

ModusOne



ModusOne Client

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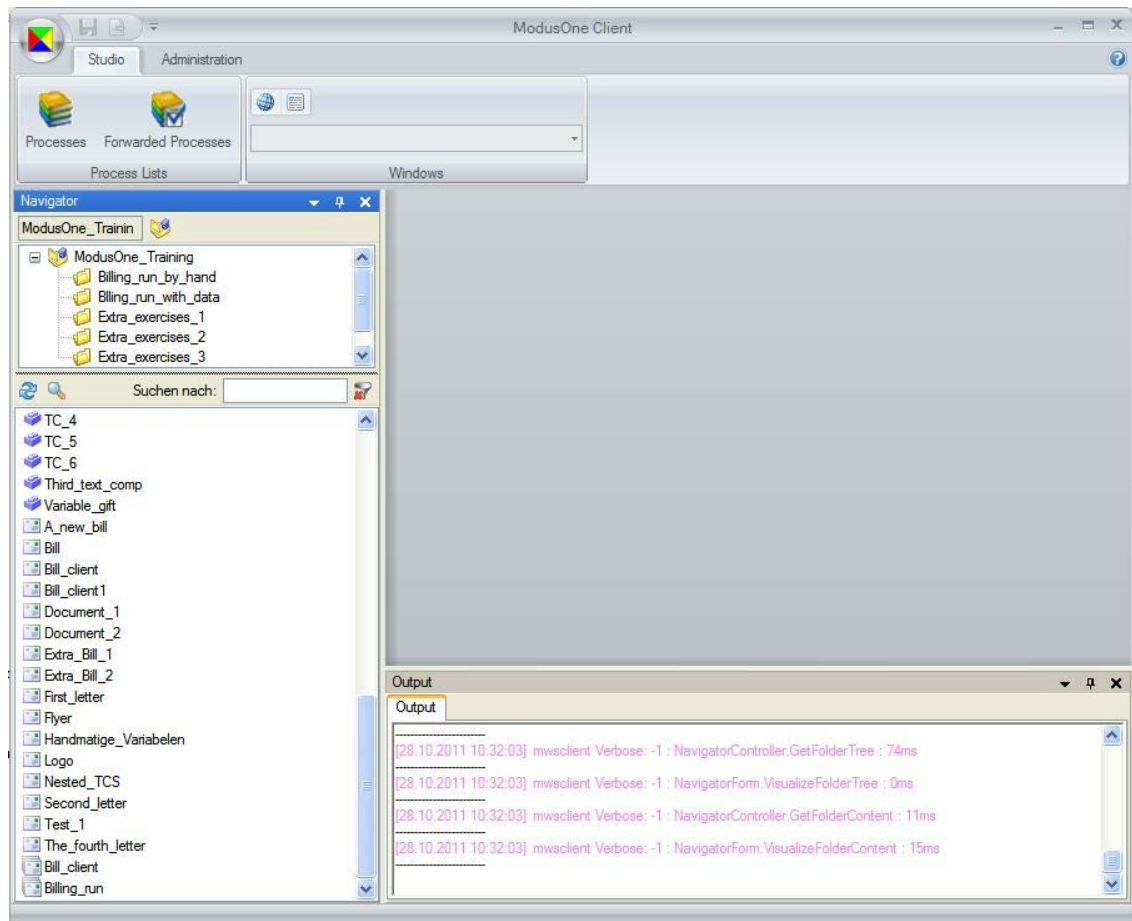
ModusOne Client

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ModusOne Client

Introduction

The ModusOne Client provides business user access to the ModusOne bundle generation process.



System Selection

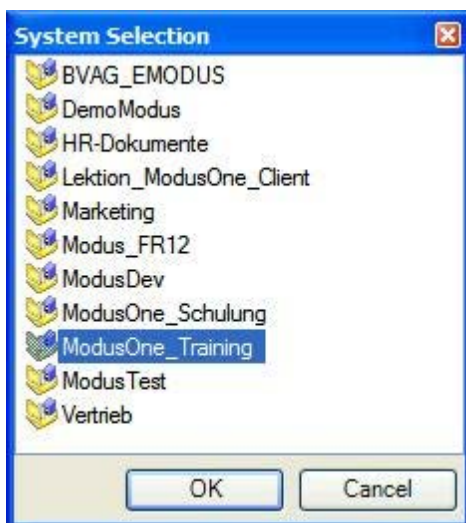
Before you can begin with creating documents, you must first select and open the system the document template is stored in.

As a standard setting, the ModusOne Client will open the last used system on launch.

Click on the button **System Selection** in the Navigator to select a system:



Select the required system in the dialog window that follows:



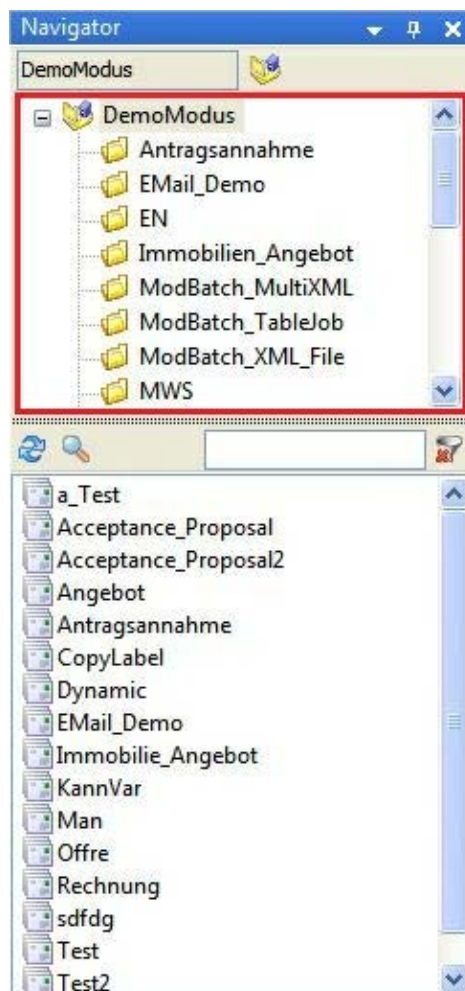
Navigator

If the Navigator is not visible, you can activate it by pressing the button in the Studio Ribbon:

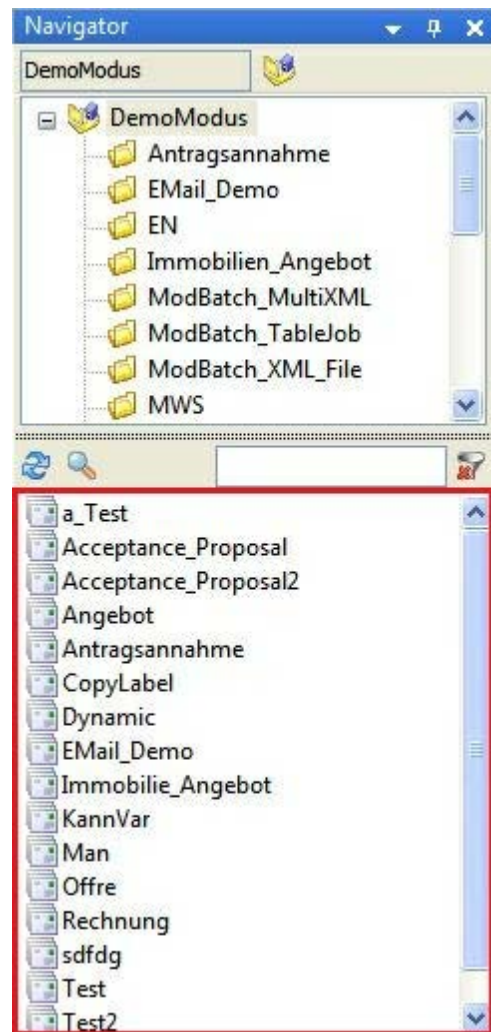


The Navigator Window

System folders are displayed in the upper pane:



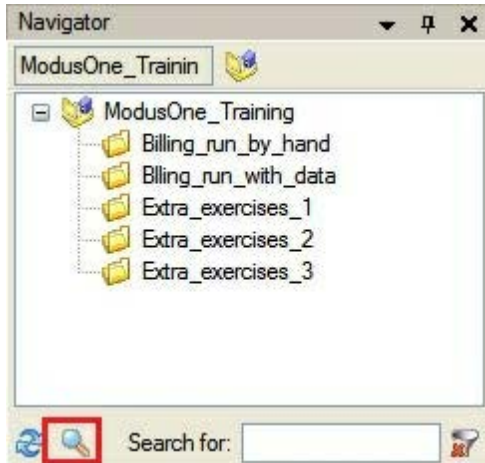
Depending on the **Filter Settings**, the lower pane displays the text blocks, documents and bundles of the system:



Filter Settings

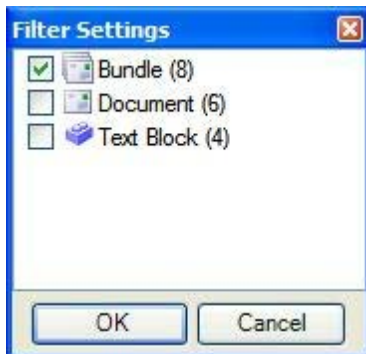
Show Filter List

Click on the button **Show Filter List** in the Navigator to show or hide objects:



Select Objects

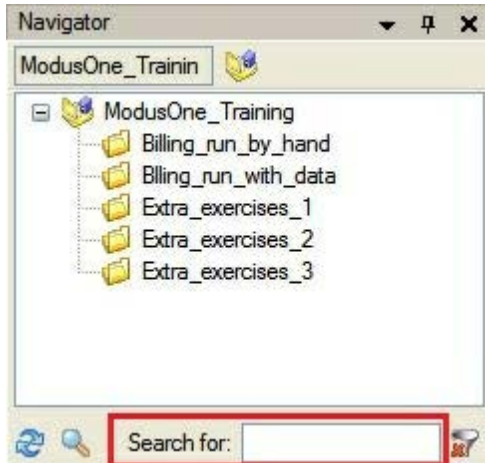
Select the required objects in the dialog window that follows:



Search

Search

You can use the dialog field **Search** to find objects.



Enter the first letters of the object to be found. The list of objects is reduced according to the selection criteria.

You can also use * as a wildcard.

Example

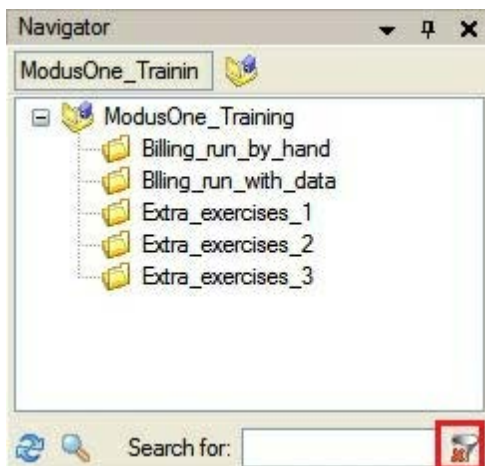
*account lists all objects ending in account

account lists all objects that have account in their object name.

However, a search filter such as part*account is not allowed.

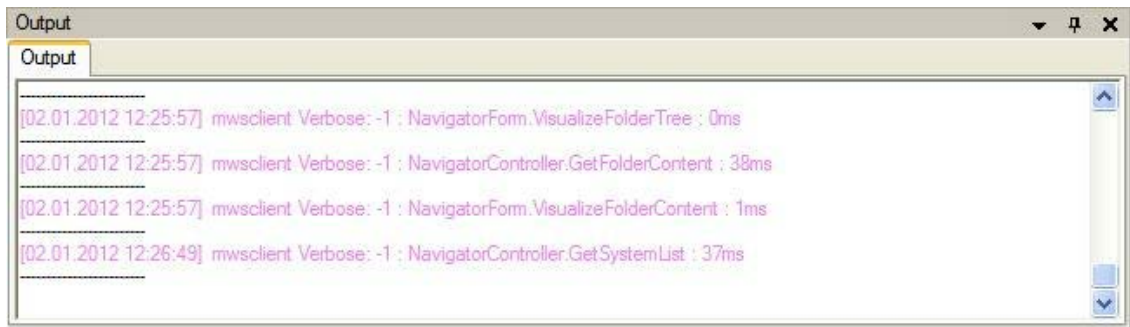
Reset Search

Pressing the button **Reset Search** removes the search filter.



Output Window

This window displays information, status messages, error messages as well as console output.



If the output window is not visible, you can activate it by pressing the button in the Studio Ribbon:

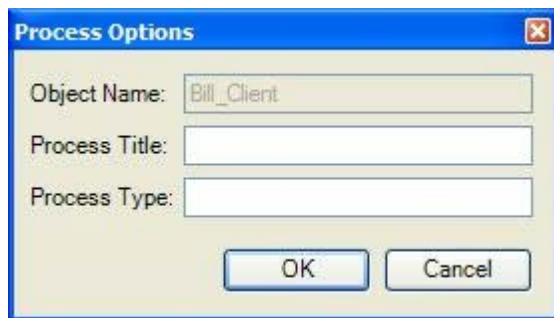


Create Bundle

7.1 Start

Start the bundle with a double-click.

In the dialog box that appears, you now have the option to enter in a process title and process type.

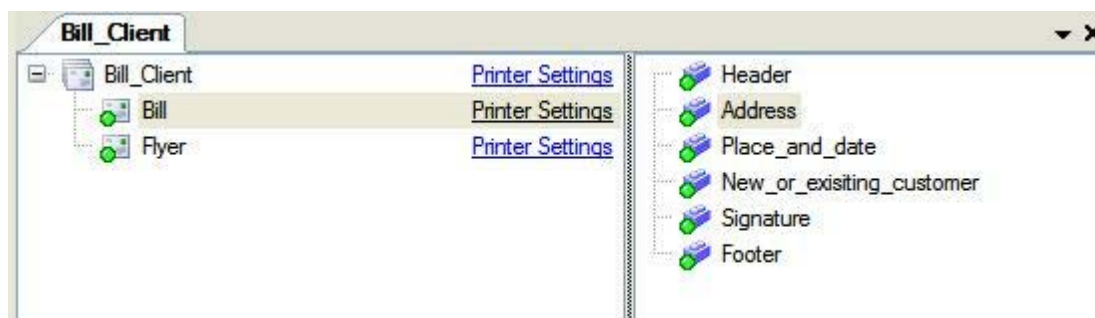


The toolbar contains buttons to start data retrieval, create documents, print and archive documents as well as a button to forward a process.

Any additional documents that may be required can be inserted into the bundle by drag and drop from the Navigator.

Main Window

The bundle is opened in the main window.



Document templates / text blocks with a **red** dot will be created/inserted.

Document templates / text blocks with a **green** dot will be created/inserted, but with the help of the context menu can be excluded from document generation.

Document templates / text blocks **without** a dot will not be created/inserted. With the help of the context menu, you can change the object setting so that they will be created/inserted.

7.2 Insert Additional Documents and Text Blocks

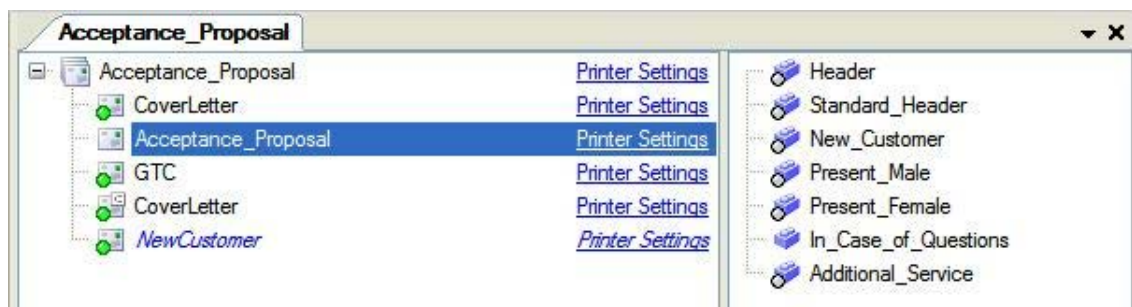
Any documents that may be additionally required in the bundle can be inserted by drag and drop from the Navigator.

To insert additional text blocks in a document, first select the document and then drag a text block from the Navigator to the desired position in the structure.

A precondition for inserting additional text blocks is that the selected document already has at least one fixed text block in its structure.

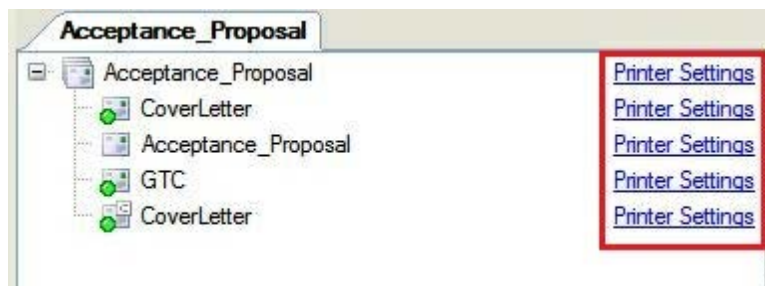
Additionally inserted objects are displayed in blue italics.

Documents that were inserted by use of an **AfterDataRetrieval** script are also displayed in blue, but not in italics.



7.3 Printer Settings

The printer settings for each document can be changed in the bundle editor window, as long as in ModusStudio the option '**Changes allowed**' was set for the document in the bundle.



If the printer settings for the bundle are changed, the changes are applied to all documents and document copies in the bundle for which the option '**Changes allowed**' was set.



Printer Selection	Effect
No printer	All documents in the bundle are assigned the print time ' shifted '
Email Printer	Print time can be selected
Online Printer	All documents in the bundle are assigned the print time ' direct ' The print time for online printers can also be selected if the key ' enableOnlinePrinterPrintTimeChanging ' in the file ModusClient.exe.config is set to True .

7.4 Context Menu

Context Menu of a Document

The context menu of a document offers the following functions:

Switch status

Activates / deactivates the document.

View document in Word

Opens the generated document in Word or in the internal viewer.

Save document as...

Opens a dialog window to enable you to save the generated document to a specific directory.

To be able to use this functionality, the user must possess the rights '**Download created documents (13)**' and '**Save Created Document As...(35)**'.

Delete document

Removes the document from the bundle.

Assign external document

This menu item is available for active static documents and is used to replace documents in the bundle with external documents.

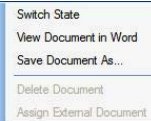
Documents in a bundle can be replaced by external documents of the same type.

For external documents the text **('external document')** is shown.

You can remove the link with the menu item

Remove external document.

To be able to use this functionality, the user must possess the rights '**Assign / remove external text block file (34)**' and / or '**Assign / remove external text block file (33)**'.



Switch State
View Document in Word
Save Document As...
Delete Document
Assign External Document

Context Menu of a Text Block

The context menu of a text block offers the following functions:

Switch status

Activates / deactivates the text block.

Delete text block

Removes the text block from the document.

Assign external document

This menu item is available for active text blocks without child objects and is used to replace the Word document of existing text blocks with external documents.

Text blocks can be replaced by Word documents.

For external documents the text (**'external document'**) is displayed.

You can remove the link with the menu item

Remove external document.



7.5 Process Toolbar

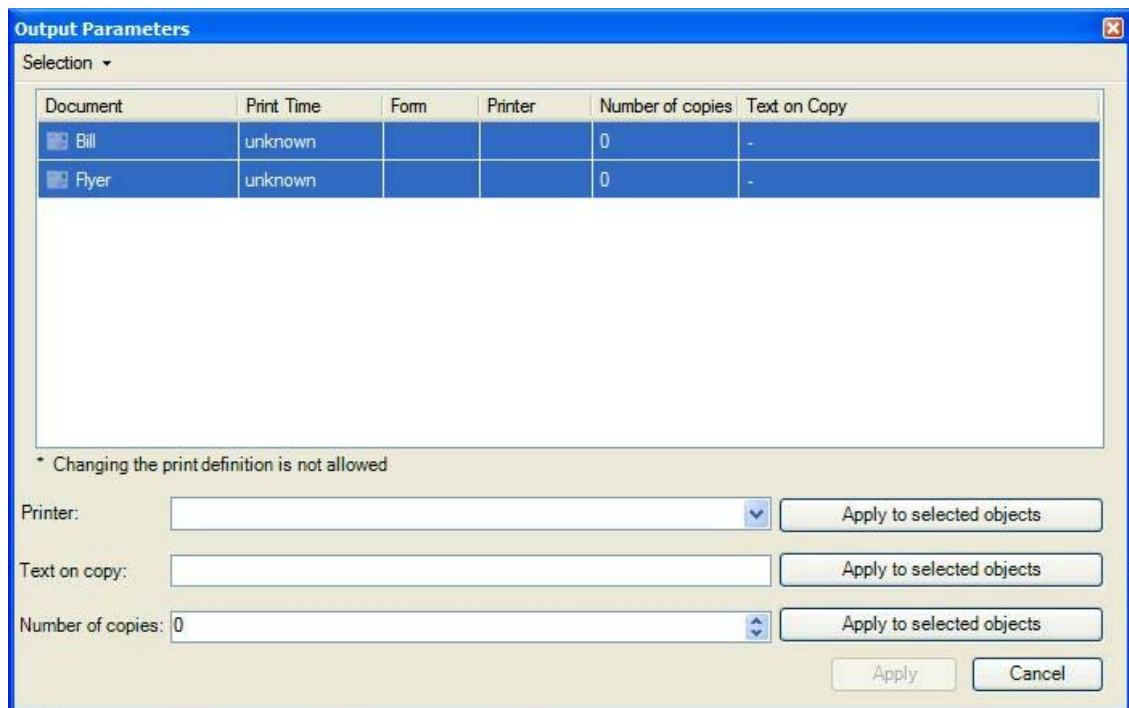


Forward

See **Forward Bundles**.

Output Parameters

This dialog allows you to change the following properties: printer, text on copy and number of copies.



Print and Archive

This button starts data retrieval, creates documents and then transfers the bundle to the output management system.

If a bundle is so configured that the user who creates it is not allowed to print it, a corresponding dialog for process forwarding opens.

A user group and/or a single user can be selected as the target for the bundle.

If a user group and a user are selected, the bundle is forwarded to both the group and the individual user.

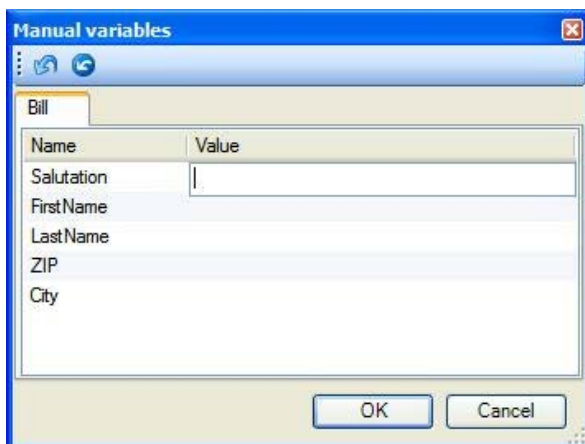
See also

Forward Bundles

Create Documents

This button starts data retrieval and creates documents.

If the document template contains manual variables, an input dialog opens:



The image shows a Windows-style dialog box titled "Manual variables". It has a blue title bar with standard window controls. Below the title bar is a tabbed interface with a tab labeled "Bill". The main area contains a table with two columns: "Name" and "Value". The "Name" column lists variables: "Salutation", "FirstName", "LastName", "ZIP", and "City". The "Value" column has a text input field for "Salutation" and empty space for the others. At the bottom right are "OK" and "Cancel" buttons.

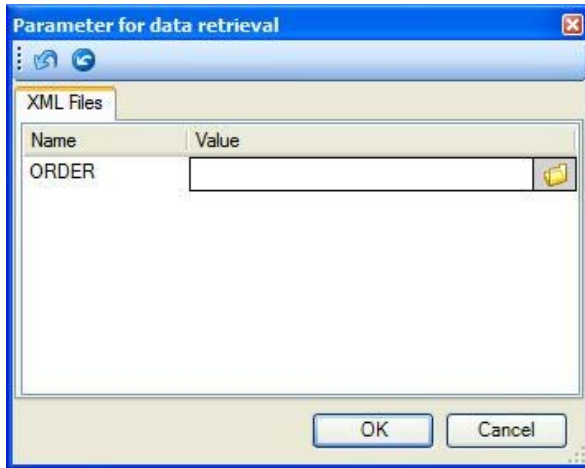
Name	Value
Salutation	
FirstName	
LastName	
ZIP	
City	

Variables in red are required variables and require an entry.

Data Retrieval

This button starts data retrieval without creating documents.

If a selection is assigned, either a start value must be entered for an active selection, or an XML-File selected for a passive selection.



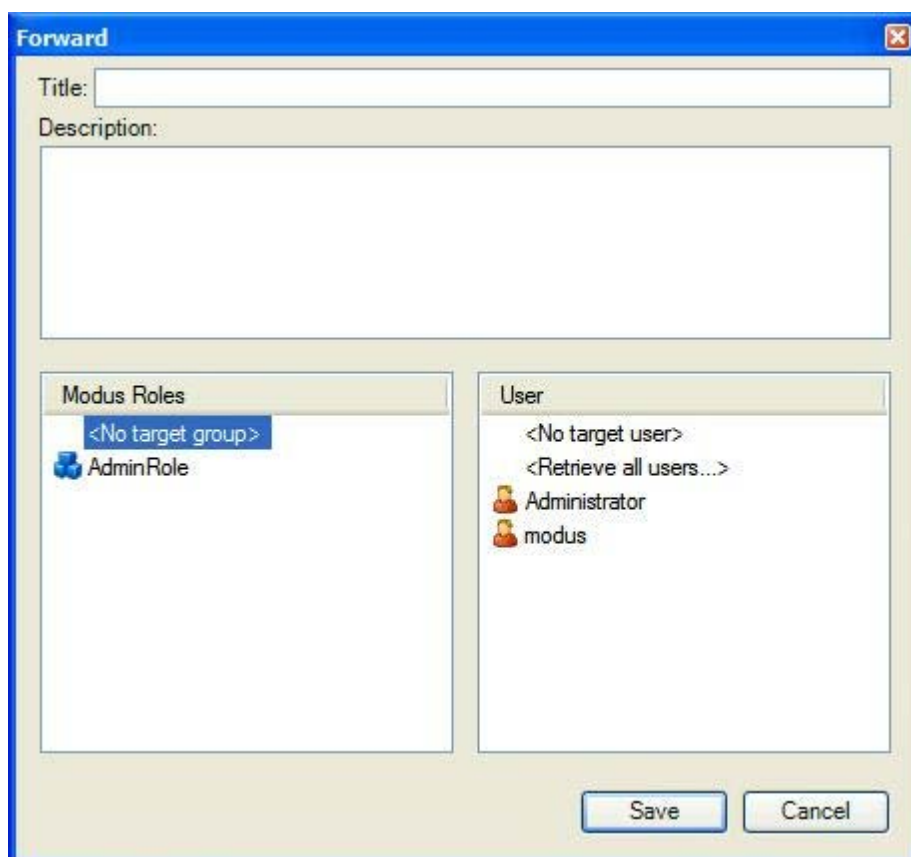
7.6 Forward Bundles

A bundle can be forwarded should internal procedures require that it has to be approved and printed by another user.

Use the corresponding button in the **Process Toolbar** to do this.

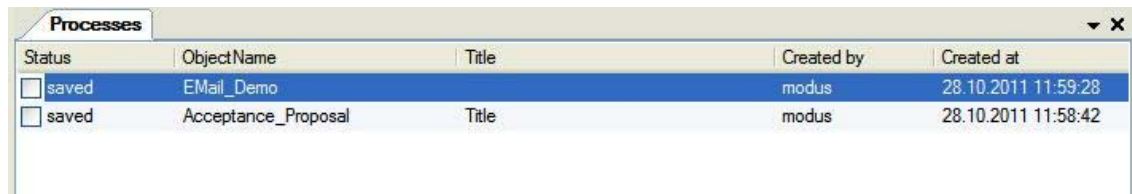
A user group and/or a single user can be selected as the target for the bundle.

If a user group and a user are selected, the bundle is forwarded to both the group and the individual user.



Process List

The process list displays a list of unfinished saved tasks. These tasks can be opened from the list for continued processing or editing.



Status	ObjectName	Title	Created by	Created at
<input type="checkbox"/> saved	EMail_Demo		modus	28.10.2011 11:59:28
<input type="checkbox"/> saved	Acceptance_Proposal	Title	modus	28.10.2011 11:58:42

Toolbar



Back/Forward

Scrolls one page forward or back through the process list.

Refresh

Refreshes the process list.

Select All

Selects all processes in the list.

Deselect All

Deselects all processes in the list.

Delete Processes

Deletes the selected processes.

Extended Information

Shows all available information for the selected process.

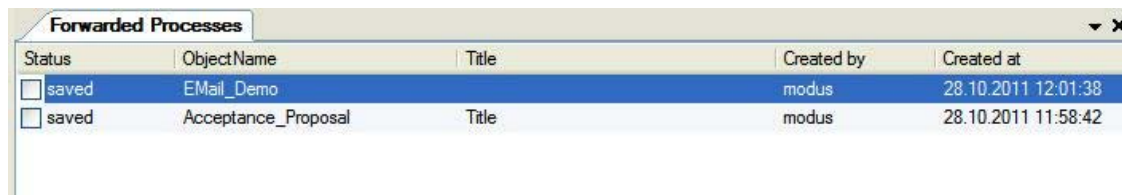
Open Process

Opens the selected process for further processing.

Forwarded Processes

To be able to open forwarded processes, a user must first possess the right '**List of Forwarded Processes**'.

In the list of forwarded processes, only those processes that were assigned to the user actually logged onto the workstation, or to the user group as a whole, are visible.



Status	ObjectName	Title	Created by	Created at
<input type="checkbox"/> saved	EEmail_Demo		modus	28.10.2011 12:01:38
<input type="checkbox"/> saved	Acceptance_Proposal	Title	modus	28.10.2011 11:58:42

Toolbar



Back/Forward

Scrolls one page forward or back through the process list.

Refresh

Refreshes the process list.

Select All

Selects all processes in the list.

Deselect All

Deselects all processes in the list.

Delete Processes

Deletes the selected processes.

Extended Information

Shows all available information for the selected process.

Open Process

Opens the selected process for further processing.

Start Parameters

The ModusOne Client can be started with specific parameters to control initial behaviour.

Start parameters always have the following structure:

'/parametername:Paramvalue'

If the '**Paramvalue**' contains a space, the parameter must be enclosed in quotation marks.

The following parameters are supported:

startsystem

Example

/startsystem:MySystemOID

See below, 'Structure of the File Startoptions.xml'

navipath

Example

/navipath:/Test

See below, 'Structure of the File Startoptions.xml'

objectname

Example

/objectname:ApplicationPack

See below, 'Structure of the File Startoptions.xml'

processid

Example

/processid:MyProcessId0815

See below, 'Structure of the File Startoptions.xml'

closeonexitprocess

Example

/closeonexitprocess:true
/closeonexitprocess:false

This parameter is only taken into account when '**objectname**' or '**processid**' are defined.

See below, 'Structure of the File Startoptions.xml'

enableselectionautostart

Example

```
/enableselectionautostart:true  
/enableselectionautostart:false
```

See below, 'Structure of the File Startoptions.xml'

selparams

Parameter for active data retrieval can be defined here in the form of

ParameterName=ParameterValue.

Multiple name and value pairs must be separated by commas.

If parameters have already been set by defining them in a startoptions.xml, any parameters with the same name are overwritten and any new parameters added.

If an empty string is specified, all parameters will be deleted, including those already set in a specified startoptions.xml.

Example

```
/selparams:PartnerNumber=0815,ContractNumber=4711
```

See below, 'Structure of the File Startoptions.xml'

xmlsels

Parameter for a passive data retrieval (XML files) can be defined here in the form of NameDataReference=NameXmlFile. Multiple name and value pairs must be separated by commas.

If XmlSelections have already been set by defining them in a startoptions.xml, those with the same name are overwritten and new ones added.

If an empty string is defined, all XmlSelections (including those that may have already been set in a startoptions.xml) are deleted.

Example

```
/xmlsels:Partner_1=C:\Partner_Female.xml,Partner_2=C:\Part
```

See below, 'Structure of the File Startoptions.xml'

listuser

Example

```
/listuser:Administrator
```

See below, 'Structure of the File Startoptions.xml'

startoptions

This parameter defines the name of an XML file used to configure the launch behaviour of the ModusOne Client.

This file can be used to control whether a bundle should be started directly, whether data be retrieved, or whether an existing saved process be resumed.

The structure of this file and the resulting launch behaviour is described in the following chapter.

If the parameter is set, it is read first before any other parameters influencing the launch.

These can then be used to overwrite settings made in the XML file or to extend, alter, or delete lists.

Example:

`/startoptions:startoptions.xml`

 **Structure of the File Startoptions.xml**

The XML has the following structure:

```
<startparameters>
  <startsystem>demo</startsystem>
  <navipath>/MWS/MyFolder1</navipath>
  <processopen processid="e8647d5d-f90e-4c9d-a948-4429f28
  <objectname>ApplicationPack</objectname>
  <selection>
    <selparams>
      <parameter name="PartnerNumber" value="0815" />
      <selparam name="Department" value="ITC"/>
    </selparams>
  </selection>
  <xmlselections>
    <xmlselection name="Partner_V2_1" filename="C:\Partn
  </xmlselections>
</startparameters>
```

Node/Attribute	Meaning
/startparameters/startsystem	<p>System OID of the system to be automatically loaded after application launch.</p> <p>If the parameter is not set, the Client starts with the last system used.</p> <p>See also: UserAttributes StartSystemOID and StartFolder</p>
/startparameters/navipath	<p>This element defines which folder will be selected in the Navigator.</p> <p>If no start system is set, the parameter refers to the last system used.</p> <p>The name of the system must not be included in the path.</p> <p>See also:</p>

	UserAttributes StartSystemOId and StartFolder
/startparameters/objectname	This element defines whether a bundle be started directly when ModusOne Client is launched. If ' objectname ' is specified, the entry ' processid ' is not taken into account.
/startparameters/selection/ selparams/selparam	Multiple entries are allowed. If ' objectname ' or ' processid ' are defined, data retrieval is automatically executed after the respective bundle or process is started. If neither ' objectname ' nor ' processid ' are defined, the parameter values set are used as the default values for the selection parameter input dialog box.
name	Name of a selection parameter that is set after a bundle is started and used for data retrieval
value	Value of the selection parameter
/startparameters/ xmlselections/xmlselection	Multiple entries are allowed. If ' objectname ' or ' processid ' are defined, data retrieval is automatically executed after the respective bundle or process is started. If neither ' objectname ' nor ' processid ' are defined, the parameter values set are used as the default values for the selection parameter input dialog box.
name	Refers to the data reference within the bundle defined in ' objectname ' or ' processid ' .
filename	Name of the XML file whose content is to be assigned to the data reference.
/startparameters/processopen/ processid	Specifies the process to be opened after ModusOne Client is started. This parameter is only taken into account if ' objectname ' was not defined.
/startparameters/processopen/ closeonexitprocess	Specifies whether the Client should be closed when the last process step has been completed. This parameter is only taken into account when ' objectname ' or ' processid ' are defined.
/startparameters/processopen/ enableselectionautostart	Specifies whether an automatic start for data retrieval (when ObjectName or ProcessId und SelParams are set) should be executed or not. If the attribute is not defined, the standard setting is True.

<code>/startparameters/processopen/ listuser</code>	<p>If this parameter is defined and the right MwsProcessListFromDefinedUser exists, the processes and forwarded processes of the specified user are displayed.</p> <p>The list of forwarded processes only displays those processes that were forwarded to the user directly.</p> <p>The name of the user is displayed in the tabs of the respective process lists.</p>
---	--

User Attributes **StartSystemOID** and **StartFolder**

By entering the a system object ID in the user attribute **StartSystemOID**, you can define a specific start system. This works in a similar fashion to setting the start system in the start parameters.

By entering the a system object ID in the user attribute **StartFolder** you can define a start folder.

Unlike the start parameter `navipath`, the value here is not the path to the folder, but the folder name itself. This attribute, therefore, only has effect on setting a start folder when the `MwsChangeFolder` permission is missing.

Values set in the start parameters have priority over those specified in user attributes.

- If the start parameters specify a start system, that system is preset on application launch.
- If the start parameter is not set, the application checks whether the user attribute **StartSystemOID** is set and then applies the value on application launch.
- If neither options are defined, the last system used is set at application launch.
- If the start parameter `navipath` is set, the following checks are made:
 - If the user has the right **Client Change Folder(27)**, the Navigator switches to the folder.
If the folder is not found, the Navigator switches to the system root folder.
 - If the user does not have the right **Client Change Folder(27)**, the system root folder becomes the default folder for the user.
If the specified folder is not found in the system, a warning is displayed and the Navigator flushed. Users can change to another system if they have the Change System right.
This is only possible if the target system has a folder of the same name.
- If the start parameter `navipath` is not set, the following checks are made:
 - If the user attribute **StartFolder** is set and the user has the **Client Change Folder(27)** right, no further action is taken.
 - If the user does not have the **Client Change Folder(27)** right, the system root folder becomes the default folder for the user.
If the specified folder is not found in the system, a warning is displayed and the Navigator flushed. Users can change to another system if they have the Change System right.
This is only possible if the target system has a folder of the same name.

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