
Setup Guide Automation AIS-Message Tracking 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.

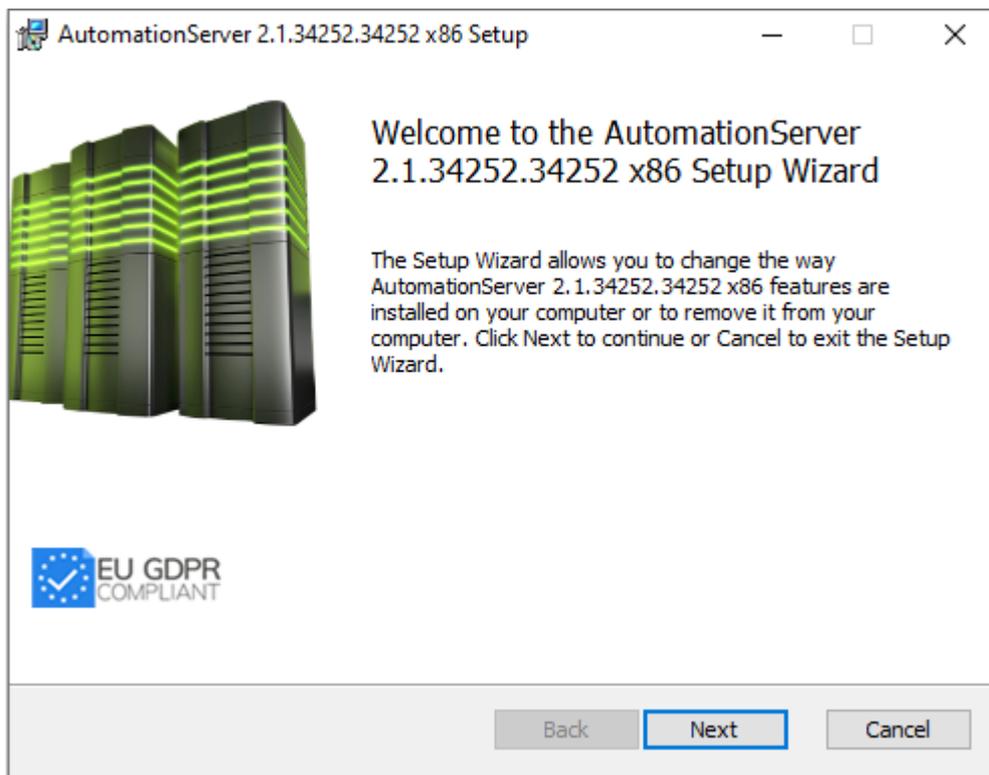


Figure 1 – Setup Wizard

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

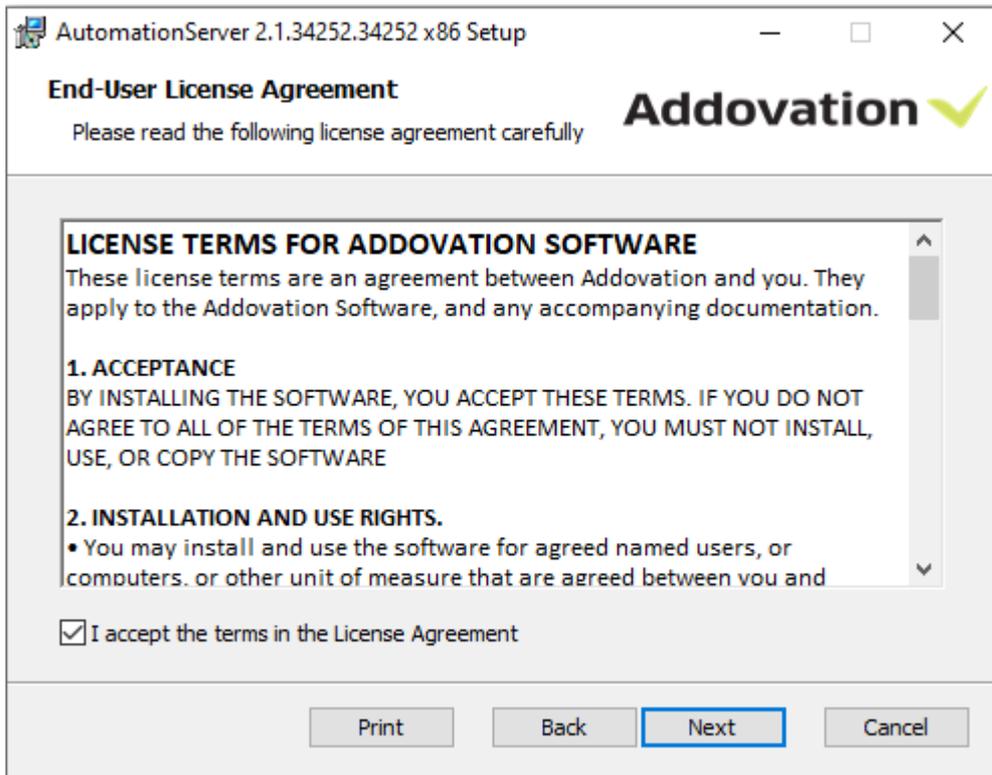


Figure 2 – End-User License Agreement

1.2 Environmental Configuration

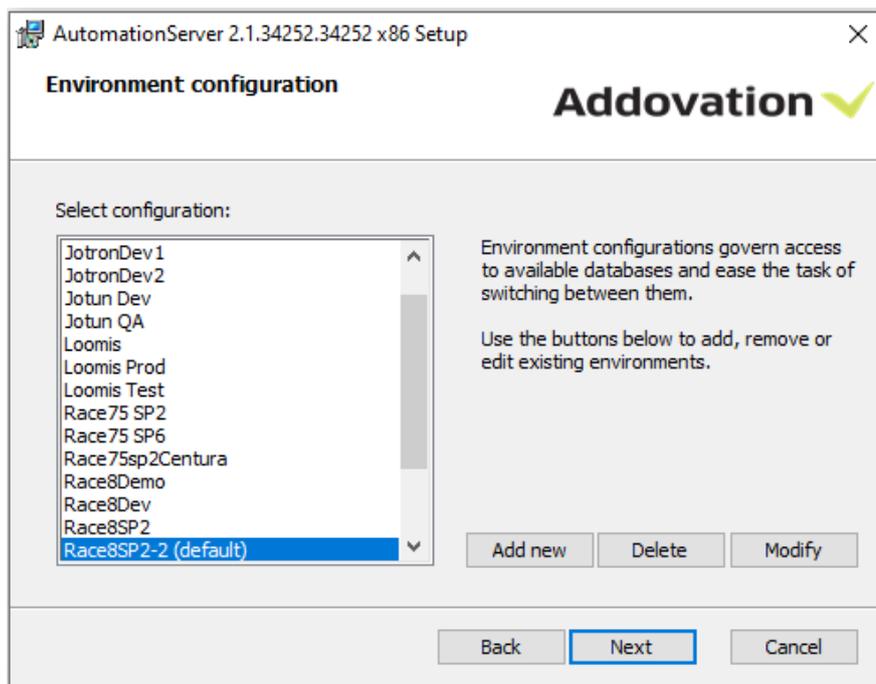


Figure 3 – Environmental Configuration

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.

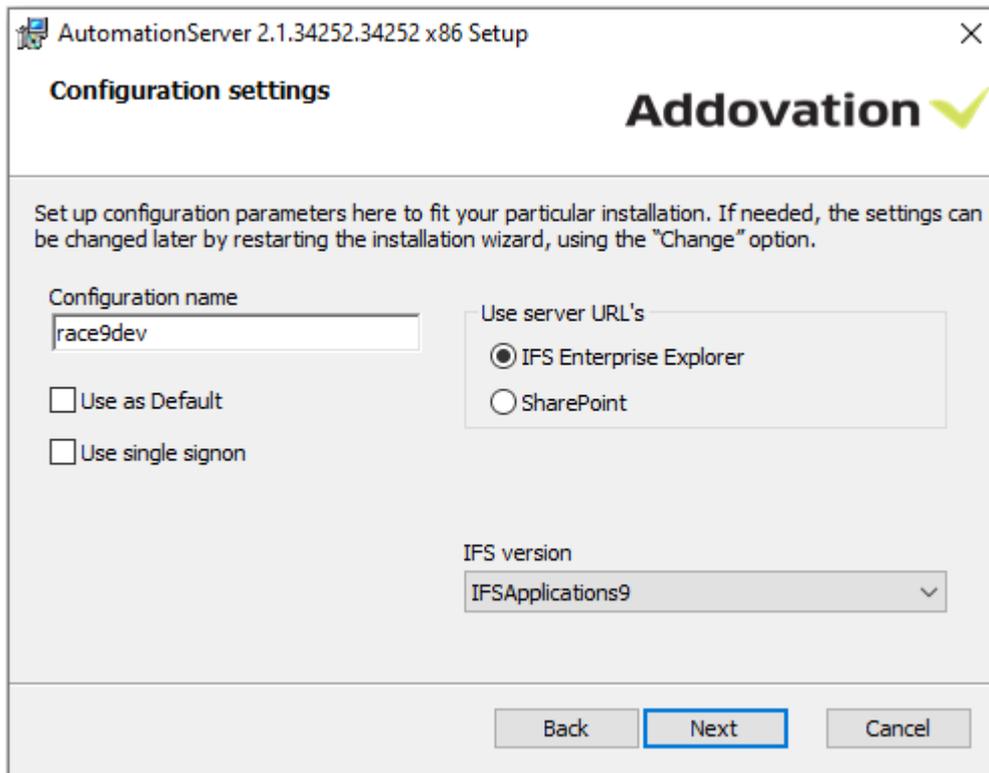


Figure 4 - Configuration Settings

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. <http://race75sp6:58080/>).

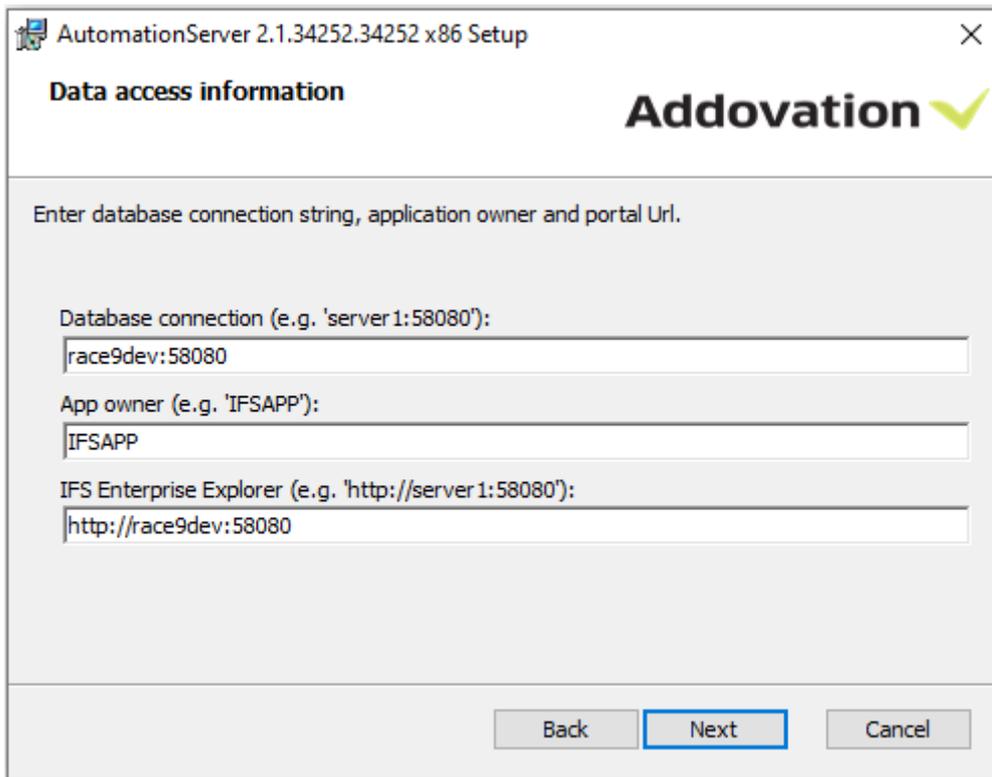


Figure 5 - Data Access Information

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

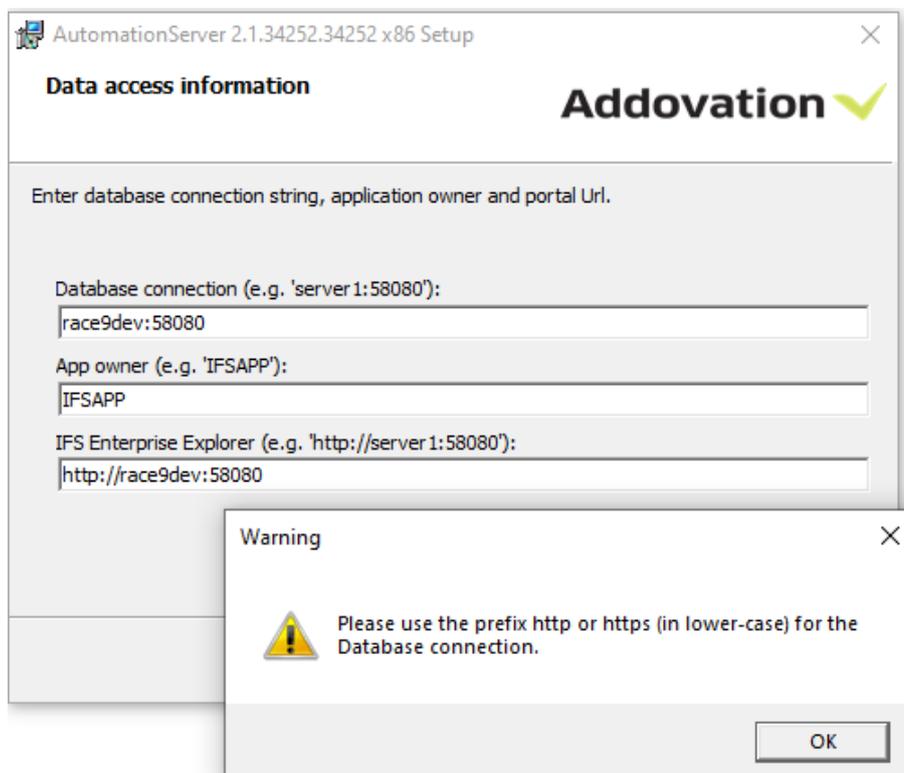


Figure 6 - Data Access Information

AutomationServer 2.1.34252.34252 x86 Setup

Data access information **Addovation ✓**

Enter database connection string, application owner and portal Url.

Database connection (e.g. 'server1:58080'):

App owner (e.g. 'IFSAPP'):

IFS Enterprise Explorer (e.g. 'http://server1:58080'):

Back 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.

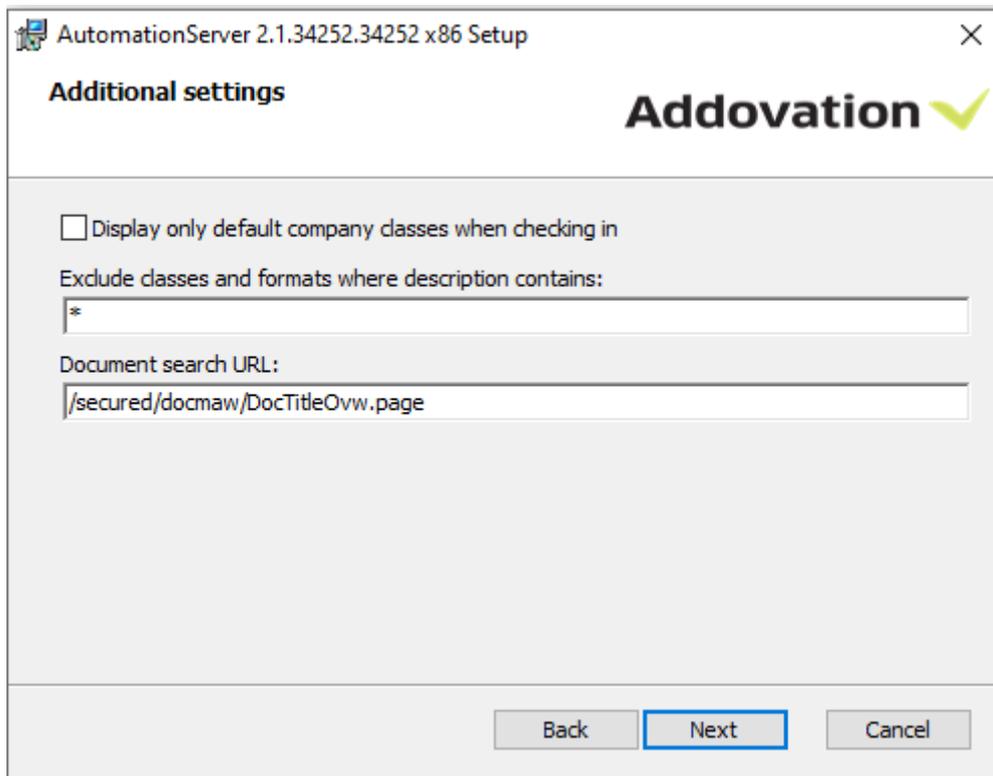
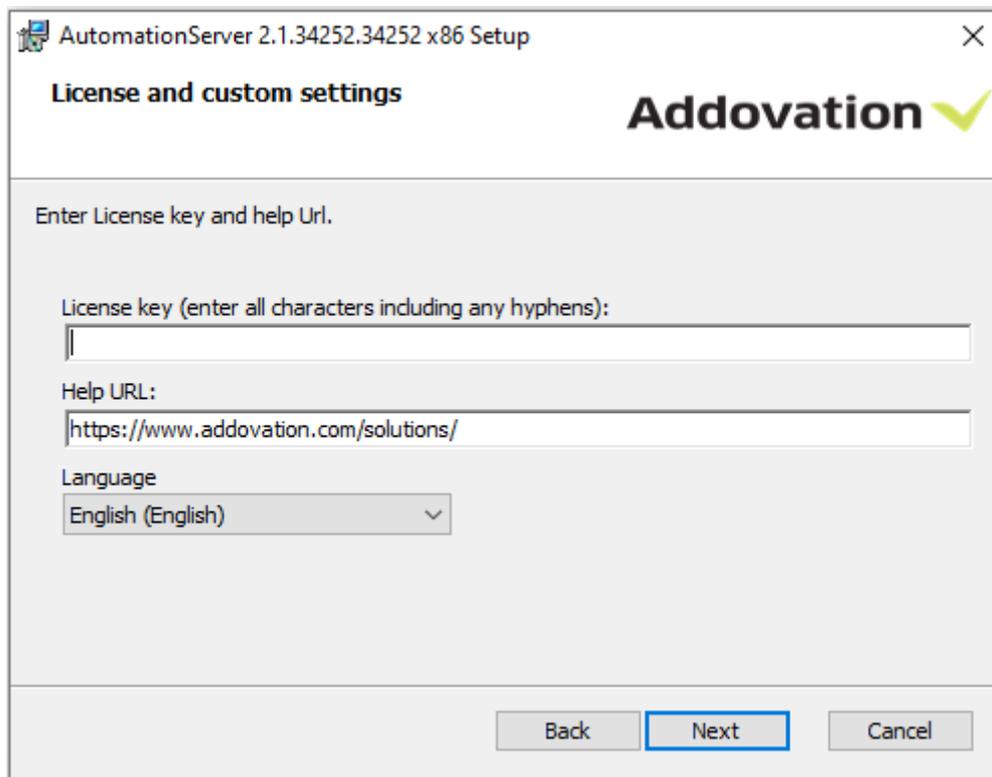


Figure 8 – Additional Settings

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.



The screenshot shows a Windows installation window titled "AutomationServer 2.1.34252.34252 x86 Setup". The main heading is "License and custom settings" with the Addovation logo. Below the heading, it says "Enter License key and help Url." There are three input fields: "License key (enter all characters including any hyphens):" which is empty, "Help URL:" which contains "https://www.addovation.com/solutions/", and "Language" which is a dropdown menu currently showing "English (English)". At the bottom, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "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.

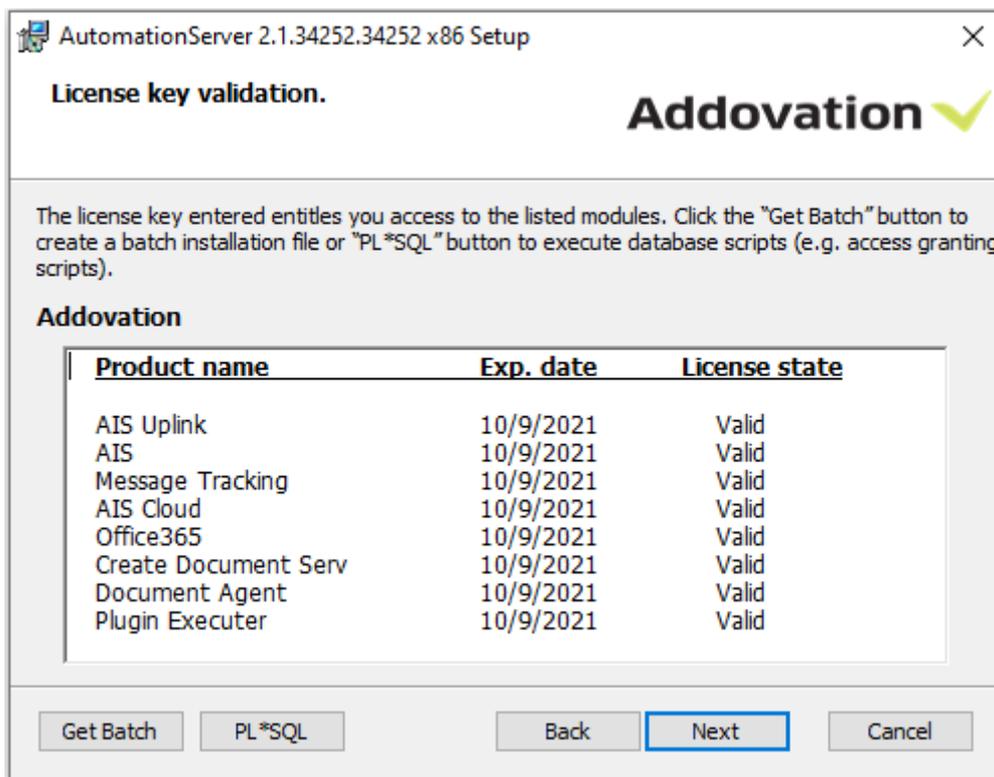


Figure 10 – License key validation

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.

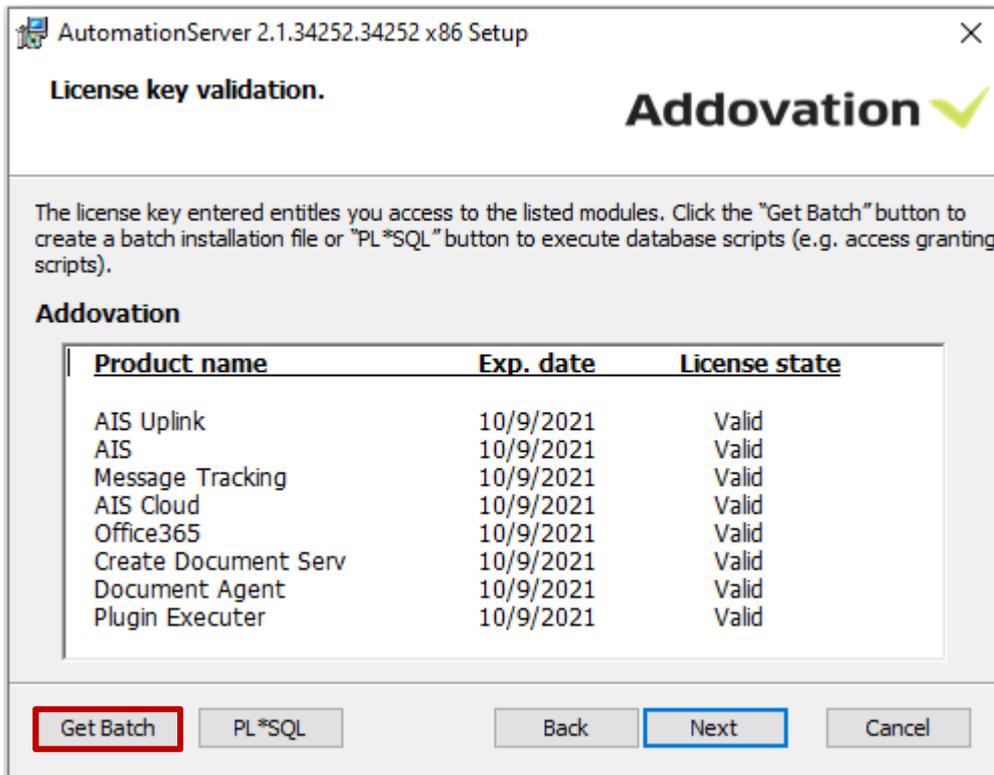


Figure 11 – Get Batch

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.

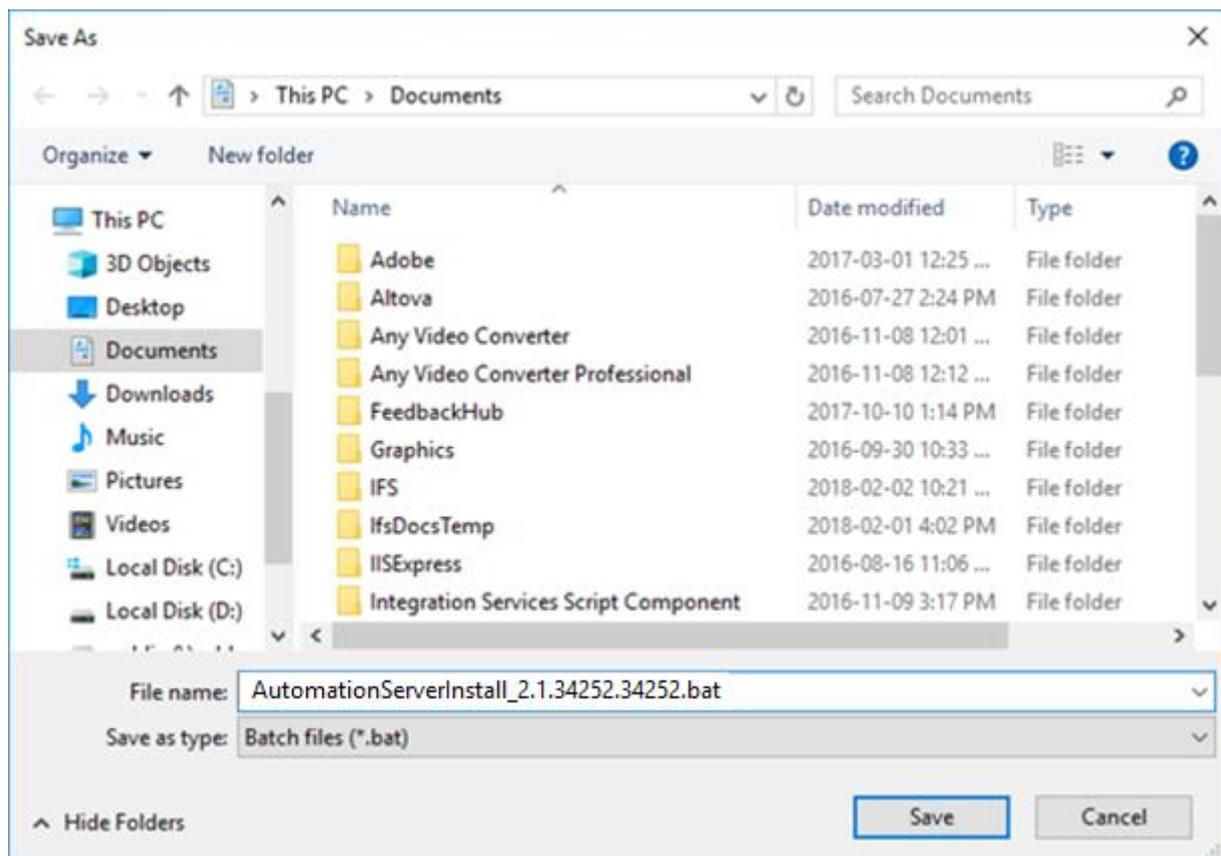


Figure 12 – Save batch file

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.

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.

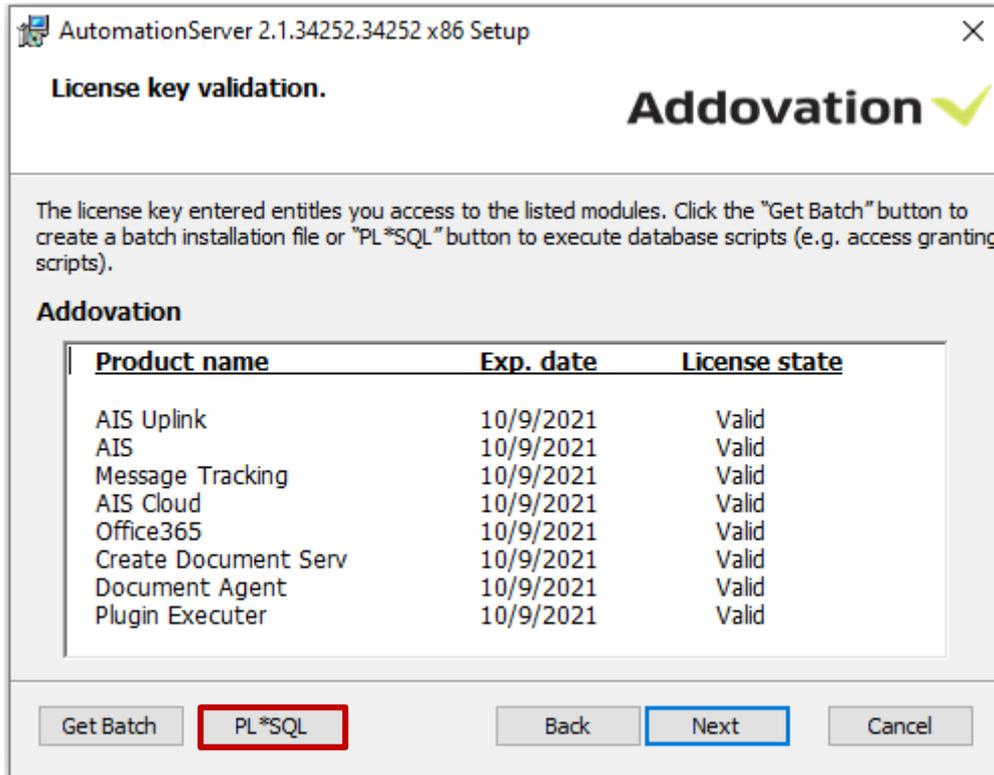


Figure 13 – PL*SQL script

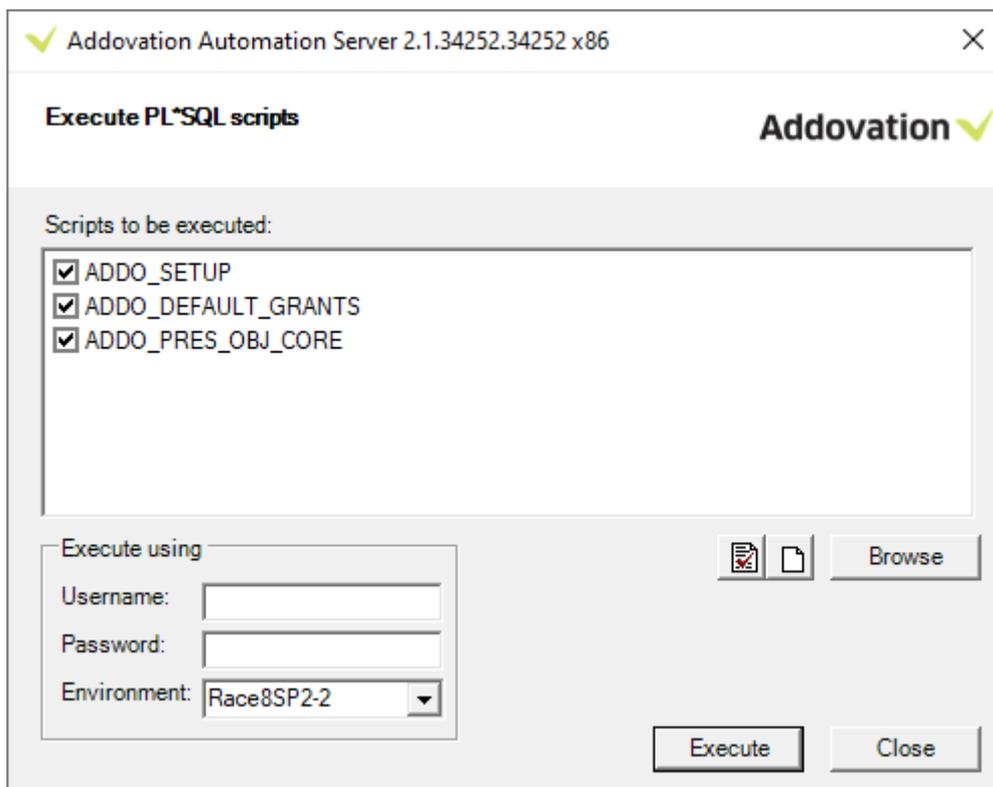


Figure 14 – Execute PL*SQL scripts

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.

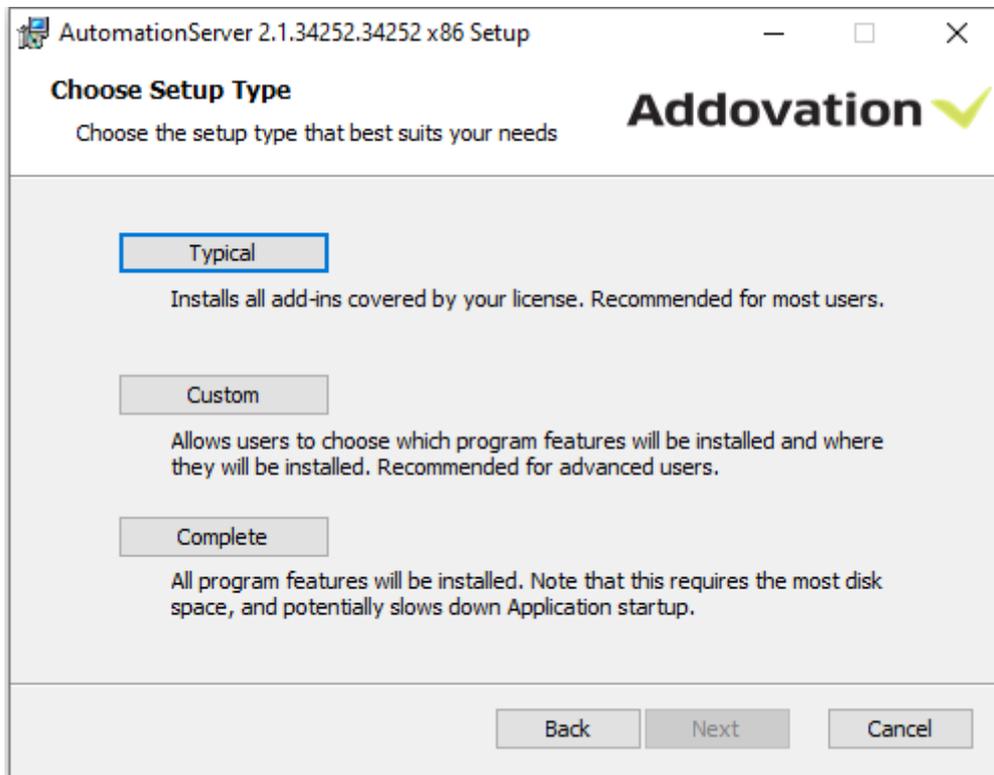


Figure 15 – Setup Types

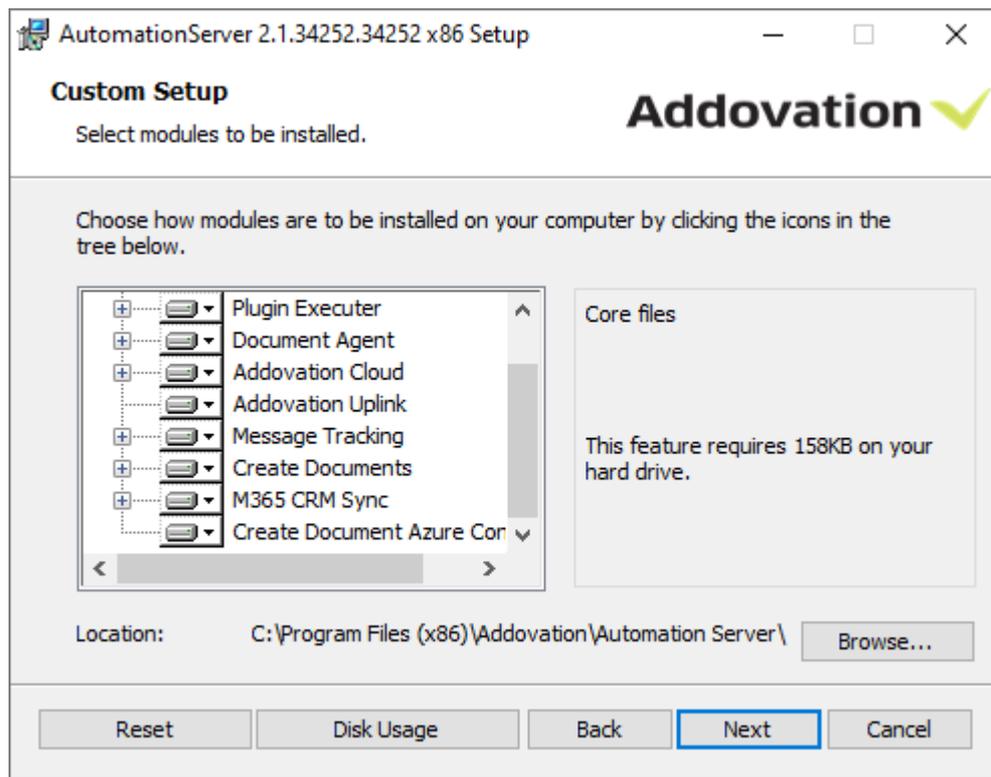


Figure 16 – Custom Setup

Components

- IFS to SQL Server Plugin
- Plugin Executer
- 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.

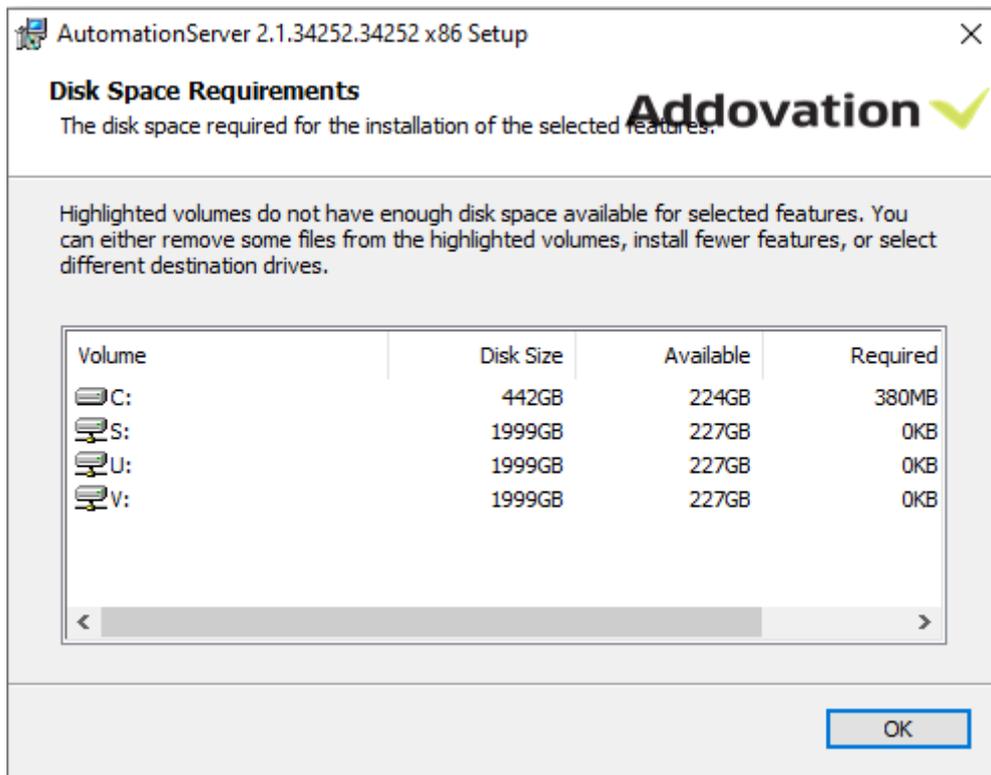


Figure 17 – Disk Space Requirements

1.10 Ready to Install

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

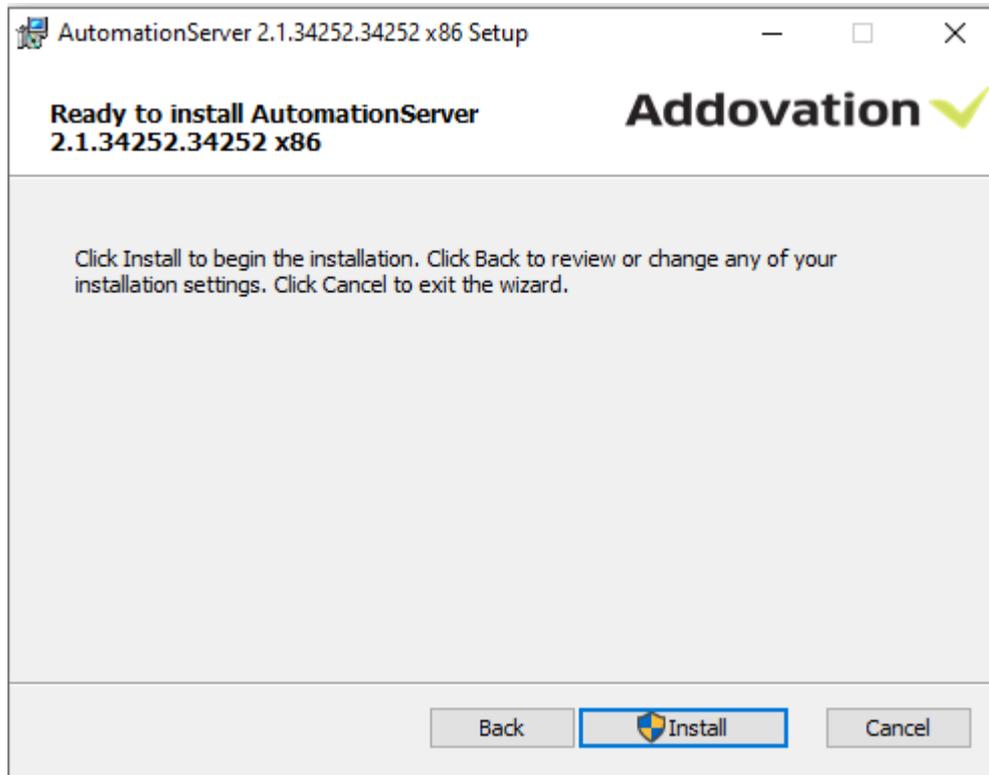


Figure 18 - Install

Message Tracking web site is not be able to install/upgrade without IIS. Setup will exit after giving below warning message.

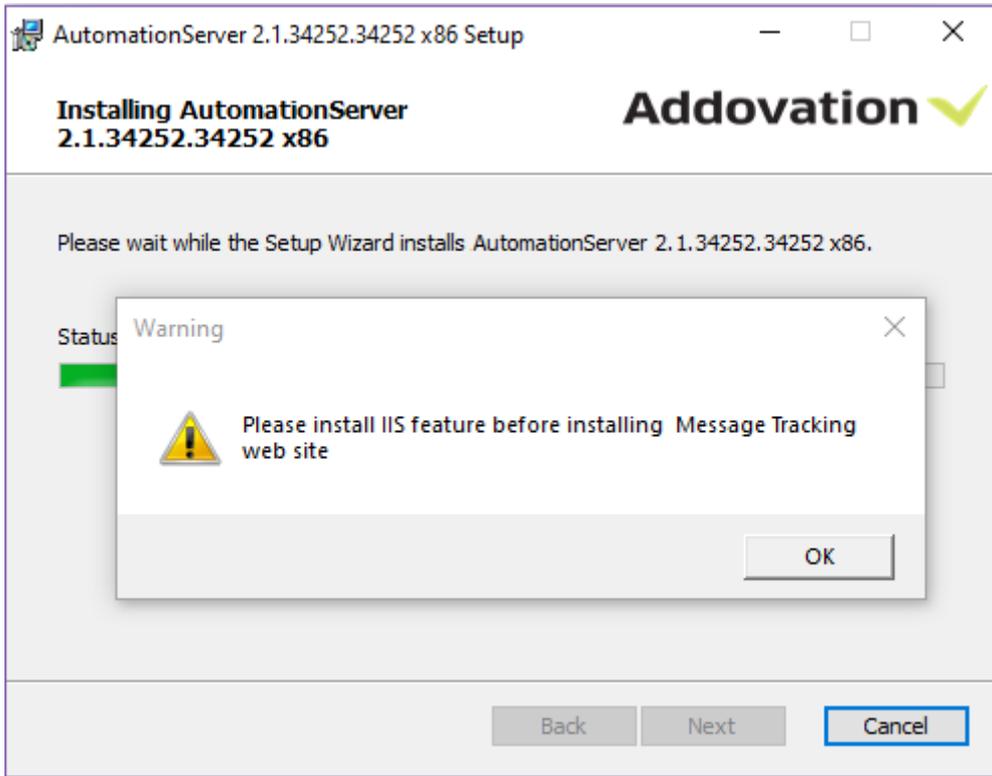


Figure 19 – IIS requirement

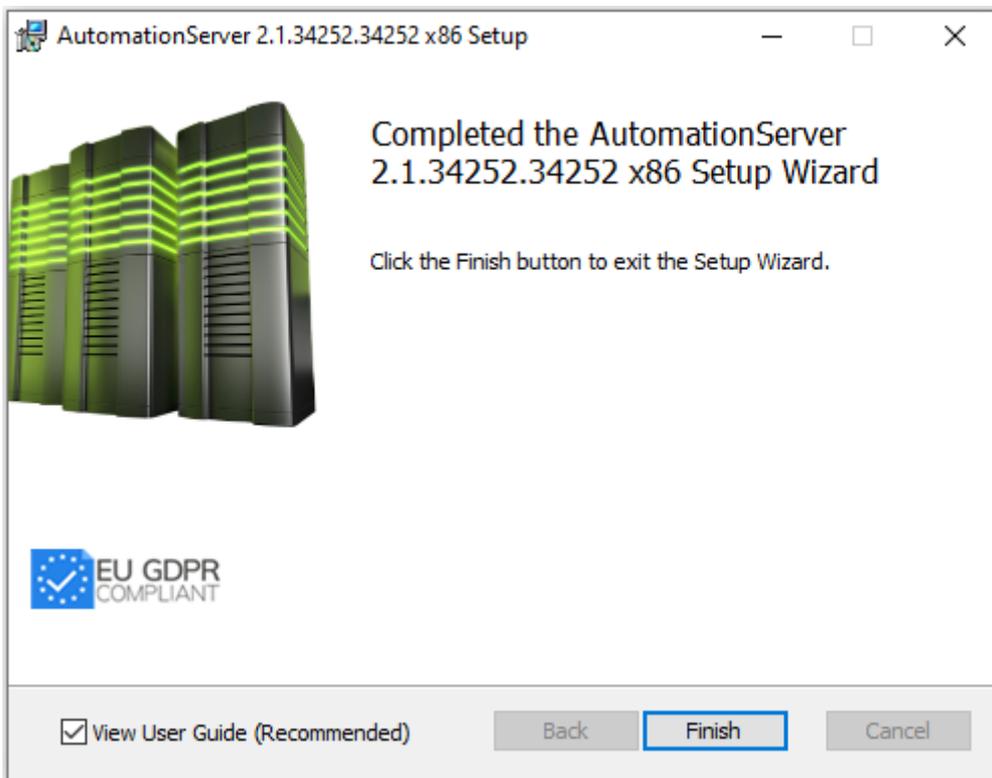


Figure 20 - Finish

2 Message Tracking Configuration

- Program shortcuts

Go to -> Start -> Programs -> Addovation ->

Message tracking

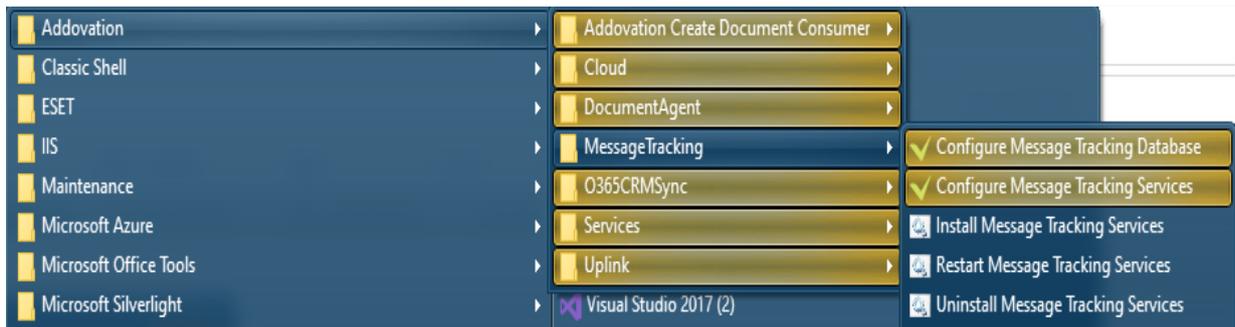


Figure 21 – Message Tracking Database/Service

2.1 Configure & run services

2.1.1 How to configure message tracking database

2.1.1.1 Grant access to users to 'create databases'

- Right click on the relevant user and select 'Properties'

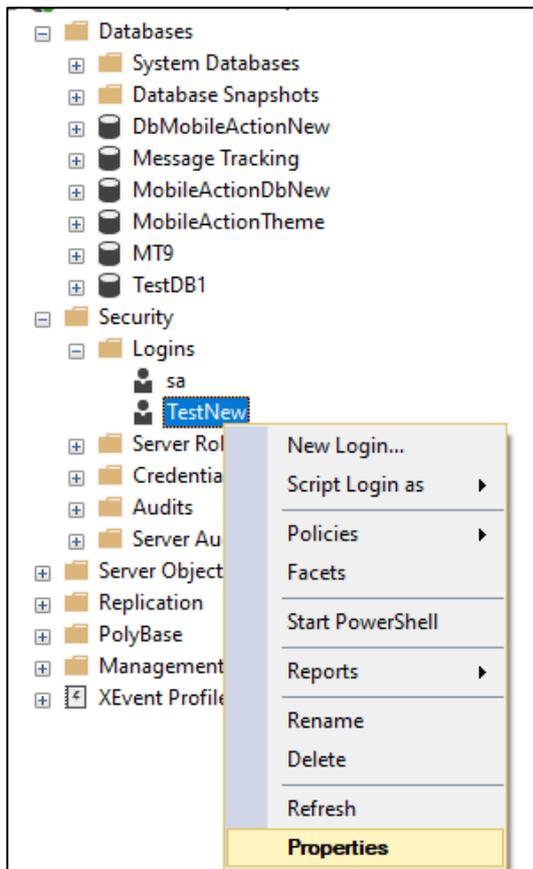


Figure 22 - Grant Access

- Select 'Server Role' tab and check 'dbcreator'

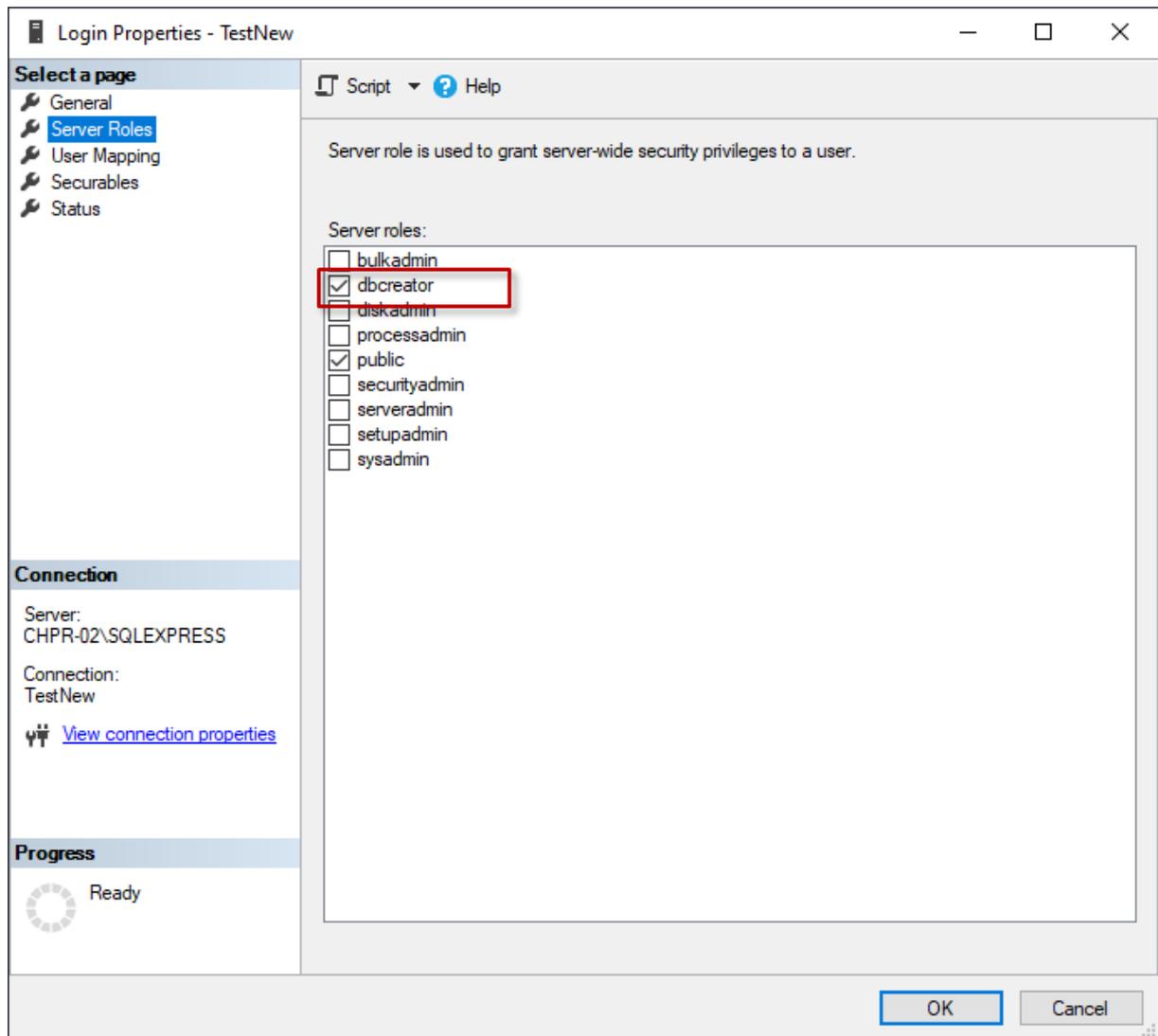
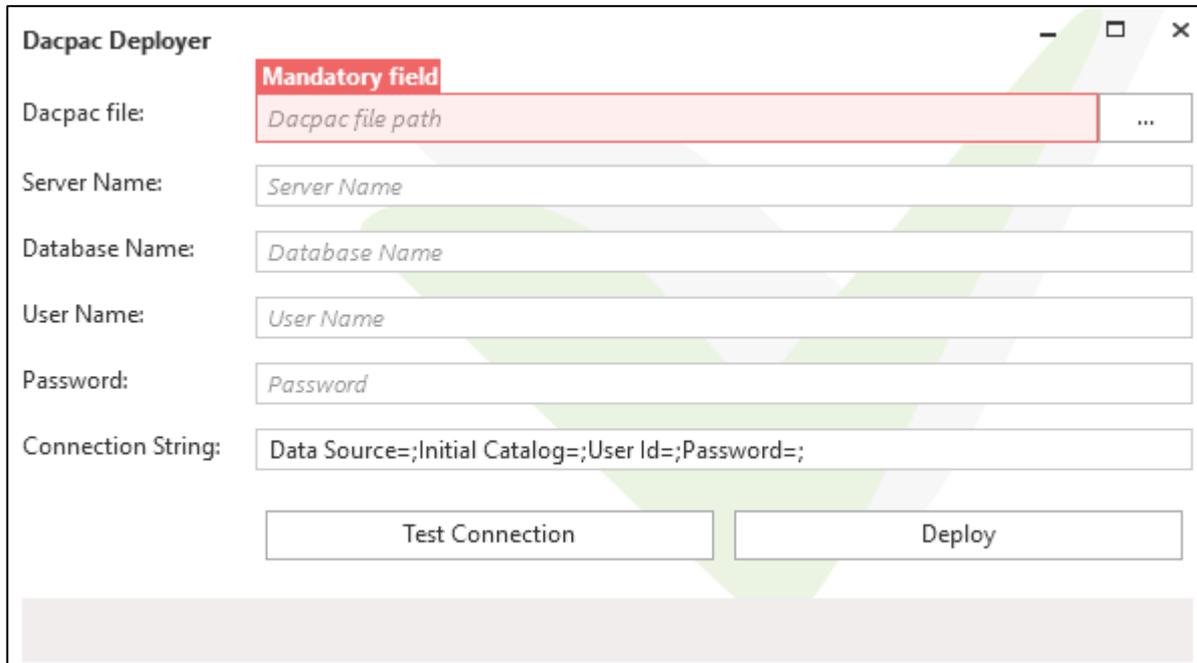


Figure 23 – Setup Roles

2.1.1.2 Using Dacpac Deployer

- Go to Start-> Programs-> Addovation-> Configure Message Tracking Database



The screenshot shows the 'Dacpac Deployer' application window. The title bar reads 'Dacpac Deployer'. The interface includes the following elements:

- Dacpac file:** A text box containing 'Dacpac file path' with a red highlight and a 'Mandatory field' label above it. A file selection button (three dots) is to the right.
- Server Name:** A text box containing 'Server Name'.
- Database Name:** A text box containing 'Database Name'.
- User Name:** A text box containing 'User Name'.
- Password:** A text box containing 'Password'.
- Connection String:** A text box containing 'Data Source=;Initial Catalog=;User Id=;Password=;'.
- Buttons:** Two buttons at the bottom: 'Test Connection' and 'Deploy'.

Figure 24 – Dacpac Deployer

- Select the Dacpac file which was installed into the below location
 - C:\Program Files (x86)\Addovation\Automation Server\MessageTrackingDB (default location)
- Server Name (e.g.: ISAB-01\SQLEXPRESS)
- Database Name (e.g.: Message Tracking)
- Username/ Password: Credentials for the SQL server
- Connection String for the SQL server & click on 'Deploy'
- Dacpac was successfully deployed. You can see the 'Message Tracking' database is created.

2.1.1.3 Using Command Prompt or power shell (alternative way)

- Go to C:\Program Files (x86)\Microsoft SQL Server\140\DAC\bin
- Shift + right click on an empty area and click “Open PowerShell window here”

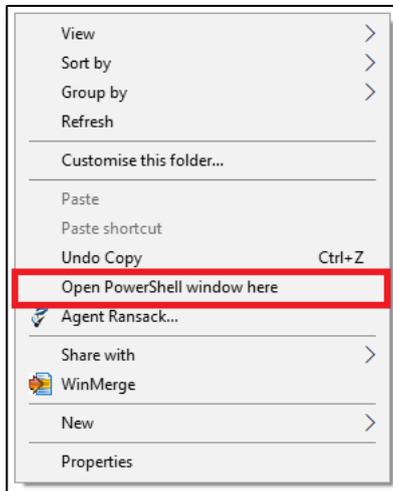


Figure 25 - PowerShell

- Or open command prompt as an administrator and go the following path.
 - C:\Program Files (x86)\Microsoft SQL Server\140\DAC\bin

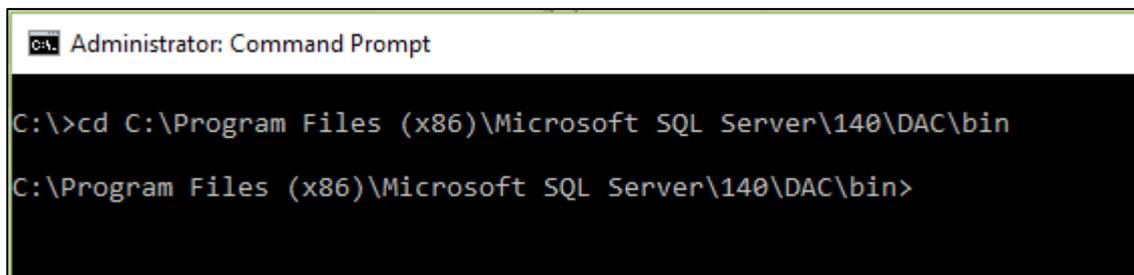


Figure 26 – Command Prompt

- Use following command to deploy the dacpac.

– In PowerShell

```
./SqlPackage /Action:Publish /SourceFile:"C:\Program Files (x86)\Addovation\Automation Server  
\MessageTrackingDB\MessageTracking.dacpac" /TargetDatabaseName:MT1  
/TargetServerName:"ISSA-01\MSSQLSERVER2017" /TargetUser:"sa" /TargetPassword:"sa123"
```

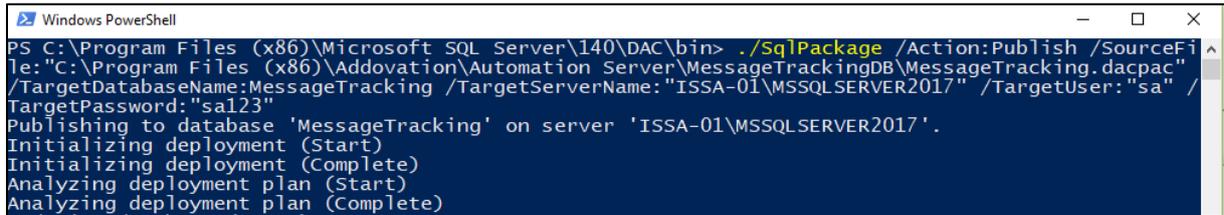


Figure 27 – Command Prompt

– In Command Prompt

```
SqlPackage /Action:Publish /SourceFile:"C:\Program Files (x86)\Addovation\Automation Server  
\MessageTrackingDB\MessageTracking.dacpac" /TargetDatabaseName:MT1  
/TargetServerName:"ISSA-01\MSSQLSERVER2017" /TargetUser:"sa" /TargetPassword:"sa123"
```

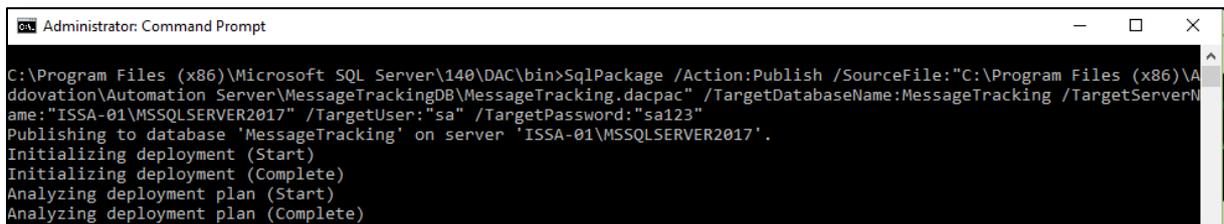


Figure 28 – Command prompt deployer

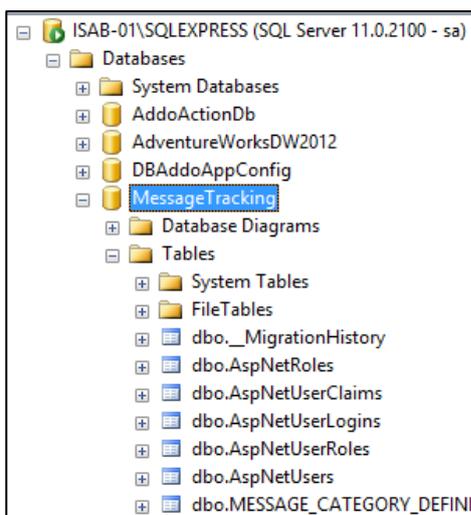


Figure 29 – Created Database

2.1.2 Multiple databases for multiple IFS Applications instances

Dacpac Should be deployed for each instance to create separate databases by reopening Configure Message Tracking Database and giving relevant values for each instance.

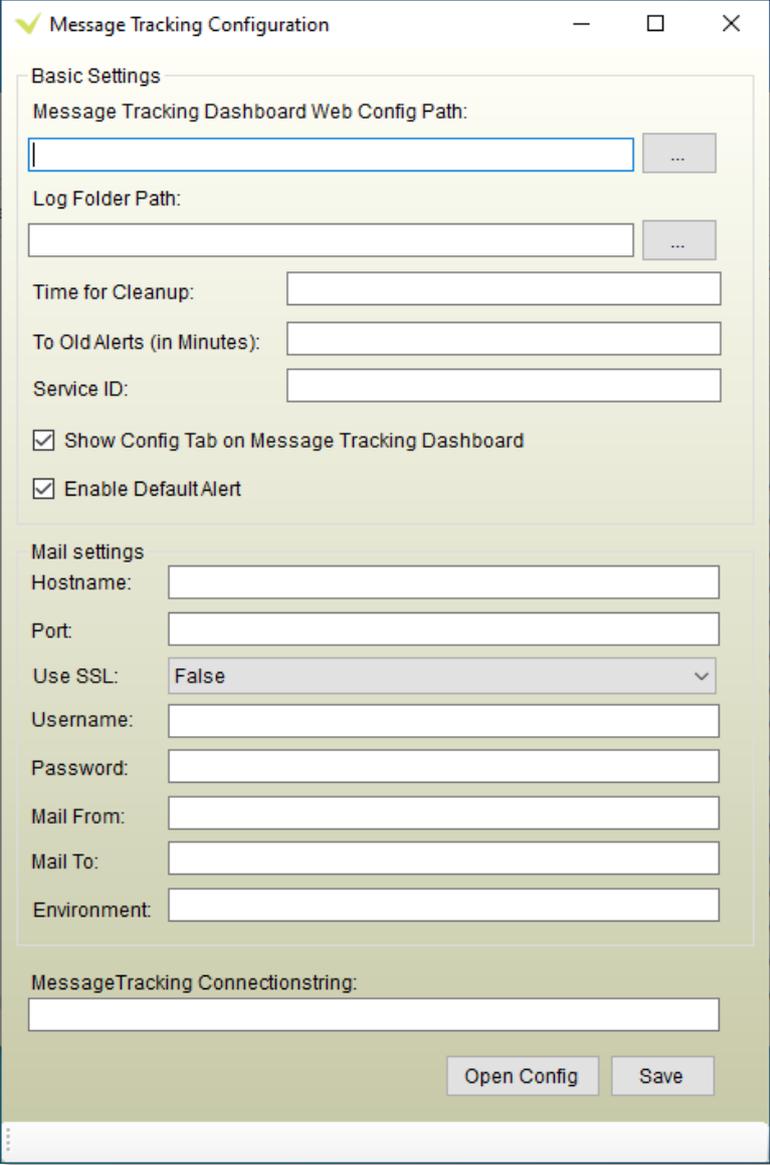
Ex:

- Database Name: MessageTracking1, MessageTracking2
- Connection string for each database

Important: When AIS Message Tracking is upgraded from the obsolete version which has only option to use single instance to the new version that has facility to use multiple instances, already configured services should be removed and New service instances should be created & installed. Multiple Message Tracking service configuration files should be created for each instance. Previously Installed service will only work for a one instance as it is worked previously.

2.1.3 How to configure message tracking service

Go to Start-> Programs-> Addovation-> **Configure Message Tracking Services**



The screenshot shows a window titled "Message Tracking Configuration" with a green checkmark icon in the top-left corner. The window is divided into several sections:

- Basic Settings:**
 - Message Tracking Dashboard Web Config Path: A text input field with a browse button (...).
 - Log Folder Path: A text input field with a browse button (...).
 - Time for Cleanup: A text input field.
 - To Old Alerts (in Minutes): A text input field.
 - Service ID: A text input field.
 - Show Config Tab on Message Tracking Dashboard
 - Enable Default Alert
- Mail settings:**
 - Hostname: A text input field.
 - Port: A text input field.
 - Use SSL: A dropdown menu currently set to "False".
 - Username: A text input field.
 - Password: A text input field.
 - Mail From: A text input field.
 - Mail To: A text input field.
 - Environment: A text input field.
- MessageTracking Connectionstring:** A text input field.

At the bottom right of the dialog, there are two buttons: "Open Config" and "Save".

Figure 30 – Message Tracking Configuration

- Select the 'Message Tracking Dashboard Web Config Path'
- C:\inetpub\MessageTracking\Web.config

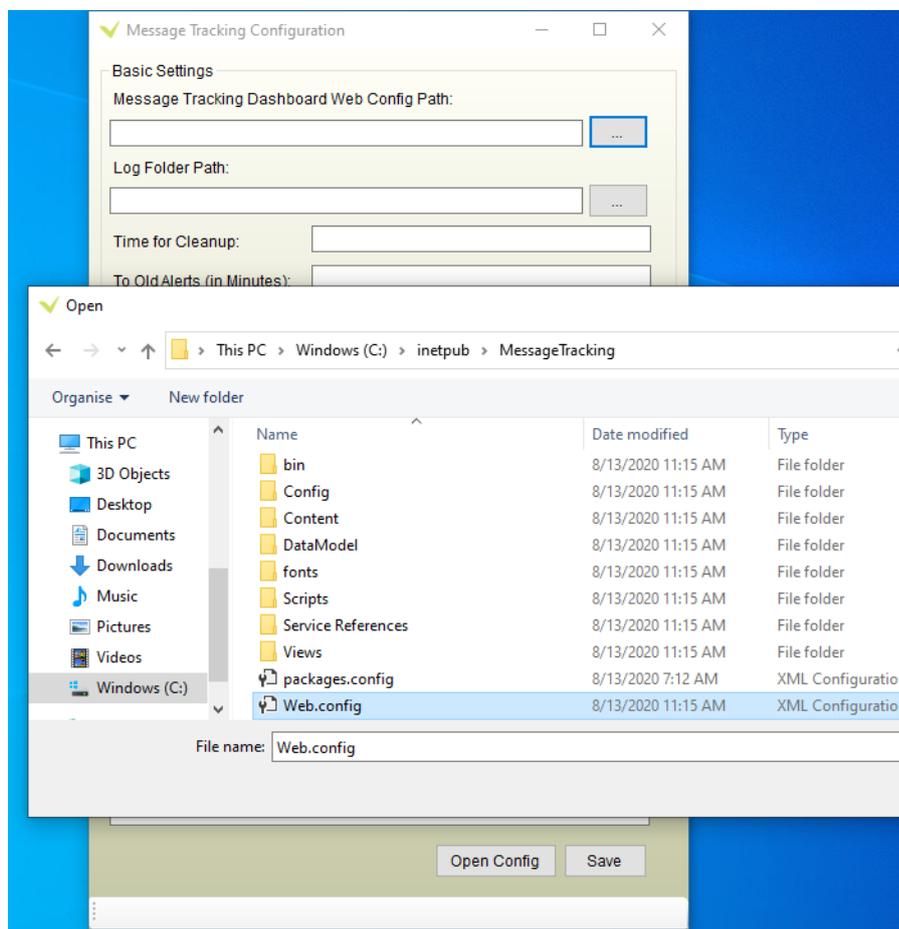


Figure 31 – Select web config

- Select the 'Log Folder Path'
- Configurations will automatically create a folder structure inside the log folder

2.1.4 Multiple services for multiple IFS Applications instances

Log folders should be created for each instance & mapped the relevant folder. Ex: Log App9, Log App 10

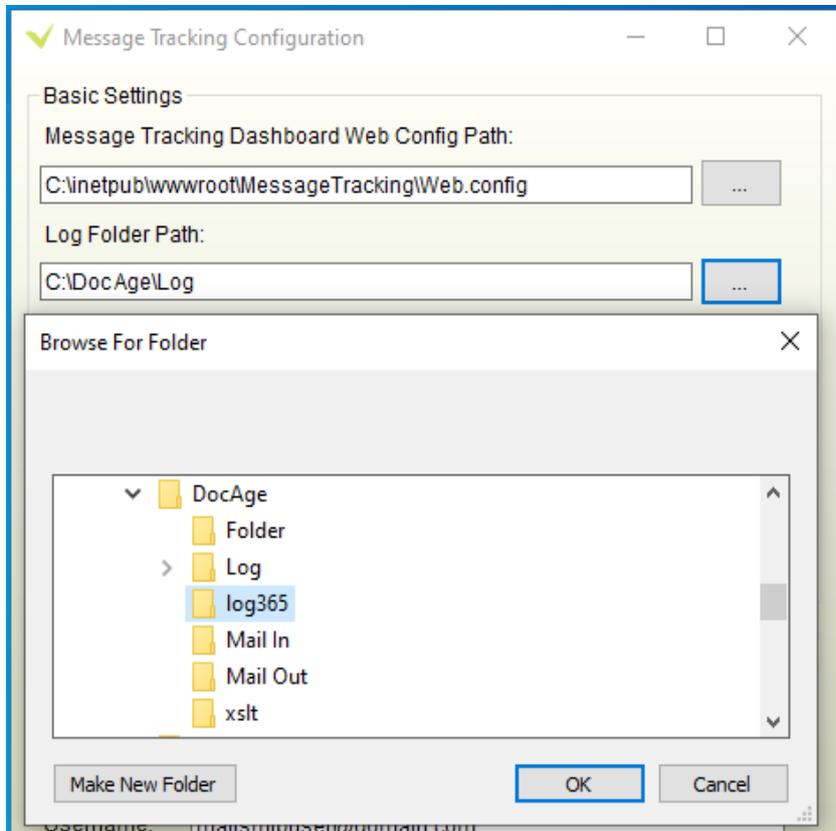


Figure 32 – Select Log File

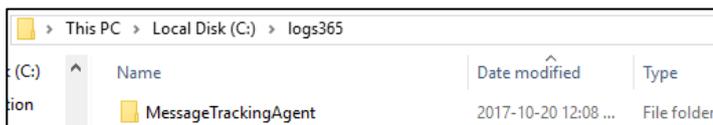


Figure 33 – Log File

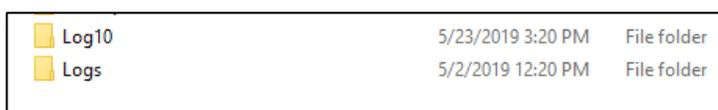


Figure 34 - Log File

- 'Open Config' & select the 'Addo.MessTracking.Agent.exe.config' file
- C:\Program Files (x86)\Addovation\Automation Server\MessageTrackingAgent (default location)

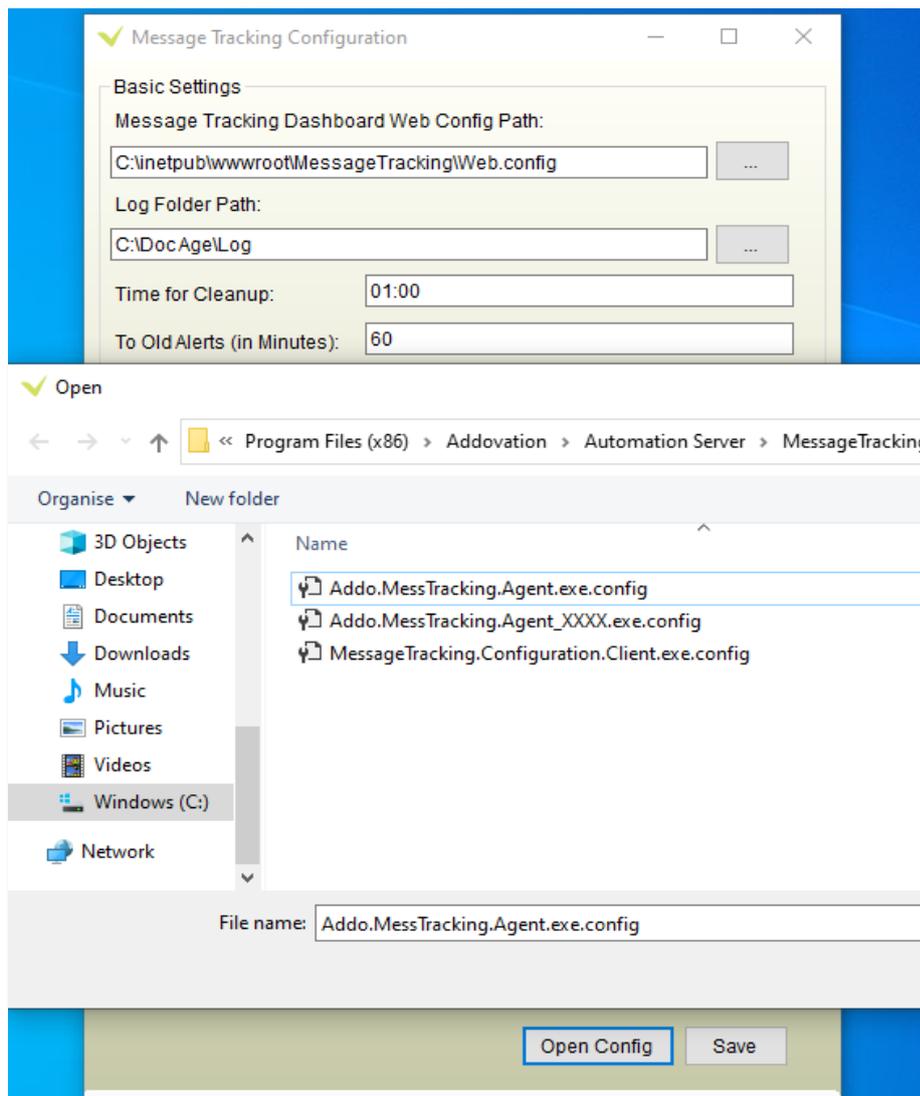


Figure 35 – Open Config

- After loading the configuration information, now you can change the data.

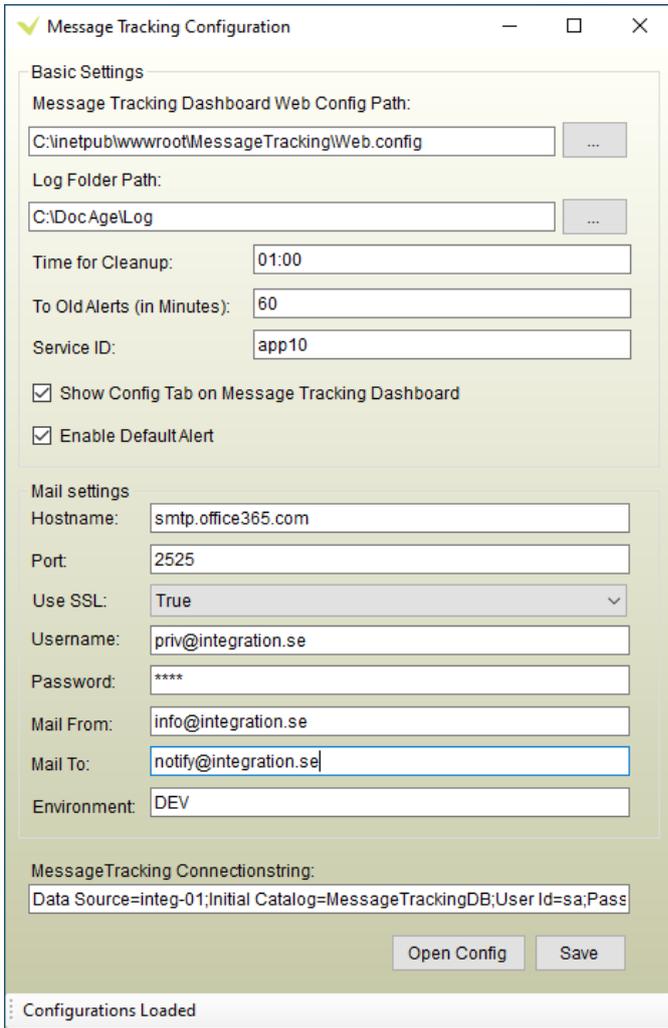


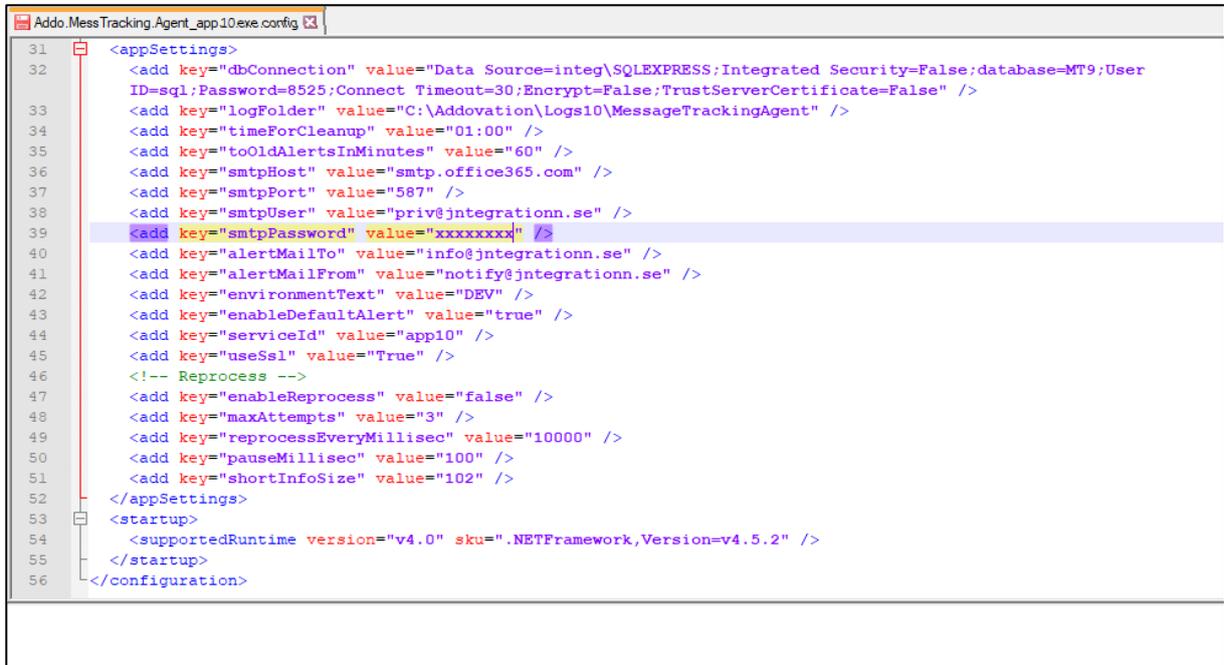
Figure 36 – Configuration

- **Time for Cleanup:** Time when cleanup process runs. Normally at night.
- **To Old Alerts (in Minutes):** Alerts that is older than this time will not be sent.
- **Service ID:** ID to use for each instance when multiple instances are used. Ex: App9,App10
- **Show Config Tab on Message Tracking Dashboard:** You need to check this box to display the Message Tracking Configuration parameters in Message Tracking Dashboard.
- **Enable Default Alert:** This check box will enable the default alerts. Ex: Sending e-mails when error/warning occurred.

Mail settings:

- **Host Name:** Mail server host
- **Port:** Mail server port
- **Use SSL:** to enable/disable SSL
- **Username:** Mail address
- **Password:** Mail password
- **Mail From:** From mail address

- **Mail To:** To mail address
- **Environment:** environment-identifier in mail
- **Message Tracking Connection String:** Connection setting to the Message Tracking database



```

31 <appSettings>
32   <add key="dbConnection" value="Data Source=integ\SQLEXPRESS;Integrated Security=False;database=MT9;User
33     ID=sql;Password=8525;Connect Timeout=30;Encrypt=False;TrustServerCertificate=False" />
34   <add key="logFolder" value="C:\Addovation\Logs10\MessageTrackingAgent" />
35   <add key="timeForCleanup" value="01:00" />
36   <add key="toOldAlertsInMinutes" value="60" />
37   <add key="smtpHost" value="smtp.office365.com" />
38   <add key="smtpPort" value="587" />
39   <add key="smtpUser" value="priv@jntegrationn.se" />
40   <add key="smtpPassword" value="xxxxxxx" />
41   <add key="alertMailTo" value="info@jntegrationn.se" />
42   <add key="alertMailFrom" value="notify@jntegrationn.se" />
43   <add key="environmentText" value="DEV" />
44   <add key="enableDefaultAlert" value="true" />
45   <add key="serviceId" value="app10" />
46   <add key="useSsl" value="True" />
47   <!-- Reprocess -->
48   <add key="enableReprocess" value="false" />
49   <add key="maxAttempts" value="3" />
50   <add key="reprocessEveryMillisecc" value="10000" />
51   <add key="pauseMillisecc" value="100" />
52   <add key="shortInfoSize" value="102" />
53 </appSettings>
54 <startup>
55   <supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.5.2" />
56 </startup>
</configuration>

```

Figure 37 – Configuration file

2.2 How to Install, Restart, Uninstall the Message Tracking Service

Once all configuration values are provided, service can be installed.

Go to Start-> Programs->Addovation->MessageTracking->

- Install Message Tracking Services
- Restart Message Tracking Services
- Uninstall Message Tracking Services

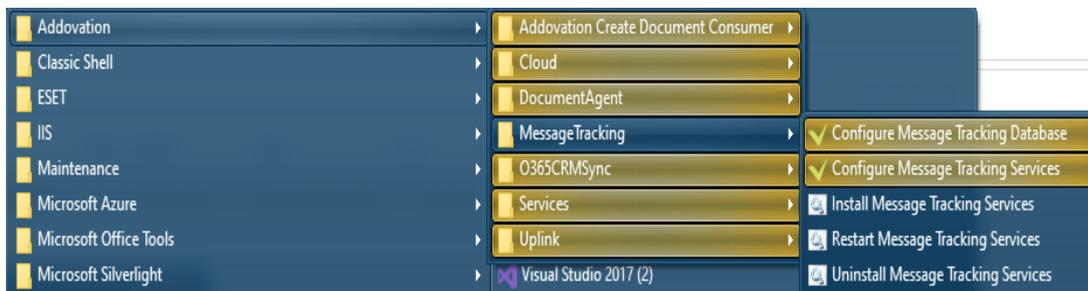


Figure 38 – Install/ Restart/ Uninstall

Addovation Document Agent	Enables automatic checkin of documents	Automatic	Local syste...
Addovation Message Tracking Service	Message Tracking cleanup jobs	Running Automatic	Local Systeme...
Addovation Office365IFS Service (addovation.com)	Sync between Office365 and IES	Running Manual	Local Systeme...

Figure 39 – Installed service

For Multiple instances

Addovation Message Tracking Service (app10)	Message Tr...	Running	Automatic	Local Systeme...
Addovation Message Tracking Service (app9)	Message Tr...	Running	Automatic	Local Systeme...
Addovation Office365IFS Service (APP10-addovation.com)	Sync betwe...	Running	Manual	Local Systeme...
Addovation Office365IFS Service (APP9-addovation.com)	Sync betwe...	Running	Manual	Local Systeme...

Figure 40 - Services

2.3 Deploy Message Tracking Site

Configure Message Tracking as IIS site & assign to a port.

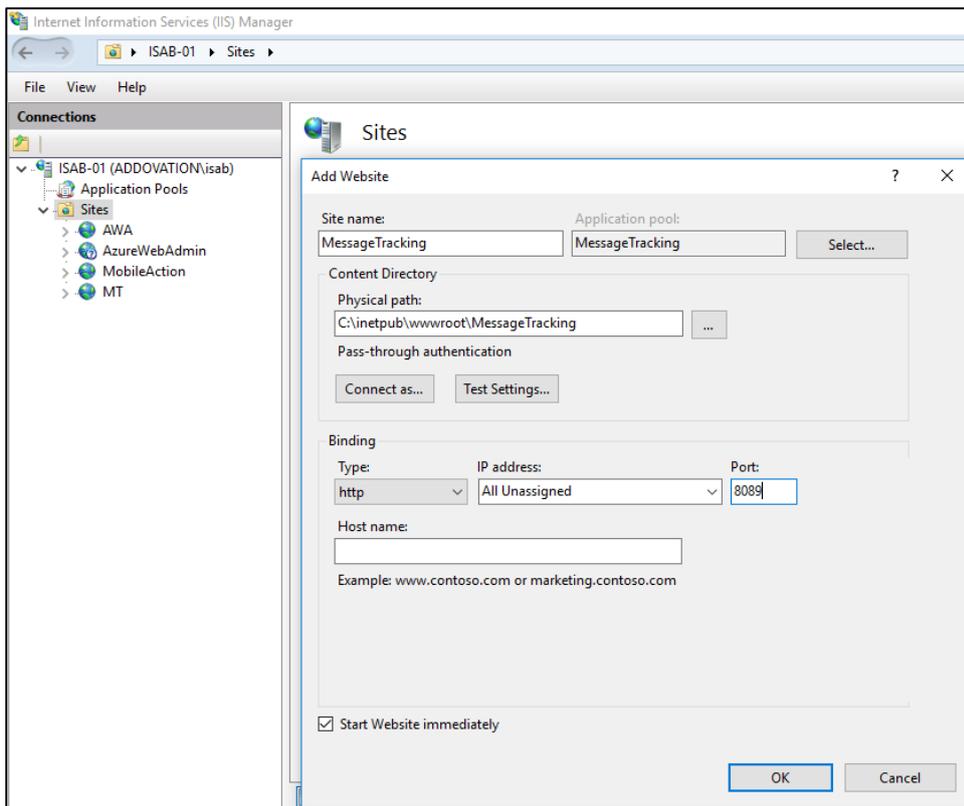


Figure 41 – IIS

- Go to -> <http://localhost:8089/> & log in to the Message Tracking Dashboard. Multiple IFS instances will have Multiple Message Tracking sites.
- Email: admin@addovation.com
- Password: Pa\$\$word1

2.3.1 Multiple sites for multiple IFS Applications Instances

- Once message tracking site is deployed user can have a copy of the already created web config file with the related folder and change the 'connection string' in the web config file for each instance and setup the web site in IIS by mapping the config file.

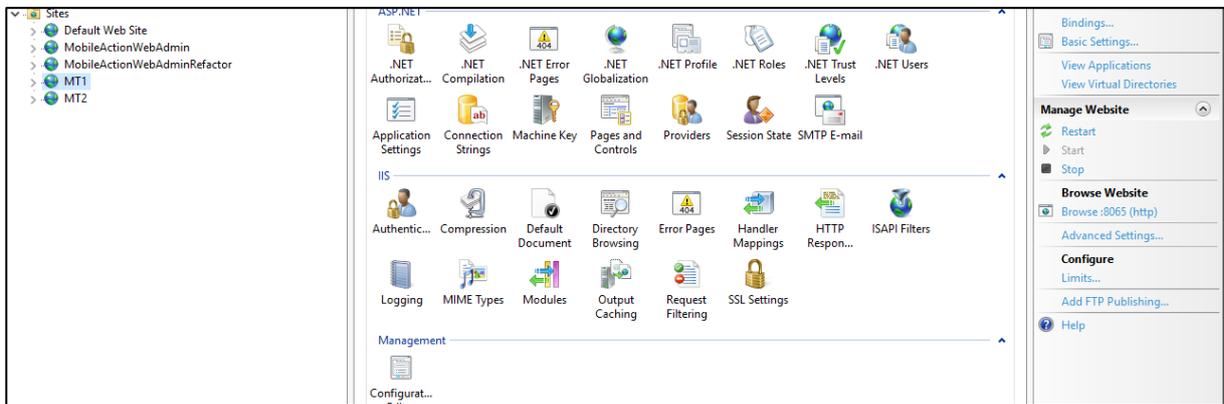


Figure 42 – Multiple Sites

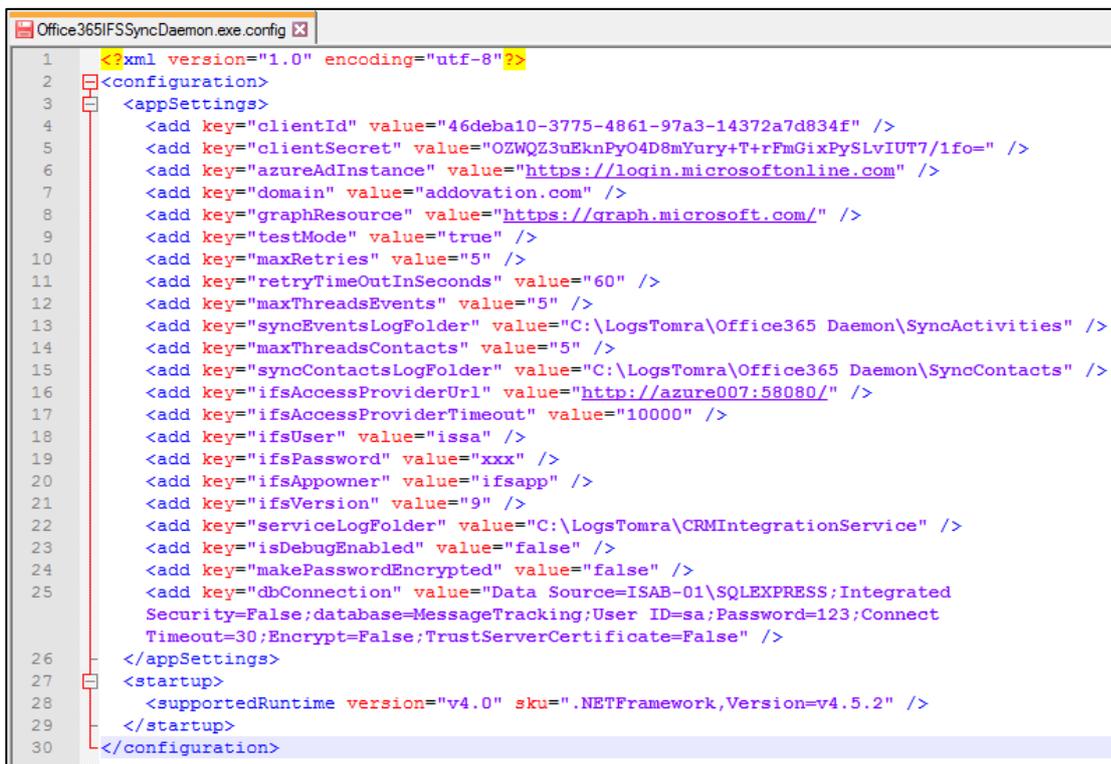


Figure 43 – Connection String in Web Config

3 Upgrade

3.1 Upgrading old versions to Automation Server 2.1.0.3 or higher.

Before performing an upgrade, Database should be backed up and after the upgrade the DACPAC should be re-deployed, from version 2.1.0.3, to avoid issues in Message tracking process.

3.2 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.