

Automated Document Linking Verification Instructions

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Description

The purpose of this screen is for building relationships between link types used by the Automated Document Linker and fields in the database. The relationships dictate how the Automated Document Linker verifies if a file being attached to objects in Global Shop is pointing at an existing object. This document will list out the use-case for attaching a file to a Sales Order Master (Link Type: 45).

Interface

The screenshot shows a Windows-style application window titled "Link Verification Functionality". It contains several input fields and buttons. Blue numbers 1 through 6 are overlaid on the interface to identify specific areas of control:

- 1**: Points to the "Key Delimiter" text box.
- 2**: Points to the "Failed Email Recipients (Semi-colon [;] between multiple recipients)" text box.
- 3**: Points to the "Link Type Checks" list area, which includes a "Link ID" input with a search icon and an "Add" button, and a "Delete" button at the bottom.
- 4**: Points to the "Table Name" input field with a search icon.
- 5**: Points to the "Table.Field" list area, which includes a "Field Name" input with a search icon and an "Add" button, and a "Delete" button at the bottom.
- 6**: Points to the "Field Length" input field, which also includes a "Left Pad Zeros" checkbox.

At the bottom of the window are "Save" and "Intruc." buttons.

Figure 1 – Maintenance screen for Automated Document Linking Verification

The maintenance screen has six areas of control:

1. **Key Delimiter** – The key delimiter text box (1) is a required field to be able to use this interface in the Automated Document Linker. This field needs three non-unique characters that can be used by Windows to name files. If you enter a character that can't be used, the program will let you know what character you used and ask you to change it.
2. **Failed Email Recipients** – The failed email recipients text box (2) is not a required field for integration with the Automated Document Linker. Optionally, emails can be listed in this text box for a notification to be sent when a document fails to link after checking fields in the database.
3. **Link Type List** – The link type list (3) consists of five controls:

1. **Link ID** – The link ID text box is used for manually entering a link type number. The program will auto correct a manually entry to match the formatting of link types in the database. (i.e. entering “45” becomes “00045”)
2. **Link ID Browser** – The link ID browser button is used for opening a browser of all the link ID types available and selecting one. The selected link ID will populate the link ID text box
3. **Add** – The add button is used for adding a link ID from the link ID text box to the link type list. If the textbox is empty, nothing is added. If the link type is already on the list, it will not be added again. The link type is added with the link type description, so the list contains the ID and the name.
4. **Link Type List** – The link type list is used for displaying link types that have been selected for parsing values in the database. When the list is populated with values, the contents can be clicked on and other controls on the screen will be enabled.
5. **Delete** – The delete button is used to delete a selected link type from the link type list. Any link types deleted will lose all table and field settings.



Figure 2 – Link ID Browser

4. **Table Name** – The table name text box (4) is used for manually entering in a table name from the database. This control becomes active when a link type is selected from the link type list (3). The program will verify if the table exists when the losing focus on the text box. It will also auto-capitalized the table name entered to maintain a uniform display of tables. This text box also comes with a browser button to filter through tables in the database and select one. When a table is entered into the textbox either manually or via the browser, the field list (5) becomes active. If there are already fields entered for the current table, changing the table name will prompt the program to ask the user if they wish to continue.
5. **Table Field List** – The field list (5) consists of five controls:
 1. **Field Name** – The field name text box is used for manually entering in a field name from the table in the table name text box (4). If the field does not exist on the table, the program will empty the text box. The program will auto-capitalized the field name to maintain uniformity.
 2. **Field Name Browser** – The field name browser button is used to open a browser of all the fields that are on the table in the table name text box (4). When a field is selected, the program will populate the field in the field name text box.
 3. **Add** – The add button is used to add the field in the field name text box to the field list. If the field already exists on the list, the program will not allow the user to add the field again.
 4. **Field List** – The field list contains all the fields ordered by when they were added. The order is very important and will be detailed later in this document. Clicking on a field in this list will activate the field settings (6) to the right.
 5. **Delete** – The delete button is used to delete a selected field from the field list. After removing the field, the other fields will be re-ordered to make sure the list is consistent with the numbering.
6. **Field Settings** – The field settings (6) consists of two controls:

1. Character Length – The character length text box determines the amount of characters needed for the field to satisfy the conditions for the key in the link ID. This text box allows any whole number between 1 and 30.
2. Left Pad Zeroes – The left pad zeroes check box is used to flag if the field needs zeroes in front of what is passed to the Automated Document Linker. (i.e. File is created for Sales Order 550; the program will automatically correct the 550 in the filename to 0000550)

Interaction with Automated Document Linker

To fully understand how this program works with the Automated Document Linker, this document will walk you through how to setup the Sales Order Master Link Type (Link ID 45).

The screenshot shows the 'Link Verification Functionality' window. The 'Key Delimiter' is set to ';'. The 'Failed Email Recipients (Semi-colon [;] between multiple recipients)' field contains 'address@domain.com'. The 'Link ID' field is empty, with a search icon and an 'Add' button. The 'Link Type Checks' section is a large empty box. The 'Table Name' field is empty, with a search icon. The 'Field Name' field is empty, with a search icon and an 'Add' button. The 'Table.Field' section is a large empty box. To the right, the 'Field Length' field is empty, and the 'Left Pad Zeros' checkbox is unchecked. At the bottom, there are 'Delete', 'Save', and 'Intruc.' buttons.

Figure 3 – Setup Key Delimiter and Email

First, a key delimiter needs to be decided on. Whatever delimiter you choose will be used to split up fields in the file name. In the example in *Figure 3*, the key delimiter “;-” is used. In this case, the filename may look something like this: “Part Number,-,Location,-,Lot,-,Bin,-,Heat,-,Serial_Description.ext”. This is for the Item Master link type (Link ID 31). If a link type is not entered on this screen, the file naming will follow the same schema as 5606. (more information on that can be found by right-clicking on the grid under System Support > Administration > Auto Document Linking Maintenance)

Next, you can optionally choose to enter one or more email(s). Multiple emails have a semi-colon [;] between each email. These are the emails that will receive a notification if there is a file that can’t be reconciled against the database. If no emails are entered, the email will be skipped when a file can’t be linked.

The screenshot shows a window titled "Link Verification Functionality" with a red header bar. At the top, there are two text boxes: "Key Delimiter" containing a comma and "Failed Email Recipients (Semi-colon [;] between multiple recipients)" containing "address@domain.com". Below these, the "Link ID" section has a text box and an "Add" button. The "Link Type Checks" section contains a list box with "SALES ORDER MASTER (00045)". To the right, the "Table Name" section has a text box and a search icon. Below it, the "Field Name" section has a text box and an "Add" button. The "Table.Field" section has a large empty text area. At the bottom right, there is a "Field Length" text box and a checkbox labeled "Left Pad Zeros". At the bottom left, there are "Delete", "Save", and "Intruc." buttons.

Figure 4 – Add a Link Type to the Link Type List

Next, link types can be added to the link type list. This can be done by manually by typing into the link ID text box or by using the link ID browser to view the names of link types as depicted in *Figure 2*. Once a link ID is in the link ID text box, the add button will add the link type to the link type list as depicted

This screenshot is identical to the previous one, but the "Link ID" text box now contains "SALES ORDER MASTER (00045)". In the "Link Type Checks" list box, the same item "SALES ORDER MASTER (00045)" is now highlighted with a blue background, indicating it has been successfully added to the list.

Figure 5 – Click on a Link Type to enable other controls

in *Figure 4*. At this point, the link type can be clicked on to enable additional controls as depicted in *Figure 5*, or so that the link type can be deleted with the delete button.

Clicking on a link type that has not had a table set will only enable the table name text box. Next, a table will need to be selected from the database. You can either manually enter the database table or select it from the browser button. When a table is entered or selected, the field list will become active as depicted in *Figure 6*.

The screenshot shows a window titled "Link Verification Functionality" with a red header bar. The window contains several input fields and buttons. At the top, there are two text boxes: "Key Delimiter" with a comma and a space, and "Failed Email Recipients (Semi-colon [;] between multiple recipients)" with "address@domain.com". Below these are two main sections. The left section, "Link ID", has a text box and an "Add" button. Below it, "Link Type Checks" has a list box with "SALES ORDER MASTER (00045)" selected, and a "Delete" button. The right section, "Table Name", has a text box with "ORDER_HEADER" and a search icon. Below it, "Field Name" has a text box and an "Add" button. Below that, "Table.Field" has a large empty text area and a "Delete" button. On the far right, "Field Length" has a text box and a "Left Pad Zeros" checkbox. At the bottom of the window are "Save" and "Intruc." buttons.

Figure 6 – Enter a valid table name to enable the Field List

Next, at least one field is needed for the program to function normally when the Automated Document Linker is running. In the case of Sales Order Masters, the link key is the Sales Order Number, so we can add the ORDER_NO field from the ORDER_HEADER table.

Link Verification Functionality

Key Delimiter: ; Failed Email Recipients (Semi-colon [;] between multiple recipients): address@domain.com

Link ID: [] [] Add

Link Type Checks: SALES ORDER MASTER (00045)

Table Name: ORDER_HEADER []

Field Name: ORDER_NO [] Add

Table.Field: 1. ORDER_HEADER.ORDER_NO

Field Length: []

Left Pad Zeros: ☐

Delete Save Intruc.

Figure 7 – Enter a valid field name from the selected table to add it to the field list

In some examples, the field list may need more than one value in it for the verifications to make sense (i.e. Item Master Link Type 31). For the Sales Order example, all we need to rectify is the Order Number. Last thing we need to do is set the properties for the field we added to the field list.

Link Verification Functionality

Key Delimiter: ; Failed Email Recipients (Semi-colon [;] between multiple recipients): address@domain.com

Link ID: [] [] Add

Link Type Checks: SALES ORDER MASTER (00045)

Table Name: ORDER_HEADER []

Field Name: ORDER_NO [] Add

Table.Field: 1. ORDER_HEADER.ORDER_NO

Field Length: 7

Left Pad Zeros: ☒

Delete Save Intruc.

Figure 8 – Click on a field to change its field settings

This part of the program requires deep analysis and understanding of how Document Link Control works in Global Shop. You can refer to the file name explanations PDF from System Support > Administration > Auto Document Linking Maintenance to get more information about what properties will work for the link type you are trying to setup. Order Numbers are always formatted as seven characters and always have leading zeroes to the left. (i.e. 0000001, 0000002, 0000003, etc.) To keep this rigid format, we can tell the program to make the passed field seven characters and left pad the value with zeroes.

The resulting files being passed to the system will look like this: "785_Packing List.pdf" for Order Number 0000785, "5048_Items List.xlsx" for Order Number 0005048, etc. When these files are passed to the Auto Document Linking tool, the program will verify that the Orders exist before it attempts to attach the files. If the program cannot verify that the Orders Exist before attaching them, it will abort the attachment, log the reason why it couldn't attach the files and send an email to the "Failed Email Recipients".

Also, this program can parse Part and Revs. If you have the part revision system turned on you can separate your Part and Rev with "REV" and the program will properly space out the two fields to 20 characters. For example, part "12345 BOLT A " can be passed to this program as "12345 BOLTREVA" and the program will properly space out the fields to 20 characters.