User Guide Automation AIS-Message Tracking v2.1

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Addovation 🗸

Contents

| 1 | Intro | duction3 | 3 |
|---|-------|---|----|
| 1 | L.1 | Configure Message Tracking Site | 4 |
| 1 | L.2 | Setup Category/s | 5 |
| 1 | L.3 | Setup Category Type/s | |
| 1 | L.4 | Setup basic data for message tracking service | |
| 1 | L.5 | Functional configuration parameters (CONFIG) | 12 |
| | 1.5.1 | Message overview | 13 |
| | 1.5.2 | Reprocess | 14 |
| 2 | Possi | bilities and limitations16 | 5 |
| 3 | Conta | act17 | 7 |

1 Introduction

Addovation Message Tracking is a common platform for all supervision and message logging.

The integration solution for Microsoft 365 will log all user's synchronizations in Message Tracking. If something goes wrong in any user's sync, mail alerts will be sent to a configurable mail address.

The integration is a flexible solution. Configuration can be done per customer.

Login to Message Tracking should be done by an administrator.

Once Message tracking service is installed successfully, the site can be browsed using IIS as depicted in below example.

| ✓ ✓ | ASP.NET .NET Authorizat Connection Strings | .NET Compilation Machine Key | NET Error Pages Pages Pages and Controls | .NET Globalization Providers | .NET Profile | .NET Roles | .NET Trust Levels | .NET Users | Application Settings | M. ** | Edit Site Bindings Basic Settings View Apfications View Virtual Directories anage Website Restart Start Start Starp |
|--|--|------------------------------------|--|------------------------------------|-----------------------|--------------|----------------------|----------------|-------------------------|----------|--|
| | ASP | Authentic | 2 Compression | Default Document | Directory Browsing | Error Pages | Handler Mappings | HTTP Respon | ISAPI Filters | ۲ | Browse Website Browse :8065 (http) Advanced Settings Configure Limits |
| | Logging Managemer Configurat | MIME Types | Modules | Output Caching | Request Filtering | SSL Settings | | | ^ | e | HSTS Add FTP Publishing Help |

Figure 1 – IIS hosted site

User can log in to the site using specified credentials.

| | AUTOMATION SERVER |
|----------|--|
| | |
| Log in. | |
| Email | |
| Password | |
| Log in | |
| | © 2018, Addovation - Automation Server Dashboard Version: 1.1.0.18641 |

Figure 2 - Login

Addovation V

1.1 Configure Message Tracking Site

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

| Log in - Automation Set × + | | | | | | | | |
|---|--|--|--|--|--|--|--|--|
| \leftarrow \rightarrow \circlearrowright localhost:8889/Account/Login | | | | | | | | |
| | AUTOMATION SERVER | | | | | | | |
| | | | | | | | | |
| Log in. | | | | | | | | |
| Email | | | | | | | | |
| admin@addovation.com | | | | | | | | |
| Password | | | | | | | | |
| ••••• | | | | | | | | |
| Log in | | | | | | | | |
| | | | | | | | | |
| | © 2017, Addovation - Automation Server Dashboard | | | | | | | |
| | Version: 1.1.0.27804 | | | | | | | |

Figure 3 - Login

| - Automation Server Das X | | e |
|---|---|------------------------|
| \leftarrow \rightarrow C () localhost:8089/Home/Administration | | \$ |
| | AUTOMATION SERVER | LOGGED IN AS : ADMIN®A |
| ADMIN LOG OFF | | |
| SYSTEM ADMINISTRATION | | |
| USERS | ROLES | |
| MESSAGE CATEGORIES | MESSAGE TYPES | |
| MESSAGE TRACKING CONFIGURATION | LOG VIEW | |
| TABLE CONFIGURATIONS | | |
| BATCH OVERVIEW | MESSAGE OVERVIEW | ITEM OVERVIEW |
| BATCH ITEMS | ITEM HISTORY | |
| | © 2017, Addovation - Automation Server Dashboard Version: 11.02385 | |

Figure 4 - Admin



1.2 Setup Category/s

- Admin-> MESSAGE CATEGORIES
- Register the message category 'O365IFS'

| Index - Automation Serve × | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|
| ← → C 🛈 localhost:8089/MessageCategoryAdmin | | | | | | | | | |
| | AUTOMATION SERVER | | | | | | | | |
| ADMIN LOG OFF | | | | | | | | | |
| MESSAGE CATEGORY PREVIEW | | | | | | | | | |
| Create New | | | | | | | | | |
| Message Category | | | | | | | | | |
| Demo | Edit Details Delete | | | | | | | | |
| | © 2017, Addovation - Automation Server Dashboard Version: 1.1.0.23285 | | | | | | | | |

Figure 5 - Message category

| \leftarrow \rightarrow O localhost.8089/MessageCategoryAdmin/Create | |
|---|---|
| | AUTOMATION SERVER |
| ADMIN LOG OFF | |
| ADD MESSAGE CATEGORY | |
| MESSAGE_CATEGORY O365IFS O365IFS Create Back to List | |
| | © 2017, Addovation - Automation Server Dashboard Version: 1.1.028891 |

Figure 6 – Create message category



| \leftarrow \rightarrow \circlearrowright localhost=8089/MessageCategoryAdmin | |
|--|---|
| | AUTOMATION SERVER |
| ADMIN LOG OFF | |
| MESSAGE CATEGORY PREVIEW | |
| Create New | |
| Message Category | |
| Demo | Edit Details Delete |
| O365IFS | Edit Details Delete |
| | © 2017, Addovation - Automation Server Dashboard Version: 11.0.28891 |

Figure 7 - Message category preview

• Go to Admin -> Users -> click on 'Edit' (Edit the admin user)

| \leftarrow \rightarrow \circlearrowright localhost:8089/AccountAdministration | | | L | a = 12 e |
|---|---|-------|--------------------|---------------|
| | AUTOMATION SER | VER | LOGGED IN AS : ADI | MIN®ADDOVATIC |
| ADMIN LOG OFF | | | | |
| USERS PREVIEW | | | | |
| Create New | | | | |
| User Name | Email | Roles | Categories | |
| admin@addovation.com | admin@addovation.com | Admin | | Edit |
| | | | | |
| | © 2017, Addovation - Automation Server Dashboo Version: 11.0.28891 | ard | | |

Figure 8 – Edit user

- Add the '0365IFS' category to the user & Save
- Now the menu is extended.



| \leftarrow \rightarrow \circlearrowright $ $ localhost:8089/AccountAdministr | ation/Edit/3d230b8a-ddb2-4659-b3aa-e80c7d76c6b4?Claims=System.Collections.Generic.List | %601%5BMicrosoft.AspNet. |
|--|--|--------------------------|
| | AUTOMATION SERVER | LOGGED |
| 0365IFS V MESSAGE OVERVIEW | DASHBOARD CONFIG ADMIN LOG OFF | |
| UPDATE USER | | |
| User Name | Roles | Categories |
| admin@addovation.com | ☑ Admin | Demo |
| Email | | ⊠O365IF S |
| admin@addovation.com | | |
| Save | | |
| Back to list | | |

Figure 9- 0365IFS to user

| \leftarrow \rightarrow \circlearrowright localhost:8089 | /AccountAdministration | | | | | III 7 | t = 🛛 🖸 |
|---|------------------------|----------------|--|---------|-------|------------|-----------|
| | AUTOMATION SERVER | | | | | | |
| 0365IFS V MESSAGE (| OVERVIEW DASHBOARD | CONFIG | | log off | | | |
| USERS PREVIEW | | | | | | | |
| Create New | | | | | | | |
| User Name | Email | | | | Roles | Categories | |
| admin@addovation.com | admin@a | addovation.com | | | Admin | O365IFS | Edit |
| | | | | | | | |
| | | oard | | | | | |

Figure 10 – User preview



1.3 Setup Category Type/s

• Admin-> MESSAGE TYPES

| 0365IFS • MESSAGE OVER | VIEW DASHBOARD | CONFIG | LOG OFF |
|---------------------------------|----------------|--------|---------|
| ADD MESSAGE TYPE | | | |
| MESSAGE_TYPE SYNC_ACTIVITIES | | | |
| Syncronization of events | | | |
| Create Back to List | | | |

Figure 11- Create message types

1.4 Setup basic data for message tracking service.

- Open Message Tracking Dashboard
- Go to 'admin' page and select 'Message Tracking Configuration'

| 0365IFS VIEW DASHBOARD CONFIG ADMIN LOG OFF | |
|--|---------------------------|
| -SYSTEM ADMINISTRATION | ROLES |
| MESSAGE CATEGORIES MESSAGE TRACKING CONFIGURATION | MESSAGE TYPES LOG VIEW |
| | |
| BATCH ITEMS | MESSAGE OVERVIEW |

Figure 12 - Message Tracking Configuration



• Create New or Edit basic data for the given Message Type

| MESSAG Create Ne | E TRACK | ING SETTINGS | | | |
|---------------------------|---------------------|-----------------|-----------------------|----------------------------|------|
| | Message Category | Message Type | INFORMATION_REFERENCE | CLEANUP_TRACKINGS_DAYS_OLD | CLEA |
| Edit Details Delete | O365IFS | SYNC_ACTIVITIES | | 1 | 2 |
| Edit Details Delete | O365IFS | SYNC_CONTACTS | | 2 | 2 |

Figure 13 -Create/ Edit message Tracking Configuration



| <u>.</u> | |
|---------------------------|--------|
| MESSAGE_TYPE | |
| CheckInDocument | ~ |
| MESSAGE_CATEGORY | |
| DocumentManagementService | ~ |
| INFORMATION_REFERENCE | |
| CLEANUP_TRACKINGS_DAYS_O | LD |
| 1 | |
| CLEANUP_MESSAGES_DAYS_O | LD |
| 1 | |
| CLEANUP_ERR_TRACKINGS_DA | YS_OLD |
| 1 | |
| CLEANUP ERR MESSAGES DA | YS OLD |
| 30 | \$ |
| REPROCESS_BINDING | |
| http://localhost:8075/ | |
| REPROCESS_LOCATION | |
| REPROCESS_RIGHTS | |
| NONE | |
| CLEANUP_ALERTS_DAYS_OLD | |
| 1 | |

Figure 14 - Message tracking settings



| 🧹 Message Trac | king Configu | uration | - | | × |
|-------------------|----------------|-------------------|-----------------|------------|-----|
| Basic Settings | | | | | |
| Message Trac | king Dashbo | ard Web Config Pa | ith: | | _ |
| C:\inetpub\www | wrootMessa | geTracking\Web.co | onfig | | |
| Log Folder Pat | th: | | | | |
| C:\DocAge\Lo | g | | | | |
| Time for Clean | iup: | 01:00 | | | |
| To Old Alerts (in | n Minutes): | 60 | | | |
| Service ID: | | app10 | | | |
| Show Conf | ig Tab on Me | ssage Tracking Da | ashboard | | |
| | ault Alart | bodge Hacking D | | | |
| M Enable Del | aunvien | | | | |
| Mail settings | - | | | | |
| Hostname: | smtp.office | 365.com | | | |
| Port | 2525 | | | | |
| Use SSL: | True | | | | ~ |
| Usemame: | priv@integr | ation.se | | | |
| Password: | **** | | | | |
| Mail From: | info@integ | ration.se | | | |
| Mail To: | notify@inte | gration.se | | | |
| Environment | DEV | | | | |
| | | | | | |
| MessageTrack | ing Connect | ionstring: | | | _ |
| Data Source=i | nteg-01;Initia | al Catalog=Messag | eTrackingDB;Use | r Id=sa;Pa | \$5 |
| | | | Open Config | Save | |
| Configurations L | oaded | | | | |

Figure 15 - Time for cleanup

- Message Tracking cleanup process will start according to the time defined in 'Time for Cleanup' in the service configuration.
 - Process will clean following tables in Message Tracking database according to the configured basic data setup.
 - MESSAGE_TRACKING_TAB
 - MESSAGE_TRACKING_ITEM_TAB
 - MESSAGE_TRACKING_LATEST_ITEM_TAB
 - MESSAGE_TRACKING_APPREF_TAB
 - MESSAGE_TRACKING_RESPONSE_TAB
 - MESSAGE_TRACKING_PAYLOAD_TAB
 - MESSAGE_TRACKING_ALERT_TAB
 - MESSAGE_TRACKING_REPROCESS_STATUS_TAB
 - MESSAGE_TRACKING_LOG_TAB
 - MESSAGE_TRACKING_AGENT_CLEANUP_TAB
 - Details in 'Message Overview' will be cleaned consequently.

Important:

Before performing an upgrade, Database should be backed up and after the upgrade the DACPAC should be redeployed to avoid issues in Message tracking process. Addovation V

1.5 Functional configuration parameters (CONFIG)

Different parameters can be adjusted in the 'config' tab in Message Tracking. These parameters can be changed during runtime. No restart is needed.

| O365IFS 🗸 | MESSAGE OVERVIEW | DASHBOARD | CONFIG |
|-----------|--------------------------|----------------------|--------|
| CONFIG | | | |
| Ø | | | |
| SYNC TIME | E EVENTS-IN MINUTES- | Save | |
| SYNC TIME | CONTACTS-IN MINUTES | Save | |
| SYNC EVE | NTS-DAYS-BACK FROM CURF | Save | |
| SYNC EVE | NTS-DAYS-FORWARD FROM | CURRENT DATE Save | |
| | ACTIVITY TYPE | Save | |
| SYNC ONL | Y MAIN REPRESENTATIVE CC | NTACTS- | |
| FORCE SY | NOHRONIZATION OF CONTAC | TS | |
| FORCE SY | NCHRONIZATION OF EVENTS | | |



Sync time events in minutes

How often events/business activities should be synchronized.

Sync time contacts in minutes

How often contacts should be synchronized.

Sync events days back from current date

Time span events-start.

Sync events days forward from current date

Time span events-end.

Default activity type

When creating business activities, activity type is mandatory. All activities created in Office 365 will be assigned this default activity type.

Force synchronization of events

For testing purposes. Will force a synchronization.

Force synchronization of contacts

For testing purposes. Will force a synchronization.

Sync only main representative contacts

Synchronize only contacts where you are main representative. Default setting is ON.

Important:

The synchronization always be initiated from IFS to O365 and then from O365 to IFS. Therefore, changes of contacts & activities in IFS will be synchronized to O365 as the first phase and changes in O365 will be synchronized to IFS as the second phase. If both IFS and O365 have changes, O365 changes will be overwritten by IFS changes. (same will be happened for business leads)



1.5.1 Message overview

Synchronization details can be seen in the Message Overview. If something went wrong in the synchronization, an error message will appear. Synchronizations that is ok is marked in green, while errors are marked in red. Information about what is synchronized (activities, contact), for which user and how it went is shown.

| (| 0 | Q | G | Ð | - | 1 | 3/ | 13/2018 3:45 PM | O365IFS | SYNC_ACTIVITIES | t | _test6@addovation.com | OLNO | ок | FINISHED | Update syncronization task is succesfully finalized. 1 event is updated in Office365. [00:00:01.6492293 ms] |
|---|---|---|----|---|---|---|----|-----------------|---------|-----------------|---|-----------------------|------|-------|-----------|--|
| • | 0 | Q | C+ | Ð | - | 1 | 3/ | 13/2018 3:44 PM | O365IFS | SYNC_CONTACTS | ι | _test6@addovation.com | OLNO | OK | FINISHED | Update syncronization task is succesfully finalized. Nothing is created or updated. [00:00:01.6543907 ms] |
| • | 9 | Q | 0 | Ð | C | 1 | 3/ | 13/2018 3:44 PM | O365IFS | SYNC_ACTIVITIES | t | _test6@addovation.com | OLNO | ERROR | PROCESSED | ORA-20111: The Business Activity Type object does not exist. |



Figure 17 - Message overview

Figure 18 - Message overview



1.5.2 Reprocess

User can reprocess unsuccessful requests in Batch Overview/Item Overview/Message Overview. If the 'REPROCESS_BINDING' field has a value provided in the message tracking configuration, 'Reprocess' icon will be visible and requests which are stated as an 'Error' can be reprocessed by clicking on the icon (2). In the batch overview all items stated as 'Error' in the related batch will be reprocessed (Batch should have more than 1 items so that the request status will be displayed on Batch overview, otherwise it will only be displayed on Item Overview). Also, in batch reprocess, if only one item is processed through one request (if 'Error' status item count is = 1), message overview also will get updated and item reprocess always will update a record on Message Overview. Reprocess works for SOAP and REST_V1 requests (XML& Json).

REPROCESS_BINDING field should contain the IIS hosted url of the request (EX: http://localhost:8073/DocumentManagementServiceRest_v1/DocumentManagementService/CheckInDocume nt/xml), otherwise there will be an error stated 'Unable to connect to the remote server : (EX: http://localhost:8075)'.

| Adv | anced Settings | ? | × |
|-----|--|---|-----|
| ~ | (General) | | |
| | Application Pool | DocumentManagementServiceRest_v1 | |
| | Bindings | http:*:8073: | |
| | ID | 9 | |
| | Name | DocumentManagementServiceRest_v1 | |
| | Physical Path | C:\Addovation\Toolkit\InetPub\Releases\AddoDocumentManagementServiceRest_v1 | |
| | Physical Path Credentials | | |
| | Physical Path Credentials Logon Type | ClearText | |
| | Preload Enabled | False | |
| ~ | Behavior | | |
| | Enabled Protocols | http | |
| > | Failed Request Tracing | | |
| > | HSTS | | |
| > | Limits | | |
| | | | |
| P | ysical Path | | |
| [p | hysicalPath] Physical path to the content for the virtual directory. | | |
| | | OK Can | cel |

Figure 19 -Binding details

| | | | | | | | AUTOMA | TION SE | RVEF | LOGGED IN A | AS : ADMIN@ADE | DOVATION.COI |
|---|------|---------------|----------------------|----------------|-------------------|--|---------------------------|-----------------|--------|-------------|----------------|--------------|
| Do | cume | entMa | nage | mentS | ervice | ✓ MESSAGE | OVERVIEW DASHBO | ARD CONFIG | | LOG OFF | | |
| Sho | w 🛃 | 10 n visit | v e bility | entries Cop | ZAuto F y Exce | Refresh | | | | 1 2 | 2 3 4 5 | 42 Next |
| | | | | | Item | 1 LastUpdated | Category | Туре | Sender | It Receiver | .↓† Status .↓† | Stage 🕼 |
| | Î | | | | | * | | Туре | Sender | Receiver | Status - | Stage - |
| Image: A set of the set of the | | Q | G• | •) | 1 | 9/10/2020 2:55 PM | DocumentManagementService | CheckInDocument | IFSAPP | IFS | ОК | FINISHED |
| 0 | | Q | G | • 〕 _ | Repr | 00000000000000000000000000000000000000 | DocumentManagementService | CheckInDocument | IFSAPP | IFS | ERROR | EXECUTED |
| 0 | | Q | G | +D (| 5 1 | 9/10/2020 11:21 AM | DocumentManagementService | CheckInDocument | IFSAPP | IFS | ERROR | EXECUTED |
| 0 | | Q | G | ÷0 4 | 3 1 | 9/10/2020 11:16 AM | DocumentManagementService | CheckInDocument | IFSAPP | IFS | ERROR | EXECUTED |

Figure 20:Reprocess



When the reprocess occurs. If you get an error 'Mismatched convention of the request. The current request cannot be reprocessed'

Reasons for the mentioned error.

- 1. The failed requests are initiated by a previous version from 2.1.31 version of toolkit.
- 2. The service is not hosted in IIS and called by an external service which are not related to toolkit.
- C 2017, Addovation Automation Server Dashboard
- Go to 'Dashboard'

Figure 21 - Dashboard



2 Possibilities and limitations

The integration does support:

•

- New contacts and new activities in both IFS and Office 365
- Changes made on contacts and activities in both IFS and Office 365
- Removal of activities
 - Activities of type "appointment" and "task"
 - Task is "read" in Office 365 as an appointment
- Business activities with references to business opportunities

The integration does not support:

• Removal of contacts – if you remove a record in IFS/Office 365, this will not be synchronized. Deleting contact records must be done in both systems.

3 Contact

For further inquiries, please contact your nearest Addovation office:

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