
User Guide Automation AIS-Message Tracking v2.1

Updated: Date 2020-09-29

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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.

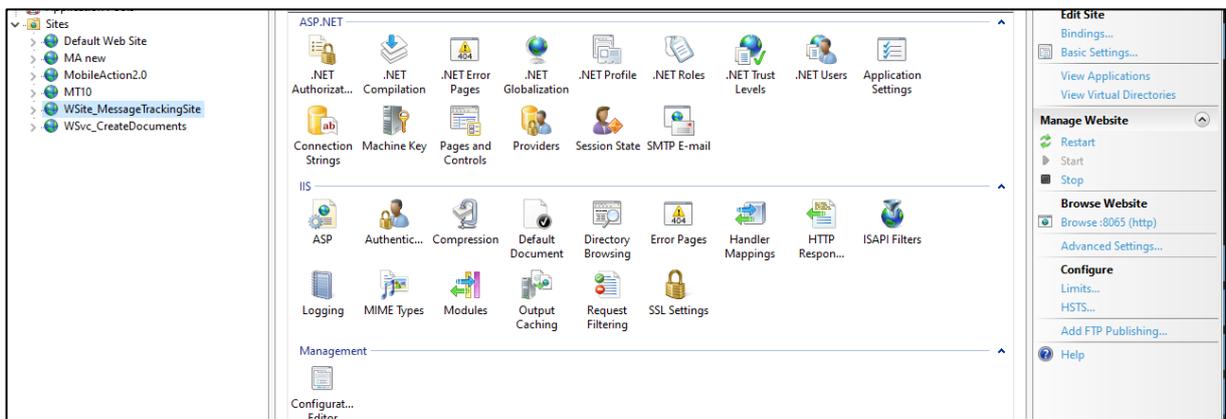


Figure 1 – IIS hosted site

User can log in to the site using specified credentials.



Figure 2 - Login

1.1 Configure Message Tracking Site

- 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

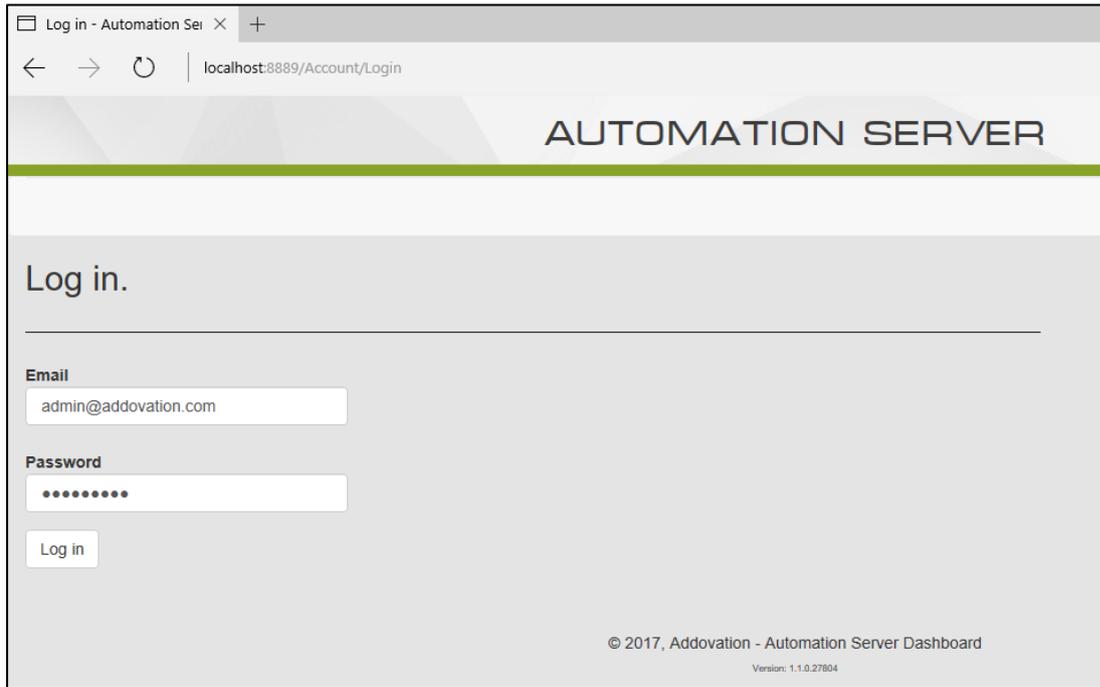


Figure 3 - Login

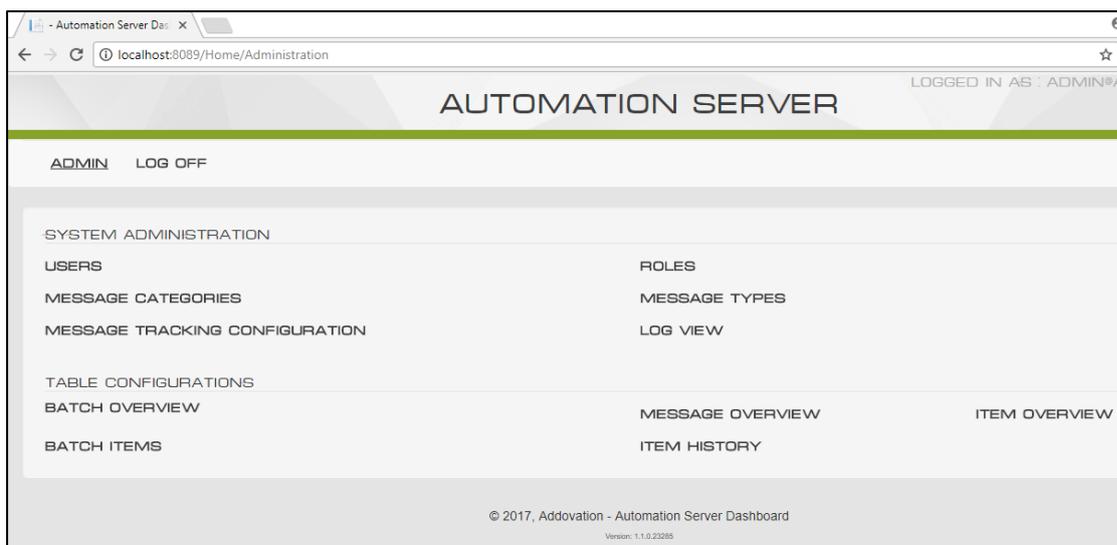


Figure 4 - Admin

1.2 Setup Category/s

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

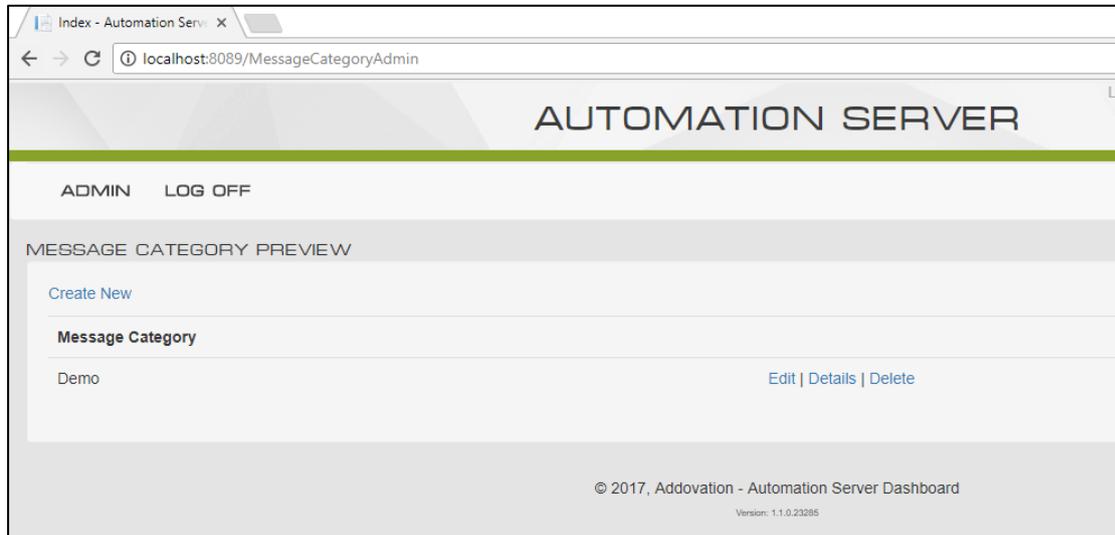


Figure 5 - Message category

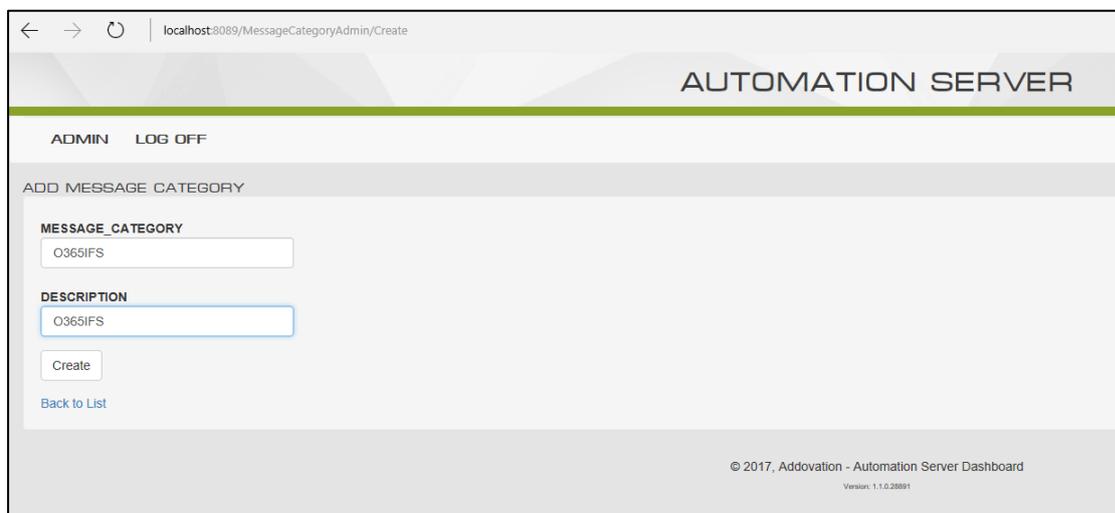


Figure 6 – Create message category

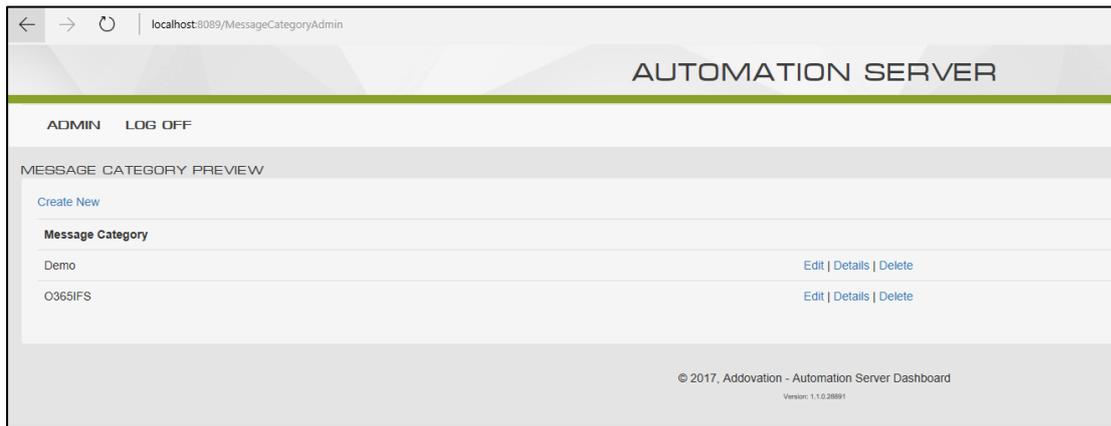


Figure 7 - Message category preview

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

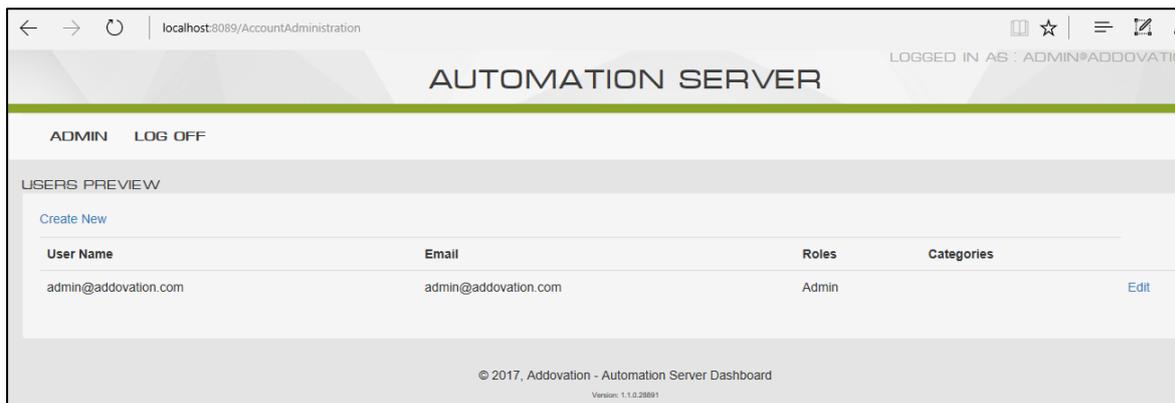


Figure 8 – Edit user

- Add the 'O365IFS' category to the user & Save
- Now the menu is extended.

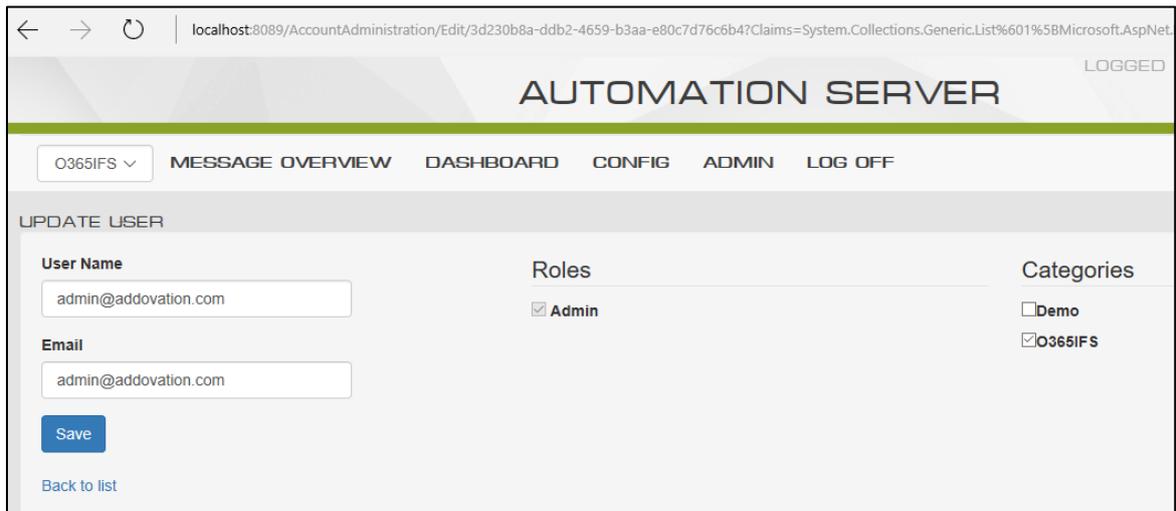


Figure 9- O365IFS to user

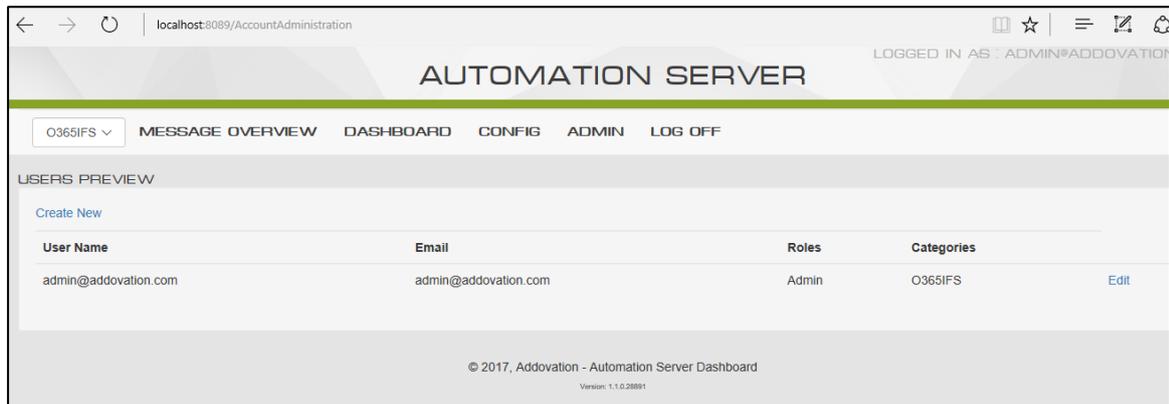
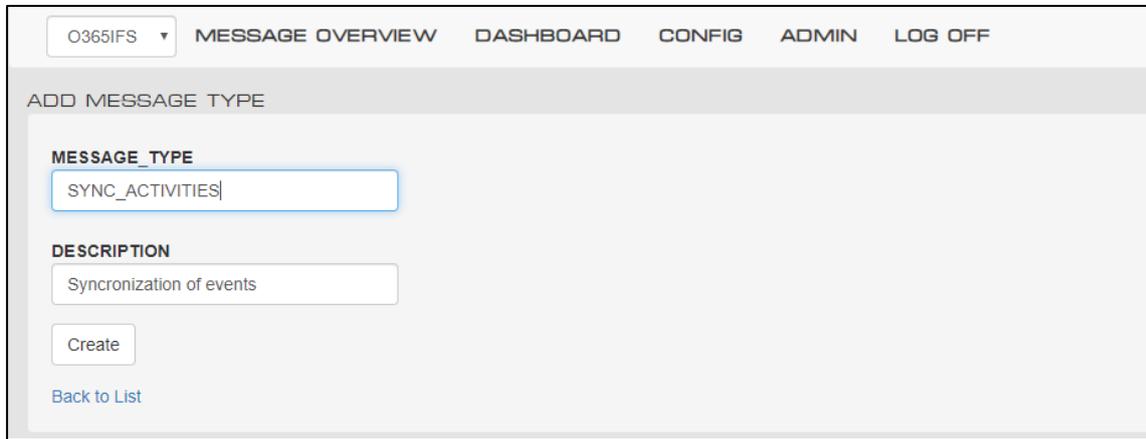


Figure 10 – User preview

1.3 Setup Category Type/s

- Admin-> MESSAGE TYPES



0365IFS MESSAGE OVERVIEW DASHBOARD CONFIG ADMIN LOG OFF

ADD MESSAGE TYPE

MESSAGE_TYPE
SYNC_ACTIVITIES

DESCRIPTION
Synchronization 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'

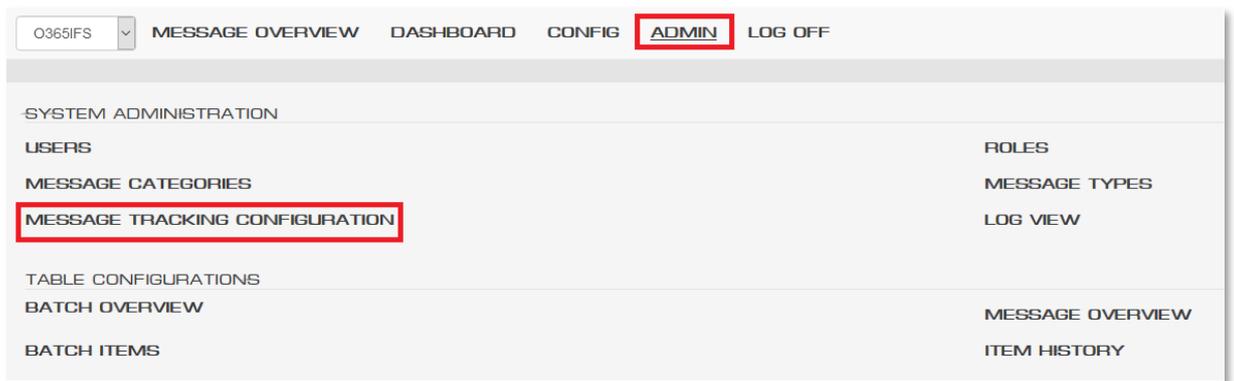
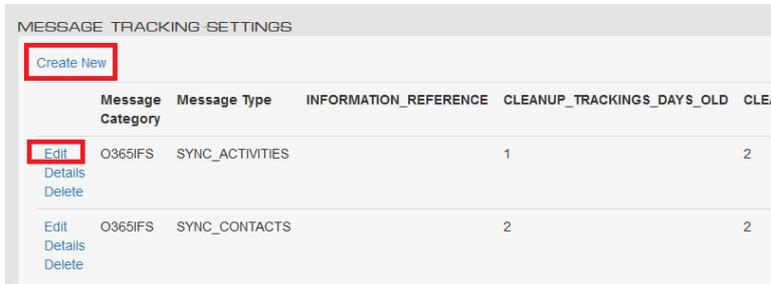


Figure 12 - Message Tracking Configuration

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



MESSAGE TRACKING SETTINGS					
	Message Category	Message Type	INFORMATION_REFERENCE	CLEANUP_TRACKINGS_DAYS_OLD	CLEA
Create New					
Edit Details Delete	O365IFS	SYNC_ACTIVITIES		1	2
Edit Details Delete	O365IFS	SYNC_CONTACTS		2	2

Figure 13 -Create/ Edit message Tracking Configuration

UPDATE MESSAGE TRACKING SETTINGS

MESSAGE_TRACKING_CONFIG_TAB

MESSAGE_TYPE

MESSAGE_CATEGORY

INFORMATION_REFERENCE

CLEANUP_TRACKINGS_DAYS_OLD

CLEANUP_MESSAGES_DAYS_OLD

CLEANUP_ERR_TRACKINGS_DAYS_OLD

CLEANUP_ERR_MESSAGES_DAYS_OLD

REPROCESS_BINDING

REPROCESS_LOCATION

REPROCESS_RIGHTS

CLEANUP_ALERTS_DAYS_OLD

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Figure 14 - Message tracking settings

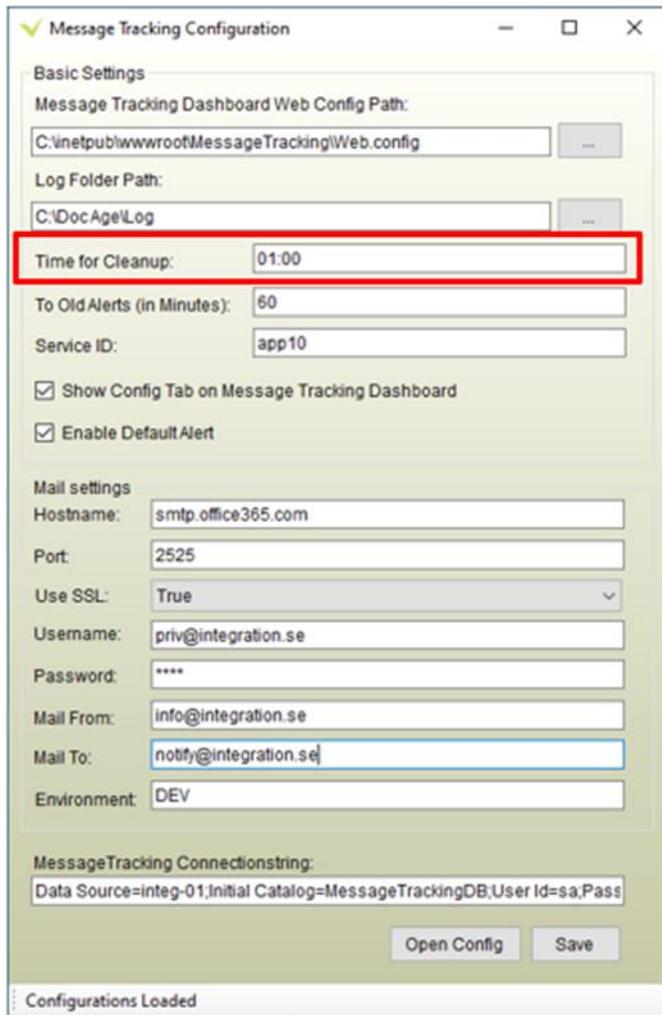


Figure 15 - Time for cleanup

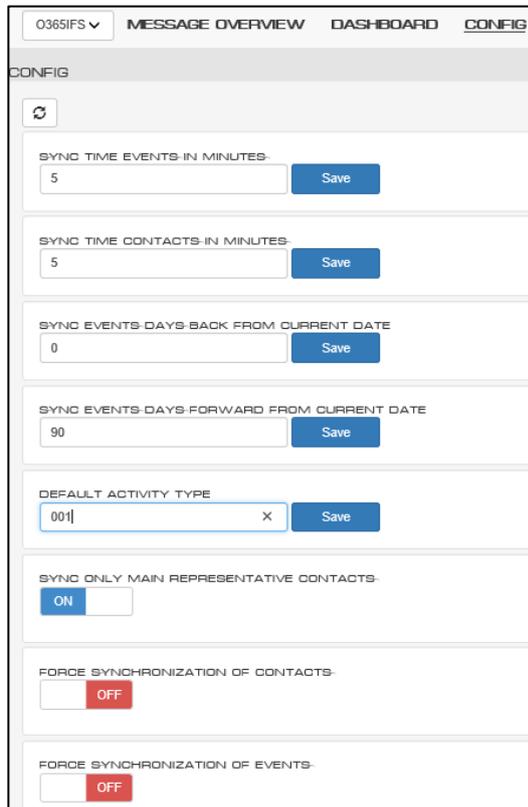
- Message Tracking cleanup process will start according to the time defined in 'Time for Cleanup' in the service configuration.
 - Process will clean following tables in Message Tracking database according to the configured basic data setup.
 - MESSAGE_TRACKING_TAB
 - MESSAGE_TRACKING_ITEM_TAB
 - MESSAGE_TRACKING_LATEST_ITEM_TAB
 - 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 re-deployed to avoid issues in Message tracking process.

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.



The screenshot shows the 'CONFIG' tab in the Message Tracking interface. It contains several configuration sections, each with a text input field and a 'Save' button:

- SYNC TIME EVENTS-IN MINUTES:** Input field contains '5'.
- SYNC TIME CONTACTS-IN MINUTES:** Input field contains '5'.
- SYNC EVENTS-DAYS-BACK FROM CURRENT DATE:** Input field contains '0'.
- SYNC EVENTS-DAYS-FORWARD FROM CURRENT DATE:** Input field contains '90'.
- DEFAULT ACTIVITY TYPE:** Input field contains '001'.
- SYNC ONLY MAIN REPRESENTATIVE CONTACTS:** A toggle switch is currently set to 'ON'.
- FORCE SYNCHRONIZATION OF CONTACTS:** A toggle switch is currently set to 'OFF'.
- FORCE SYNCHRONIZATION OF EVENTS:** A toggle switch is currently set to 'OFF'.

Figure 16 - configuration parameters

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:

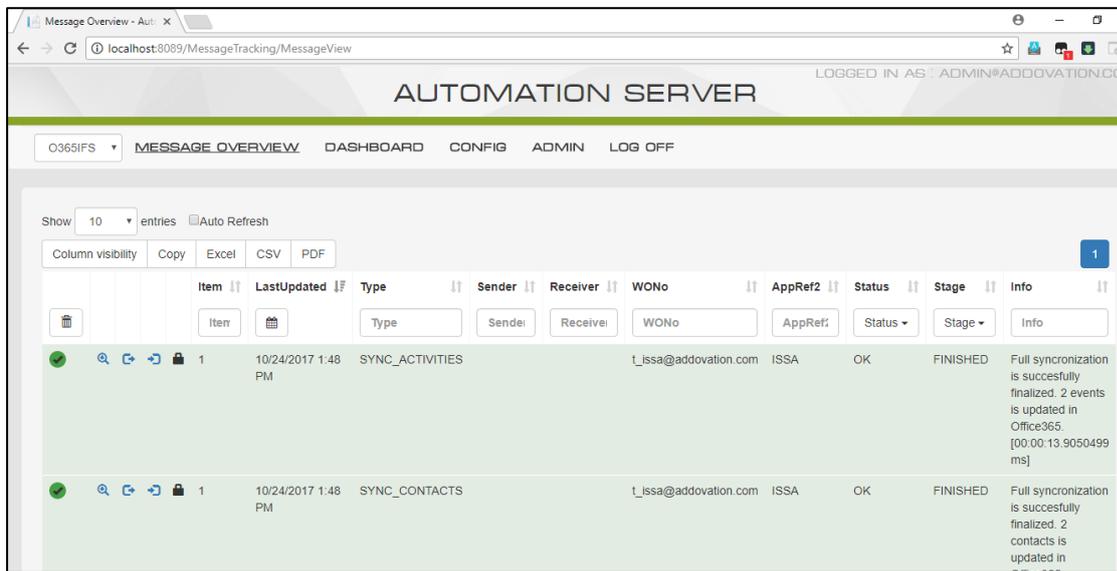
The synchronization always be initiated from IFS to O365 and then from O365 to IFS. Therefore, changes of contacts & activities in IFS will be synchronized to O365 as the first phase and changes in O365 will be synchronized to IFS as the second phase. If both IFS and O365 have changes, O365 changes will 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.

				1	3/13/2018 3:45 PM	O365IFS	SYNC_ACTIVITIES	t_test16@addovation.com	OLNO	OK	FINISHED	Update synchronization task is successfully finalized. 1 event is updated in Office365. [00:00:01.6492293 ms]
				1	3/13/2018 3:44 PM	O365IFS	SYNC_CONTACTS	t_test16@addovation.com	OLNO	OK	FINISHED	Update synchronization task is successfully finalized. Nothing is created or updated. [00:00:01.6543907 ms]
				1	3/13/2018 3:44 PM	O365IFS	SYNC_ACTIVITIES	t_test16@addovation.com	OLNO	ERROR	PROCESSED	ORA-20111: The Business Activity Type object does not exist.

Figure 17 - Message overview



Item	LastUpdated	Type	Sender	Receiver	WONO	AppRef2	Status	Stage	Info
	10/24/2017 1:48 PM	SYNC_ACTIVITIES	t_issa@addovation.com	ISSA			OK	FINISHED	Full synchronization is successfully finalized. 2 events is updated in Office365. [00:00:13.9050499 ms]
	10/24/2017 1:48 PM	SYNC_CONTACTS	t_issa@addovation.com	ISSA			OK	FINISHED	Full synchronization is successfully finalized. 2 contacts is updated in Office365.

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 (). 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/CheckInDocument/xml), otherwise there will be an error stated 'Unable to connect to the remote server : (EX: http://localhost:8075)'.

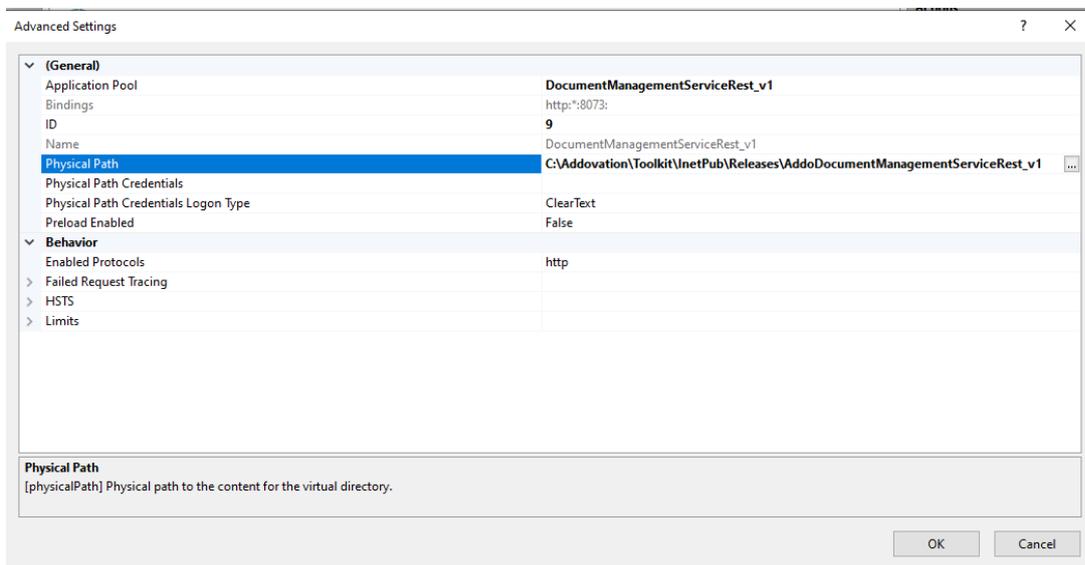


Figure 19 -Binding details

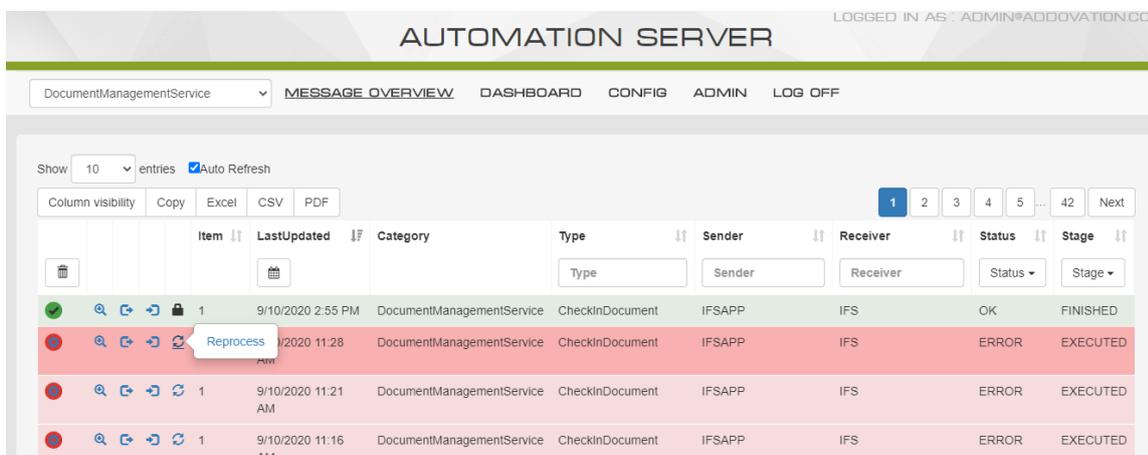


Figure 20:Reprocess

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.

- Go to 'Dashboard'

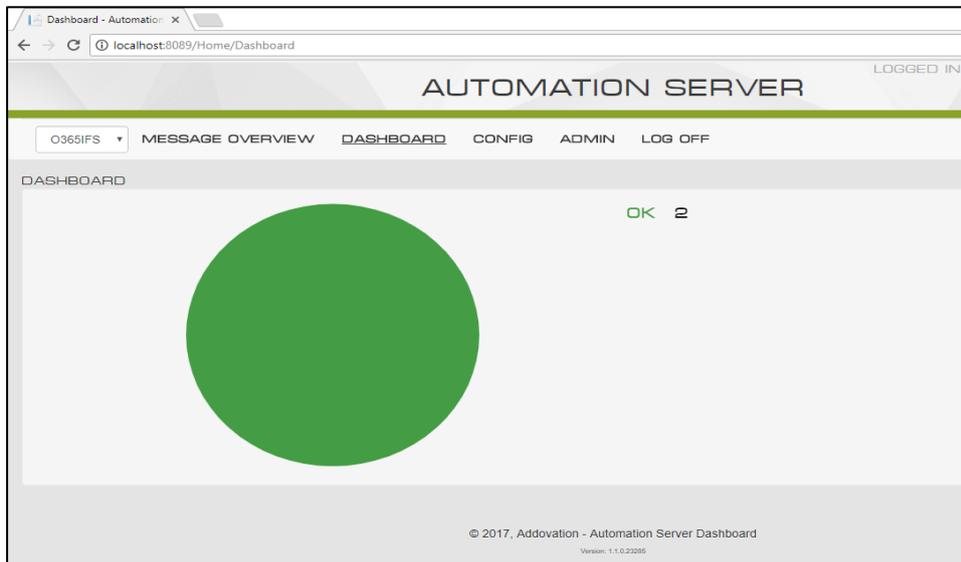


Figure 21 - Dashboard

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

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