ELO Integration Service for SmartWe

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ELO for SmartWe

Introduction

This documentation describes how to set up the ELO Integration Service for SmartWe. This service provides the technical platform for implementing the ELO Integration Client in SmartWe. Following installation, the ELO Integration Client is available as an iframe in correspondingly configured objects in the SmartWe application.

When the ELO Integration Client is called within SmartWe, a configurable path is created (assuming one doesn't already exist) and displayed in ELO. This provides the user with the functions of the ELO Integration Client, which can also be customized if required.

ELO basics

To use the ELO Integration Service for SmartWe and the ELO Integration Client within SmartWe, the systems must meet the following requirements:

- · ELOprofessional or ELOenterprise version 12 and higher
- Depending on the version, at least the following modules are required:
 - ∘ ELO 23:
 - ELOwf 23.00.000
 - ∘ ELO 21:
 - ELOwf 21.00.000
 - ∘ ELO 20:
 - ELOwf 20.05.000
 - ∘ ELO 12:
 - ELOwf 12.06.000
- ELO Business Solutions Common version 1.13.000 or higher
- Installed and configured ELOauth plug-in
- Correctly set SameSite flag (see <u>ELO Integration Client</u> documentation)

The ELO license must also include the ELO Integration Client.

ELO configuration

First, you need to install and configure the ELO Integration Service for SmartWe in the ELO system.

You will find the necessary installation packages on the ELO SupportWeb under <u>Integration</u>. The ELO installation package contains the following files:

- crm.csw.integrationservice
- custom_crm.csw.integrationservice

The ELO Integration Client also requires a configuration file in ELOapps:

· elo.integration.Client

'elo.integration.client' configuration file

To use the ELO Integration Client, you need the configuration file *elo.integration.client* in JSON format, which is stored in the Administration folder. You will find this configuration file under this path:

//Administration//ELOapps//Configuration//elo.integration.Client

1. If it does not yet exist, create it with the following parameters. This is essential for calling the client.

Alternative: If this file already exists because the ELO Integration Client is already being used in other systems, you need to add the entry "csw".

```
{
 "csw": {
    "noForm": false,
    "noFeed": false,
    "noFulltext": false,
    "noImagePreview": false,
    "rFInit": "RF_crm_csw_integrationservice_service_Init",
    "newDocVersFct": true,
    "saveDocFct": true,
    "gotoFct": true,
    "webClientURL": "http(s)://<ELOSERVER>:<PORT>/ix-<REPOSITORY>/plugin/
                   de.elo.ix.plugin.proxy/web/",
    "editInOfficeFct": true,
    "removeEntryFct": true,
    "startWorkflowFct": false,
    "startWorkflowTemplates": null,
    "externalLinkFct": true,
    "folderMask": "(E10E1000-E100-E100-E100-E10E10E31)",
    "documentMask": "(E10E1000-E100-E100-E100-E10E10E10E30)",
```

```
"hasSearch": true,
    "referenceEntryFct": true,
    "refreshFct": true
}
```

 $^{2\cdot}$ Be sure to check the following important parameters when creating or modifying the file:

- rFInit: Function that creates the folder path in ELO; provided with the crm.csw.integrationservice package.
- webClientURL: URL to open the ELO Web Client when the GoTo function is enabled. To prevent the user from having to log on multiple times, the proxy behind the ELO Indexserver must be configured. The ELO Web Client should be configured accordingly as a plug-in behind the ELOix proxy (recommended method).
- folderMask: Defines the metadata form that the ELO Integration Service for SmartWe uses to create new structures based on the SmartWe object.
- documentMask: Defines the metadata form that the ELO Integration Service for SmartWe uses when filing documents from the ELO Integration Client within SmartWe.
 You can use metadata forms that pass information onto the objects.

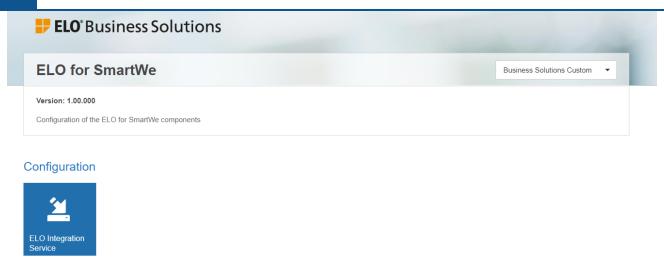
For more information on the parameters of this configuration file, refer to the technical documentation on the <u>ELO Integration Client</u>.

Configuration of ELO Integration Client for SmartWe

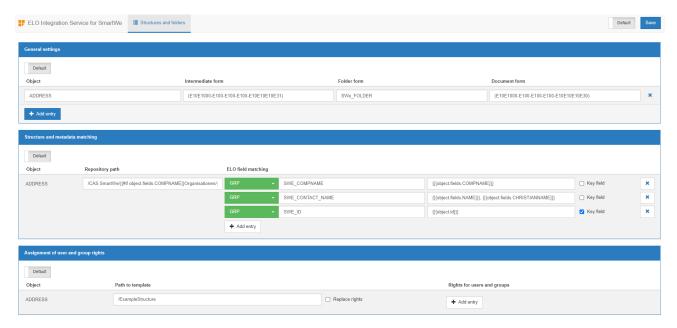


Once you have successfully installed the ELO packages, you will find the configuration app in the ELO Administration Console under:

//Solutions//ELO for SmartWe//ELO Integration Service



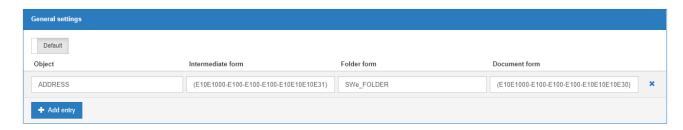
Now click on the *ELO Integration Service* tile to access the configuration interface of the ELO Integration Service for SmartWe.



You can make the following configurations in the *Structures and folders* configuration area:

- General settings
- Structure and metadata matching
- Assignment of user and group rights

General settings



Under *General settings*, you can now create configurations for each SmartWe object. As soon as you add a new entry, corresponding lines are automatically created in the *Structures and metadata matching* area. Lines are also created in the *Assignment of user and group rights* area.

Object: In the *Object* column, enter the name of the object you are creating the configuration for. The selected object name must correspond to the SmartWe name of the object type (*objectType* attribute in SmartWe) that you want to configure the object type for.

Intermediate form: In the *Intermediate form* column, enter the metadata form for folders that may have to be created on storage so that the specified path can be generated.

Folder form: The final metadata form is specified in the *Folder form* column. You have the option to specify it with the GUID or the name of the metadata form.

Document form: This is where you specify which metadata form to use when filing from SmartWe. You can enter the same form as in the ELO Integration Client configuration file, or a separate one for each SmartWe object.

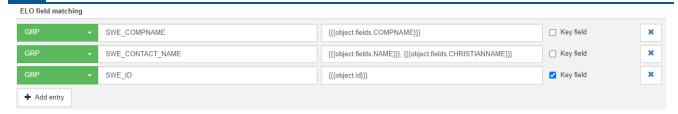
Structure and metadata matching



As described in the section General settings, when you create an entry under *General settings*, a separate entry for the object is automatically created in the *Structure and metadata matching* area.

Object: This entry is copied directly from the *Object* column under *General settings* and can also only be modified in this area.

Repository path: The filing path in ELO is defined in the *Repository path* column. In this field, you can also enter SmartWe variables passed in the URL, e.g. using Handlebars syntax.



ELO field matching: This where you specify how to complete the fields on the metadata form defined under *Folder form*. In our example, it is the *Folder* metadata form. Choose between *GRP* for metadata field and *MAP* for map fields and enter the technical name of the field here.

ELO field: In MAP fields, it is possible to use iteration by attaching the value {i} to the technical name. This is useful for transferring multiple values for a parameter passed from SmartWe, for example.

If the metadata fields do not exist in the metadata form, the corresponding values will be lost and written as a warning in the log.

Value in Handlebars: The value entered here is stored in the corresponding ELO field in the ELO entry. To copy the value of the transfer parameter from the URL, it must be enclosed in triple curly brackets.

If the values are iterated, you can use the {i} identifier to indicate the Handlebars.

Please note

If an iteration is defined but there is no {i} in the ELO field, all values will be concatenated in this field up to a maximum of 255 characters. Any values above this will be rejected.

Key field: You can select one key field. The value of the key field is used to specify a property of the object that remains a unique identifier even when other data changes. For example, you can specify an ID that uniquely identifies an object.

This ensures that an object is not created twice (with a new name) in the repository, for example. Instead, the corresponding folder is found and a new path is created according to the new name. The folder and its contents are moved to this new path. The documents that were stored under the old name remain in the folder with the new name.

Configuration in SmartWe

Before you can use the ELO Integration Service in SmartWe, you have to do some configurations in SmartWe.

Method

1. Subscribe to the ELO Integration Service in the SmartWe App Store.



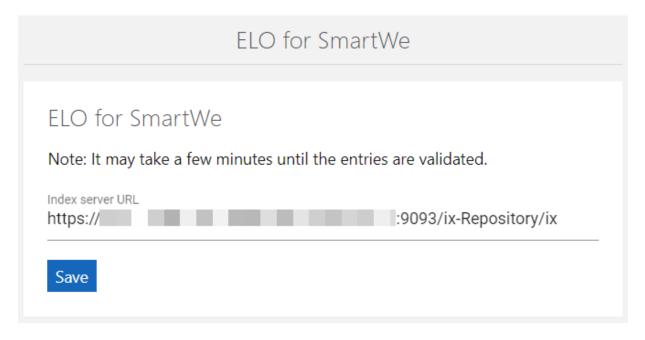
2. In the SmartWe administration area, a new entry for *ELO for SmartWe* appears om the *Administration* tab.



Administration

8	Groups	
-	Resources	
	Subscription	
٩	Customer information	
10	Payable option	
+	Extensions	
1	App Designer	
	Data record types	
	App access	
×	Event Management	
<i>ξ</i> ή	Rules	
7	Unternehmensverzeichnis.o	
	Region	
<u>↑</u>	Data export	
➅	Security	
'ELO	ELO for SmartWe	

Click the ELO for SmartWe button.



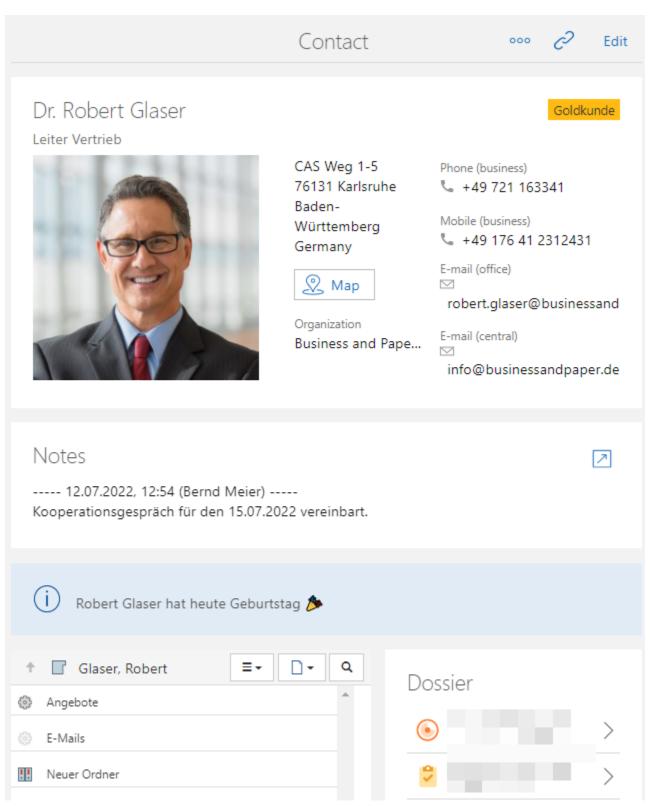
- 4. Enter the URL of your ELO Indexserver in the dialog box. Use the following syntax: http(s)://
 <ELOSERVER>:<PORT>/ix-<REPOSITORY>/ix
- 5. Click Save.

Result

SmartWe now communicates with ELO and you can use the ELO Integration Service in SmartWe.

Usage example

After successful configuration, the ELO Integration Client is available for the corresponding objects.



The screenshot shows an example of the corresponding ELO configuration.

OAuth authentication

ELO for SmartWe uses oAuth authentication to authenticate the SmartWe user. You therefore need to install the ELOauth plug-in and configure it accordingly.

You can download the ELOauth plug-in on the ELO SupportWeb. The installation process is described in the <u>ELOauth plug-in</u> documentation.

The plug-in is configured using a JSON file named *de.elo.ix.plugin.auth.json* located in the ELO Indexserver configuration directory:

```
<ELO-Inst>/config/ix-<repository>/<server name>
```

Add the following entry to your ELOauth plugin-in configuration file and store your required values.

The clientUrl parameter is passed to the /login/request. It is redirected after authentication to call the ELO Integration Client or ELO Web Client, for example.

The parameter is available with ELOauth version 1.5.0.

The values you need to enter for *appKey* and *appSecret* are provided by ELO. The *<smartWE* instance URL> can be taken from your browser. This is the URL used to call your SmartWe instance.

Example: https://beta.smartwe.de

In the example shown here, the mapping value is set to *mail*. This means that the system checks whether the e-mail field of the ELO user matches an e-mail address transferred from SmartWe.



System settings



User manager

Create and manage ELO users and groups for all clients

To check this, go to //System settings//User manager in the ELO Administration Console and select the user.

