Infor PLM Accelerate 11

Visual Collaboration Administrator Guide

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About this guide

This document provides information about the administrative capabilities for configuration of Infor Visual Collaboration feature.

Intended audience

This guide is intended for system administrators. This document assumes that you have at least some knowledge in:

- System architecture and function for your Infor system
- SQL Server database

For the most up-to-date list of software and hardware requirements for Infor products, see the documentation for your system.

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section below.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1. Visual Collaboration

The Visual Collaboration Administration Guide describes the administrative capabilities for configuration of Infor Visual Collaboration.

A whole new dimension of secure social communication is opened up with the introduction of Infor Visual Collaboration. Focused on the ability to easily view and comment on graphical file content, Infor Visual Collaboration provides security, control and context to your day-to-day product development discussions. It includes threaded discussions with comments and replies, configurable discussion forums, and the ability to easily view and graphically comment on all your file content, including 3D models, drawings, and Office documents. Powerful aggregation capability for files and comments pulls together the needed information where and when you need it.

The Infor Visual Collaboration end user functionality and the features of the User Interface are described in detail in the Online Help section **Just Ask Innovator**. Refer to the topics under **End User→ Item Window** to learn more about the features and the end user functions of Infor Visual Collaboration.

Chapter 2. Visual Collaboration Installation

In order for Visual Collaboration to function properly, Infor PLM Accelerate requires PDF Viewer to be installed. PDF Viewer is a feature included in Infor PLM Accelerate to display PDF documents as part of the Visual Collaboration feature. However, the technology used to make feature display PDFs is browser specific. Users may experience differences in behavior when loading in Internet Explorer vs FireFox or Chrome. While all browsers provide the same functionality, the user experience will be slightly different.

The PDF Viewer installation includes updates to the Infor PLM Accelerate database and code tree.

Prerequisites

Before installing the PDF Viewer package, confirm that the server has **Microsoft Visual C++ 2010 Redistributable** installed. If required, the package may be downloaded from the Microsoft web site:

64-bit: http://www.microsoft.com/en-us/download/details.aspx?id=14632

Installing the PDF Viewer package

Before proceeding with the installation, confirm that the **Microsoft Visual C++ 2010 Redistributable** package is installed on the server machine.

1. Confirm that a current version of Feature licenses are activated in the database.
    a. Log into Infor PLM Accelerate as an administrator.
    b. Go to **Administration\Feature Licenses** in the TOC and do a search for "Aras.SecureSocial" and Aras.PDFViewer licenses.
    c. Go to **Administration\Feature Licenses**.
    d. If a feature license is found, check the expiration date to confirm that the license is still active.
    e. If a feature license is not found. enter Infor's support portal at www.infor.com/inforxtreme to request for a license key and to download any related installation documentation.
2. Unzip the `PDFViewer.zip` file on the server.
3. Copy the \Innovator folder to the root of your install directory, overwriting the existing \Innovator folder and all its contents.

    It is recommended that this step be performed by an administrator on the server.
    a. Click '**Yes**' when prompted to merge the 'Innovator' folder.
    b. Select the '**Do this for all current items** check box and click **Yes** when prompted to merge the 'Client' folder.
    c. Select the **Do this for the next … conflicts** check box and click **Copy and Replace** when prompted **There is already a file with the same name in this location. Click the file you want to keep**.
4. From the root of your code tree, navigate to \Innovator\Client and edit the web.config file with an ASCII editor.

a. Change the value of the filesRevision attribute. The value should be changed from std to 2, 3, 4, etc

```
...
    </runtime>
  <cachingModule moduleEnabled="true" filesRevision="2" />
</configuration>
```

b. Save the changes to the web.config file and close it.

5. If Windows Authentication is set up, update it to include pdftron_user.

c. Open **InnovatorServerConfig.xml** file located at the root of the Infor PLM Accelerate code tree.
d. Edit the `ClientLogon` tag to add `pdftron_user` to `denied_domain_users` and `allowed_direct_users`.

```
<ClientLogon  allowed_domain_names="^DOMAINNAMEHERE$"
   allowed_domain_users=".+"
   denied_domain_users="^admin$|^root$|^vadmin$|^PLM$|^pdftron_user$
   "
   allowed_direct_users="^admin$|^root$|^pdftron_user$"
   shared_secret="Your shared secret here"
   empty_logon_user_allow_direct="false" />
```

6. Clear the browser cache.
7. Next, you need to import the database package with the Package Import Export Utilities For more information using this tool, refer to the *Infor PLM Accelerate 11.0 - Package Import Export Utilities* documentation.)

a. You need to enable the “Super User” login to perform this step.
b. Browse to the \PackageImportExportUtilities\Import\ folder and run the Import.exe file

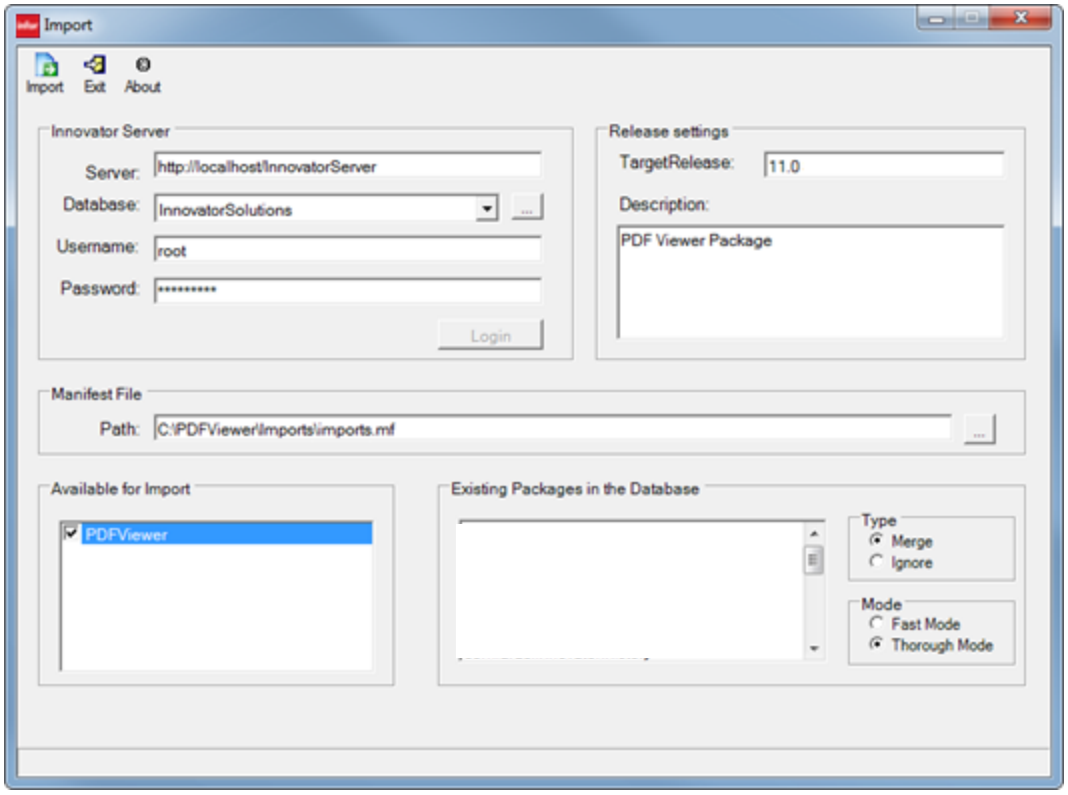


Figure 1.

e. Input the connection information
   - **Server** = The connection URL for Infor PLM Accelerate
   - **Database** = The target Infor PLM Accelerate database
   - **Username** = root
   - **Password** = Password for “root” login (Default is “innovator”)
   - **Target Release** = Choose target release version
   - **Description** = PDF Viewer Package
   - **Manifest File Path** = The manifest is found in the folder \Imports\import.mf
   - **Available for Import** = Check "PDFViewer"
   - **Type** = Merge
   - **Mode** = Thorough Mode

f. Click on the **Import** button.
g. After the import is complete, disable the “SuperUser” login.

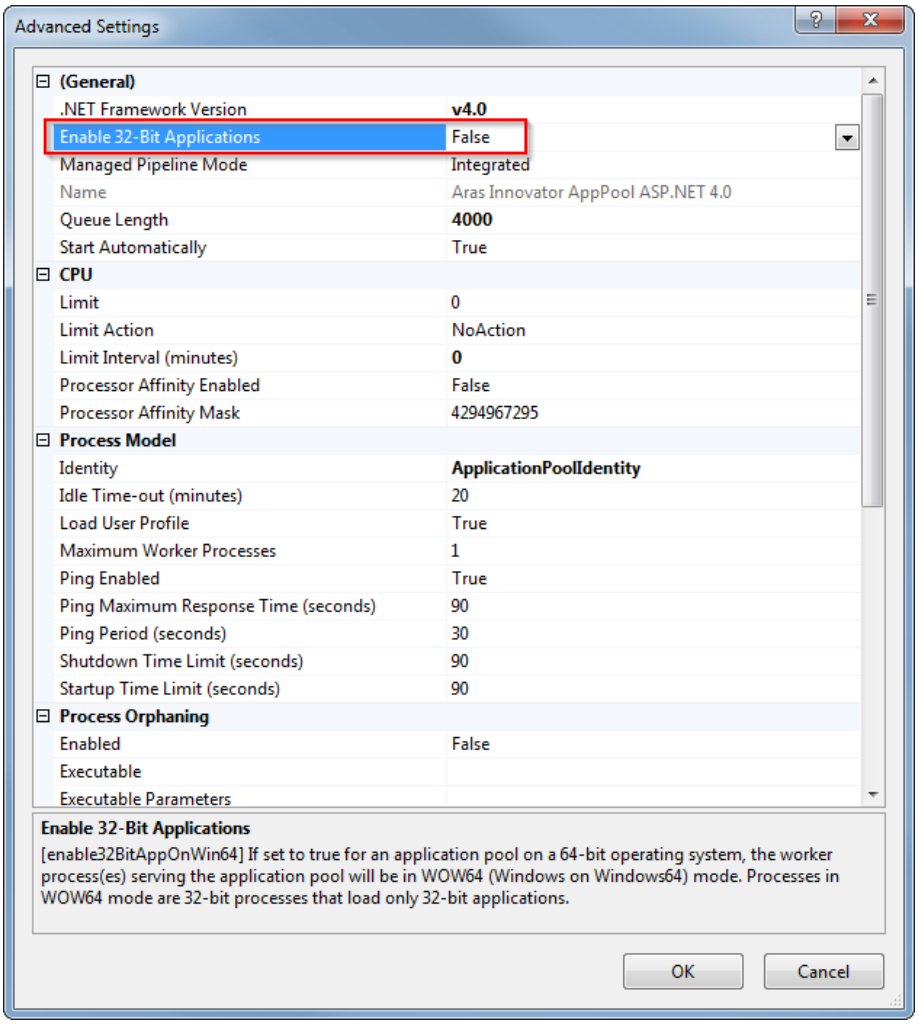
8. Log into Infor PLM Accelerate as an administrator.
9. In the TOC go to **Administration\Users** and open the `pdftron_user` User for editing.
10. Set the password for `pdftron_user` User as required and Save, Unlock and Close.
11. At the root of Infor PLM Accelerate code tree, Open **InnovatorServerConfig.xml** file for editing.

12. Add the following before the closing `</Innovator>` tag, filling in the password set in Step 10 above.

```
    ...
    <operating_parameter key="pdftron_user" value="pdftron_user|innovator"
    />
</Innovator>
```

13. Save and close the **InnovatorServerConfig.xml** file.

PDFViewer must be run as a 64-bit application. To confirm that the application is running in 64-bit mode, check the settings on the assigned **Application Pool User** in IIS.



Chapter 3. Glossary of Terms

The table below defines all relevant terms, acronyms, and abbreviations used in the document.

Table 1:

Term	Definition
Secure Social Messaging	Also known as “Secure Social”, it is the messaging subsystem that underlies Infor Visual Collaboration. It allows posting secure messages in the context of Innovator Items, replying to secure messages thus creating Secure Message threads, aggregating secure messages and/or history events into Discussions.
Secure Message (SM)	A message entered interactively in the context of an Innovator Item or as a mark-up in a file viewer integrated with Infor PLM Accelerate. A Secure Message can be posted to one and only one Board. It can be aggregated into unlimited number of Discussions.
Board	Message Board (wall) where Secure Messages are posted and stored. Each Board belongs to one and only one Innovator Item. A single Innovator Item can have zero or one Board.
Discussion	Item centric set of Secure Messages and/or history events from one or multiple Boards that are a result of read-only aggregation based on one or more Feeds. Each Innovator Item can have zero or one Discussion.
Feed	A function in Innovator that returns a set of Secure Messages and\or History records associated with a set of items.
Forum	A free-form subject exchange of Secure Messages. Forum might also reference individual items and\or searches in order to incorporate the Secure Messages associated with these items and\or search results, into the *Forum.*
SM Reply	A Secure Message that is entered in reply to any other Secure Message. All the SM replies subordinate to the top-level Secure Message that originates the SM thread.
SM Thread	A combination of the top-level Secure Message that originated the SM Thread, any replies to it, and any tags (Flagged and Rating) associated with the SMs in the Thread.
My Discussions	Main entry point to Infor Visual Collaboration, located in the TOC under **My Innovator**.
VC	Short for Visual Collaboration, the end-user functionality

Term	Definition
SSVC	Short for Secure Social Visual Collaboration, which means the combination of both the messaging sub-system and end-user functionality

Chapter 4. Enabling an ItemType for Secure Social

When an ItemType is enabled for Secure Social Messaging, then the tear-off window for that item will include a colored sidebar on the left side of the window plus a Discussion Panel that provides the Visual Collaboration (VC) functionality.

A detailed description of the Visual Collaboration User Interface is described in the Online Help section **Just Ask Innovator**.

Not all ItemTypes are enabled by default. They can be enabled only by an administrator.

To enable social content for an ItemType, do the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to **Administration → ItemTypes**.
3. Create a **New ItemType** or open an existing ItemType, for example, **Manufacturer Part** ItemType from the search grid for edit.

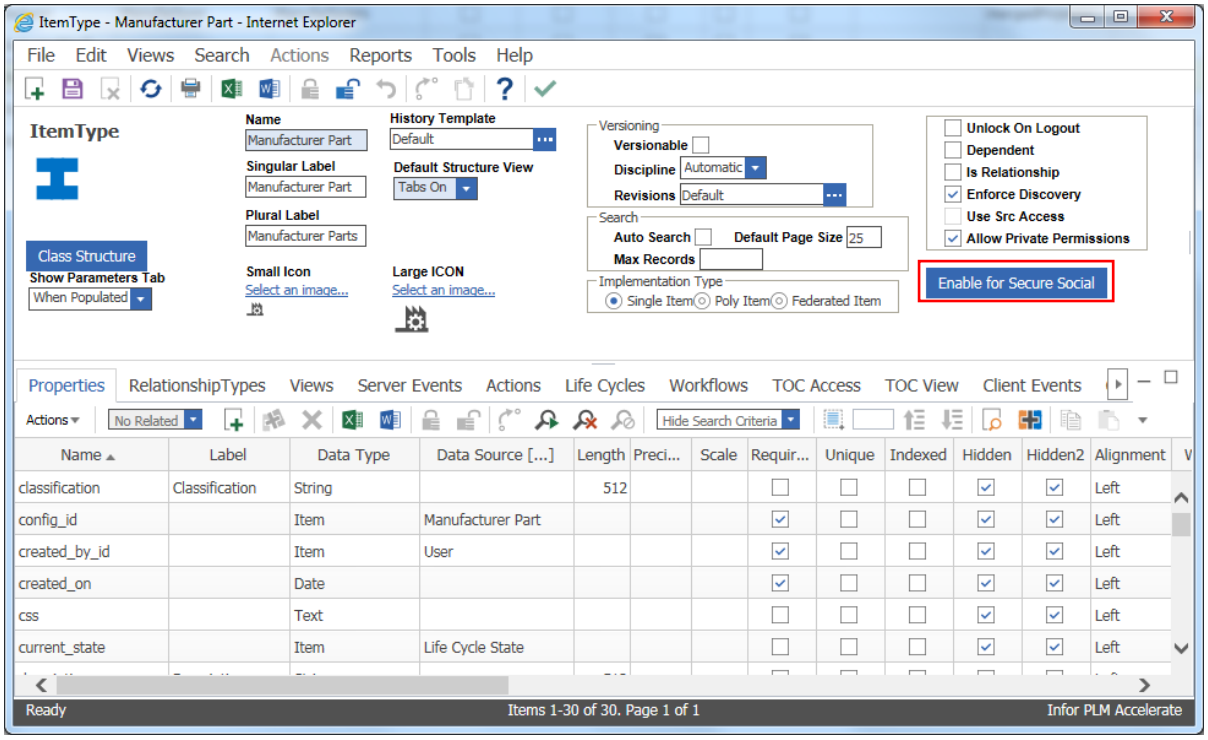


Figure 2.

4. A new **Enable for Secure Social** button is seen on the right side of the window.
5. Click on this tab to enable the **Document** ItemType for secure social content.

Note: For the **Is Relationship** ItemTypes, enabling for Secure Social is not possible.

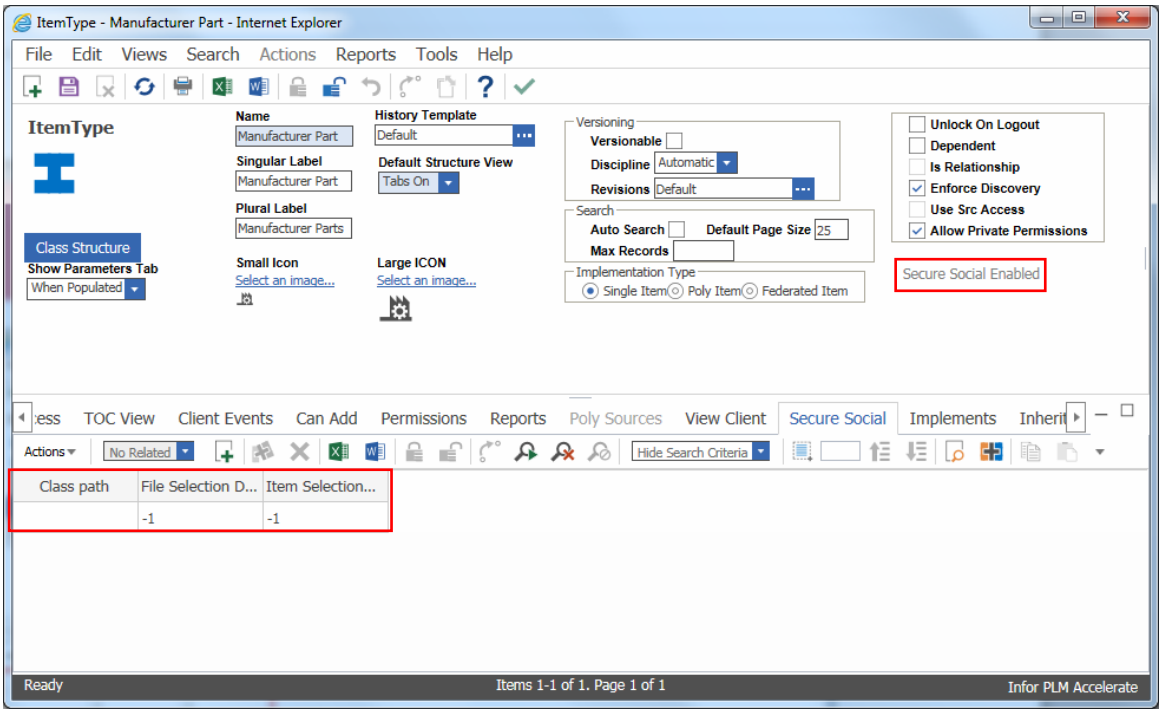


Figure 3.

6. The ItemType is now enabled for secure social.
7. Select the **Secure Social** tab.
8. It is seen that a single **DiscussionTemplate** with the following default properties has already been added in the relationship grid.
   - Class path: Root
   - File Selection Depth: -1
   - Item Selection: -1

   Note: It is not possible to save **Enabled for Secure Social** ItemType without setting the *DiscussionTemplate* for **Root** Class path.

9. Save, Unlock and close the window.

   For more information on the administrator configurations to the *DiscussionTemplate*, refer to Aggregation of Secure Messages in the next section.

Chapter 5. Discussion Templates

The Secure Social Messaging Subsystem allows the end user to post secure messages in the context of Innovator Items, reply to secure messages to create Secure Message Threads, and aggregate secure messages and/or history events into Discussions.

When an end user opens the Discussion Panel in an item window, the user sees Secure Messages and/or History records. Each discussion represents a set of Secure Messages aggregated from various Boards directly or through other discussions (recursively).

The administrator has the capability to aggregate the secure messages in this discussion panel by configuring the **Discussion Template** of the associated ItemType.

The aggregation of the Secure Messages occurs based on either DiscussionTemplate associated with the item's ItemType or *DiscussionDefinition* associated with the item.

When an ItemType is enabled for social content, it has at least one *DiscussionTemplate* associated with it. The administrator has the capability of configuring the *DiscussionTemplate* of an ItemType or the *DiscussionDefinition* associated with the item.

DiscussionTemplate

The *DiscussionTemplate* is a relationship type with *ItemType* as its source. The *DiscussionTemplate* serves the following purposes:

- Defines *Feeds* that are used for aggregating Secure Messages and History records for items of this type.
- Defines *FileSelectors* that are used for finding *Files* associated with the items of this type.

An administrator can make configurations to the *DiscussionTemplate* by doing the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to **Administration→ ItemTypes**.
3. Run the search and open an ItemType, for example **Document** ItemType, for edit.
4. Select the **Secure Social** tab.
5. Click on in the Relationship toolbar to add a new **DiscussionTemplate** in the relationship grid.

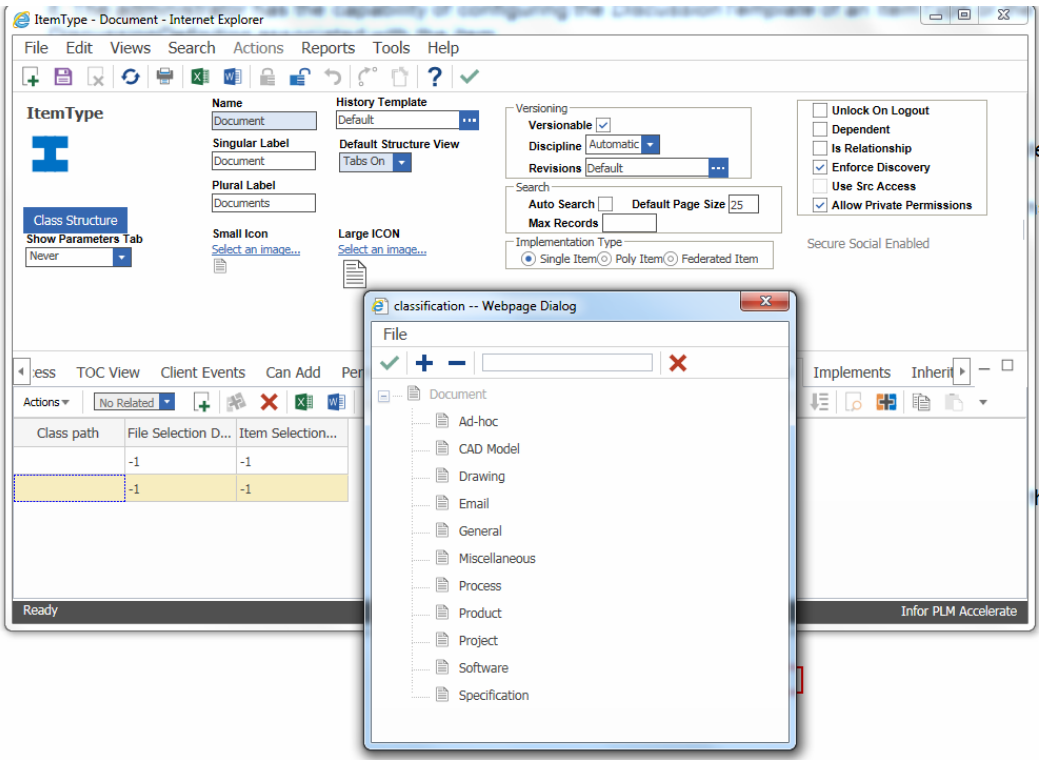


Figure 4.

6. On adding a new relationship, a **classification** dialog box is opened. Double click on the required class path to select and add it to the new **DiscussionTemplate**.
7. Right click on the **DiscussionTemplate** and select "**View Secure Social**" from the context menu.

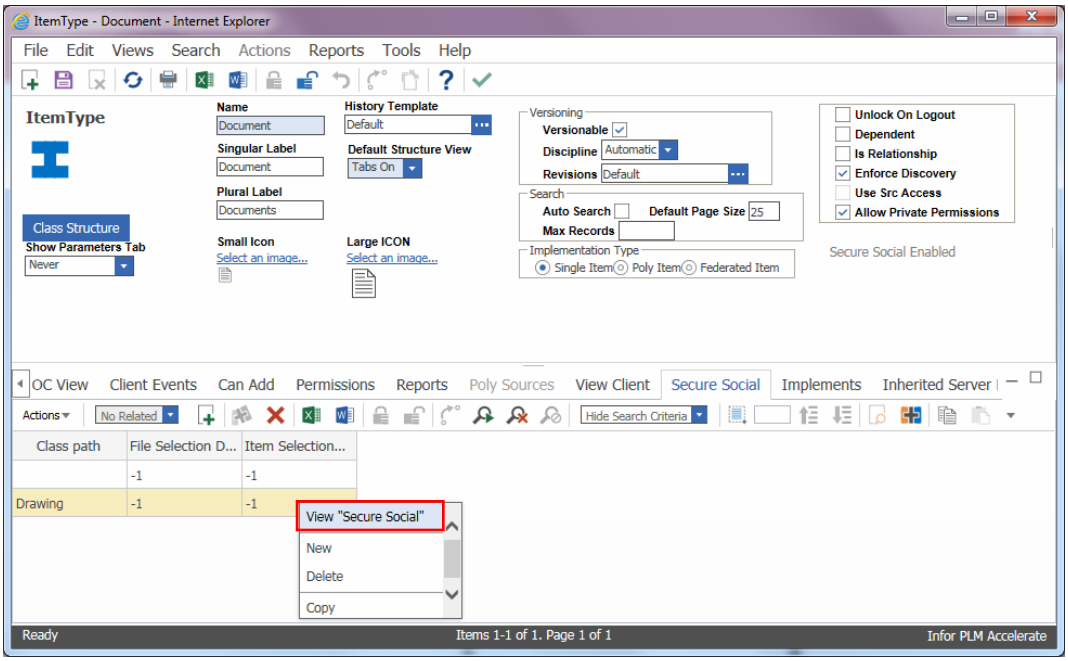


Figure 5.

8. This opens the item tear-off window for the **DiscussionTemplate**.

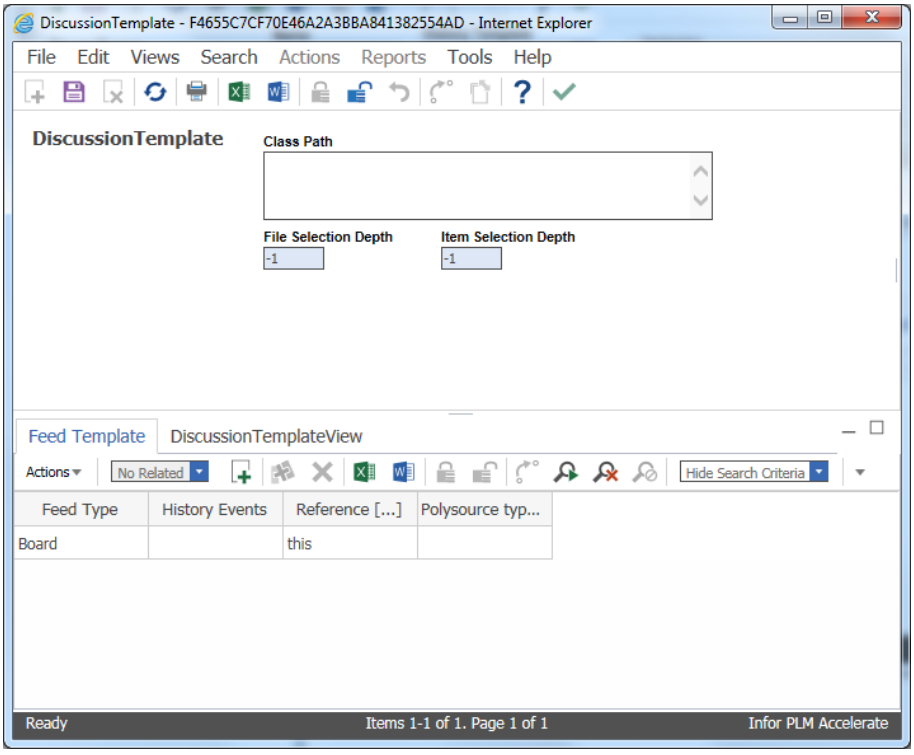


Figure 6.

9. Modify the properties provided in the **DiscussionTemplate** item tear-off window as required. Refer to the table below for the properties of the **DiscussionTemplate** along with its description.

Table 2:

Property	Description
Class Path	(string: 512) Classification for which the *DiscussionTemplate* would serve as "default" template (`is_default = true`). It is a single template for a particular classification.
File Selection Depth	(int; default: -1) This property defines the depth of the recursion in case of recursive message aggregation. The value "-1" means – no restriction.
Item Selection Depth	(int; default: -1) This property defines from how many levels of recursion to collect files for viewing in the UI in case of recursive message aggregation. The value "-1" means – no restriction.
Default Visibility Identity	(item: Identity) Identity to be used as the default shown in the "Share with" selector. A blank value means "World" See section 0 for more details.
Message Visibility Supported	(boolean) if ON, the "Share with" selector is exposed in the Discussion Panel of any items of the given ItemType. If OFF, the selector is not exposed and all messages are set to visibility = World. See section 0 for more details.
Feed Template Tab	The **Feed Template** tab defines Feeds and FileSelectors that are used for aggregating Secure Messages and History records for items of this type. For more information about the Feed Template, refer to FeedTemplate.
DiscussionTemplateView Tab	The **DiscussionTemplateView** Tab defines options to change the Secure Message template style. For more information about the DiscussionTemplateView, refer to DiscussionTemplateView.

FeedTemplate

A *Feed* is a function that returns a set of Secure Messages and\or History records associated with a set of items. Each Feed essentially represents a "function".

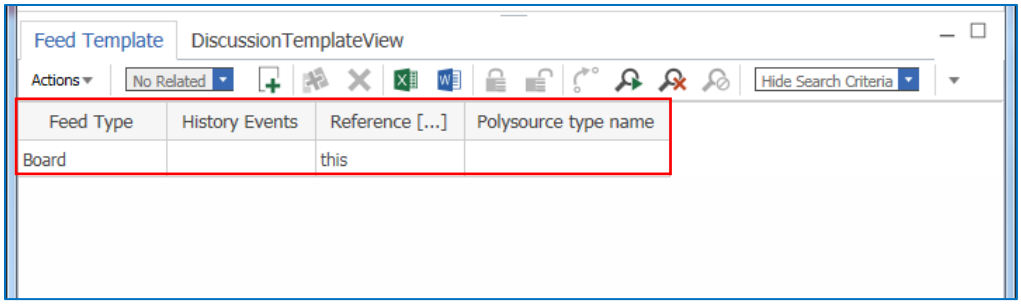


Figure 1.

It is seen that a single FeedTemplate with the following default properties is already added in the Relationship grid:

- Feed Type: Board
- History Events: null
- Reference […]: this
- Polysource type name: null

To make configurations to the **FeedTemplate**, do the following:

1. Click on in the Relationship Toolbar to add a new **FeedTemplate** in the relationship grid.
2. Right click on the **FeedTemplate** in the Relationship grid and select **View "FeedTemplate"** from the context menu.
3. This opens the **FeedTemplate** Item tear-off window.

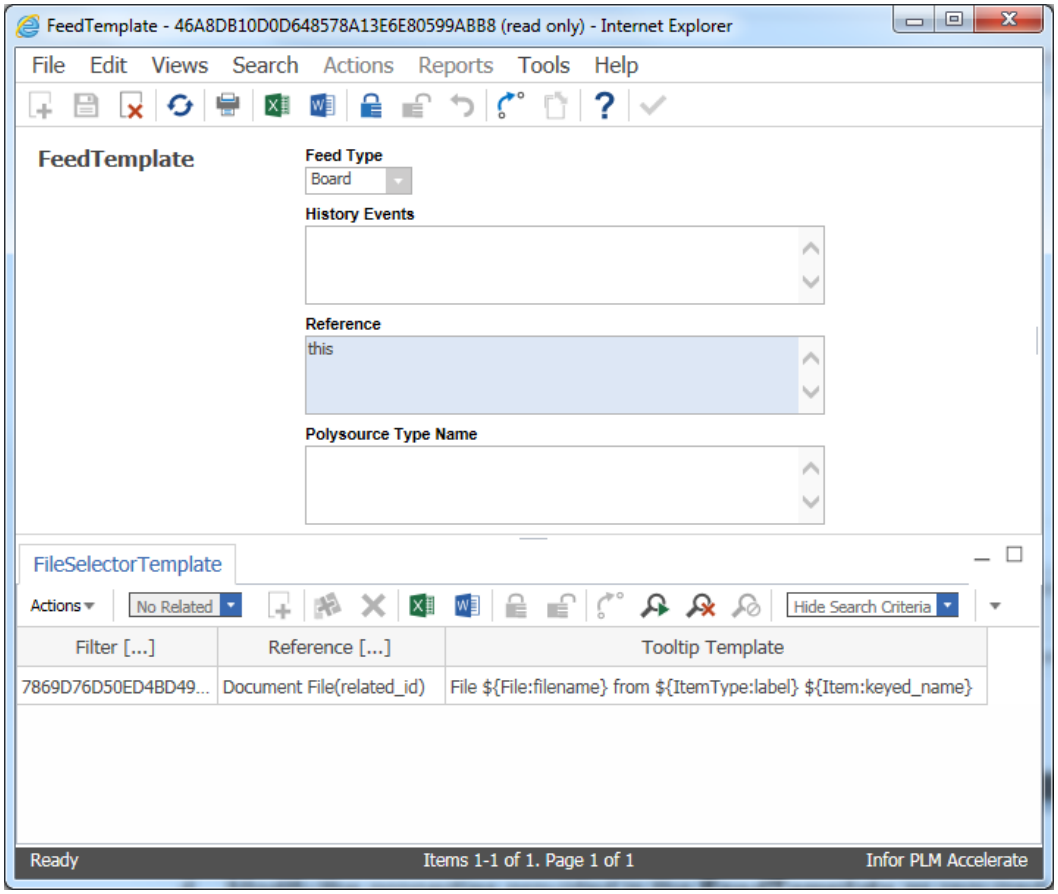


Figure 2.

4. Modify the properties provided in the **FeedTemplate** as required. Refer to the table below for the properties of the **FeedTemplate** along with its description.

Property	Description
Feed Type	There are two types of Feed: 1. **Board** – It this Feed Type is selected, it means that the Secure Messages (and History records) will be aggregated from Boards of items that are referred by reference property. 2. **Discussion** – If this Feed Type is selected, it means that for each item referenced by reference property, the Innovator executes all Feeds for the Item's DiscussionTemplate. It allows performing recursive aggregation of Secure Messages and History records from a hierarchical structure of items.
History Events	string:512) This property is used to aggregate History actions on an item together with the Secure messages. The syntax of History Events is ("|") separated by a list of Configurable History Events. For example "**Add|Update|Promote**" If the property value is "*" (asterisk wildcard) then all history records are aggregated. If the property value is blank then no history records are aggregated. The property cannot be set for Feeds of Type **Discussion**.
Reference	(text) This property is used to aggregate secure messages depending on the Reference property of an Item. The syntax of the reference is: reference = *this* | property | relationshipPath(property) | AML property = *Name of the property of type Item*. relatinshipPath - relationshipName | relationshipName/relationshipPath relationshipName - *Name of a Relationship Type* AML = *{valid AML with single top level Item that has action="get" | {custom method}"}* Following are examples of few valid references: • `this` • `p1` • `R1(p1)` • `R1/R2/R3/R4(p1)` • `<Item type="CAD" id="…" action="get" />`

Polysource type name	This defines from what specific polysource type the Feed must aggregate Secure Messages. This property is set only when the reference of the Feed refers to a polyitem (For example, a Feed on the DiscussionTemplate for an ItemType Project has the *reference=Project Docs(related_id)* which references the deliverable which is a polyitem with out-of-the-box polysource Document). Defining a polysource is essential in case the Feed has at least one *FileSelector*, as different polysource of the same Polymorphic itemtype can have different properties of type item with data source file in their structure.
FileSelectorTemplate Tab	Selecting this tab displays a FileSelectorTemplate.

FileSelectorTemplate

VC has the capability to associate one or more *FileTypes* with an item in order to allow an end user to view files using the appropriate file viewer.

This is a template for creating *FileSelector* relationships when *Feed* is created based on a *FeedTemplate.*

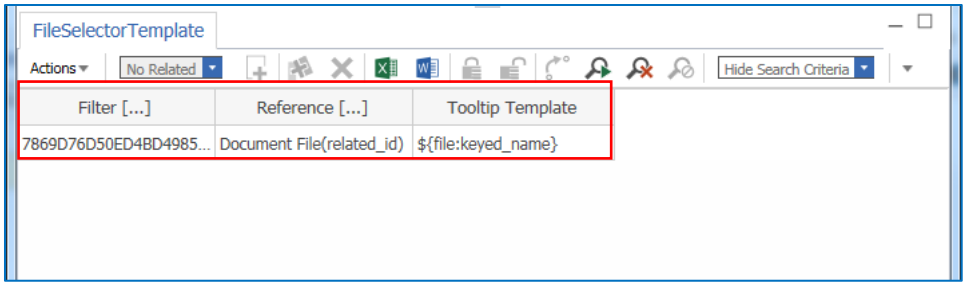


Figure 3.

In the case of the Document ItemType as shown here, a single **FileSelectorTemplate** with default properties is already added in the Relationship grid:

- Filter […]
- Reference […]
- Tooltip Template

To make configurations to the **FileSelectorTemplate**, do the following:

1. Click on in the Relationship Toolbar to add a new **FileSelectorTemplate** in the relationship grid.
2. Right click on the **FileSelectorTemplate** in the Relationship grid and select **View "FileSelectorTemplate"** from the context menu.
3. This opens the **FileSelectorTemplate** Item tear-off window.
4. Modify the properties of the **FileSelectorTemplate** as required. Refer to the table below for the properties of the **FileSelectorTemplate** along with its description.

Table 3:

Property	Description
Filter […]	(text) This allows selecting required files based on their FileType(s) and filter out files of undesired types. It is indicated by "|" separated by a list of FileType Ids. If the property is not set, then Files of any types from which there is appropriate Viewer built-in can be selected. Lists of FileTypes already assigned to standard Innovator ItemTypes are shown in Appendix A.
Reference […]	(text) This property is used to select the files selected by appropriate *FeedTemplate*. The required files are selected from its own item files that belong to its relationships. The syntax of the reference is: reference = property | relationshipPath(property) property = Name of property of type Item relatinshipPath = relationshipName | relationshipName/relationshipPath relationshipName = Name of a Relationship Type Following are few examples of valid References: • `p1` • `R1(p1)` • `R1/R2/R3/R4(p1)`
Tooltip Template	(string:128) It is a template for the tooltip. This tooltip is displayed when the user points the mouse over the appropriate file aggregated on sidebar. The tooltip template consists of a parameterized syntax with attribute or property name in it. For instance: • File ${File:filename} from ${ItemType:label} ${Item:keyed_name} – This template is used to display the keyed name of the "markup" holder item.

DiscussionTemplateView

The **DiscussionTemplateView** tab defines the secure message template styles and tooltip templates for the secure messages.

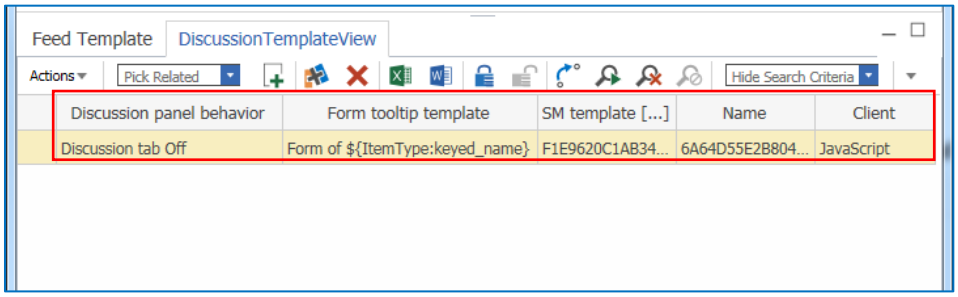


Figure 1.

It is seen that one **DiscussionTemplateView** with default properties is added in the Relationship grid:

- Discussion panel behavior
- Form tooltip template
- SM template […]
- Name
- Client (“View Client” list)

To make configurations to the **DiscussionTemplateView**, do the following:

1. Click on in the Relationship Toolbar to add a new **DiscussionTemplateView** in the relationship grid.
2. Right click on the **DiscussionTemplateView** in the Relationship grid and select **View SSVCPresentationConfiguration** from the context menu.
3. This opens the **SSVCPresentationConfiguration** Item tear-off window.

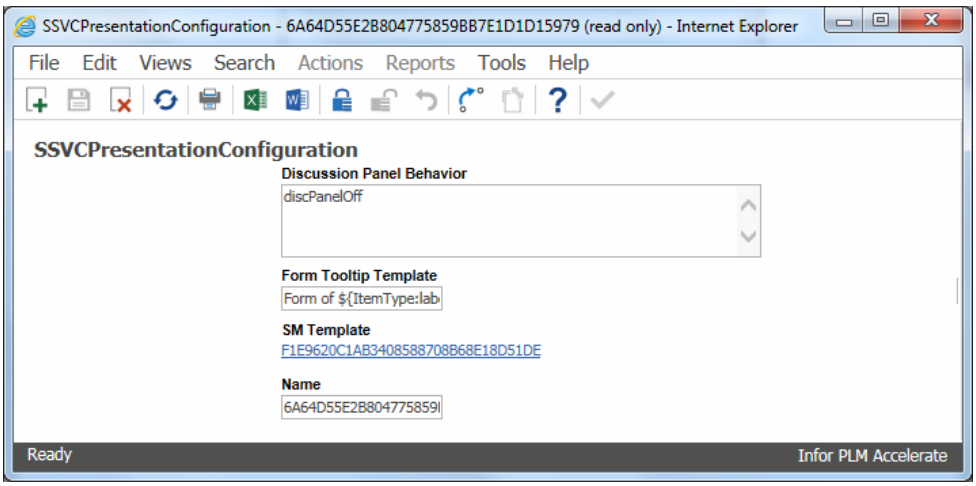


Figure 2.

4. Modify the properties provided in the **SSVCPresentationConfiguration** as required. Refer to the table below for the properties of the **SSVCPresentationConfiguration** along with its description.

Table 4:

Property	Description
Discussion Panel Behavior	This indicates the default behavior of the discussion panel. This indicates whether the Discussion Panel is automatically displayed or not when the user opens the tear-off window
Form Tooltip Template	(string:128) It is a template for the tooltip of the Item's Form. The tooltip template consists of a parameterized syntax with attribute or property name in it. For instance: • *"${ItemType:label} ${Item:keyed_name}"* where *keyed_name* is property. This is the default value specified. • *"Form of ${@id}"* where *id* is an attribute.
SM Template	This gives a reference to the Secure Message Template used to display Secure Messages in the Discussion Panel. For more information, refer to SecureMessageViewTemplate.

SecureMessageViewTemplate

This template defines the style and template used to display the Secure Messages in the discussion panel.

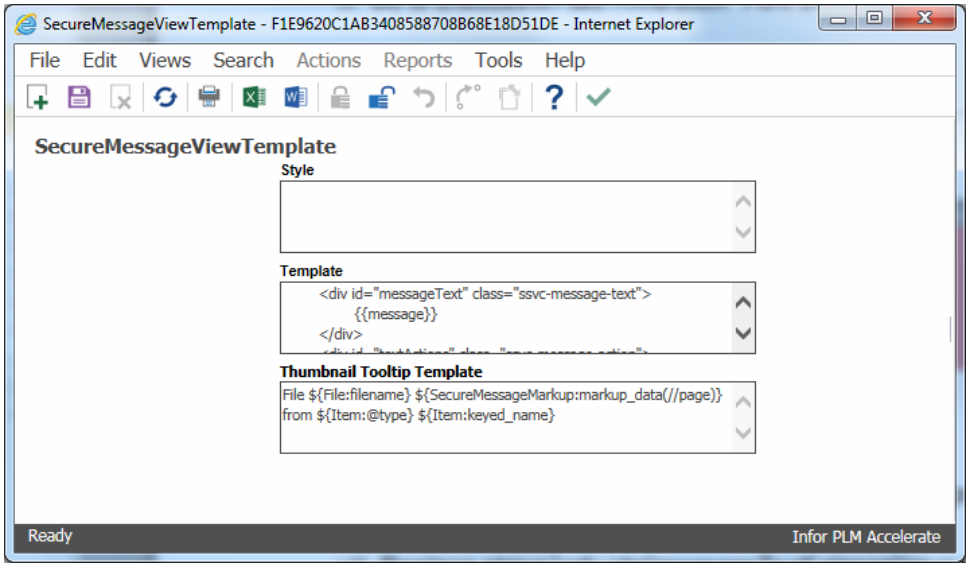


Figure 3.

Modify the properties provided in the **SecureMessageViewTemplate** as required. Refer to the table below for the properties of the **SecureMessageViewTemplate** along with its description.

Table 5:

Property	Description
Style	(text) This indicates the specific styling of the client. For example, CSS or XAML.
Template	(text) This is a template that is responsible for creating Secure Messages “mark-out”. For example, JS or XAML.
Thumbnail Tooltip Template	(ml_string:128) This is a template for the thumbnail tooltip shown in the secure message. The tooltip template consists of a parameterized syntax with the following attribute/parameters in it: • "markup holder" item • file from which thumbnail was made • the *SecureMessageMarkup* itself • data from the *SecureMessageMarkup.markup_data* For instance: File ${File:filename} ${SecureMessageMarkup:markup_data(//page)} from ${Item:@type} ${Item:keyed_name}

Individual DiscussionDefinition

An administrator can configure the *DiscussionDefinition* of an individual item that is based on the *DiscussionTemplate.* This is used when a user (administrator) explicitly expressed a desire to change how the Secure Messages are aggregated for that particular item. In case the user wants to change at least one of *Feeds* that is associated with the *DiscussionTemplate* for this particular item. Thus, two items of the same ItemType can have discussions that are differently defined.

To change the settings in the individual item using *DiscussionDefinition*, do the following:

1. Open an instance of an item that has been enabled for Secure Social.
2. Click on **Actions** from the Item toolbar and select **Change Discussion Definition**.

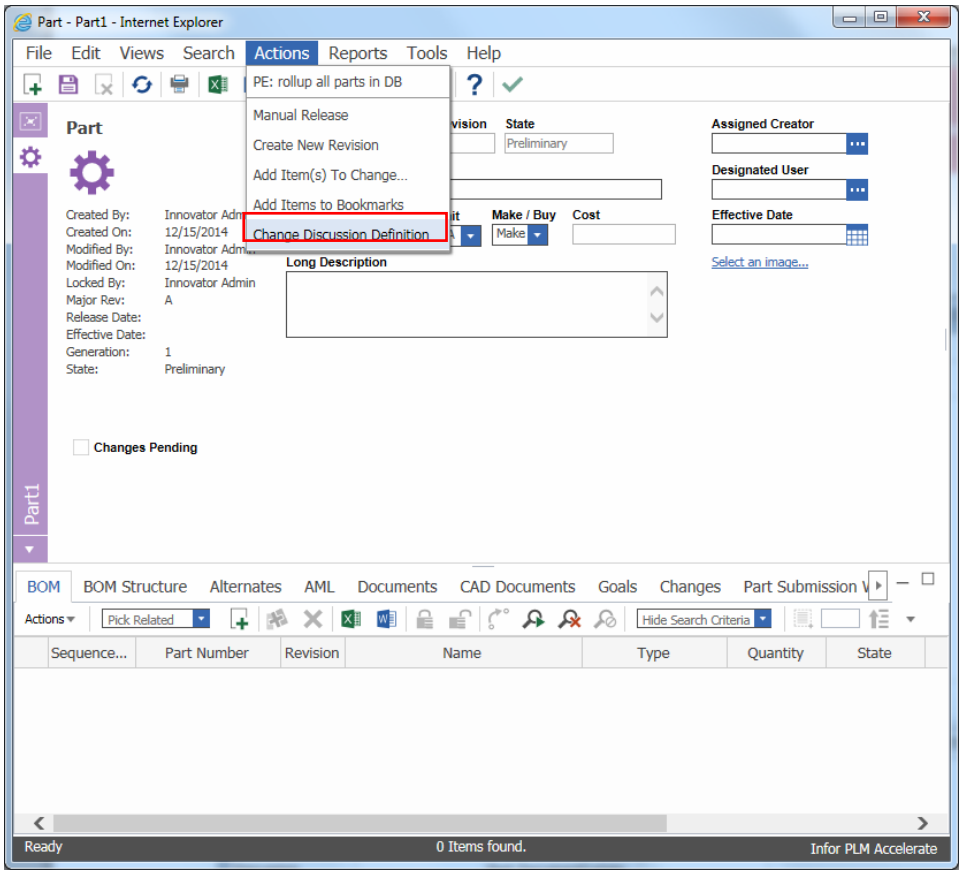


Figure 4.

3. This opens the **DiscussionDefinition** item tear-off window.

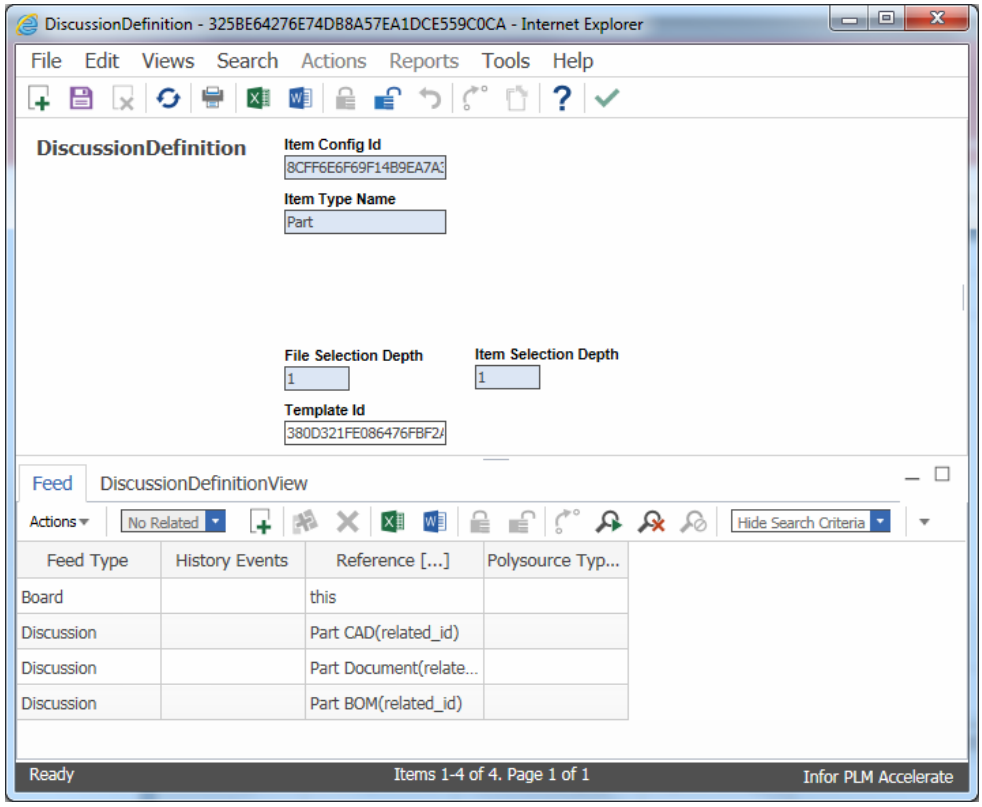


Figure 5.

4. Modify the properties of the **Feed** tab to have multiple feeds used to aggregate secure messages in the discussion panel. For more information about the configurations that can be made in the **Feed t**ab, refer to FeedTemplate.
5. Modify the properties of **DiscussionDefinitionView** tab to change the style, template and behavior of the Discussion Panel. For more information about the configurations that can be made in the **DiscussionDefinitionView** tab, refer to DiscussionTemplateView.
6. Save, Unlock and Close the window.

Chapter 6. Display and Styling Control

The administrator can configure how the different aspects of the standard Visual Collaboration User Interface can be displayed.

Change the Secure Message Template Style

To change the Secure Message Template Style, do the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to **Administration→ItemTypes**.
3. Run the search and open a secure social enabled ItemType for edit, for example, **Document**.
4. In the ItemType window, select the **SecureSocial** tab.
5. Right click on the **DiscussionTemplate** in the Relationship grid and select "**View SecureSocial"** in the context menu.
6. In the **DiscussionTemplate** item tear-off window, click on the **DiscussionTemplateView** tab.
7. Click on the ItemType ID in **SM template […]** property.

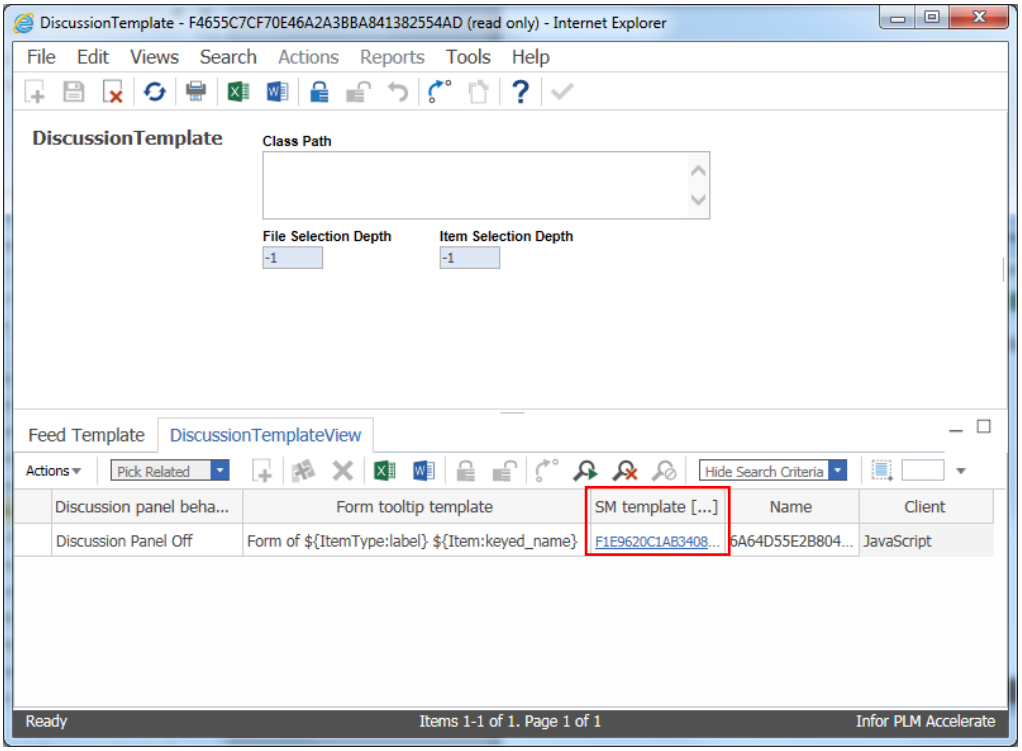


Figure 6.

8. This opens a **SecureMessageViewTemplate** item tear-off window.

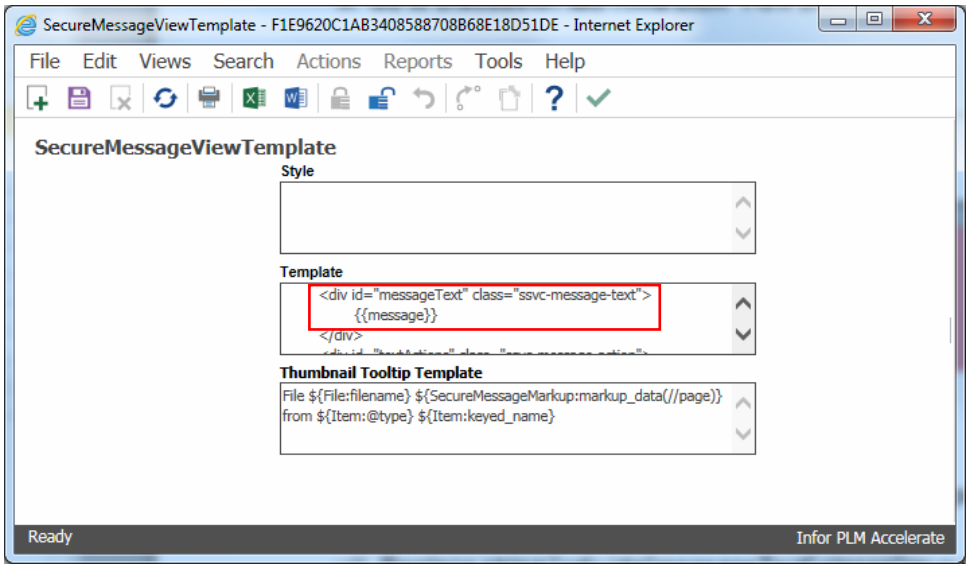


Figure 7.

9. In the **Template** field, for example, replace string:

   ```
   <div id="messageText" class="ssvc-message-text">
   ```

   with

   ```
   <div id="messageText" class="ssvc-message-text" style="color: red";">
   ```

10. Save, Unlock and Close the windows.

Note:	The described subsequence of steps will result in applying change in the style of displaying secure messages for all the ItemTypes from which modified item of SecureMessageViewTemplate is referenced from. In Order to apply change to items of one specific type only – new item of SecureMessageViewTemplate should be created (modified, as desired) and referenced from mentioned itemtype (DiscussionTemplate→DiscussionTemplateView→SM template […]).

Set Sidebar Color for ItemType

The admin can set a color that is used for the vertical sidebar in the item tear-off window, as well as the vertical stripes shown on the right of all comments in the Discussion Panel. This color helps users to identify the type of item they are looking at on the screen. For standard ItemTypes the colors are set to be similar to the color of the ItemType's icon (e.g. Part is set to purple).

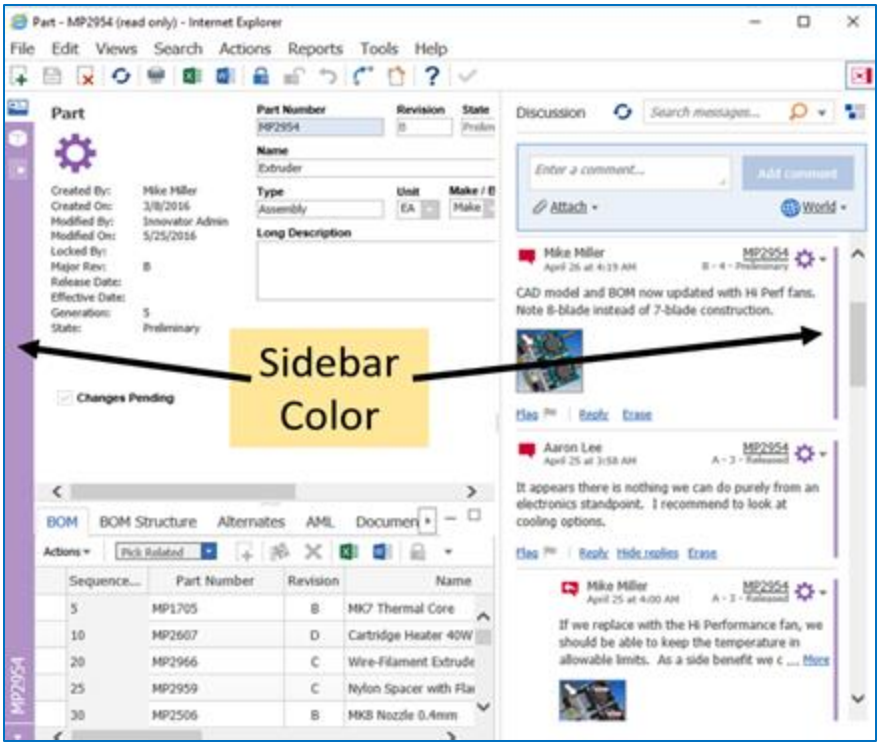


Figure 8.

To set the sidebar color for an ItemType, do the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to **Administration→ItemTypes**.
3. Run the search and open a secure social enabled ItemType for edit.
4. In the ItemType window, select the **View Client** tab.

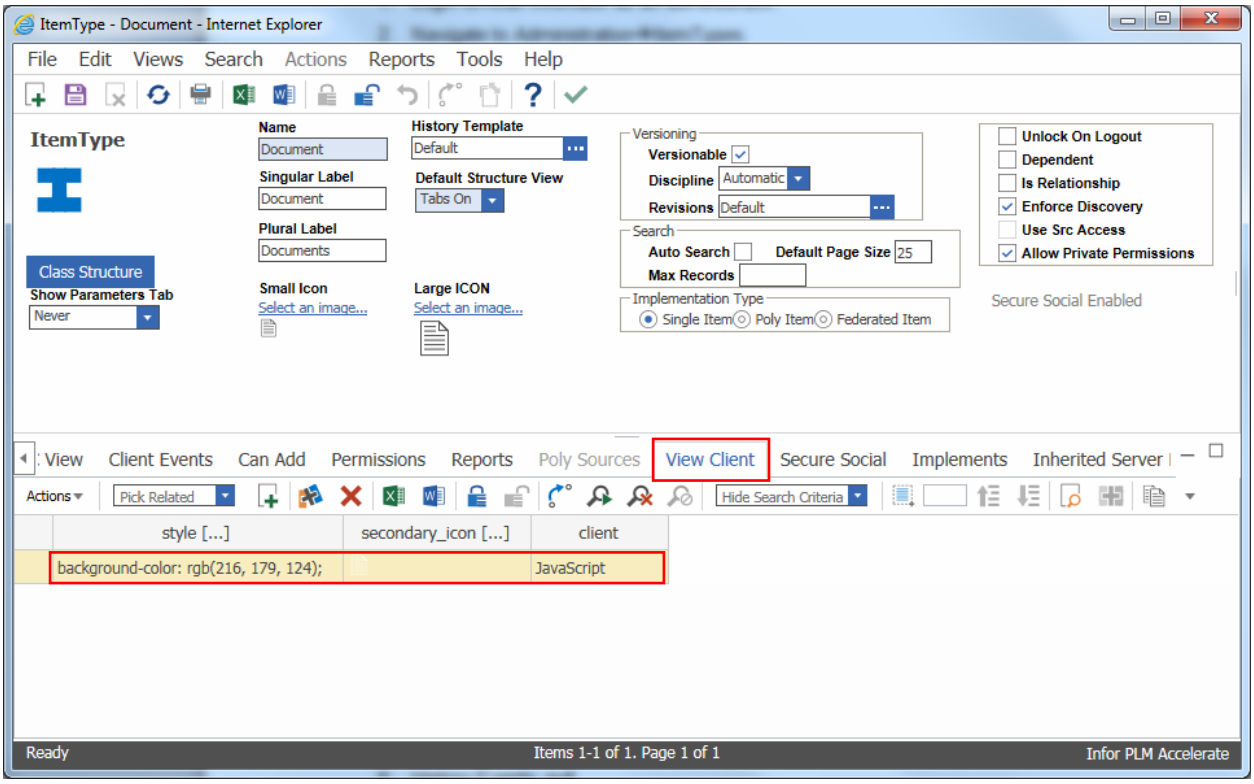


Figure 9.

For standard ItemTypes a single **PresentationConfiguration** template with default properties is listed in the Relationship grid:

- style […]: background-color: rgb(216, 179, 124);
- secondary_icon […]
- Client: JavaScript

5. Right click on the **PresentationConfiguration** in the Relationship grid and select "**View PresentationConfiguration"** in the context menu.

This opens the **PresentationConfiguration** item tear-off window.

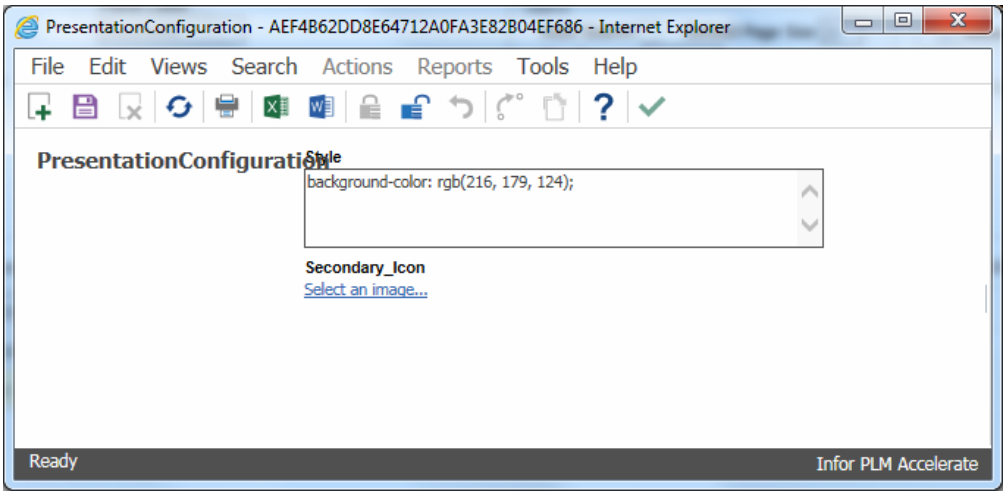


Figure 10.

6. Modify the values of **Style** field.

Note that this field is in CSS format. Either RGB or RGBA syntax is acceptable:

- Example of RGB syntax: background-color: rgb(2126, 179, 124);
- Example of RGBA syntax: background-color: rgba(0, 114, 198, 0.6);

7. Save, Unlock and Close the windows.

Note: The setting for "Secondary Icon" was used prior to Infor PLM Accelerate 11 SP5 to display an inverted (reverse color) icon in the sidebar and discussion panel, but starting with 11 SP5 the styling has been changed so that this icon is no longer required.

Configure Form Tooltip Text

Tooltips are configurable by an administrator, by defining a parameterized string.

To configure "**Form**" tooltip text, do the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to **Administration→ItemTypes**.
3. Open the **Document** ItemType for edit.
4. Select the **Secure Social** tab.
5. Right click on the **DiscussionTemplate** and select "**View SecureSocial**" from the context menu.
6. Click on the **DiscussionTemplateView** tab.

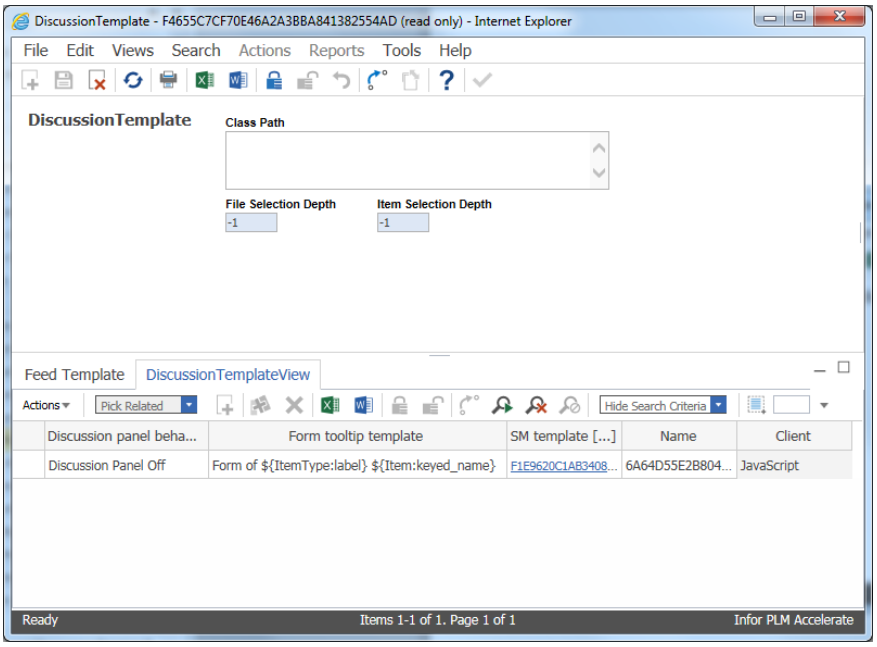


Figure 11.

7. Right click on the Relationship grid and select "**View SSVC PresentationConfiguration**" in the context menu.
8. This opens the **SSVCPresentationConfiguration** item tear-off window.

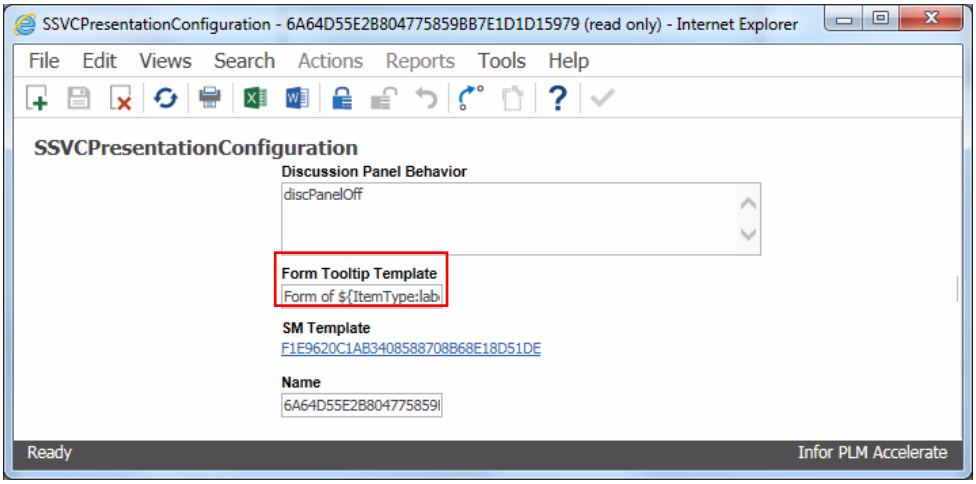


Figure 12.

9. In the **Form of Tooltip Template** field, for example, replace the text from:

   `Form of ${ItemType:label} ${Item:keyed_name}`

   to

   `This is the form of ${ItemType:label} ${Item:keyed_name}`
10. Save, Unlock and Close the windows.

Configure File Tooltip Text

Tooltips are configurable by an administrator, by defining a parameterized string.

To configure tooltip text of File Selector, do the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to **Administration→ItemTypes**.
3. Open the **Document** ItemType for edit.
4. Select the **Secure Social** tab.
5. Right click on the **DiscussionTemplate** in the Relationship grid and select "**View SecureSocial"** in the context menu.
6. In the **DiscussionTemplate** item tear-off window, click on the **FeedTemplate** tab.
7. Click on in the Relationship Toolbar to add a new **FileSelectorTemplate** in the relationship grid.

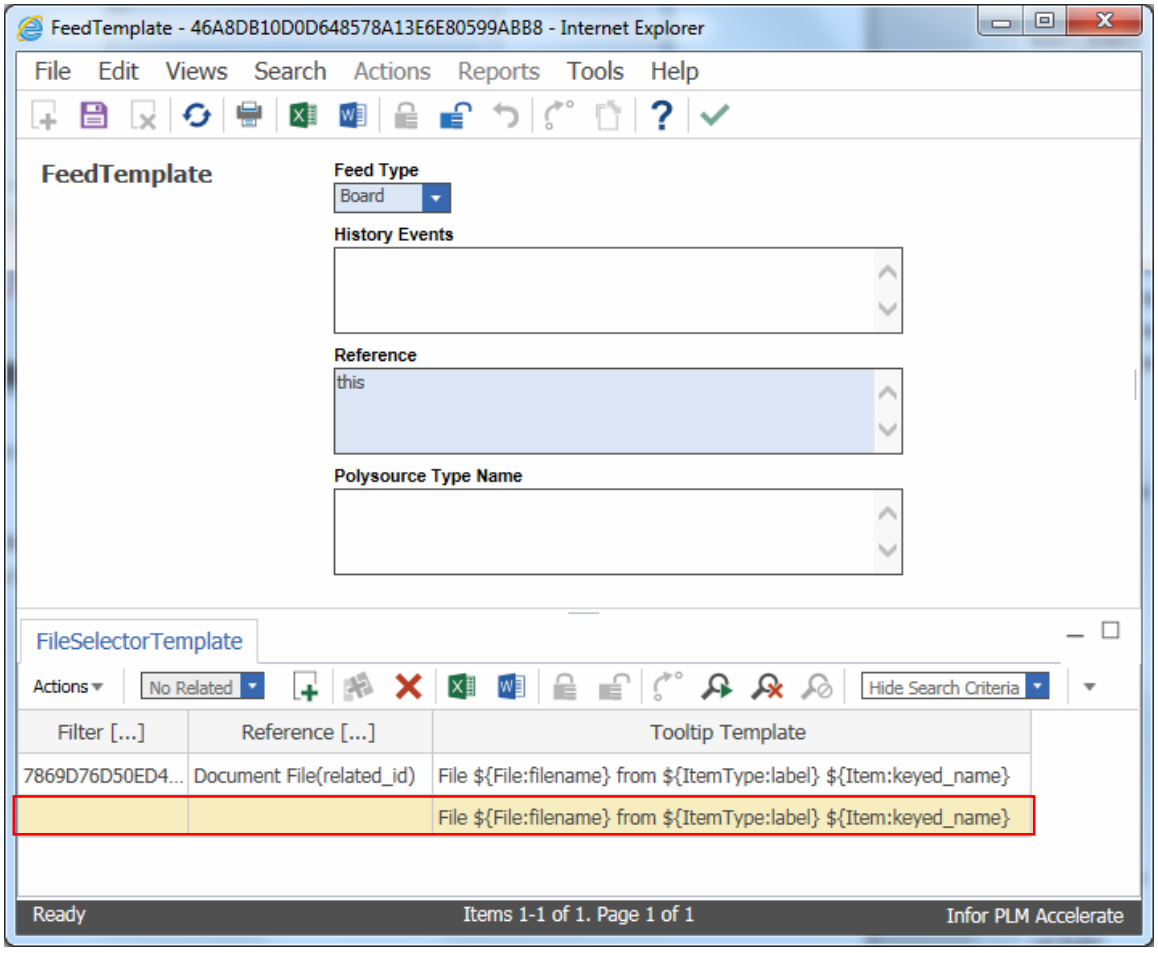


Figure 13.

8. Double click on the properties in the columns to modify them as required.
    a. **Filter […] –** Input the file type Id

b. **Reference […] –** Input the file “related_id” value
c. **Tooltip Template –** Configure the Tooltip template, for example,

Replace

```
File ${File:filename} from ${ItemType:label} ${Item:keyed_name}
```

To

```
Test File ${File:testpdf} from ${ItemType:testssvc}
${Item:pdfdoc}
```

11. Save, Unlock and Close the windows.

The following table shows the configuration options and default settings:

Type	Parameterization Options	Default Setting	Example
3D Viewer with single file	• label property of container ItemType • Any property of the current Item • Any property of the File • Filename without extension, as a calculated value	“File “ <filename_no_ext> “ from “<itemtype label> “ “ <item keyed_name>	File StepStruder from CAD Document D-24811
PDF Viewer with single file	• label property of container ItemType • Any property of the current Item • Any property of the File • Filename without extension, as a calculated value	“File “ <filename_no_ext> “ from “<itemtype label> “ “ <item keyed_name>	File Test Plan from Document D12345
Image Viewer with single file	• label property of container ItemType • Any property of the current Item • Any property of the File • Filename without extension, as a calculated value	“File “ <filename_no_ext> “ from “<itemtype label> “ “ <item keyed_name>	File Image001 from Document D35135

Setting Visibility of Sidebar and Discussion Panel

The Visual Collaboration User Interface for an individual item tear-off window consists of a sidebar and a discussion panel. An admin can choose to display this interface for a specific ItemType, either overall or on the basis of Identity or classification. Note that this is independent of whether the ItemType is enabled for Secure Social.

An admin can configure this setting by doing the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to Administration→ItemTypes.
3. Open a secure social enabled ItemType, for example, **Document** ItemType for edit.
4. Select the **Views** tab.

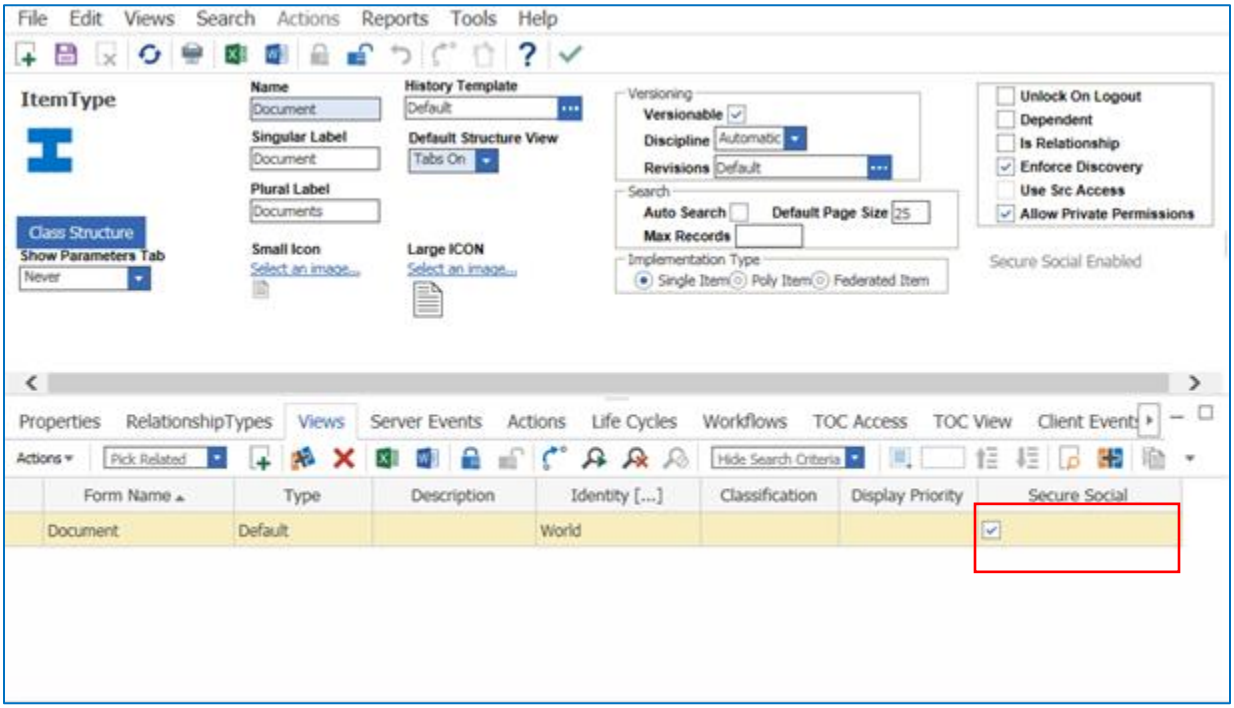


Figure 14.

The **Secure Social** property in the relationship grid is enabled (set to 1) by default. This means that for view type "**Default**" for a **Document** Item, the visual collaboration user interface is visible to an end user.

Note: For the remaining view types, this property is disabled (set to 0) by default.

5. Disable this property if you need to hide the visual collaboration interface for that specific view.
6. Save, Unlock and close the window.

Chapter 7. Notifications

An important feature of Visual Collaboration is the ability to notify users when they have new messages available to read. Notification is handled in two ways, directly within the Infor PLM Accelerate client, and through email.

Set up of Conversion Server and Agent Service

Notification capability relies on the Conversion Server and Agent Service, so these must be installed and available to the current Infor PLM Accelerate environment. See the *Conversion Server Setup Guide* and *Installation Guide* (for Agent Server) for details.

Once these have been installed, you must configure the conversion.config file located within the AgentService folder. The following additions must be made to the file:

```
<ProcessingCycles>
  <cycle DB="database" User="user" Password="password" Interval="20000"
  MaxBatch="5" />
  <cycle DB="database" User="user" Password="password" Interval="20000"
  MaxBatch="1" ConversionRuleName="SSVC.Email.Digest.Notification.Rule" />
  <cycle DB="database" User="user" Password="password" Interval="5000"
  MaxBatch="50" ConversionRuleName="SSVC.Notification.Rule" />
</ProcessingCycles>
```

Substitute appropriate values for your environment for the items in blue.

Once these edits have been made, restart the Agent Service

Enabling Notifications

There is a “master switch” available only to Administrators, which turns on (or off) the overall Visual Collaboration Notification mechanism. This is located in the Actions menu as shown below.

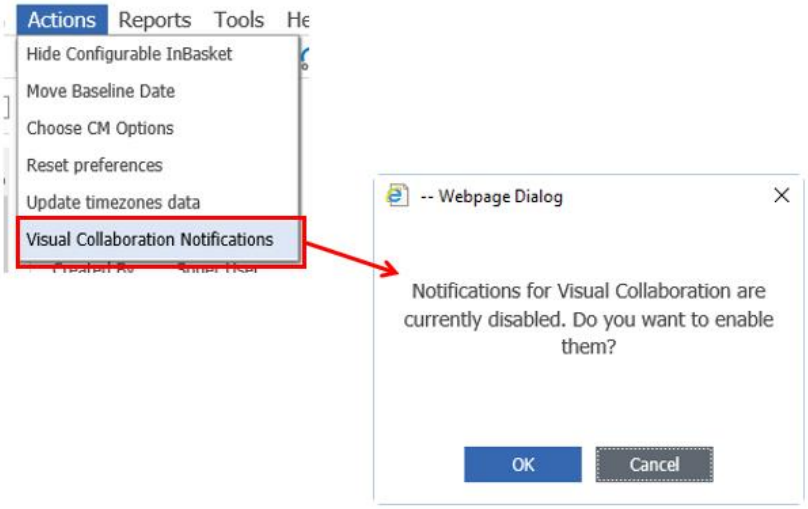


Figure 15.

Setting Polling Interval

The administrator can control the polling interval for notifications, this is set by a Variable named MessageCheckInterval. The value is set in milliseconds, with the default of 900000 (15 minutes).

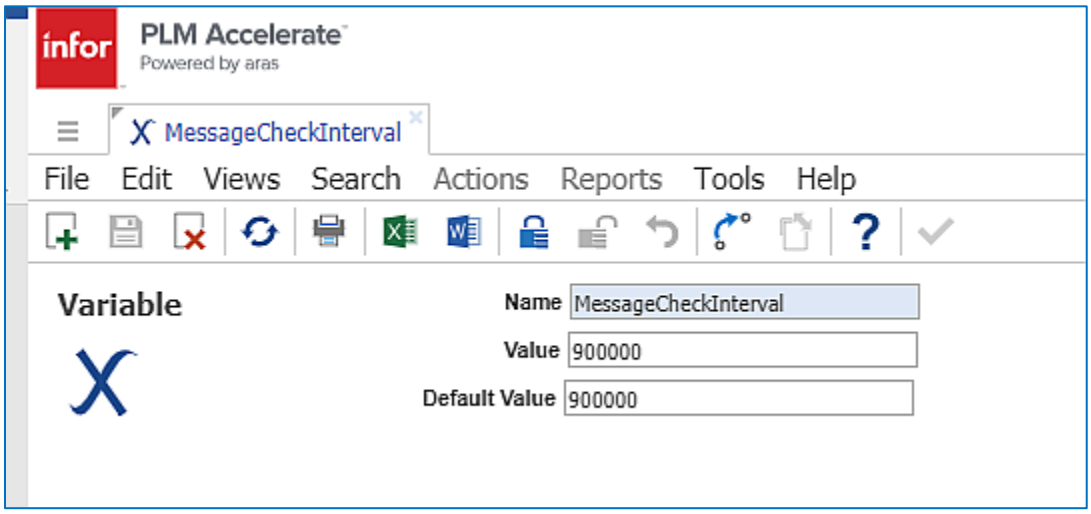


Figure 16.

Notification Preferences

Preference settings for notifications are contained within the Secure Social tab of the Preferences ItemType. Options include:

- Notification within the web client
- Notification by email on every message
- Notification by email as a digest

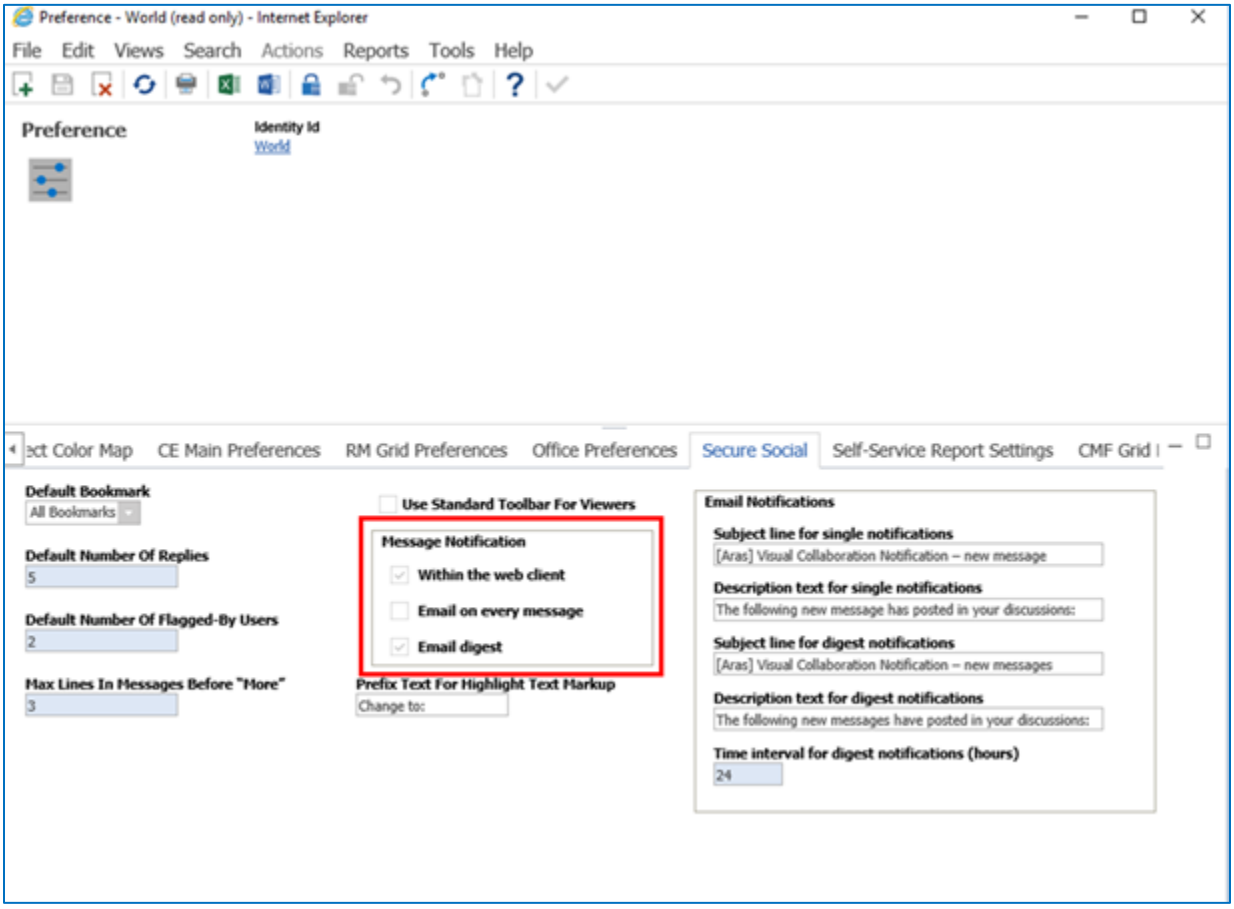


Figure 17.

By setting these values for the World identity, the administrator can set the default values for all users. Users do not access the Preferences ItemType directly, there is a simple Preferences dialog located in My Discussions for them to set their notification preferences:

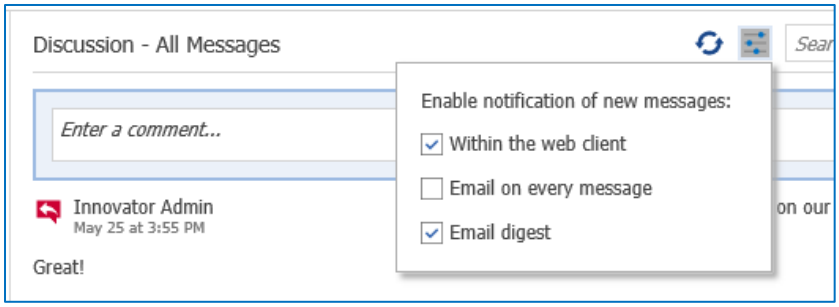


Figure 18.

When the user changes the values here, it sets the Preferences values for their Identity. Note that it is possible to set all three options independently.

Notifications in the Web Client

When notifications are enabled and the user has selected the option to see notifications in the web client, the notifications will appear in the lower-right corner of the Infor PLM Accelerate client:

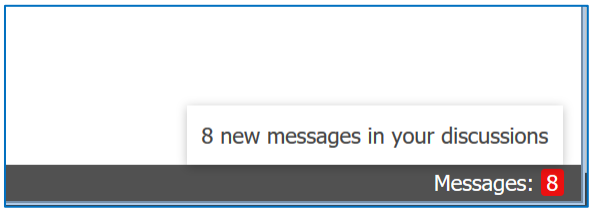


Figure 19.

If the user clicks on the pop-up notification, they will be re-directed to their My Discussions screen to see the new messages.

Configuration of Email Notifications

Use of email notifications requires the general setup of email capability within Infor PLM Accelerate. If you have any questions about setting up an email server with Infor PLM Accelerate, please go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

Configuration of email notifications specifically for Visual Collaboration is done in Secure Social tab of the Preferences ItemType for World Identity:

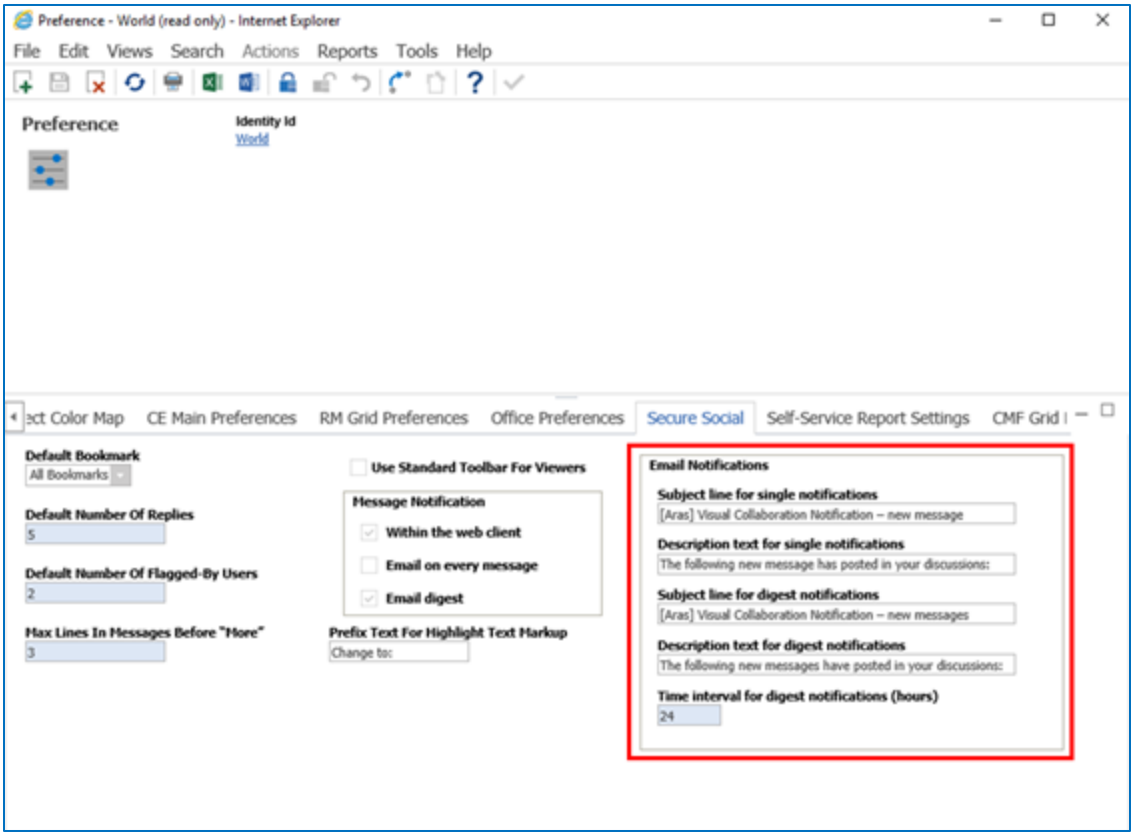


Figure 20.

Settings include:

Subject line for single notifications

- The text to display in the subject line for emails sent on a per-message basis

Description text for single notifications

- The text to display in the email message body for emails sent on a per-message basis

Subject line for digest notifications

- The text to display in the subject line for digest emails

Description text for digest notifications

- The text to display in the email message body for digest emails

Time interval for digest notifications (hours)

- The time interval (in hours) at which digest emails will be sent. Note that this interval must be the same for all users that have chosen to receive digest emails.

Result of Email Notifications

Assuming that users have enabled one or both types of email notification, and have an email address defined for them, they will receive emails that look as follows:

Single emails

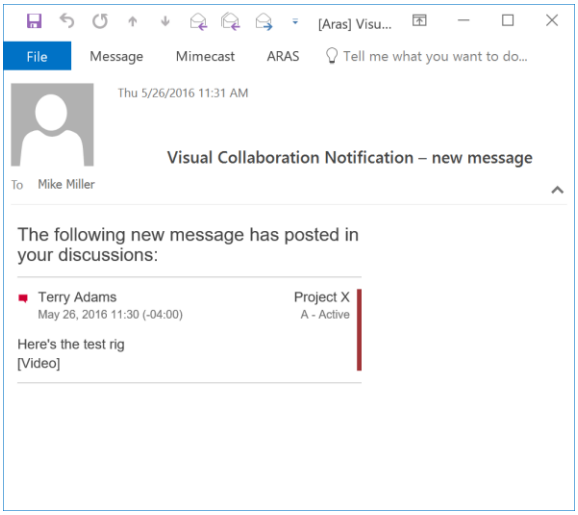


Figure 21.

Digest emails

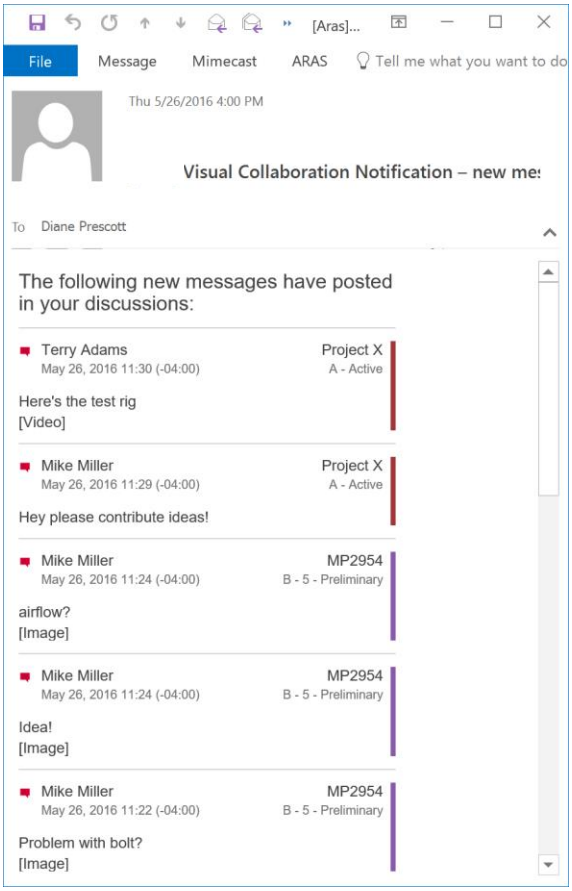


Figure 22.

Note that some details have been removed in the email content, compared to the corresponding live content in the web client, such as icons and thumbnails.

Chapter 8. Message Visibility

By default, any user with “Get” permissions to an item can see messages that have been posted on the Board of that item. However, it is sometimes desirable to restrict more tightly the visibility of messages on items. This can be achieved through the use of message visibility control, also known as the “Share with” control.

When this option is used, all users with “Get” permissions to an item **and** who belong to the selected Identity will be able to see the message.

ItemType Configuration Options

The settings for configuration of message visibility are found on the Discussion Template, as described in full in section 0 above.

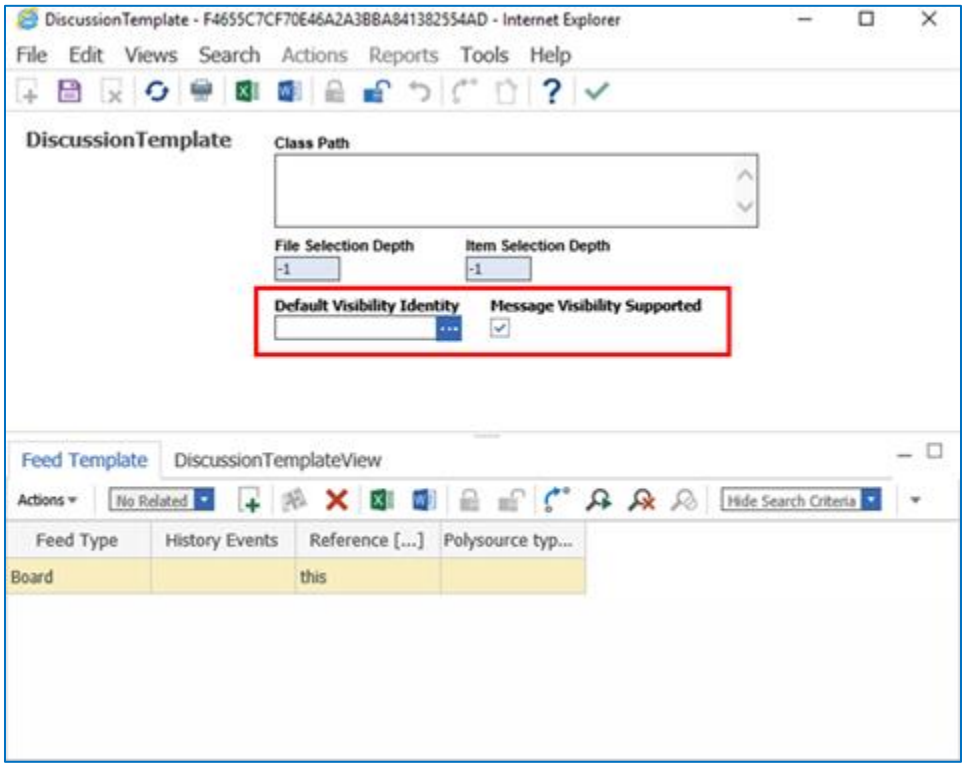
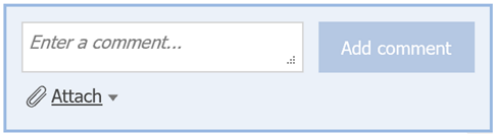
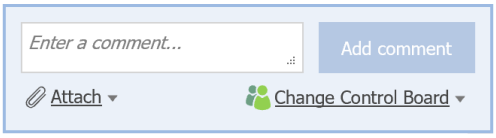


Figure 23.

Property	Description
Default Visibility Identity	(item: Identity) Identity to be used as the default shown in the "Share with" selector. A blank value means "World"
Message Visibility Supported	(boolean) if ON, the "Share with" selector is exposed in the Discussion Panel of any items of the given ItemType. If OFF, the selector is not exposed and all messages are set to visibility = World.

Based on these settings you can achieve the following behaviors for the "Share with" selector:

Settings	Behavior
Message Visibility Supported = OFF	
Message Visibility Supported = ON **Default Visibility Identity = (blank)**	
Message Visibility Supported = ON **Default Visibility Identity = Change Control Board**	

The point of the Default Visibility Identity is to provide a way to restrict messages by default to a smaller subset of users, rather than forcing the user posting the message to always have to remember to set something other than "World".

Identity Selection

When the "Share with" selector is enabled, users will be able to select any available Identity to share the message with. This can be an alias identity (person) or non-alias identity (group). The following identities are not available for the user to select:

- System identities (Team identities, Forum Reader, etc.)
- The user's own identity (Sharing a message with one's self is not supported)

When the user initially picks the selector, a list of certain pre-set options will be available, as shown here:

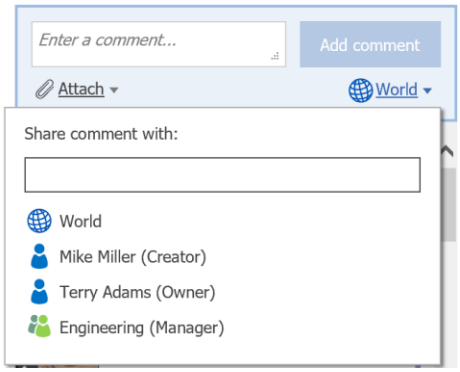


Figure 24.

This list will include:

- World
- The item's Creator (created_by_id)
- The item's current Owner (owned_by_id), if set
- The item's current Manager (managed_by_id), if set
- The ItemType's default visibility identity, if set

These presets just make it easier to pick some of the common identities that may be used in typical messaging situations. Note that if assignments of Owner or Manager change at a later time, it does not change the visibility of already-created messages (all messages are set to a specific Identity at time of creation).

If the user starts to type a name, the system will display matching Identity names. At any point the user can pick the desired Identity name.

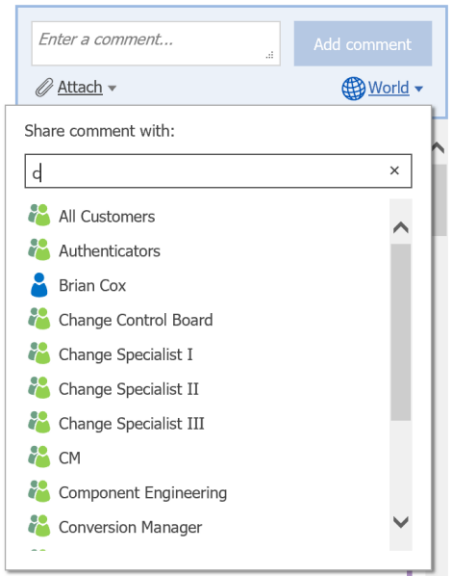


Figure 25.

Display of Posted Messages

When a message is posted with the “Share with” Identity set to something other than World, an icon will be displayed in the lower-left corner of the message. By hovering over this icon, a tooltip will appear which shows the shared-with identity, as shown below:

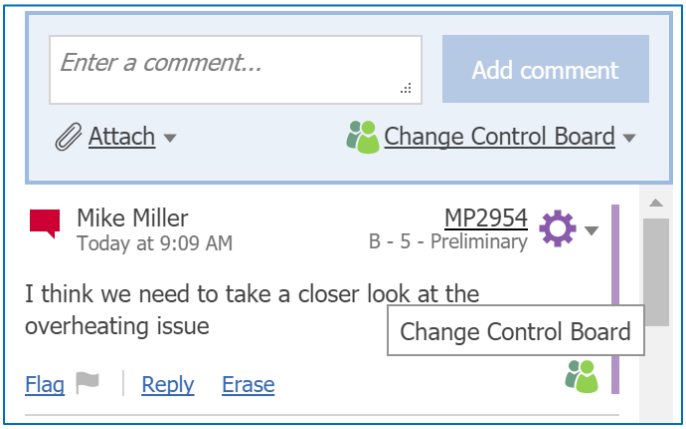


Figure 26.

For Reply messages, the tooltip will show both the original sender and the shared-with Identity.

Note: The original sender of a message may or may not be part of a group identity that a message is sent to. Users should be aware that all Reply messages are visible both to the original sender and the group the message was sent to.

Special Handling for Private Messages

When message visibility is set to an alias Identity (a single person), special handling is used to make sure that the recipient will be able to see this “private message”. Display of messages in a user’s “My Discussions” window is based on whether the user is following either the sender of the message, or the item the message is posted on, in his Bookmarks. Notification is in turn based upon what message appear in the user’s “My Discussions” window. So if the “recipient” of a private message is not following the sender or the item in his Bookmarks, he would not see the message in his My Discussion window. To avoid this issue, the system automatically adds the message to the user’s My Discussion window, within the bookmark “My Messages”. This means also that the message will be included in any notifications.

Messages where the “Share with” Identity is set to a group (non-alias Identity) do not have any such special handling.

Chapter 9. Managing Forums

Forums are items that users interact within only from within the My Discussions window. They provide a way to have a general discussion topic, and also can aggregate discussion content from items and saved searches contained within them. End user functionality for Forums exists within My Discussions, and also in the “Add Item(s) to Bookmarks” action. Special administrator-only capabilities for Forums are detailed in this section.

Force Users to Follow Forums

Administrators have access to Forums in the Infor PLM Accelerate section of the TOC. Administrators can force other users to follow forums from here. The reason for forcing users to follow Forums is to make sure that some or all users within an environment have the same discussion topics available to them.

An admin can force a forum to reside on a user’s bookmarks by doing the following:

1. Login to Infor PLM Accelerate as an administrator.
2. Navigate to **Administration → Secure Social→ Forums** in the TOC.
3. Run a search to see all the forums created by the users.

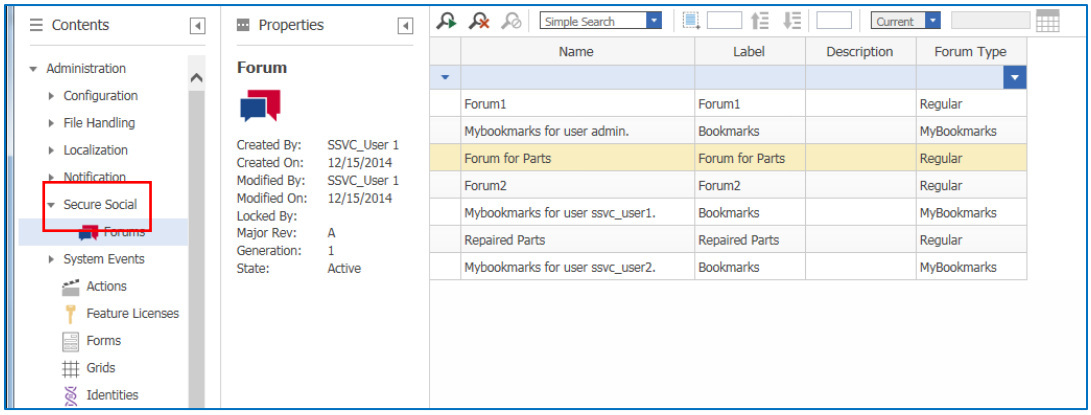


Figure 27.

4. Right click and open the required **Forum** for edit.

Note: The selected forum should be a type “Regular” forum.

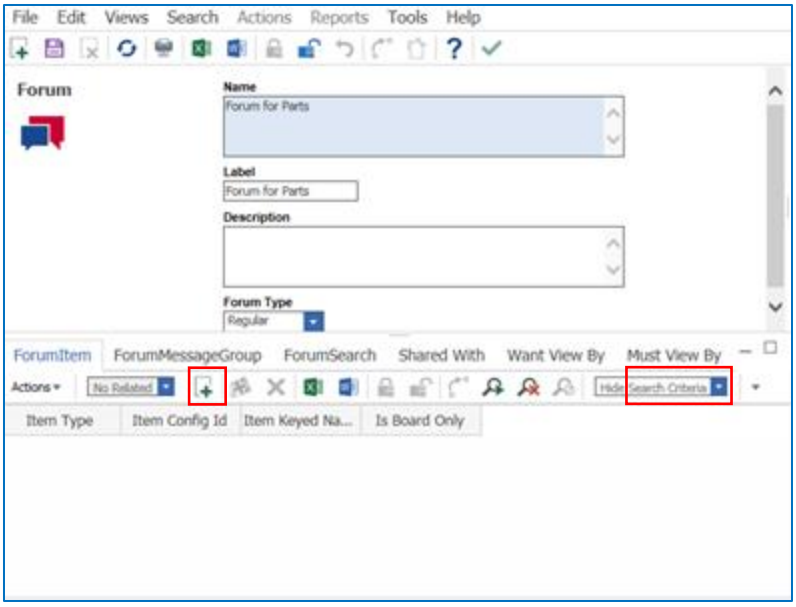


Figure 28.

7. Select the Must View By tab and then click on icon in the Relationship toolbar.
8. Add the required Identities to the property **must_view_id [...]**.

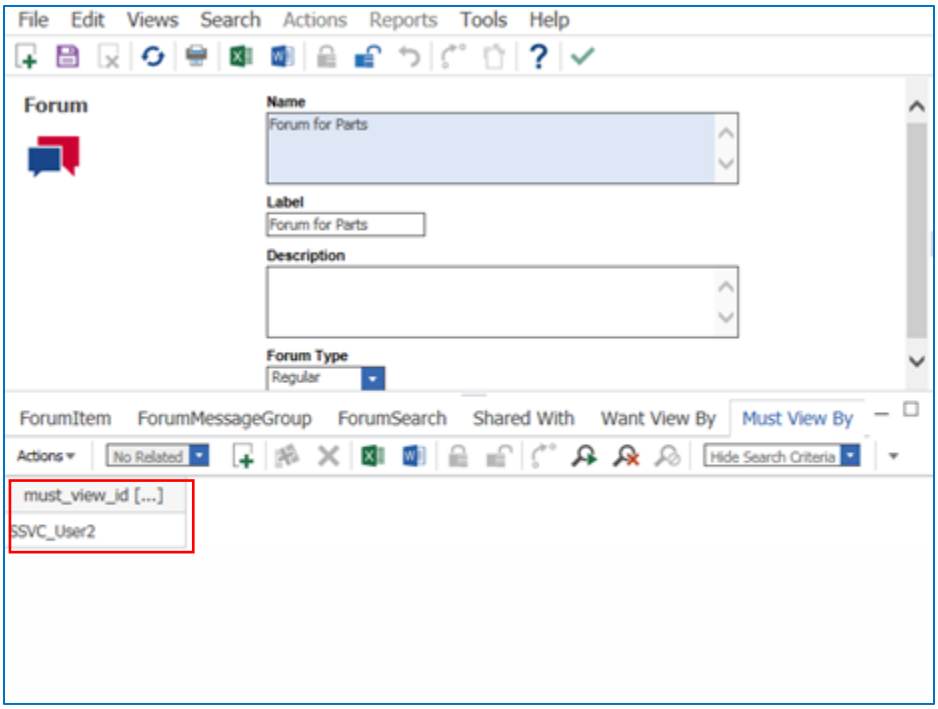


Figure 29.

9. Save, Unlock and Close the window.

Set a Forum Inactive

The administrator has the ability to set a Forum to an inactive state. The admin can do this by using **Promote** button on the Item toolbar.

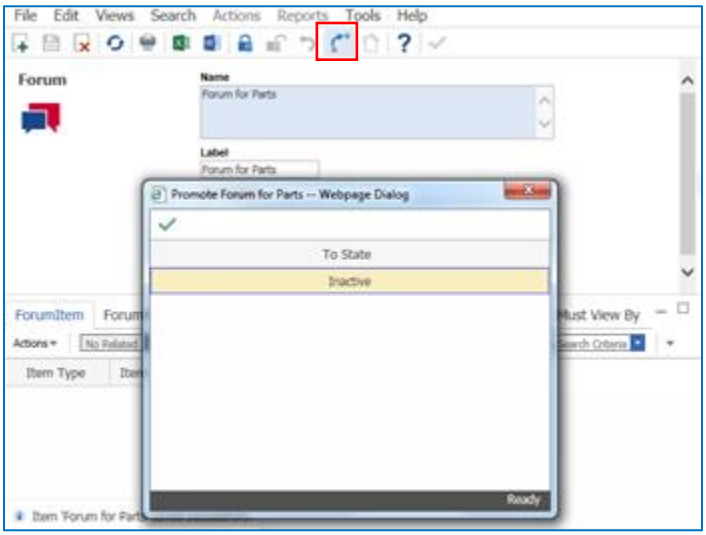


Figure 30.

When a Forum is in inactive state, it automatically disappears from any user's Bookmarks. It is also not visible within the Follow Forum selector.

Delete a Forum

The administrator has the ability to delete a Forum. The admin can do this by using the **Delete** button on the Item toolbar.

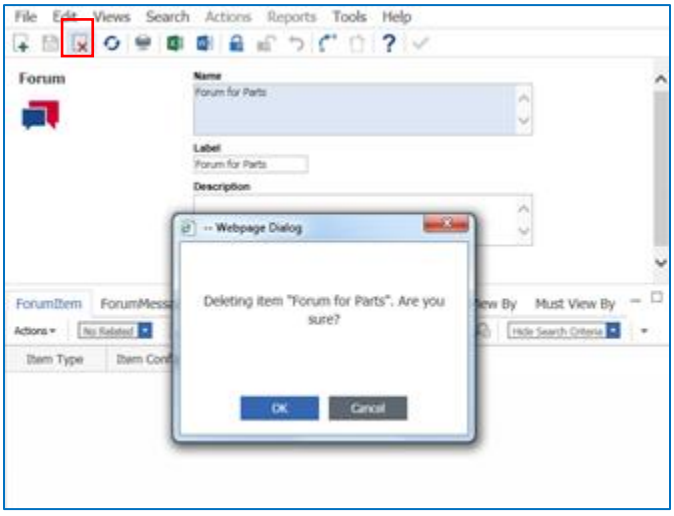


Figure 31.

When a Forum is deleted by an admin, it is automatically deleted from any user’s Bookmarks without giving any warning to the user.

Chapter 10. Viewer Configuration

Visual Collaboration supports viewing of file content in a variety of common formats. Different viewers with capabilities uniquely suited to the different file formats are provided. Options for configuring the behavior of the viewers are described in this section.

Available Viewers

Infor PLM Accelerate provides five different viewers, depending on the type of file being viewed. Viewers are access from the sidebar of the item window. The following configuration steps are necessary in order for files to be accessible on the sidebar:

- The ItemType must be enabled for Secure Social (see Chapter 4)
- A FileSelectorTemplate must be defined, and set to include in the IDs of desired FileTypes in the *Filter* property (see section 0)
- A file with the specific FileType must be added to the Item at the *Reference* location as specified on the FileSelectorTemplate

The following viewers are provided, and support the listed FileTypes:

Sidebar Display	Viewer	FileType(s)	Extension(s)
	3D	HOOPS Web Model	hwf
	PDF	PDF Document	pdf
	Image	JPEG Image	jpg,jpeg
		PNG Image	png
		GIF Image	gif
	Advanced Image	TIFF Image	tif,tiff
		BMP Image	bmp
	Comparison	Special viewer created dynamically when using the Compare function on PDF or Advanced Image files	

Note that any of these FileTypes can be supported for viewing on **any** Infor PLM Accelerate ItemType, given the proper configuration.

Note: Standard ItemTypes are not currently configured to display TIFF and BMP files. Administrators must configure ItemTypes to include these FileTypes if desired.

Converting and Viewing 3D CAD Files

The use of the 3D viewer requires conversion of native 3D CAD models to the format used by the viewer (hwf). This is done using the 3D CAD to PDF Converter, which runs inside the Conversion Server. This converter takes any standard native 3D CAD files as input and runs a conversion process in the background. In the typical case, these input native 3D CAD files are coming from an CAD Connector.

Note: For more information on the CAD to PDF Conversion Server, refer to the topic "*Configuring the Conversion Server"* from the document *Infor PLM Accelerate 11.0 CAD to PDF Converter Setup Guide*.

By default the 3D CAD to PDF Converter will produce as output the following set of files, which will be set to the listed properties on the CAD Document item:

FileType	Extension	CAD Property	Purpose
HOOPS Web Model	hwf	view_file	Viewing within Visual Collaboration
PNG Image	png	thumbnail	Thumbnail image
3D PDF Document	pdf	viewable_file	Viewing within Adobe Reader
PRC Model	prc	monolithic_model_file	Neutral 3D representation

Note that unlike the PDF viewer, the 3D viewer does not view the 3D PDF file directly. The 3D PDF file is made available for other purposes, such as sending outside the company to those without direct access to Infor PLM Accelerate, for viewing in Adobe Reader. If the requirement is just to view 3D inside Visual Collaboration, the generation of the 3D PDF file can be disabled. See the **Infor PLM Accelerate 11.0 CAD to PDF Converter Setup Guide** for details. This also means that 3D viewing in Visual Collaboration cannot be achieved just by attaching a 3D PDF file to an item. The 3D viewer requires hwf format, which has to be generated by the converter. Please contact Infor Support with any questions regarding the ability to convert and view 3D models.

Setting Proper FileType for 3D PDF Files

The PDF viewer is only designed to view “standard” PDF files and not 3D PDF files. Therefore it is important that 3D PDF files be set as a separate FileType in Infor PLM Accelerate, because otherwise the PDF viewer will attempt to view them. The two standard FileType definitions existing in Infor PLM Accelerate, both with the extension “pdf”. 3D PDF files generated by the 3D CAD to PDF Converter are automatically set to the FileType “3D PDF Document”. However, if a 3D PDF file is manually attached to an item, it will be set to the FileType “PDF Document”. Administrators should be aware that files manually attached in this way may show up in the sidebar as an available PDF file for viewing. Users will see only a static image of the 3D model in this case.

FileType	Description	Ext.
PDF Document	Adobe Acrobat PDF Document	pdf
3D PDF Document	Adobe Acrobat 3D PDF Document	pdf

Browser Compliance Check for 3D Viewing

The 3D viewer is only supported on HTML5-compliant browsers including Firefox and Internet Explorer 11 and higher. Since Infor PLM Accelerate is supported on some browsers that do not meet this requirement, the system checks for the browser compliance when the user attempts to use the 3D viewer.

There are two cases where this check is made:

- When the user clicks on a file in the 3D viewer tab in the item window sidebar.
- When the user clicks on the View button when a markup snapshot is active in the viewer.

In each case, the user sees an error message that displays “This web browser does not support 3D viewing. Please use a supported browser in order to view this file”.

Measurement Units Settings for Viewers

Both the PDF Viewer and Advanced Image Viewer provide a Measure command. Within this command is a selector to pick which measurement units to use. This list is based upon the entries specified by “Measurement Units” as found in the Administration / Secure Social TOC entry. By modifying these items, you can control the entries in the list, their order, and the default.

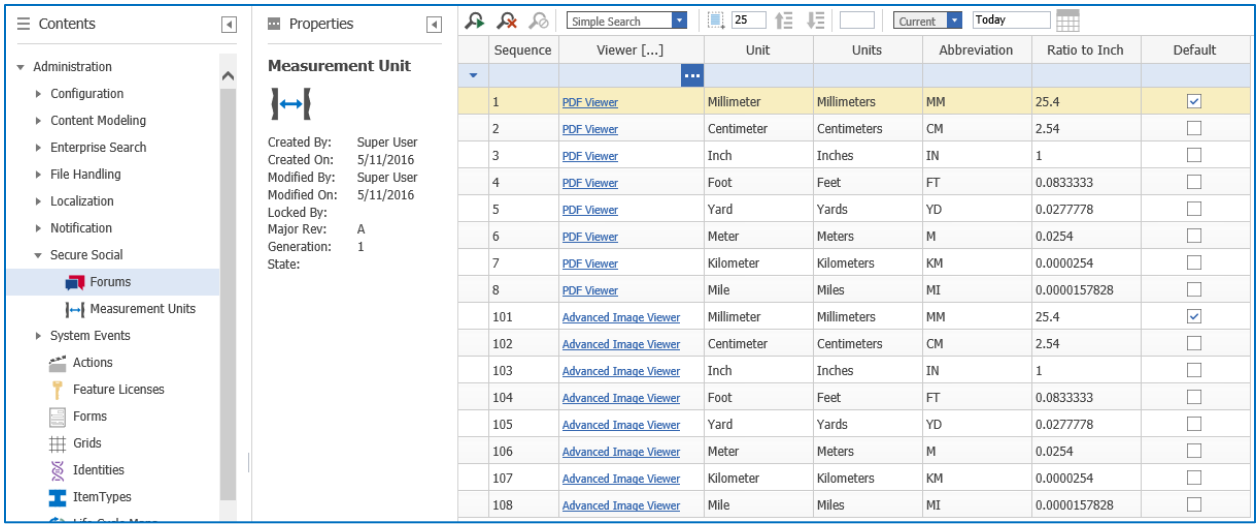


Figure 32.

Configuring Viewer Toolbars

All viewers support two styles of toolbars, Basic and Standard. Basic toolbars have only a few commands to make it easy to use for occasional users. Standard toolbars provide all available commands.

Basic Toolbar

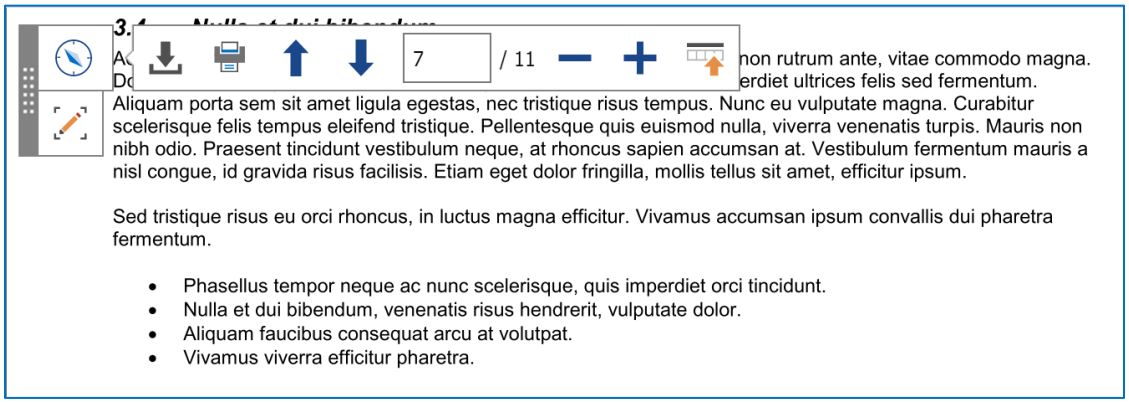


Figure 33.

Standard Toolbar

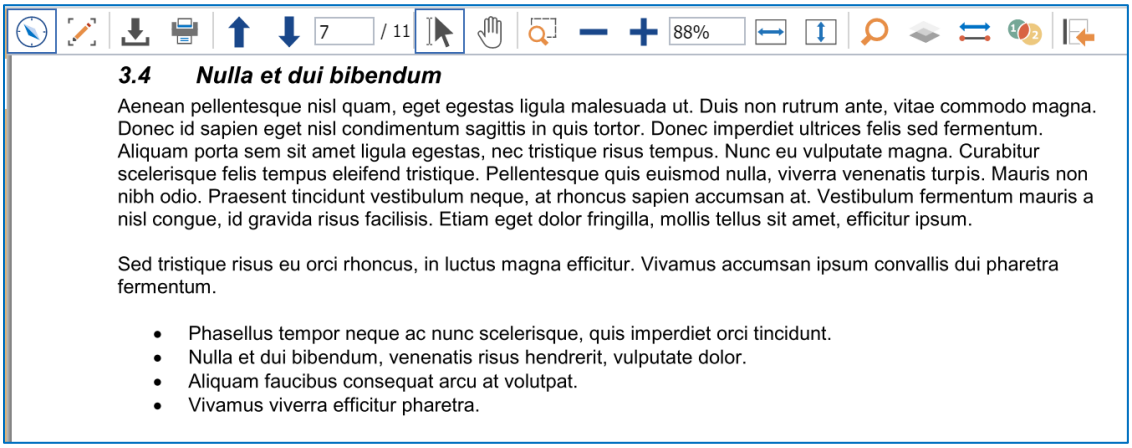


Figure 34.

Both types of toolbars are configurable based on the “Command Bar” modeling capability. With this ability, the content of the toolbars can be configured based on the user’s Identity as well as item Classification. This can enable some important behaviors, such as:

- Force users to only use one or the other style of viewer toolbars (remove “Switch to Standard” or “Switch to Basic” commands)
- Remove user’s ability to download and print files, restricting them to access only in the web client
- Removal of any viewer command(s) for any user or set of users

Configuring Browsers for Printable View

The PDF, Image, and Advanced Image viewers provide a Printable View command which allows the user to easily view and then print the file. This command uses any available client-side PDF viewer, and will use whatever is configured for the web browser in use. The quality of client-side PDF viewers varies significantly, and content displayed in some of these viewers may not match the quality of the display provided from within the Visual Collaboration PDF viewer. As a result, Infor recommends setting the browser's PDF viewer add-on to Adobe Reader or Adobe Acrobat for best results when printing. Please consult your specific web browser's help documentation for information on setting the PDF viewer add-on.

Chapter 11. Additional Preference Settings

In addition to preference settings described previously in this document, there are others which control various other aspects of Visual Collaboration. All settings listed here are active on a per-user basis, and if set for World act as defaults for users created later.

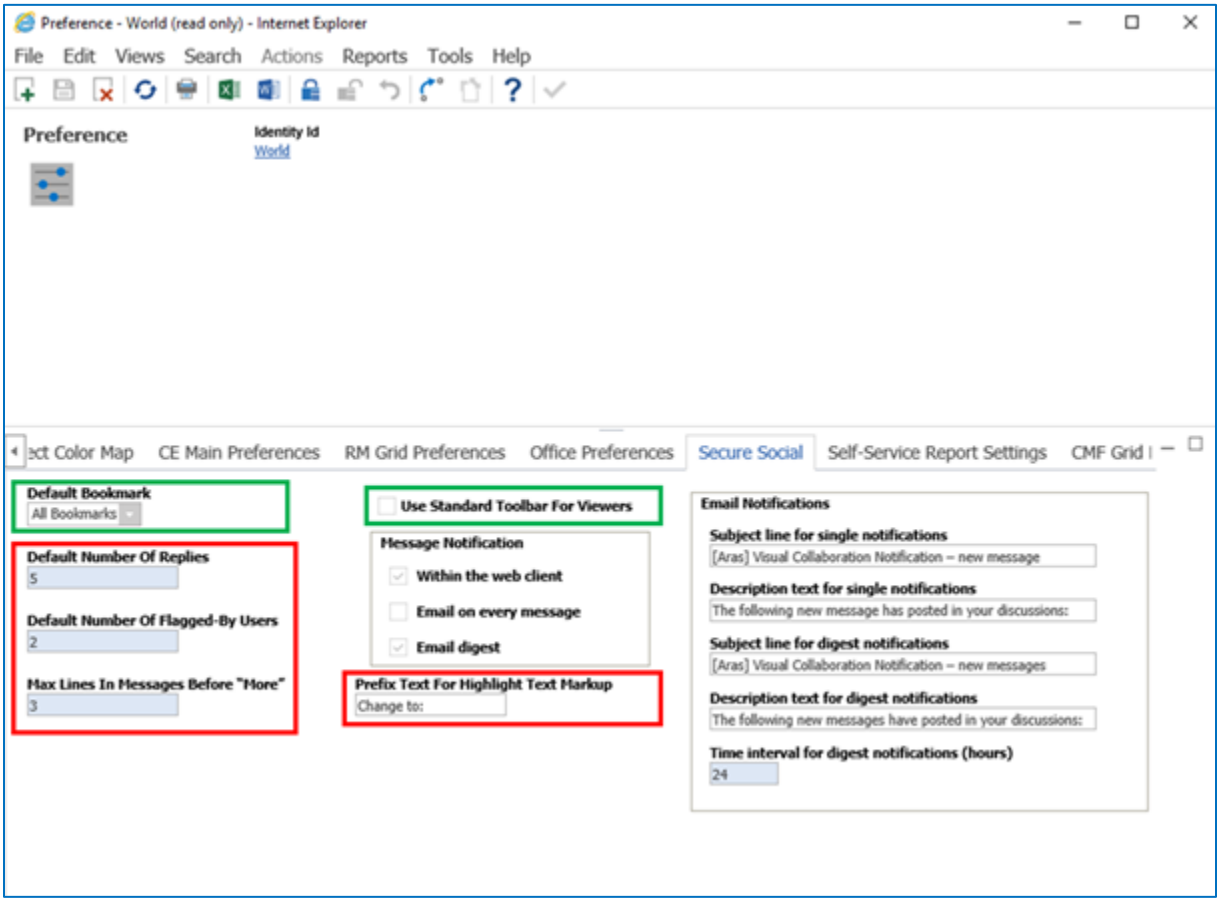


Figure 35.

Settings shown in green can be indirectly set by users based on available functions. They can also be set directly by administrators here in the Preference dialog.

- **Default Bookmark**

  This setting controls the default bookmark and its associated messages that a user sees when first opening the My Discussions window. The standard value for the default is All Bookmarks.

  End users can change this setting using the Set as Default context menu command available within Bookmarks.

- **Use Standard Toolbar for Viewers**

  If set ON, it means the user is using the standard toolbars in the viewers, instead of the basic toolbars.

  End users can change this setting by using the **Switch to Standard** and **Switch to Basic** command available in the viewer toolbars.

Settings shown in red cannot be set directly by end users. They can only be set directly by administrators here in the Preference dialog.

- **Default number of replies**

  The administrator controls the default maximum number of replies to display in the message thread. The standard value for the default is 3.

- **Default number of Flagged-By-Users**

  The administrator controls how many user names will be listed by default when the “Flagged by” list is shown. The standard value for the default is 2.

- **Maximum lines in messages before “More”**

  The administrator controls how many lines of a message will be displayed by default in the discussion panel, before showing the **More** hyperlink. The standard value for the default is 3.

- **Prefix Text for Highlight Text Markup**

  In the PDF viewer, if the user selects a portion of text and then picks the Markup button, it copies the selected text into the Comment box, prefixed by this text. This function is known as “Highlight Text” markup. The administrator can change this prefix text on a per user basis. Setting it to blank will result in no appended text in the Comment box.

Appendix A – Standard ItemType Configuration

The appendix defines out-of-the-box *Feeds* for some of Infor PLM Accelerate's standard ItemTypes.

Part

Aggregate messages from own *Board, Boards* of directly referenced CADs (i.e. first level only without further CAD dependencies), referenced Document *Boards* and *Boards* of first level *Part BOM* children. Shows files only from related CADs and Documents (does not show files from CADs and Documents of first level Part BOM children).

DiscussionTemplate

- *item_selection_depth: 1*
- *file_selection_depth: 1*

Feed 1:

- *feed_type: Board*
- *reference: this*
- *history_events: null*

Feed 2:

- *feed_type: Discussion*
- *reference: "Part CAD(related_id)"*
- *history_events: null*

Feed 3:

- *feed_type: Discussion*
- *reference: "Part Document(related_id)"*
- *history_events: null*

Feed 4:

- *feed_type: Discussion*
- *reference: "Part BOM(related_id)"*
- *history_events: null*

Document

Aggregates messages from own *Board.* Shows own files.

Feed 1:

- *feed_type: Board*
- *reference: this*
- *history_events: null*
- *{related FileSelectors}:*
    - *FS1:*
        - *reference: "Document File(related_id)"*
        - *filter: { ID of "*.pdf" FileType } | {ID of "*.jpg" FileType} | {ID of "*.png" FileType} | {ID of "*.gif" FileType}*

CAD Document

Aggregate messages from own *Board*. Shows own files.

Feed 1:

- *feed_type: Board*
- *reference: this*
- *history_events: null*
- *{related FileSelectors}:*
    - *FS1:*
        - *reference: view_file*
        - *filter: {ID of '*.HWF' FileType}*
    - *FS2:*
        - *reference: viewable_file*
        - *filter: {ID of '*.pdf' FileType} | {ID of "*.jpg" FileType} | {ID of "*.png" FileType} | {ID of "*.gif" FileType}*
    - *FS3:*
        - *reference: "CADFiles(attached_file)"*
        - *filter: { ID of "*.pdf" FileType } | {ID of "*.jpg" FileType} | {ID of "*.png" FileType} | {ID of "*.gif" FileType}*
        -

Express ECO

Aggregate messages from own *Board* and discussions of all new “change control items” of affected items related to the ECO. Show files from all new “change control items” of affected items related to the ECO. **This is representative of the Feed definition of other Change items, including PR, ECR, ECN, Simple ECO, Simple MCO, Express DCO, and Express EDR.**

DiscussionTemplate

- *item_selection_depth: 2*
- *file_selection_depth: 2*

Feed 1:

- *feed_type: Board*
- *reference: this*
- *history_events: null*

Feed 2:

- *feed_type: Discussion*
- *reference: <Item type=”Express ECO” id=”{id}” action=”SSVC_GetECOAffectedControlParts”/>*
- *history_events: null*
- *polysource_type_name: Part*

Feed 3:

- *feed_type: Discussion*
- *reference: <Item type=”Express ECO” id=”{id}” action=”SSVC_GetECOAffectedControlCADs”/>*
- *history_events: null*
- *polysource_type_name: CAD*

Feed 4:

- *feed_type: Discussion*
- *reference: <Item type=”Express ECO” id=”{id}” action=”SSVC_GetECOAffectedControlDocs”/>*
- *history_events: null*
- *polysource_type_name: Document*

Notes:

- Internally all three methods must call the same “internal” parameterized method where the type of the polysource is the method parameter.
- Here is pseudo-code for the method:

```
if (new_item_id !== null)
{
  if (affected_id !== null && affected.config_id != new_item_id.config_id)
  {
    return messages from both affected_id and new_item_id
  }
  else
  {
    return messages only from new_item_id
  }
}
else
{
  Return messages only from affected_id
}
```

Appendix B – Notes on Exported AML

When exporting SSVC-enabled ItemTypes, the “Change Discussion Definition” Action should *not* be part of the exported AML. This Action is generated automatically by the system.

If the exported AML includes this action, the import will fail with a message that the Item already exists in the database with a different id.