SmartLink for Laser App
Deployment Guide

SmartOffice®

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Introduction

This guide is intended for the SmartOffice® System Administrator and is designed to provide the information necessary to deploy and test SmartLink for Laser App for SmartOffice v3.5.9 and higher. This guide is not intended for users as it requires access to administrative functions and technical knowledge.

Use this guide to:

- Install the Laser App adapter.
- Provide access to users.
- Test the integration to ensure that it works.

In addition, it includes instructions on how to:

- Reinstall the Laser App adapter.
- Uninstall the Laser App adapter.
- Export the Laser App adapter.

Installing the Laser App Adapter

Prior to installing the adapter, you must save **LaserApp.zip** to either your local workstation or a server.

To install the Laser App adapter:

1. Log in to the System office as an administrator.
2. Select **SI Adapter** from the expanded **Interfaces** menu to display the Adapter Search dialog box.
3. Click the **Search** button to display the Adapter Summary.
4. Click the **Install** button to display the Adapter Installation Wizard dialog box.
5. Select the **Select the package file from your local system** option and then click the **Browse** button to navigate to the folder that contains the LaserApp.zip file.
6. Click the **Next** button to display the Adapter Basic Configuration dialog box. The fields on this page are pre-populated with the default values for the Laser App adapter.
7. Make the necessary changes to the following fields:

Field Name	Description
Name	Enter a name that uniquely identifies the adapter.
	The name will be used throughout SmartOffice to refer to the integration. The integration for Laser App will be referred as such throughout SmartOffice: SI Adapter. + Name (e.g., SI Adapter.LaserApp).
Description	Enter a description that will help you understand the purpose of the adapter.
License Type	Specify the level of access for the adapter.
	• **Site**: Provides access to all users defined in SmartOffice to the Laser App integration.
	• **Office**: Provides access to all users of a particular office(s) to the Laser App integration.
	• **User**: Provides access to specific users of certain office(s) to the Laser App integration.

	Make a note of the License Type as you will refer to it in the *Providing Access to Users* section.
Type	Ensure that **Local Application** is selected.
Target Address	Leave blank.
Post Type	Ensure that **File** is selected.
Content Type	Ensure that **Text/Plain** is selected.
File Name	Ensure that **LaserApp.~ls** is entered.
Parameter Name	Leave blank.
Multi-selection	Leave blank.
Authentication Required	Leave blank.

8. Click the **Next** button to display the Adapter - Accessibility Configuration with the fields pre-populated.

9. From the Adapter - Accessibility Configuration page, populate the following:

Field	Description
Button Icon	Click on the empty image next to the Button Icon field to select the button that will open Laser App.
Button ToolTip	Enter a tip that will describe the functionality of the button. We recommend **Launch Laser App**.
Adapter Accessibility	Ensure that both **Contact Summary** and **Contact Detail** are selected. Note that the Laser App integration can only be accessed through the Contact module.
Bottom Bar	Leave this option unselected. This displays the Laser App button at the bottom right corner throughout SmartOffice.

10. Click the **Next** button to display the Adapter – Side Menu Configuration page.

11. Click the **Next** button to skip this page. Note that the Laser App integration should not be available from the side menu as the user must first select a contact to export the data to Laser App.

12. Click the **Finish** button to complete the installation and display the Adapter – Status dialog box noting the success of the installation.

13. Click the **OK** button. The newly installed adapter is listed on the Adapter Summary.

Providing Access to Users

Once the Laser App adapter has been installed, rights must be awarded to those users who will use the integration.

The type of access for this integration was already specified during the installation of the Laser App adapter. The field that contains this information is the License Type field located on the Detail tab of the Laser App integration.

Only award rights to users if the following License Types were selected:

- Office
- User

License Type	Description	How to Proceed
Site	Access is given to every user defined for this instance of SmartOffice.	Users can begin utilizing the Laser App integration.
Office	Access is given to all users defined for a particular office.	Complete - *To provide access to the Laser App integration*
User	Access is given to specific users of a particular office.	Complete - *To provide access to the Laser App integration* - *To award user rights to the Laser App integration*

To provide access to the Laser App integration

1. Log in to the System office as an administrator.
2. Select **Office Settings** from the expanded **Office Setup** menu to display the Search Office dialog box.
3. Enter the name of the office in the Office Name field and then click the **Search** button to display the corresponding Detail tab.
4. Click the **Licenses** tab to enable the Laser App integration.
5. Locate the Laser App integration (e.g., SI Adapter.LaserApp).
6. Depending on the License Type, perform the following:

License Type	Instructions
Office	Select the check box corresponding to the Laser App integration. **Licenses** License Type Maximum Licenses Licenses in Use SIAdapter.LaserApp ☑ 2 This provides access to all users of this particular office.
User	Specify the maximum number of users who can have access to the Laser App integration.

Licenses

License Type	Maximum Licenses	Licenses in Use
SIAdapter.LaserApp	15	2

The integration will be available as an option on the User Roles/Licenses tab for each user account.

Note that the Licenses in Use column reflects the number of users who have currently been given access to the integration.

7. Click the **Save** button. If you have set rights to this integration at the user level, you must now proceed to award rights to specific users.

To award user rights to the Laser App integration

1. From the Office Administration screen (follow Steps 1 through 3 in the *To provide access to the Laser App integration* section), click the **Users List** tab.

2. Select the user that requires access to this integration and then click the **User Roles/Licenses** tab.

3. From the Modules/Licenses section, scroll down to the Integration section.

4. Select the **SI Adapter.LaserApp** option to provide access to this user.

5. Click the **Save** button. The user now has access to the Laser App Adapter from the Contact module. Refer to the *SmartLink for Laser App User Guide* to learn how to utilize the integration between SmartOffice and Laser App.

Note that once the number of users that have access to this integration exceeds the maximum number of users specified in the Maximum Licenses field, the integration will no longer be available as an option to other users within the User Roles/Licenses tab.

Maintaining Laser App Adapter

There may be circumstances where you will need to:

Task	See	Button
Modify the Adapter properties, such as name, license type, etc.	*Modifying Properties of the Laser App Adapter*	
Upload an updated LaserApp.zip file to the Laser App Adapter.	*Reinstalling the Laser App Adapter*	
Remove the Laser App Adapter from the list of Adapters.	*Uninstalling the Laser App Adapter*	
Export the existing LaserApp.zip file to install on other instances of SmartOffice.	*Exporting Laser App Adapter*	

Modifying Properties of the Laser App Adapter

Details regarding the Adapter can be modified.

To Modify the Laser App Adapter:

1. Log in to the System office as an administrator.
2. Select **SI Adapter** from the expanded **Interface** menu to display the Adapter Search dialog box.
3. Click the **Search** button to display the Adapter Summary.
4. Select the **Laser App** adapter and then click the **Detail** tab.
5. Click the **Modify** button to make changes to the necessary fields. The Detail and Add'l Detail tab information can be modified.
6. Click the **Save** button to save the changes.

Reinstalling the Laser App Adapter

You may need to reinstall the Adapter in order to upload a new LaserApp.zip file. During this time you will also be able to modify the properties for the Adapter.

If modifications only need to be made to the properties of the Adapter, use the **Modify** button. For instructions, refer to the *Modifying Properties of the Laser App Adapter* section.

To Reinstall the Laser App Adapter:

1. Log in to the System office as an administrator.
2. Select **SI Adapter** from the expanded **Interfaces** menu to display the Adapter Search dialog box.
3. Click the **Search** button to display the Adapter Summary.
4. Select the Laser App adapter and then click the **Reinstall** button to upload the file.
5. A Confirmation dialog box displays prompting to confirm your request; click the **Yes** button to display the Adapter Installation Wizard – File Upload dialog box.
6. Select the **Select the package file from your local system** option and then click the **Browse** button to navigate to the folder that contains the LaserApp.zip file.
7. Click the **Next** button to go through the remaining pages of the installation and make changes, if necessary.
8. Click the **Finish** button to save the updated file and information.

Uninstalling the Laser App Adapter

You may need to remove the Adapter from an instance of SmartOffice. Note that this integration will no longer be available for those users who currently have access to it.

To Uninstall the Laser App Adapter:

1. Log in to the System office as an administrator.
2. Select **SI Adapter** from the expanded **Interfaces** menu to open the Adapter Search dialog box.
3. Click the **Search** button to display the Adapter Summary.
4. Select the Laser App adapter and then click the **Uninstall** button.
5. A Confirmation dialog box displays prompting to confirm your request; click the **Yes** button to continue.
6. A second Configuration dialog box displays notifying you that this integration will no longer be available to users; click the **Yes** button.
7. The Adapter – Status displays to notify the success of the uninstallation.
8. Click the **OK** button; the removed adapter will no longer be listed on the Adapter Summary.

Exporting Laser App Adapter

You may need to install the Laser App Adapter on another instance of SmartOffice with the properties defined from an existing installation of Laser App Adapter.

To Export the Laser App Adapter:

1. Log in to the System office as an administrator.
2. Select **SI Adapter** from the expanded **Interfaces** menu to open the Adapter Search dialog box.
3. Click the **Search** button to display the Adapter Summary.
4. Highlight the Laser App adapter and then click the **Export** button to display a Confirmation dialog box prompting to confirm the request.
5. Click the **Yes** button to continue.
6. A second Configuration dialog box displays stating that this integration will no longer be available to users.
7. Click the **Yes** button to display the File Download dialog box.
8. Click the **Save** button.
9. Save the LaserApp.zip file to any directory and make a note of it to reference when installing the Adapter.