



# Infor PLM for Discrete Microsoft Office User Guide

Release 2022.x

### **Important Notices**

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

### **Trademark Acknowledgements**

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

### **Publication Information**

Release: Infor LN 2022.x

Publication Date: May 6, 2022

Document code: ln\_2022.x\_plmmoug\_\_en-us

# Contents

<b>About this guide.....</b>	<b>6</b>
<b>Contacting Infor.....</b>	<b>7</b>
<b>Chapter 1: Microsoft Office Integration Overview.....</b>	<b>8</b>
<b>Chapter 2: Installation.....</b>	<b>10</b>
About the PLM embedded menu and toolbar.....	10
<b>Chapter 3: Working with PLM.....</b>	<b>12</b>
Connecting to PLM.....	12
Disconnecting from the PLM integration.....	12
<b>Chapter 4: Managing Objects.....</b>	<b>13</b>
File Hierarchy Management.....	13
Controlling Document Revisions.....	13
File Revisions.....	14
Saving to PLM.....	14
Saving files in PLM - Best Practices.....	14
To save a file in PLM.....	15
Duplicate file names.....	15
To save a duplicate file name in PLM.....	15
Link to item.....	16
Saving and Unlocking a file.....	16
To acquire ownership of a saved and unlocked file.....	17
Link to Document.....	18
Link to Folder.....	18
Checking in a file.....	19
To check in a file.....	19
Checking out a file.....	20
To check out a file.....	20

---

Changing Ownership of a file.....	20
To change the ownership of a file.....	21
Opening Document Structure.....	21
Using Infocards.....	22
<b>Chapter 5: General mapping.....</b>	<b>24</b>
Summary of mapping setup in Word.....	24
Outline of the procedure to set up general mapping.....	25
Creating the template.....	26
Importing the template into PLM.....	26
Mapping from Word to PLM.....	26
Mapping from PLM to Word.....	28
Example of Word file with mapped attributes.....	29
Mapping examples in Word.....	29
Create Word file based on the template.....	30
Associate mapping.....	31
Mapping results in Word.....	31
Mapping from Excel to PLM.....	33
Mapping from PLM to Excel.....	34
Defining a macro.....	35
Inserting a function from a cell.....	36
Mapping examples in Excel.....	36
Defining attribute properties in the Powerpoint.....	37
Mapping from Powerpoint to PLM.....	38
Mapping from PLM to Powerpoint.....	40
Mapping from Microsoft Outlook to PLM.....	41
Defining the mapping rules.....	42
Mapping options.....	44
Mapping restrictions.....	44
Attribute format restrictions.....	45
Associate the mapping rules to documents or work sheets.....	46
The Associate Mapping Rules menu option.....	46
Removing Mapping Associations.....	47
Display Mapping.....	47
Applying the Mapping Rules.....	47

---

<b>Chapter 6: Setting Preferences.....</b>	<b>49</b>
Locations.....	49
Initial save option.....	50
General.....	50
Post Save Process.....	50
Troubleshooting.....	51
Attached to Workflow.....	51
Automatic Link to Item and/or Folder.....	52
Outlook.....	52
Editing View/Edit File Locations for the Office Integration.....	52
<b>Chapter 7: Setup and Administration.....</b>	<b>54</b>
Troubleshooting.....	54
Limitations.....	55

## About this guide

This guide describes the configuration and usage of the Infor PLM Discrete for Microsoft Office.

Use this guide as a reference at your site. This guide does not teach you about Microsoft Office practices. This guide shows you how to use the PLM integration for Microsoft Office application administrative and user functions to complete specific setup and maintenance tasks.

### **Intended audience**

This guide is for the administrative users who are responsible for the installation of the PLM Integration for Microsoft Office and who would use the PLM integration to exchange information between PLM and Microsoft Office. This could include searching, browsing, viewing and manipulating documents from a secured central database, enhancing collaborative teamwork.

### **Prerequisite knowledge**

To fully understand the information presented in this guide, you should first install the following:

- Infor PLM Discrete
- Microsoft Office

The server to which you will connect to from the integration must be defined as well.

## Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

The latest documentation is available from [docs.infor.com](https://docs.infor.com) or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).

## Chapter 1: Microsoft Office Integration Overview

The Infor PLM Discrete integration for Microsoft Office enables you to incorporate your Microsoft Office documents into PLM product data. From the first specifications typed out on a word processor, the budgets (worksheets) and project plans prepared by project management, and the marketing presentations prepared by the sales people, Microsoft Office and PLM exchange information throughout the life cycle of the product and documents.

The PLM- Microsoft Office integration menu is embedded within the native Microsoft Office application menus. It provides some of the core functions of PLM from within the familiar Microsoft Office environment.

The integration allows you to run Microsoft Office programs simultaneously, while taking advantage of PLM's basic features. You can track the life cycle of files within the integration, in conjunction with all related engineering design objects.

The Infor PLM Discrete integration for Microsoft Office allows effective exchange of information between PLM and the supported Microsoft Office applications. All authorized users are provided with the tools to search, browse, view and manipulate documents from a secured central database, enhancing collaborative teamwork.

Once the PLM- Microsoft Office integration has been installed, the PLM toolbar is added to your Microsoft Office application toolbars, and the PLM menu is added to the Microsoft Office application menu bar. All the options that can be accessed from the toolbar can also be accessed from the menu.

You can run the PLM- Microsoft Office integration from the following Microsoft Office applications:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Outlook

The main features of the Infor PLM Discrete integration for Microsoft Office include:

- Easy access to PLM document management operations from the Microsoft Office application through a fully embedded menu and toolbar.
- Microsoft Office documents, worksheets, project plans and presentation files are represented from within PLM, via graphic displays of the file dependency and structure for all projects, using the familiar tree view component.
- All files supported by Microsoft Office Word, and Excel can be imported into PLM, with automatic updates of links, reflecting the relationships between all types of documents and files. These can be quickly and easily accessed using the PLM document management system.
- File names are maintained for all new Microsoft Office files. They are automatically checked against the PLM database to eliminate redundancy or errors caused by overwriting files.
- Foolproof authorization ensures security and enables monitoring during the entire product life cycle, based on user access rights and status of the document.



- All files can be vaulted from within the Microsoft Office environment, based on authorization.
- For Word and Excel files, the PLM- Microsoft Office integration allows you to map PLM data into Microsoft Office file properties. For example, you can choose to view the PLM ID of a document in your Microsoft Office file.
- Microsoft Office documents can be linked to items directly from the integration. This way, for example, a design document can be easily linked to the item it describes.

## Chapter 2: Installation










This section shows how to install the integration. To install the integration, follow these steps:












- 1 Select **Preferences** in the Preferences drop down menu.
- 2 The PLM Preferences window opens.

## About the PLM embedded menu and toolbar

After the PLM integration for Microsoft Office has been installed, the PLM toolbar is added to your Microsoft Office toolbar, and a menu is added to the Microsoft Office menu bar.

The following menu and toolbar options are available:

Icon	Option	See/Description
	Connect	<a href="#">Connecting to PLM on page 12</a>
	Disconnect	<a href="#">Disconnecting from the PLM integration on page 12</a>
	Save to PLM	<a href="#">Saving to PLM on page 14</a>
	Save and Unlock	<a href="#">Saving and Unlocking a file on page 16</a>
	General Mapping	<a href="#">Introduction on page 24</a>
	Associate mapping	<a href="#">The Associate Mapping Rules menu option on page 46</a>
	Display mapping	<a href="#">Display Mapping on page 47</a>
	Remove mapping	<a href="#">Removing Mapping Associations on page 47</a>
	Check In	<a href="#">Checking in a file on page 19</a>
	Check Out	<a href="#">Checking out a file on page 20</a>
	Check Out Major	<a href="#">Checking out a file on page 20</a>

Icon	Option	See/Description
	Change in Ownership	<a href="#">Changing Ownership of a file</a> on page 20
	Open in WorkSpace	<a href="#">Opening a file in a PLM workspace</a> on page 21
	Preferences	<a href="#">Preferences</a> on page 49
	Link to Item	<a href="#">Link to object</a> on page 16
	Link to Document	<a href="#">Link to Document</a> on page 18
	Link to Folder	<a href="#">Link to Folder</a> on page 18
	About	Contains product and system information as well as additional sources for professional assistance.
	Update Item	<a href="#">Using Infocards</a> on page 22
	Update Document	<a href="#">Using Infocards</a> on page 22
	Update File	<a href="#">Using Infocards</a> on page 22
	Show Document Structure	<a href="#">Opening a file in a PLM workspace</a> on page 21
	Show item Structure	<a href="#">Opening a file in a PLM workspace</a> on page 21

## Chapter 3: Working with PLM

This section contains the following topics that describe the tasks to be executed while working with PLM.

### Connecting to PLM

To use PLM Integration for Microsoft Office, you need to establish connection between Microsoft Office and PLM. The connection gives you access to the PLM database and projects that you need to work with.

To connect to PLM, proceed as follows:

From the Microsoft Office application, do one of the following:

- Click the **Connect** icon in the PLM integration toolbar.
- Select **Connect** from the PLM menu.
- If the PLM is already connected, an automatic silent connection occurs.

The functions in the PLM menu and toolbar are enabled. When you open another Microsoft Office application, it will automatically have an enabled PLM toolbar and menu ready to use.

### Disconnecting from the PLM integration

Disconnecting is a global operation for all Microsoft Office integration applications; disconnecting from one Microsoft Office application disconnects all connected Microsoft Office application from PLM.

To disconnect from the PLM integration, do one of the following:

- 1 Select **Disconnect** in the PLM integration drop-down menu.
- 2 Click on the **Disconnect** icon in the PLM integration toolbar.

## Chapter 4: Managing Objects

When any Microsoft Office file, such as a Word document or an Excel table, is saved to PLM, it is represented by two PLM objects that are linked to each other:

- A PLM file which is revision-controlled and specifies the location of the Microsoft Office file, together with additional data about it. This PLM file (also known as a data set) has the same name as the Microsoft Office file.
- A PLM document, which is also revision-controlled, and which contains attributes that describe the characteristics of the file. The file's name is held in the document's **Description** attribute.

For example, when the Word document Report\_2002.doc is created and then saved to PLM, the integration creates:

- A PLM document with the description attribute Report\_2002.doc
- A linked PLM file with the file name Report\_2002.doc

## File Hierarchy Management

The PLM documents representing Microsoft Office files are linked to one another in a way that reflects the dependencies between the actual files.

The PLM hierarchical representation of those dependencies reflects the links inserted in the Microsoft Office files. Changes made in Microsoft Office files are reflected in PLM as follows:

- When a link is inserted into a Microsoft Office file, the change is reflected in PLM only after the file is saved to PLM. After this operation, you can view the file and the related document and PLM file in PLM.
- When a link is deleted from a Microsoft Office file after the file is saved to PLM, the link between the PLM documents are also removed, but the linked document and related file are not deleted from PLM.

## Controlling Document Revisions

The Integration provides revision control by physically transferring the original file into the vault and handling the revisions via the documents that are the PLM representation of the physical Microsoft Office files.

When you want to edit a file that is checked in, you must first check it out from the PLM vault (this creates a new revision of the file). For more information, see:

- [Checking in a file](#) on page 19
- [Checking out a file](#) on page 20

The system will then place the new revision of the file in a location for your use.

## File Revisions

When a revision is first created, it is assigned the status **DRAFT**. When the revision is ready for general access, it is checked into the vault, and PLM then assigns the status **RELEASED**. Releasing a PLM object makes it available for distribution.

When you want to make changes in a released PLM object, you must check it out of the vault. The original revision is then assigned the status **UNDER CHANGE**, which indicates that another revision is being prepared, and a new revision is created with the status **DRAFT**.

## Saving to PLM

When you save a Microsoft Office file to PLM for the first time, the integration creates two PLM objects, a PLM document with the status **DRAFT** and a linked PLM file with the appropriate attributes for the newly saved Microsoft Office file.

The *Save to PLM* process saves your Microsoft Office file in the PLM database. The document is saved with the status **DRAFT**. Each consecutive save updates the latest changes performed on the **DRAFT** revision of the document in PLM.

You can only save a file if its related PLM document has a status of **DRAFT**. If a document has the status **UNDER CHANGE** or **RELEASED**, the file cannot be saved to PLM.

To save your changes on the server (not only locally), perform **Save to PLM**. However, to save system performance, do not save to PLM too often. For more information, refer to [Saving files in PLM - Best Practices](#) on page 14.

Saving an existing file to PLM also saves the file in Microsoft Office. If you save the file only to Microsoft Office, the file is saved only locally and the associated documents and/or items in PLM are not saved.

The assignment of the file ID is determined by the parameters set up by the administrator as well as by the selected preference settings. The IDs for documents and items can be assigned manually or automatically by PLM, this is also set up in the preferences.

## Saving files in PLM - Best Practices

Saving to PLM draws heavily on your configuration's resources. To save system performance, you are recommended only to save to PLM when updating the associated PLM documents, items, and files is actually required. For routine saves, use local save options.

In addition, the PLM **Check in** and **Save and Unlock** commands also save your data to PLM. Therefore, if the goal of your current session is to check in or save and unlock your part file, you can save your file locally from time to time and complete working on your file by checking in or using **Save and Unlock**.

## To save a file in PLM

Before you can save a file to PLM, you must save it in Microsoft Office with a unique name. Do not use & < > ' " symbols in the file names that you save to PLM, this will cause errors to occur.

Do one of the following:

- Click **Save to PLM** in the toolbar.
- Select **Save to PLM** from the PLM drop down menu.

Clicking **Save to PLM** in the menu or the toolbar results in one of the following:

- If all the IDs are generated automatically by PLM, you can specify in the preferences where the file is saved. To access the preferences, click PLM Options in the PLM menu. For further information about the preferences, see [PLM options](#) on page 49.

## Duplicate file names

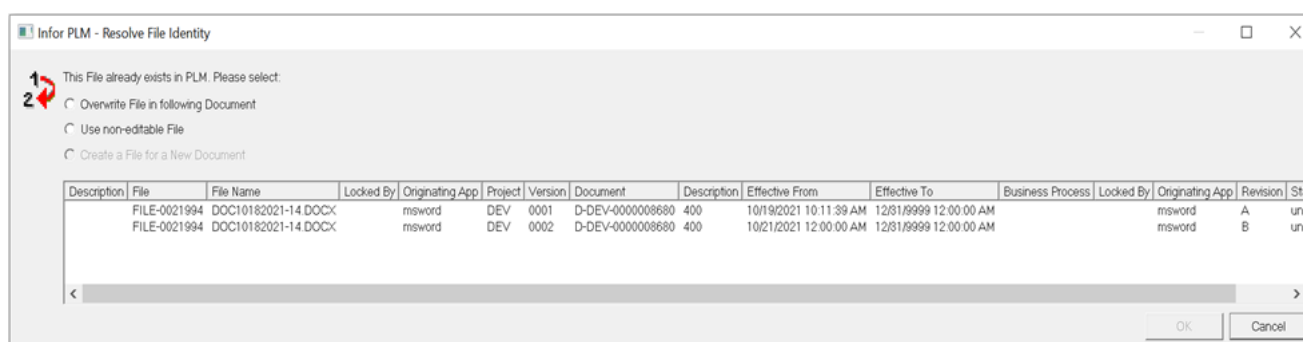
PLM enables you to save two or more files with the same name. Since in Microsoft Office you cannot save two files by the same name in the same location, you first need to save the second file in a different location and then save the file to PLM.

If you save a file with a name that already exists in the same location, you must do the following:

- 1 When prompted by Microsoft Office on whether you want to replace the existing file, select **No**.
- 2 **Save** the file with the same name to a different location on your hard disk or network.
- 3 **Save** the file to PLM.

## To save a duplicate file name in PLM

- 1 Save the file in PLM as described in [Duplicate file names](#) on page 15.
- 2 The **PLM - Resolve Filename** dialog box is displayed.



- 3 Select **Create a new Document with the same name.**

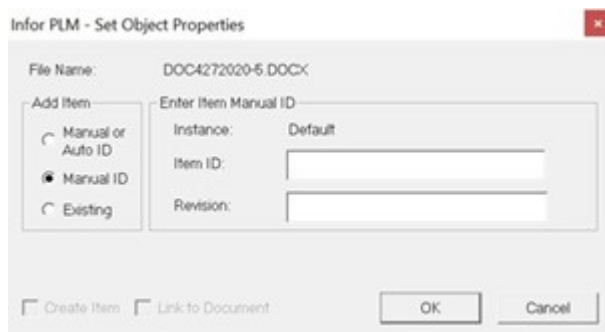
The file is saved in PLM with the selected name.

## Link to item

You can link your Microsoft Office file to a PLM item.

To link a Microsoft Office file to a PLM item, proceed as follows:

- 1 Click **PLM Menu > Link to Item.**
- 2 The **Set Object Properties** dialog box appears.



- 3 In the Item ID field, enter or browse for the ID of the item to which you want to link your Microsoft Office document or work sheet.  
In the PLM, select Item, right-click and Select Source. In the **Set Object Properties** dialog box, select Browse. The selected Item in the PLM is displayed in the Item ID field.
- 4 If required, in the **Revision** field, **enter** a revision number for the item to which you want to link your Microsoft Office document or work sheet.

## Saving and Unlocking a file

If a file that you are working on is supposed to be used in a business process, the business process cannot be launched while the file is locked. To avoid this situation, you should save such files using the **Save and Unlock**



command. This automatically updates your data, while relinquishing ownership of the file. The business process can then proceed.

If you have finished working on a file and the file must be passed on to an unknown new user, you should also use the **Save and Unlock** command. The new user who needs to work on the file can now acquire ownership of the file.

If you know who will be the new owner of the file, you can transfer ownership to the new owner. See [Changing Ownership of a file](#) on page 20.

### To Save and Unlock a file

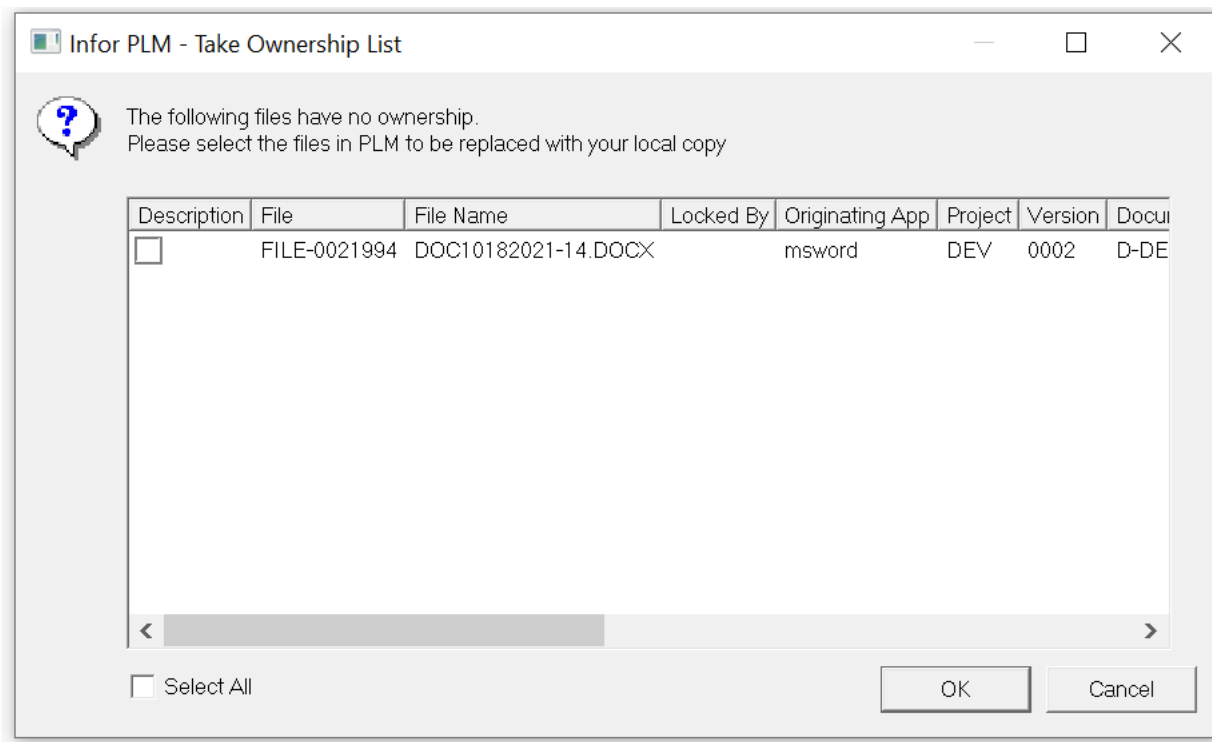
- Click **Save and Unlock** in the PLM toolbar.
- Select **Save and Unlock** from the PLM menu.

The file is saved in PLM with no owner.

## To acquire ownership of a saved and unlocked file

- 1 Click **Save to PLM** in the PLM toolbar or select **Save to PLM** from the PLM menu.

The **Take Ownership List** dialog box is displayed.



- 2 Select the required file and click **OK**.
- 3 **Save** the file again in Microsoft Office.
- 4 **Enter** the appropriate ID(s), if prompted. This depends on the preference settings. See [PLM Options](#) on page 49.

**5 Click OK.**

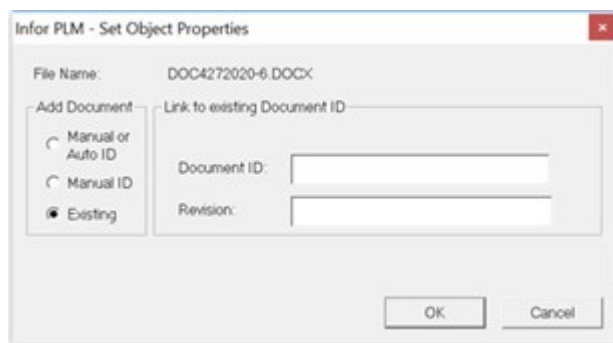
The integration verifies that the ID(s) can be used and proceeds with saving your file, or notifies you if the entry is invalid.

## Link to Document

You can link your Microsoft Office file to a PLM folder.

To link a Microsoft Office file to a PLM item, proceed as follows:

- 1** In the Microsoft Application, click **Infor PLM Menu > Link to Document**.
- 2** The **Set Object Properties** dialog box appears.



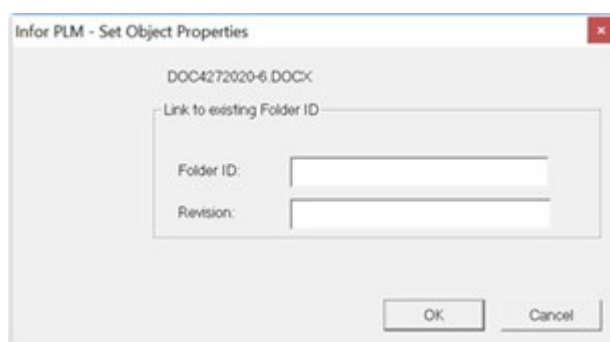
- 3** You can perform one of the following:
  - a** In the **Document ID** field, specify the ID of the document to which you want to link your Microsoft Office document, work sheet, powerpoint or outlook file.
  - b** In the PLM, select document, right-click and Select Source. In the **Set Object Properties** dialog box, select **Browse**. The selected Document details in the PLM is displayed in the **Document ID** field.
- 4** If required, in the **Revision** field, **enter** a revision number for the item to which you want to link your Microsoft Office document or work sheet.
- 5** Click **Ok**.

## Link to Folder

You can link your Microsoft Office file to a PLM folder.

To link a Microsoft Office file to a PLM item, proceed as follows:

- 1** In the Microsoft Application, click **Infor PLM Menu > Link to Folder**.
- 2** The **Set Object Properties** dialog box appears.



- 3 In the **Folder ID** field, specify the ID of the folder to which you want to link your Microsoft Office document, work sheet, powerpoint or outlook file.  
In the PLM, select folder, right-click and Select Source. In the **Set Object Properties** dialog box, select **Browse**. The selected Folder details in the PLM is displayed in the Folder ID field.
- 4 If required, in the **Revision** field, **enter** a revision number for the item to which you want to link your Microsoft Office document or work sheet.

## Checking in a file

When you have finished working with a file, it can be released. The PLM integration for Microsoft Office enables you to check in any Microsoft Office file and its linked documents to the PLM vault.

The check-in operation accomplishes the following:

- Confirms the changes you made in the Microsoft Office file.
- Changes the file's status from **DRAFT** to **RELEASED**.
- Transfers the Microsoft Office file to the PLM **Released** area from the Microsoft Office location.

The integration verifies that you have authorization to perform this operation and that the document linked to the file has the **DRAFT** status. If the file is new, the system prompts you with the **Save** dialog box to save the file locally and perform the check-in operation. You can only access this file in Microsoft Office via the PLM **Integration Query** tool. See [Introduction](#) on page 13.

After the file has been checked in, you can only change the file by checking it out.

## To check in a file

- 1 Do one of the following:
  - Click the **Check-In** icon in the PLM toolbar.
  - Select **Check In** from the PLM menu.
- 2 If prompted, save the file to Microsoft Office first.  
The file is checked in.

## Checking out a file

You must check a file out of the vault in order to change it.

To check out the file, you need to open it for editing in the integration. The file is opened in read-only mode and cannot be modified until it is checked out. If you try to perform any modification in it, you will be prompted to check it out first. This is done to protect the integrity of your data.

Two types of Check Out are available:

### **Check Out**

This option is usually used for minor design revision changes. A minor check-out results in a higher sequence number within the current revision for the checked out file, for example from A0001 to A0002.

### **Check Out Major**

This option is usually used for significant changes with major impact on the form, fit or functionality of the product. A major check-out results in a higher version number for the checked out file, for example from A0001 to B0001.

## To check out a file

- 1** In Microsoft Office, select **Query PLM** from the PLM menu and in the Query Manager that opens, run a search for the file you want to check out.
- 2** In the Document List pane, select the required file and right-click on the file. Select **Download files from PLM** in the menu that appears.  
The file is opened in Microsoft Office.
- 3** Select the file that you want to check out and select **Check Out** from:
  - The PLM toolbar
  - The PLM menu
- 4** The file is checked out.  
After the check-out, the file is no longer in read-only mode and can be modified as required

## Changing Ownership of a file

The owner of a file is determined by one of the following:

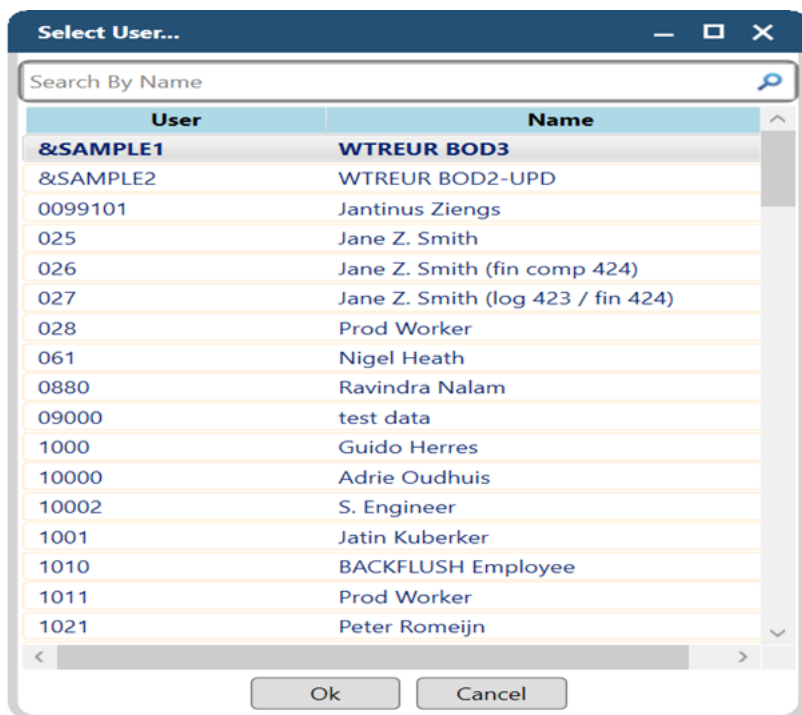
- The user who created it and saved it to PLM.
- The user who checked it out of PLM.
- The user to whom the ownership has been transferred.
- The user who performs the Download files from PLM process on a saved and unlocked file.
- Project administrators are not the owners of all files, but they are given access to modify the files owned by users in their projects.

When you are registered as the owner of a file in PLM, you can edit the file as required while other users can view but not modify the file. You can choose to transfer the ownership to another user when the user needs to work on that file. Ownership can only be changed if the file has been saved to PLM.

After a file has been checked in (and has the status of **RELEASED**), it does not have a specific owner.

## To change the ownership of a file

- 1 In Microsoft Office, in the file with which you are working with, select **Change Ownership** in PLM menu or toolbar.
- 2 In the **Select User** dialog box that appears, select the user you want to transfer the ownership to and click **OK**.



The selected user now owns the file.

## Opening Document Structure

To open document structure of a file, proceed as follows:

- 1 In Microsoft Office, create a part file and save it to PLM. See [Saving to PLM](#) on page 14.
- 2 Select **Show Document Structure** in the PLM menu or toolbar. A dialog will open that shows the document structure of the file.

Document Structure (D-DEV-0000008680. B)						
Document ID	Revision	Description	Project ID	Document Type	Status	Doc Class
D-DEV-0000008680	B	400	DEV	COMMON	Draft	Not Appli

Search By File ID						
File Name	File ID	Revision	Originator	Locked By	Created Date	Project

## Using Infocards

An infocard is a dialog box that enables you to update metadata of items, documents or files generated from part files created in Microsoft Office. There are three types of infocards, one for items, one for documents, and one for files. You must use infocards to make changes to the item, document or file in Microsoft Office rather than in PLM. You can update only those items, document, or files that you own.

To update items, documents or files generated from the Microsoft Office object that you are working on, proceed as follows:





- 1 In Microsoft Office, select an item, document or file.
- 2 From the PLM menu, select the relevant update option. You can select **Update Item**, **Update Document** or **Update File**.

The relevant Update dialog box is displayed.

- 3 Make the required changes.
- 4 Click **Update**.

You can update the document using the Details pane as shown in the following screen:

Document Details (D-DEV-0000008680,B)



General

Document	D-DEV-0000008680
Revision	B
Description	400
Status	Draft
Originating App	MSWord
PLM Project	DEV
Approval Date	
Application Format Type	MS Word
BOM Defining	Yes
Category	
Category Name	
Created By	PDANTURT
Created On	10/21/2021
Doc Class	Not Applicable
Document Type	COMMON
Derived From	
Derived From Revision	
Business Process	
Status	Draft

## Chapter 5: General mapping

### Introduction

General mapping is available for Microsoft Word. General mapping enables you to define attribute-based mapping rules for a template. When you create documents or work sheets in Microsoft Word using a template, the mapping rules are carried over to the documents or work sheets based on how you set up the rules.

The mapping rules determine how values of Microsoft Word attributes are mapped to PLM attributes and vice versa for files that use the template containing the mapping rules. To use general mapping, you must have administrator's rights. You must link the Word document to the PLM item prior to performing the mapping.

### Defining mapping rules

In Microsoft Word, create template Template\_001.dot. For Template\_001.dot, define the following mapping rule:

Microsoft Word property Project\_ID goes to PLM item attribute **Project**. Create a document based on template Template\_001.dot.

As a result, if you enter a value for the **Project\_ID** property of the Microsoft Word document, this value is entered in the **Project** field of the PLM item that you link to the Microsoft Word document.

For Microsoft Word documents, the mapped attributes can be displayed anywhere in the Microsoft Office files derived from the template:

- The body of the file
- The header and/or footer of the file
- Tables within the file

## Summary of mapping setup in Word

You can map Microsoft Word properties to PLM or vice versa. Each direction in each application requires a different property setup

### Word to PLM

When mapping from Microsoft Word to PLM, define the following data:



- Bookmark
- Document property attribute
- Select Link to Content check box for document property attribute

Result:

The property is linked to the bookmark. If you create a document based on the template and you insert a text in the bookmark, this text is filled in the property attribute and through the property attribute, the text is updated in the PLM attribute that you specify in the mapping rules. For further information on mapping rules, see [Defining the mapping rules](#) on page 42.

### PLM to Word

When mapping from PLM to Microsoft Word, define the following data:

- Document property attributes
- Document fields in which the properties are to be displayed

Result:

From the PLM attribute specified in the mapping rules, the Microsoft Word template property attribute is filled. In turn, the template property attribute fills the field in the documents derived from the template. For further information on mapping rules, see [Defining the mapping rules](#) on page 42.

## Outline of the procedure to set up general mapping

The procedure to set up general mapping for Microsoft Word includes the following steps:

- 1 Define a template in Microsoft Word.
- 2 Decide on the direction of mapping:
  - PLM to Microsoft Office
  - Microsoft Office to PLM
  - Both
- 3 Define the property attributes and related data as appropriate for the relevant mapping direction and application.
- 4 Using the PLM mapping tool, take the following steps:
  - a Import the template to PLM.
  - b Define the mapping rules.
- 5 In Microsoft Word, create a file based on the template.
- 6 In the PLM - Microsoft Office Integration, take the following steps:
  - a Save the file to PLM.
  - b Associate the mapping rules.
  - c Save the mapping association and the file to PLM.
- 7 Exit and restart PLM and Microsoft Office for the mapping to take effect.

## Creating the template

To use general mapping, templates must exist for which mapping rules have been defined. You can only create mapping rules if you have administrator's rights.

To create a Word template, proceed as follows:

- 1 In Microsoft Word, select **File > New**.
- 2 In the **New Document** task pane that appears, select one of the options to select a template type.
- 3 In the **Templates** dialog box that appears, select a template type, select **Template** and click **OK** in the **Create New** group box.
- 4 To define attribute properties for the template, select **File > Properties** to open the **Template <name> Properties** dialog box.

## Importing the template into PLM

Before you can define mapping rules for new or changed templates, you must import them in PLM. Re-importing a template will not remove any previously defined rules for this template.

To import a template into PLM, proceed as follows:

- 1 Click **Infor PLM > Preferences > Mapping Template Tool**.
- 2 From the **Application** list in the upper left of the **Mapping Template Tool** dialog box.
- 3 Click **Import**.
- 4 In the **Open** dialog box that appears, select the template for which you want to define mapping rules and click **Open**.

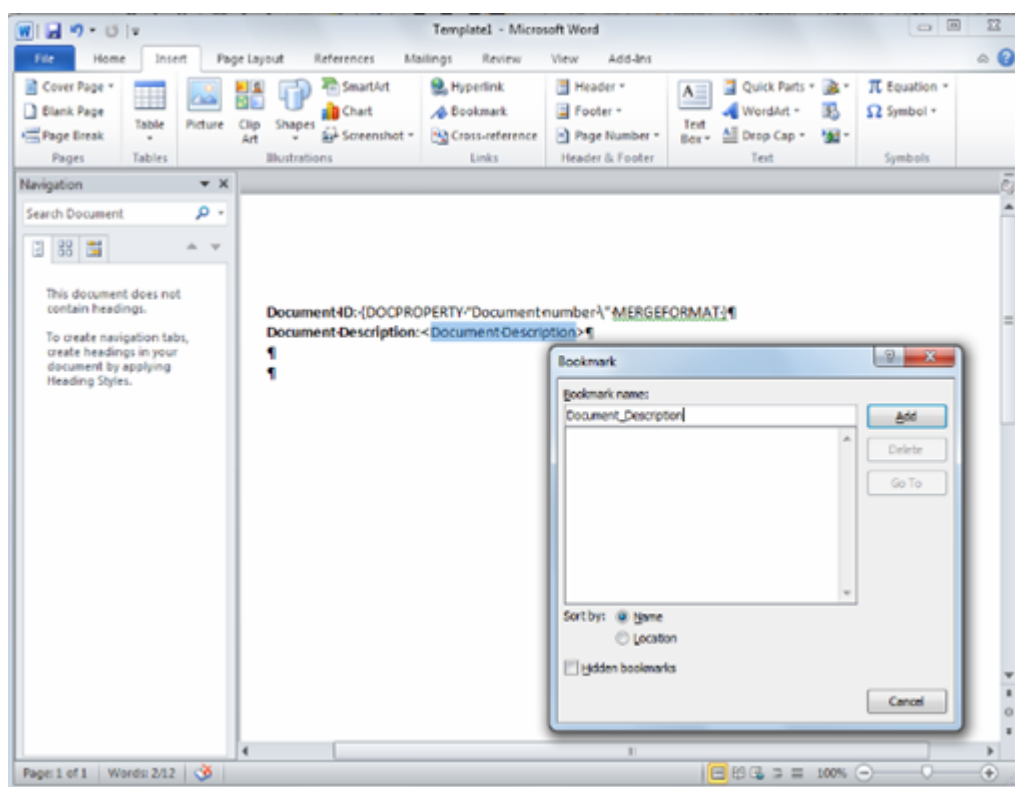
The template properties are displayed in the upper right section of the **PLM Mapping Tool** dialog box.

## Mapping from Word to PLM

To enable a text inserted in a Microsoft Word file to be updated automatically in PLM, you must define a bookmark and a property in the Word template. The property must be linked to the bookmark.

To define a bookmark and a property, take the following steps:

- 1 In the template, create some text where the text that must be mapped is to be located and highlight this text as shown in the following picture.



In this example, the text to be mapped is located in the header, but this could be anywhere in the document.

- 2 Insert a bookmark for the highlighted text as shown in the picture above.
- 3 Select **Insert > Bookmark**.  
The **Bookmark** dialog box opens.
- 4 In the **Bookmark** dialog box, make sure that you:
  - a **Type** the name for the bookmark in the Bookmark name field, for example, Document Description.
  - b Select **Sort By: Location**.
  - c Click **Add**.
- 5 Select **File > Properties** and in the Custom tab of the <Template name> Properties dialog box, proceed as follows:
  - a In the **Name:** field, enter a name for the property.
  - b Select the **Link to content** check box.
  - c In the **Source:** field that is enabled after you select the **Link to content** check box, select the bookmark that you created in the previous steps.  
The property is now linked to the bookmark. If you create a document based on the template and you insert a text in the bookmark, this text is updated in the PLM attribute specified in the mapping rules.
  - d Click **Add**.
  - e Click **OK**.
  - f Import the template into PLM. See [Importing the template into PLM](#) on page 26.
  - g Define the mapping rules. See [Defining the mapping rules](#) on page 42.

## Mapping from PLM to Word

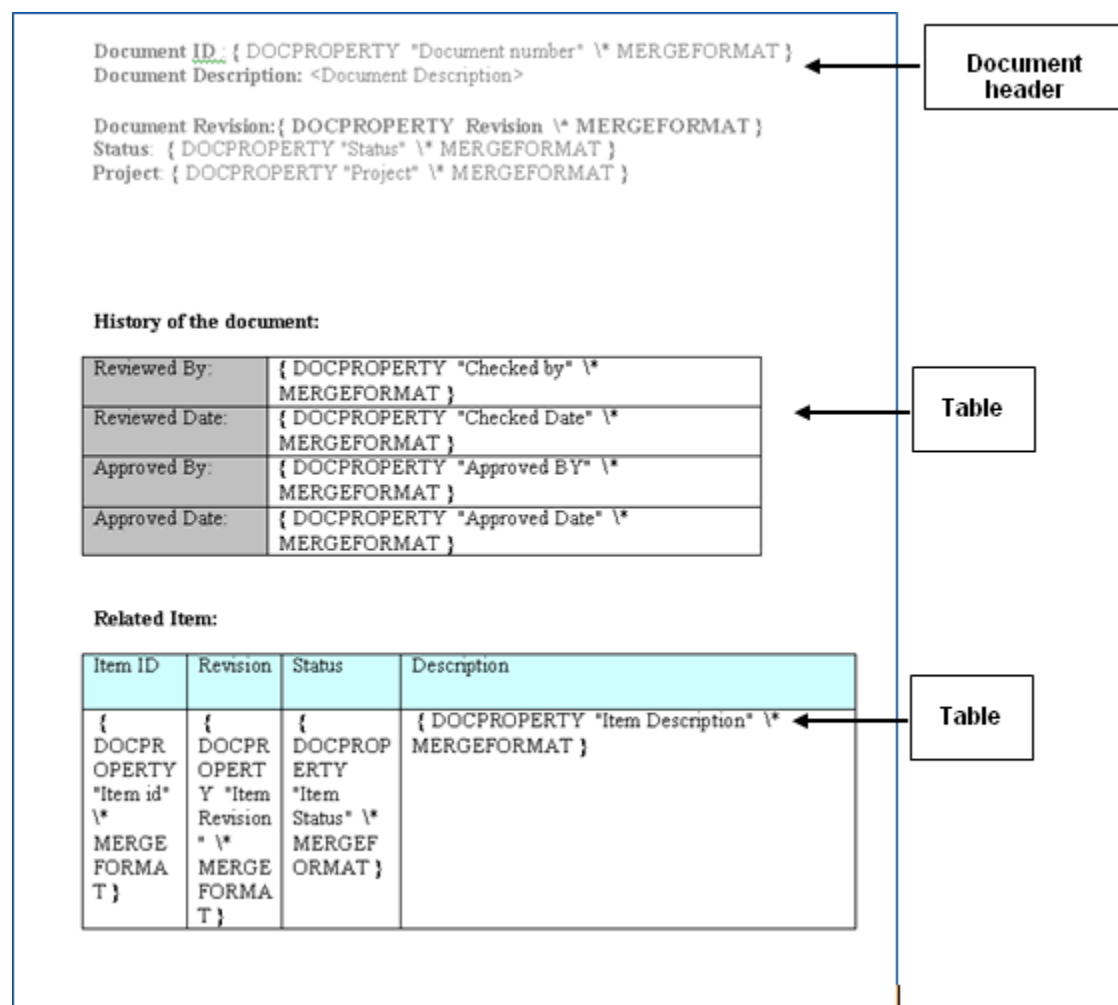
To map a PLM attribute to a Microsoft Word file, in the template you must define a property and a field that is based on the property. Through the property, the value of the PLM attribute will be displayed in the field.

To define a property and a field in the Word template, proceed as follows:

- 1** Select **File > Properties** and in the **Custom** tab of the **<Template name> Properties** dialog box proceed as follows:
  - a** In the **Name** field, enter a name for the property, for example, Document number.
  - b** In the **Value** field, enter a dummy value. This value will be overwritten by the value of the PLM attribute.  
  
In the mapping rules you can specify that the value of the **Document ID** attribute in PLM must be filled in the Microsoft Word Document number property attribute.
  - c** Click **OK**.
- 2** In the template, place the cursor in the location where you want to insert the field.
- 3** Select **Insert > Quick Parts > Field**, and in the **Field** dialog box that appears, proceed as follows:
  - a** In the **Categories** list, select (All). This is the default value.
  - b** In the **Field name** list, select **DocProperty**. This is a type of field that refers to document properties.
  - c** In the **Property:** list, select the property, for example, Document number, that you defined in the previous steps.
  - d** Click **OK**.
- 4** After you have finished defining property attributes and fields, proceed as follows:
  - a** Import the template into PLM. For further information, see [Importing the template into PLM](#) on page 26.
  - b** Define the mapping rules. For further information, see [Defining the mapping rules](#) on page 42.

To view the field code of a field, place the cursor on the field and from the right-click menu, select Toggle Field Codes.

## Example of Word file with mapped attributes



## Mapping examples in Word

In these examples, Microsoft Word and Infor PLM Discrete attributes will be mapped as follows:

Document			Item		
Word attribute	PDM attribute (document)	Direction	Word attribute	PDM attribute (item)	Direction
ID	Document ID	To integration	Item ID	Item ID	To integration
Description	Document Description	To PLM	Description	Item Description	To PLM

Document			Item		
Word attribute	PDM attribute (document)	Direction	Word attribute	PDM attribute (item)	Direction
Revision Status	Document Status	To integration	Revision Status	Item Status	To integration
Project	Project	To integration	Revision	Item Revision	To integration
Reviewed by	Originator	To integration			
Review date	Creation date	To integration			

## Create Word file based on the template

First, you must create a Microsoft Word file based on the template. The text highlighted in yellow will be updated in the Document description in PLM.

**This text will be updated in the Document description in PLM**

Document ID:

Document Description: A new production document - See notes inside

Document Revision:

Status:

Project:

**History of the document:**

Reviewed By:	
Reviewed Date:	
Approved By:	
Approved Date:	

**Related Item:**

Item ID	Revision	Status	Description

Save the document and link an item.

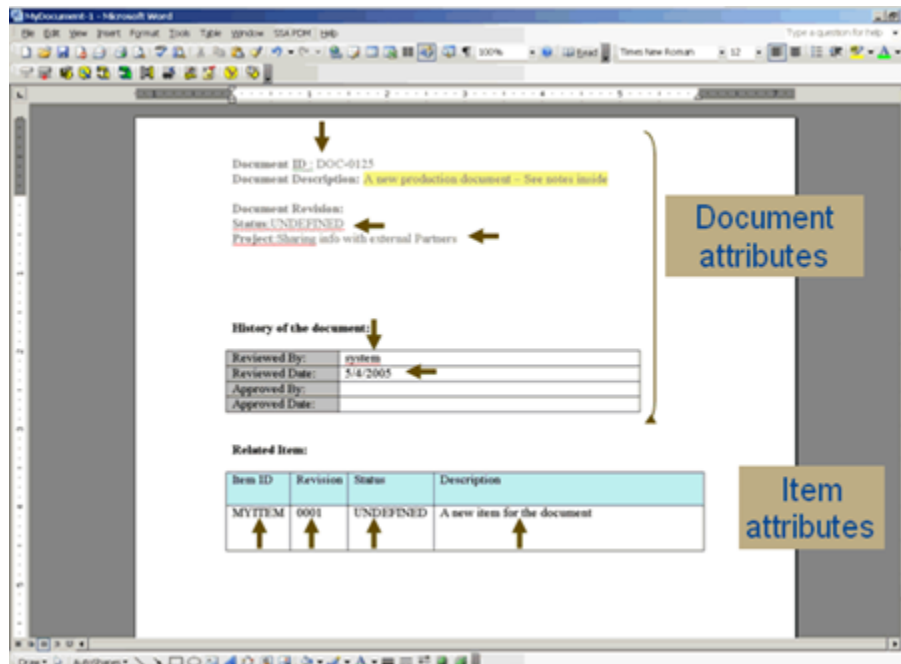
## Associate mapping

After you save the document and link the document to an item, you must associate the document to the template for which the relevant mapping rules have been defined.



## Mapping results in Word

In the Microsoft Word document, the mapping results look as follows:

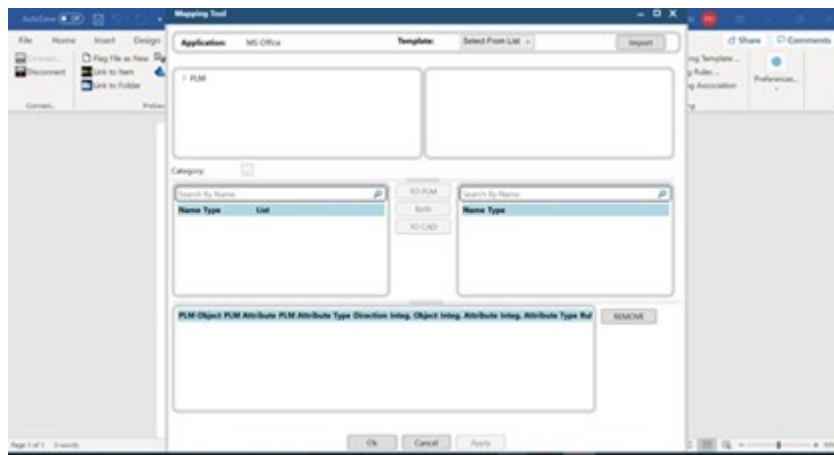


In the PLM document, the document description looks as follows:

Document Details (D-DEV-0000008680,B)	
Document	D-DEV-0000008680
Revision	B
Description	400
Status	Draft
Originating App	MSWord
PLM Project	DEV
Approval Date	
Application Format Type	MS Word
BOM Defining	Yes
Category	
Category Name	
Created By	PDANTURT
Created On	10/21/2021
Doc Class	Not Applicable
Document Type	COMMON
Derived From	
Derived From Revision	
Business Process	
Status	Draft

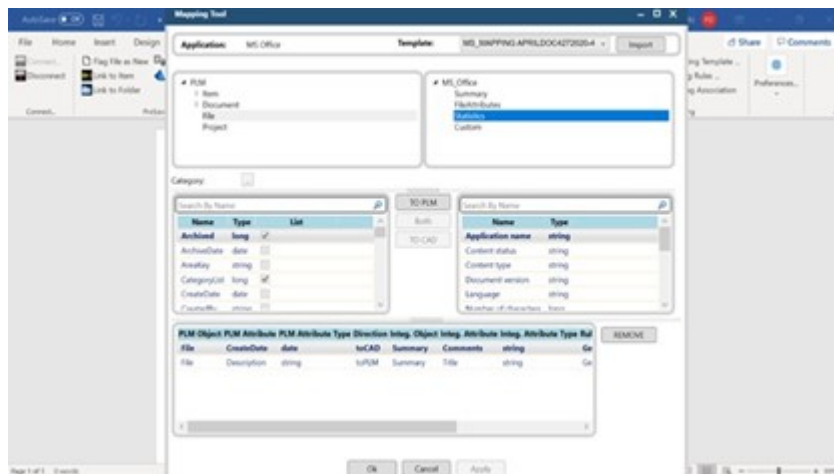
After you create the Microsoft Office attributes, you must define the mapping rules. To define mapping rules, you must have administrator authorization. Mapping rules are defined in the **PLM Mapping Tool** dialog box, which is accessed from the Infor PLM Discrete. To access PLM Mapping Tool:

- Open the Infor PLM Discrete application.
- Select Mapping Template Tool. Click Import for New Template or Select Template for existing Template.



- In the Template list, select the template for which you want to define mapping rules.  
**Note:** If the template is new or if changes were made to the template in the application, you must import the template into PLM first.





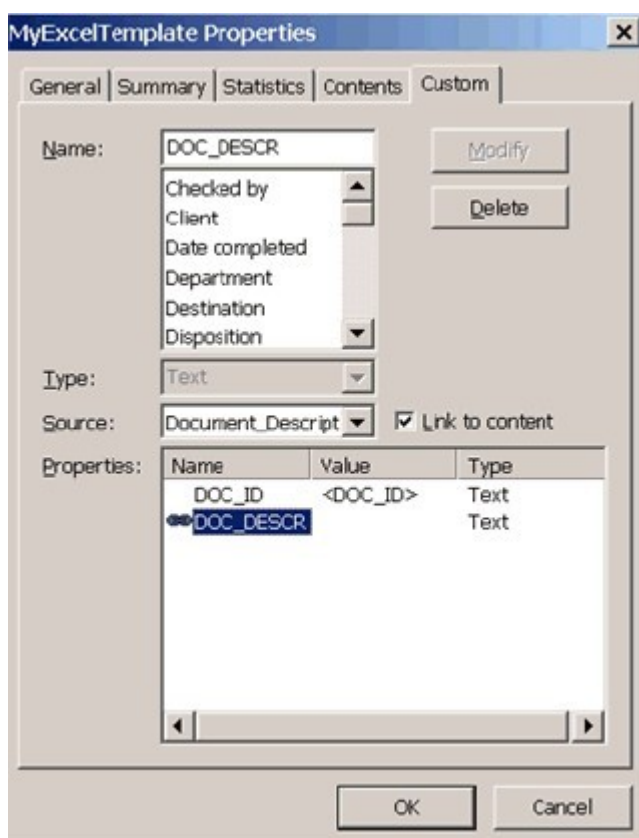
Any previously defined mapping rules for the selected template are displayed in the dialog box.

## Mapping from Excel to PLM

To enable the value of an attribute inserted in a Microsoft Excel file to automatically be updated in Infor PLM, in the Excel template, you must define an attribute and a property. The property must be linked to the attribute.

To define an attribute and a property:

- 1 In the template, from the **Formula** menu, select the **Define Name**.
- 2 In the **Define Name** dialog box that appears, proceed as follows:
  - a In the **Name in workbook**: field, enter the name, for example, Document\_Description, for the attribute.
  - b Click **Ok**.
- 3 In the **File** menu, select **Properties**, and in the **Custom** tab of the **<Template name> Properties** dialog box that appears, proceed as follows:



- a In the **Name**: field, enter the name for the property you are going to create, for example, Doc\_Descr.
- b Select the **Link to content** check box.
- c In the **Source**: list, select the attribute titled Document\_Description that you created in the previous steps. As a result, the property is linked to the attribute.
- d If you create a workbook based on the template and you insert a value in the attribute, this value will be updated in PLM through the template property. In the SSA PDM mapping tool, you can determine to which PLM attribute the value will be mapped. For further information, see Defining the mapping rules.
- e Click **Add**.
- f Click **Ok**.

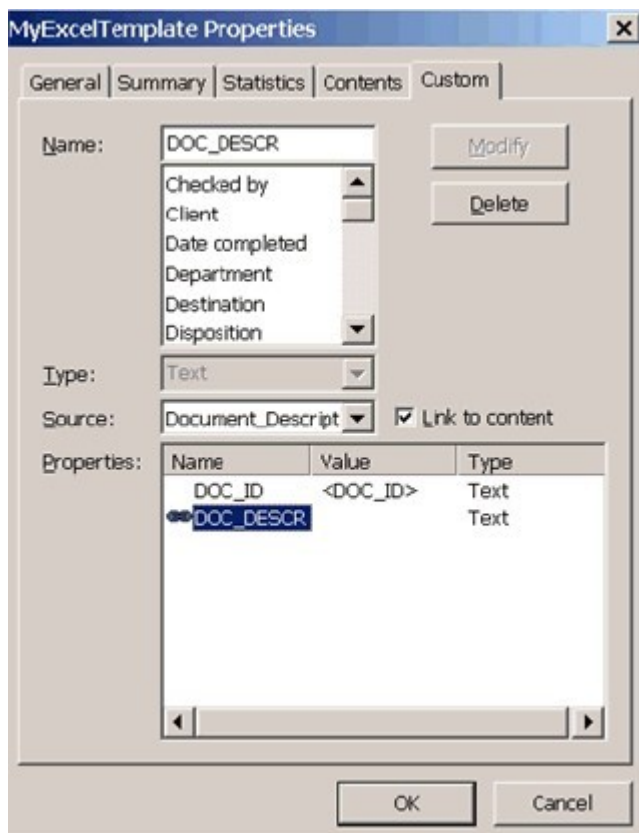
## Mapping from PLM to Excel

To enable the value of an Microsoft Excel cell to be automatically updated with the value of an PLM attribute, you must define a property attribute, a macro, and a function in the Microsoft Excel template. You must insert the function in the cell that must be updated with the property attribute value. The property will be updated with the PLM attribute value. The macro will pass on the PLM attribute value to the cell in the workbook.

To map PLM attribute value to a cell in a workbook:

- 1 In the **File** menu, select **Properties**.

- 2 In the **Custom** tab of the **<Template name> Properties** dialog box that appears, proceed as follows:



## Defining a macro

To define a macro:

- 1 In the Microsoft Excel template, press ALT - F11 to start the VBA editor.
- 2 In the VBA editor, select the **Insert** menu and from the Insert menu, select **Module** to define a new module.
- 3 In the VBA editor window, define a function for each property attribute that you defined in the template as described in the previous procedure. For property attribute DOC\_ID, for example, enter the following code:

```
Function getDOC_ID (temp As Integer) As String
    getDOC_ID=ActiveWorkbook.CustomDocumentProperties("DOC_ID").Value
End Function
```

Note that the function name, getDOC\_ID, consists of two parts:

- get
- DOC\_ID

DOC\_ID is the name of the property. This macro will fill the cell that is selected in the following procedure.

## Inserting a function from a cell

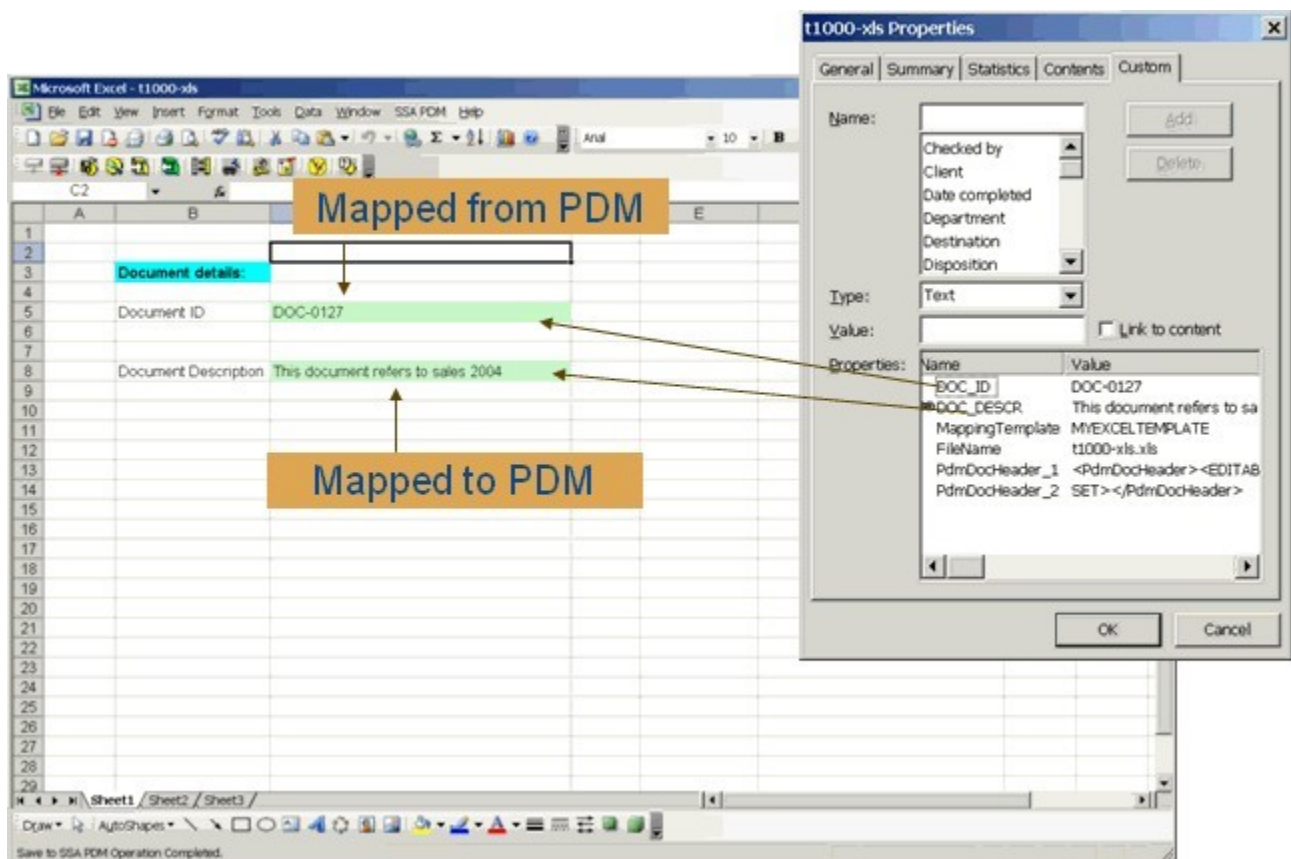
To insert a function for a cell:

- 1 In the template, select the workbook cell in which you want the value from the property attribute, for example, DOC\_ID, to be inserted.
- 2 From the **Formulas** menu, select **Insert Function**. In the dialog box that appears, proceed as follows:
  - a From the **Or select a category:** list, select **User Defined**.
  - b From the **Select a function:** list, select the macro that the function will use, for example, getDOC\_ID.
  - c Click **OK**.
  - d In the **Function Arguments** dialog box that appears, define any integer that you want to use as function input.

To view the function name in the cell in which the function was inserted, double-click the cell.

## Mapping examples in Excel

The following picture shows how the mapping setup described in Mapping from Excel to PLM and Mapping from PLM to Excel takes effect in Microsoft Excel workbooks.



The following picture shows how the mapping setup described in Mapping from Excel to PLM and Mapping from PLM to Excel takes effect in PLM documents.

The screenshot shows a PLM document form with the following fields and values:

- Document:** DOC-0127
- 0001** (version number)
- Is Latest:** Yes (indicated by a green checkmark)
- Description:** The Document refers to sales 2004.
- Draft:** A blue button labeled "Draft".
- Document Type:** COMMON (with a magnifying glass icon and the word "Common" next to it)
- Life Cycle:** Created (a blue button labeled "Created")

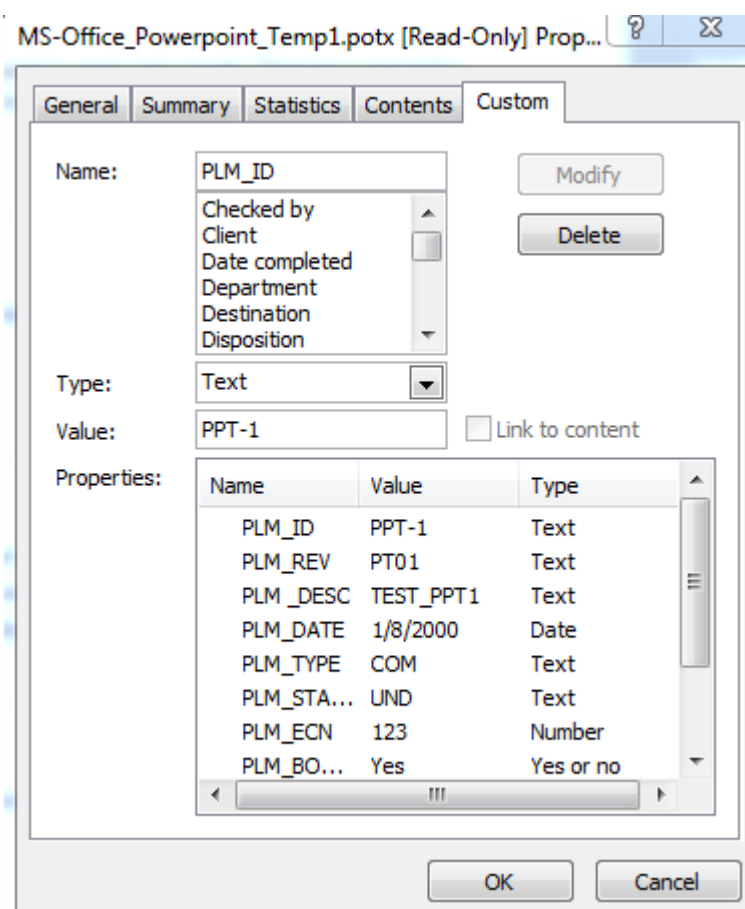
## Defining attribute properties in the Powerpoint

To use general mapping, templates must exist for which mapping rules have been defined. You can only create mapping rules if you have administrator's rights.

To map a PLM attribute to a Microsoft Powerpoint file, in the template you must define a property and a field that is based on the property. Through the property, the value of the PLM attribute will be displayed in the field.

To create a Powerpoint template and define attribute properties:

- 1 In Microsoft Powerpoint, select **File > New**.
- 2 In the **New Presentation** task pane that appears, select one of the options to select a template type.
- 3 In the **Templates** dialog box that appears, select a template type, select **Template** and click **OK** in the **Create New** group box.
- 4 To define attribute properties for the template, select **File > Properties > Advanced Properties** to open the Template <name> Properties dialog box.
- 5 In the Custom tab, specify the following information:
  - **Name:** The name of the PLM attributes that must be mapped in Powerpoint. For example, specify PLM\_ID. This value will be mapped with Document ID field in the PLM.
  - **Type:** Specify whether the value must be Text, Date, Number and so on.
  - **Value:** Specify a dummy value. This value will be overwritten by the value of the PLM attribute.



6 Click **Ok**.

## Mapping from Powerpoint to PLM

To enable a attributes in a Microsoft Powerpoint file to be updated automatically in PLM, you must define a property in the Powerpoint template. The property must be mapped to the PLM.

To map Powerpoint attributes to PLM:

- 1 In the template, go to **File > Properties > Advance Properties** and in **Summary** tab specify a **Title** and **Subject**.

The screenshot shows the 'MS-Office\_Powerpoint\_Template.potx Properties' dialog box with the 'General' tab selected. The dialog has five tabs: General, Summary, Statistics, Contents, and Custom. The 'General' tab contains the following fields and options:

- Title: PowerPoint Presentation
- Subject: Test
- Author: Rajesh
- Manager: (empty)
- Company: Infor
- Category: (empty)
- Keywords: (empty)
- Comments: (empty)
- Hyperlink base: (empty)
- Template: (empty)
- ☒ Save preview picture

At the bottom right are 'OK' and 'Cancel' buttons.

- 2 Save the template.
- 3 Open PLM Discrete Mapping Tool and import the template. See [Importing the template into PLM](#) on page 26.
- 4 Define the mapping rules. See [Defining the mapping rules](#) on page 42.
- 5 Save the file to PLM.

Document is created in the PLM and the information that is mapped from Powerpoint is updated in PLM.

**Document Details (D-DEV-0000008680,B)**

Search

General

Document	D-DEV-0000008680
Revision	B
Description	400
Status	Draft
Originating App	MSWord
PLM Project	DEV
Approval Date	
Application Format Type	MS PowerPoint
BOM Defining	Yes
Category	
Category Name	
Created By	PDANTURT
Created On	10/21/2021
Doc Class	Not Applicable
Document Type	COMMON
Derived From	
Derived From Revision	
Business Process	
Status	Draft

## Mapping from PLM to Powerpoint

To map a PLM attribute to a Microsoft Word file, in the template you must define a property. Through the property, the value of the PLM attribute will be displayed.

To map attributes from PLM to Powerpoint:

- 1 In Powerpoint file define the property. See [Defining attribute properties in the Powerpoint](#) on page 37.
- 2 Save the template.
- 3 Open PLM Discrete Mapping Tool and import the template. See [Importing the template into PLM](#) on page 26.
- 4 Define the mapping rules. See [Defining the mapping rules](#) on page 42.

PLM Object	PLM Attributes	PLM Attribute Type	Direction	Integ. Object	Integ. Attribute
Document	Document ID	string	To Integ.	Custom	PLM_ID
Document	Revision	string	To Integ.	Custom	PLM_REV
Document	Date Created	date	To Integ.	Custom	PLM_DATE

- 5 Save the file to PLM.

Document is created in the PLM and the information that is mapped from PLM is updated in Powerpoint.



MS-Office\_Powerpoint\_Temp1.potx [Read-Only] Prop...

General Summary Statistics Contents Custom

Name: PLM\_ID Modify

Checked by  
Client  
Date completed  
Department  
Destination  
Disposition Delete

Type: Text

Value: PPT-1 ☐ Link to content

Properties:

Name	Value	Type
PLM_ID	PPT-1	Text
PLM_REV	PT01	Text
PLM_DESC	TEST_PPT1	Text
PLM_DATE	1/8/2000	Date
PLM_TYPE	COM	Text
PLM_STA...	UND	Text
PLM_ECN	123	Number
PLM_BO...	Yes	Yes or no

OK Cancel

## Mapping from Microsoft Outlook to PLM

To map attributes in Microsoft Outlook to be updated automatically in PLM, you must define mapping rules in PLM. You can only map attributes such as, To, Sender name, Subject, SentOn, Creation Time, CC, BCC, and Subject.

To map Microsoft Outlook attributes to PLM:

- 1 In the PLM Discrete Mapping Rule window, select the Application and the Template to map.
- 2 Select the Document and MS Office attributes.
- 3 Define the mapping rules. See [Defining the mapping rules](#) on page 42.

PLM Object	PLM Attributes	PLM Attribute Type	Direction	Integ. Object	Integ. Attribute	Integ. Att
Document	To	string	To PLM	Summary	To	string
Document	From	string	To PLM	Summary	SenderName	string
Document	Subject	string	To PLM	Summary	Subject	string
Document	SendDate	date	To PLM	Statistics	SentOn	date
Document	SendTime	string	To PLM	Summary	CreationTime	date
Document	CC	string	To PLM	Summary	CC	string
Document	BCC	string	To PLM	Summary	BCC	string
File	Description	string	To PLM	Summary	Subject	string

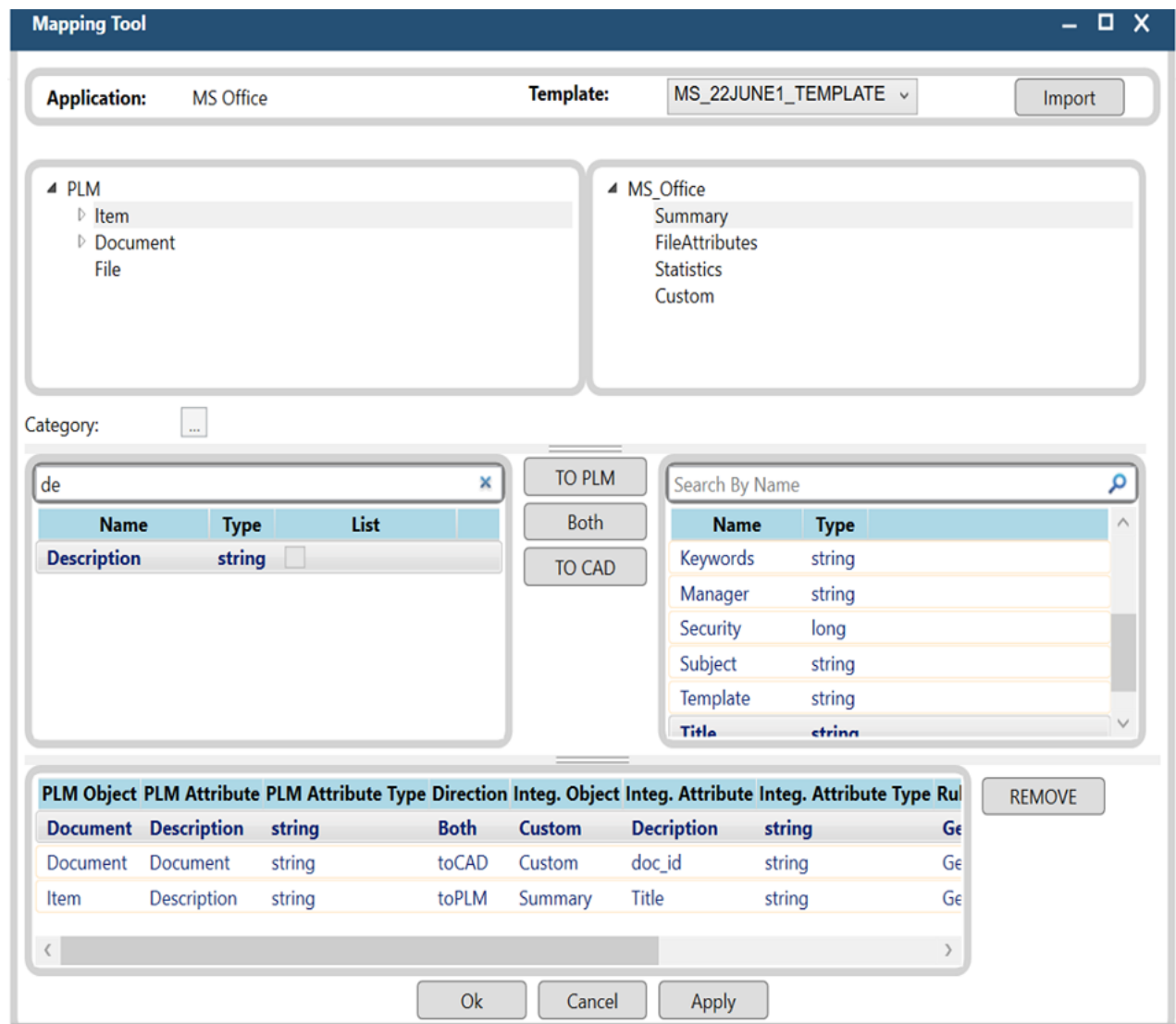
- 4 Associate mapping to the Outlook file. See [Associate the mapping rules to documents or work sheets](#) on page 46.
- 5 Save the file to PLM.  
Document is created in the PLM and the information that is mapped from Microsoft Outlook is updated in PLM.

## Defining the mapping rules

In the **Infor PLM > Mapping Template Tool** dialog box, you can define the mapping rules that are used to map attributes between PLM and Microsoft Office. This dialog box is divided into two sections, one for the PLM attributes and one for the Microsoft Office attributes.

The following example shows how to map attributes from Microsoft Office to PLM and vice versa. To map, for example, the value of the **Title** attribute in the **Summary** group in Microsoft Office to the **Description** attribute of an item from PLM, proceed as follows:

- 1 Click the Item icon on the left side of the **Mapping Tool** dialog box.  
A list of item attributes is displayed on the left side in the middle section of the screen.



- 2 From the list of item attributes, click **Description**.
- 3 From the Microsoft Office side of the window, click **Summary** from the Microsoft Office tree.  
A list of attributes is displayed in the section below.
- 4 In Word, you can find these properties in the **Summary** tab of the **Properties** dialog box. This dialog box appears if you select **File > Properties** in Microsoft Word.
- 5 Click **Title** from the list of attributes.
- 6 Click the **To PLM** button in the middle section of the dialog box. This maps the value of the **Title** attribute to the **Description** attribute of the item in PLM.  
You can add more mapping rules before accepting them. See [Mapping options](#) on page 44 for further information on the available mapping options.
- 7 Click **Apply** when you are through specifying mapping rules.

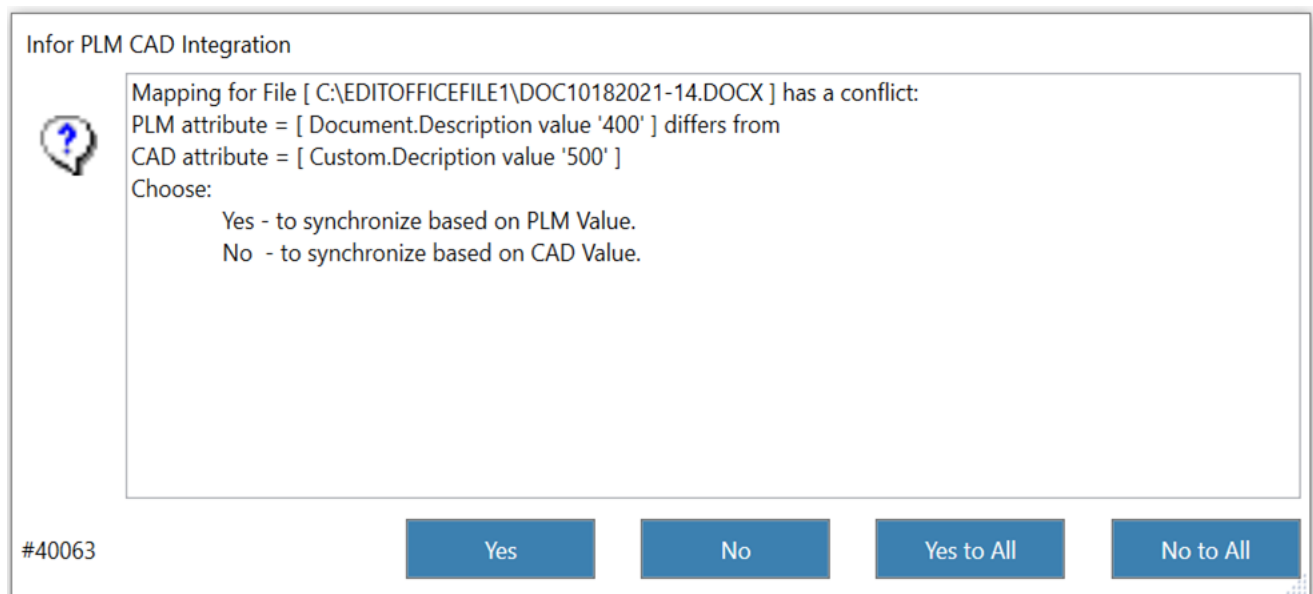
## Mapping options

There are countless variations of the attributes you can map. You can select an attribute associated with an object in PLM and map it to an attribute in Microsoft Office. Also you can reverse the direction and map an attribute value in Microsoft Office to an object's attribute in PLM.

For this purpose, make selections from the PLM and Microsoft Office sections and click the button that describes the direction you want the mapping to take place.

- The **Integ.** button maps the selected attributes from PLM to Microsoft Office.
- The **To PLM** button maps the selected attributes from Microsoft Office to PLM.
- The **Both** button maps the selection to both PLM and Microsoft Office. The mapping rule goes in both directions, meaning the values remain in sync.

In Microsoft Office, if you are working with a part file and you enter a value for an attribute that is mapped to both, the following dialog box appears when you save the part file to PLM.



This dialog box prompts you to indicate which value you want to keep: the value just entered in Microsoft Office or the value entered in PLM.

## Mapping restrictions

Depending on the attributes selected in the **PLM Mapping Tool** dialog box, mapping to PLM, to Microsoft Office, or both can be unavailable. The mapping restrictions are described in the following sections. Attributes not included in the following lists are available for mapping to PLM, Microsoft Office, and to both.

For all mapping rules that you want to define, the target attribute must be a modifiable field.

The following PLM attributes are only available for mapping from PLM to Microsoft Office:

The PLM **Effective From** and **Effective To** attributes.

### Item

Lifecycle.

All attributes related to an item's life.

Business Process.

The attributes related to an item business process or a business process.

Keywords.

Keyword attributes.

Business Attribute.

Manufacturer, supplier, customer, and subcontractor attributes.

### Document

Lifecycle.

All attributes related to an item's life.

Business Process.

The attributes related to an item business process or a business process.

Business Attribute.

Manufacturer, supplier, customer, and subcontractor attributes.

### Project

Project.

All project attributes.

## Attribute format restrictions

To enable you to define mapping rules, the PLM attributes and the Microsoft Office attributes must have the same format or must have a conversion in order to facilitate the following matches:

From	To: String	Integer	Date	Real
String	+			
Integer	+	+(*)		+(*)
Date	+		+(*)	
Real	+			+(*)

**Note:** + (\*) According to regional settings.

The target attribute must be of type string if more than one attribute is mapped to this attribute. The target PLM attribute to which Microsoft Office dimensions are mapped is of type string, because the value and the unit must be concatenated to a string.

The target PLM attribute in a Microsoft Office file-specific rule can have no other general mapping.

### Relationship

You can map one Microsoft Office attribute to one PLM attribute, one Microsoft Office attribute to many PLM attributes, or many Microsoft Office attributes to one PLM attribute.

## Associate the mapping rules to documents or work sheets

Now that you have created mapping rules and saved them to a template, you can create parts, assemblies, or drawings in Microsoft Office using this new template. The part, assembly, or drawing acquires the values of the attributes you defined in the mapping rules. Only the owner of a file or the project administrator can perform associations.

To associate mapping rules to documents or work sheets, proceed as follows:

- 1 For the mapping rules to take effect, disconnect and then reconnect to PLM.
- 2 In Microsoft Office, open a template file for which you have created mapping rules as described in [Defining the mapping rules](#) on page 42.
- 3 Save the template document or work sheet under another name.  
The new document or work sheet has obtained the attributes and the mapping rules of the template.
- 4 Save the document or work sheet with the new name to PLM.
- 5 If you mapped attributes from Microsoft Office to PLM items, link your Microsoft Office document or work sheet to a PLM item using the **Link to Item** option from the PLM menu for the mapping rules to take effect.

For further information, see [Link to Object](#) on page 16.

## The Associate Mapping Rules menu option

In addition to saving the template, for which you have defined mapping rules, under a different name, as described in [Associate the mapping rules to documents or work sheets](#) on page 46. You can use the **Associate Mapping Rules** option from the PLM menu to associate mapping rules to files.

Note that you can only use this option for files not associated to a mapping template previously by opening the template and saving the file under another name.

To associate a file to a template using the **Associate Mapping Rules** option, proceed as follows:

- 1 In Microsoft Office, open the file for which you want to associate mapping rules.

- 2 In Microsoft Office, click on the **PLM Menu > Associate Mapping Rules**. The PLM Mapping Tool dialog box is displayed, as shown below.
- 3 From the Template list, select a template you created in Microsoft Office and imported into PLM. The mapping rules for this template are displayed.
- 4 Click **OK**.

The mapping is completed when you save to PLM.



- 5 After the mapping rules are associated, you can click **Display Mapping** from the PLM menu to display the current mapping rules.

## Removing Mapping Associations

You can remove the rules that are associated with the template. For this purpose, select Remove Mapping Association from the PLM menu. Only project administrators who own the file can remove an association.

## Display Mapping

You can use the **Display Mapping Rules** option in the PLM menu to view the mapping rules defined for the template associated to the part file with which you are working. If you click this option, the PLM Mapping Tool dialog box appears in view-only mode showing the associated template and the mapping rules.

## Applying the Mapping Rules

For the mapping rules to take effect after you define or update them in the PLM Administrative Console as described in [Defining the mapping rules](#) on page 42, you must first disconnect and reconnect your Microsoft Office application to PLM.

The mapping then takes place depending on the rules that you set up. In the example in [Defining the mapping rules](#) on page 42, the mapping takes place when you:

- Save to PLM  
**Note:** If the file is new and has not been saved to PLM, you must save the file to PLM to apply the mapping. After the mapping is applied, you can select **Update Item**, **Update Document** or **Update File** from the PLM menu to see the mapped values. For further information, see [Using Infocards](#) on page 22.

- Use the infocard options: **Update Item**, **Update Document** or **Update File**.
- Edit the file.



# Chapter 6: Setting Preferences

## PLM Options

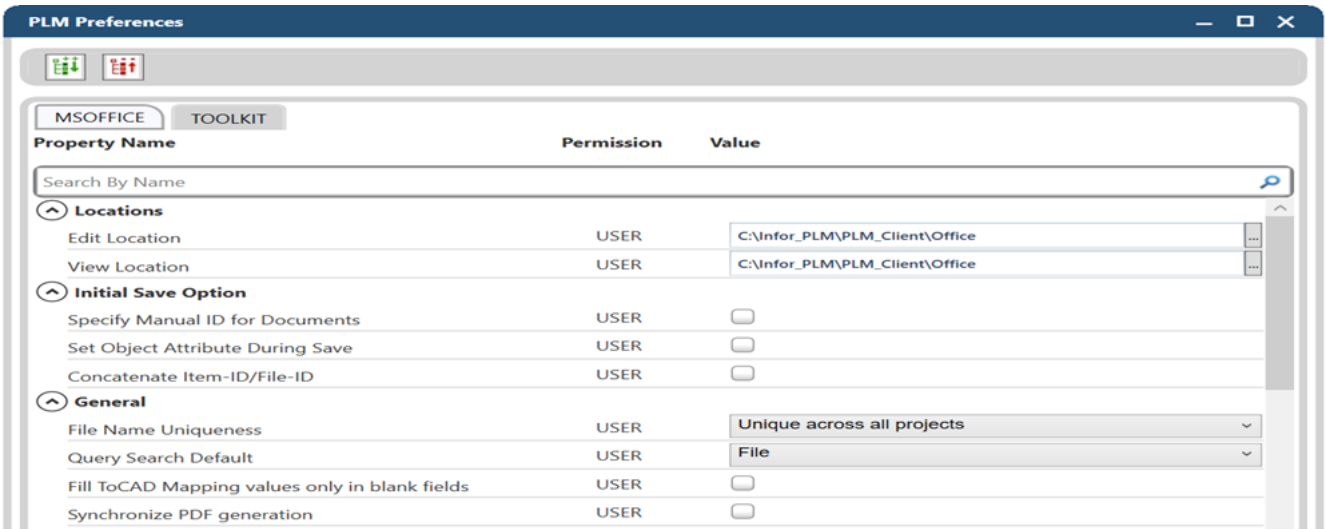
The PLM integration preferences control the way the PLM integration for Microsoft Office works.

Users locally manage integration properties for which they have been authorized by the administrator. The local integration properties are specific to each user. Your settings do not affect the properties of other users.

Users manage their local integration properties in the **PLM Preferences** pane. To access the PLM Preferences pane:

- 1 In Microsoft Office Application, select the Infor PLM menu.
- 2 Select **Preferences > PLM Options**.

The PLM Preferences pane appears.



## Locations

To carry out various commands, such as View File or Edit File from the Results panel of the integration query, PLM must locally download the files that you want to view or edit in Microsoft Office.

In the Locations section you can specify the folders in which PLM must locally download the files that you want to view or edit in Microsoft Office.

## Initial save option

The properties comprising the Initial Save Option determine how files behave when saved to PLM for the first time.

### **Specify Manual ID for Documents**

This option is used to specify whether the IDs and revision number of files created in Microsoft Office and saved in PLM must be entered manually or generated by PLM. If you select this check box, you must manually enter an ID when you save a Microsoft Office file to PLM.

### **Set Object Attribute During Save**

If this check box is selected, you can specify or change the attribute of the objects when you save them. If you set this preference, the Attributes for Files-Documents- Items objects dialog box appears.

### **Concatenate Item-ID/ File-ID**

If this check box is selected, Microsoft Office files are downloaded with filename prefixed with file id and file version.

## General

Use the General preferences category, to specify your preferences such as, Query Search Default and File Name Uniqueness.

### **File Name Uniqueness**

If this check box is selected, the names of the files stored in PLM are unique. If this check box is cleared, you can store multiple files with identical file names in PLM but in different projects. It is not recommended to clear this check box, since it might cause problems if you want to download a file while a file with an identical name already exists locally. Three options are available for this setting.

- Unique across all projects: Only one file can be saved with a given name into PLM from Office integration.
- Unique per Project: At most one file with a given name can be saved in a project.
- Duplicate file name is allowed: Multiple files with a given name can be saved in PLM.

### **Query Search Default**

This option defines the default search object in **Infor PLM > Download files** from PLM tool. The following options are available:

- File
- Document
- Item

## Post Save Process

Use the Post Save Process category to define the actions that can be performed on the local Microsoft Office file when it is copied to the PLM. The preferences are:

**Show message on successful save**

If this check box is selected, the PLM integration displays a dialog box when an object is saved successfully on the server.

**Check in cleanup**

Select the action that must be performed on the file, when it is checked into the PLM Server.

- **Make Files Read-Only:** After check-in, all the files (within the structure, including the root file) will be made read-only in the local system.
- **Delete File:** After check-in, only the root file will be deleted from local system. Rest of the files (within the structure) will be read-only.

**Save and Unlock Cleanup**

Select the action that must be performed on the file, when the Save and Unlock operation is executed.

- **Make files read-only:** After save and unlock, all the files (within the structure, including the root file) will be made read-only in the local system.
- **Delete File:** After save and unlock, only the root file will be deleted from local system. Rest of the files (within the structure) will be read-only.

## Troubleshooting

**Generate Log files**

If this check box is selected, the Integration log file is created.

## Attached to Workflow

Use the Attached to Workflow property to control the Dispatch to Business Process functionality. The options in Attached to Workflow property:

- Attach to Business Process
- Attach all related objects
- Attach Draft Objects only
- Allow edit workflow

**Attach to Business Process**

This option controls the PLM objects of a Microsoft Office file that can be attached to the business process. The available options:

- **Documents Only:** Only the documents associated with the Microsoft Office file are attached to the business process.
- **Items Only:** Only the items associated with the Microsoft Office file are attached to the business process.
- **Both:** Both the documents and the items associated with the Microsoft Office file are attached to the business process.

**Attach all related objects**

If this check box is selected, the PLM objects (items, documents) of all the components in Microsoft Office file are attached to the business process. The PLM objects attached to the business process are based on the values selected for the **Attached to Business Process** preference.

**Attach Draft Objects only**

If this check box is selected, the PLM objects (items, documents) with DRAFT status of all the components in Microsoft Office file are attached to the business process. The PLM objects attached to the business process are based on the values selected for the **Attached to Business Process** preference.

**Allow edit workflow**

If this check box is selected, you can edit the workflow template when you dispatch a Microsoft Offices file to business process.

## Automatic Link to Item and/or Folder

Microsoft Office files when saved to PLM through the MS Office integration, the files will be linked automatically to the PLM item or folder(s) to which they refer.

Custom properties will be created on the Excel, Word and Outlook documents specifying values for Item or Folder Ids. A link is established in PLM between the PLM document and Item and/or Folder based on the values found in these properties.

If Enable Automatic Link to Item and/or Folder check box is selected, automatic linking of item and/or folder is enabled.

You must specify the Item/Folder Ids available in the names of custom properties that will be created on Excel/Word.

## Outlook

**Append Received Time on the Outlook Message to the filename**

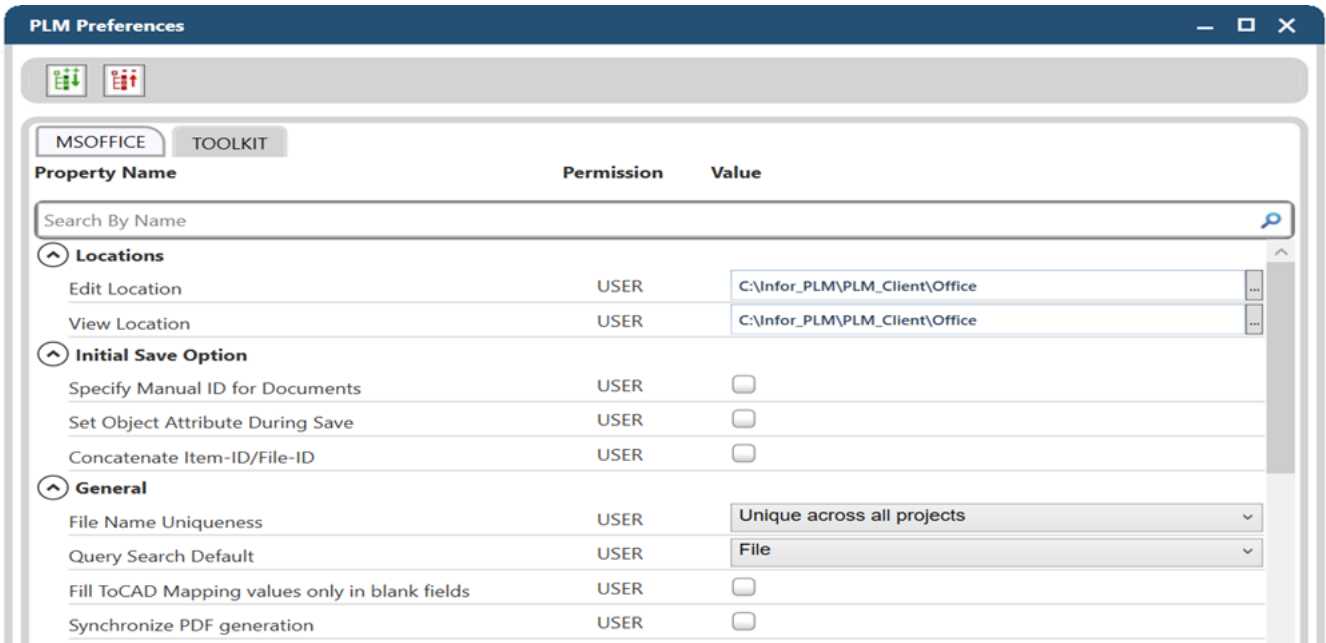
If this check box is selected and you save outlook file to PLM, the PLM includes the received time of the mail message as part of the filename.

## Editing View/Edit File Locations for the Office Integration

When you log in to PLM for the first time, you need to change the Edit and View Location to where your Office files would be transferred to.

- 1 Select **Preferences** in the Preferences drop down menu.

2 The PLM Preferences window opens.



3 Click on the value in Edit and View Location.

4 Change the paths for Edit and View Location.

You should be able to perform View File and **Download files from PLM** now.

## Chapter 7: Setup and Administration

This section describes solutions for troubleshooting and known limitations with the Office Integration.

### Troubleshooting

#### Microsoft Office not available in application list of Mapping Tool dialog box

To define mapping rules for a particular Microsoft Office template, in the **PLM Mapping Tool** dialog box, you must first select Microsoft Office in the **Application** list and then select the template for which you want to define the mapping rules. However, sometimes Microsoft Office is not available in the **Application** list.

Recommendation

In file C:\Infor\PLM\_Integration\temp\cfeMappingTool.xml, add the following line to the <APPLICATIONS> list:

```
<CFE_MAPPING_TOOL>
  <APPLICATIONS>
    <APPLICATION ID='MS' LABEL='MS Office'
      TEMPLATE_CONVERT_APP='Office2010/MS_ITC.EXE' />
  </APPLICATIONS>
</CFE_MAPPING_TOOL>
```

MS\_ITC.exe convector is the utility used by Microsoft Office for converting mapping template information to xml.

The entry for APPLICATION ID=' must be in upper case as shown in the previous example. The entry for LABEL=' is the shown label and has no functionality. The entry for the TEMPLATE\_CONVERT\_APP=" line includes the local path for the ITC executable and the ITC executable name corresponding to the integration license.

In addition, make sure that the directory and executable "Office2010/MS\_ITC.exe" indicated in the applicable TEMPLATE\_CONVERT\_APP line exists under the integration installation directory.

The entries in the cfeMappingTool.xml file use forward slashes (/) even though the windows standard is to use backward slashes (\) as a path separator.

## Error Messages

If the user is unable to open the integration, this may be due to one of a number of reasons. The error message displayed to the user should include an error number. The following table lists the error numbers with an explanation of the possible problem:

Number	Meaning
1	Invalid number of input parameters.
2	Failed to create DeProxy.exe instance.
3	Invoke Action Failed in Toolkit.
4	COM Error occurred during invocation.
5	An exception occurred during invocation.
70001	No integration exists for this file format.
70002	Missing originating application parameter.
70003	Development Toolkit Callback not set.
70004	Server Error cannot be identified.
70005	The Open operation failed.

## Limitations

The following known issues exist for the Microsoft Office integration:

### Mapping interaction with Property comment

If a relationship is defined between a PLM attribute and the Comments field of the file properties of a file, any data manually entered in the Comments field will be replaced by the value of the mapped PLM attribute.

### Deleting custom mapped properties

You must delete custom mapping properties before you remove standard mapping file properties, otherwise you cannot delete the custom properties.

### Using Word as your email editor

You cannot use Microsoft Word as your email editor with the PLM- Microsoft Office integration.

### Viewing Microsoft Office files through PLM

Due to a Microsoft limitation, you cannot use the Microsoft Office integration while viewing Microsoft Office files via the PLM viewer.

### Word documents with Control Toolbars

The Microsoft Office integration does not support Word documents containing control toolbars, that is, forms or check boxes. This limitation extends to documents that used to contain check boxes that have since been deleted.