profile	Admin consent requ No No No	Status Granted for Addovation,,, Granted for Addovation,,, Granted for Addovation,,, Granted for Addovation,,,	···· ···· ···

Figure 53 – API Permissions

Step4: Add details to xml file

Application (client) Id, Directory (tenant) Id and Redirect URL should be given as values in the Document Agent configuration file.

```
<CLIENT_ID> ***Add client_id*** </CLIENT_ID>
<TENANT_ID> ***Add tenant_id*** </TENANT_ID>
<REDIRECT_URL>https://login.microsoftonline.com/common/oauth2/nativeclient</REDIRECT_URL>
```

Figure 54 – details in xml

5 Upgrade

5.1 Upgrading old versions to Automation Server 2.1. 33715 or higher.

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

6 Limitations

Non-standard configurations in terms of authentication towards IFS Applications is not supported. Also customizations that might affect standard API:s being used is not supported, for full list of used queries and API:s please contact Addovation if in doubt.

Installation of software requires writing to registry in local machine hive.

Addovation does not install any special views or packages in the database.

Document Agent follows standard behavior using IFS API:s and basic data connected to e.g. document classes.

Document Agent does no longer check whether a LU / KeyRef combination actually exists, it just creates it even though object doesn't exist.

Unpacking of zip files

ZIP files must be zipped using Microsoft standards

- ZIP files do not need specific names, but file extension must be ZIP.
- Files included in a ZIP files is simply unpacked as is.
- An email can contain both ZIP files and other traditional file types.
- ZIP files will be unzipped using same folder structure as when zipped.
- Password protected ZIP files are NOT supported.
- ZIP files compressed using Winzip / Rarlab might work, but is NOT supported.
- TAR, ZIP and other compressed file types is NOT supported.

7 Contact

For further inquiries, please contact your nearest Addovation office:

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For existing customers, please use http://support.addovation.com