



2021.2
Developer Guide

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Developer Guide for WorkZone 365 (former WorkZone Office) 2021.2



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What's new

2021.2

No changes in this release.

2021.1

No changes in this release.

2021.0

WorkZone Office renamed to WorkZone 365

- We have changed the name of WorkZone Office to WorkZone 365. To be ready for the future and Microsoft 365, we will handle all integrations to Microsoft under our new name.

New functionality

- The structure of JSON requests used to configure WorkZone 365 forms such as Document registration has changed. Now all fields must be specified in the request: the visible fields with the `"visible": "Visible"` property, and the not visible ones with the `"visible": "None"` property. All configurations (`visible`, `readOnly`, `required`, and `order`) must be specified for every field.

2020.3

- The **Unique**, **Droplist**, **Integer**, and **Decimal** custom fields created by administrators in WorkZone Configurator can be added to the WorkZone 365 pane for users, units, and organizations. Validation rules can be applied to the **Text** and **Unique** custom fields of the WorkZone 365 pane: **CVR number**, **Email address**, and **Web address**. See 1. Configuration.

2020.2

The **Text** and **Date** custom fields created by administrators in WorkZone Configurator can be added to the WorkZone 365 pane for users, units, and organizations.

2020.1

This is the first version of the guide.

Work with Postman

Postman is a powerful tool for development and testing API.

In WorkZone, use Postman to configure WorkZone 365 forms such as Document registration. The custom configuration you specify in Postman will be taken from OData and applied to the existing form.

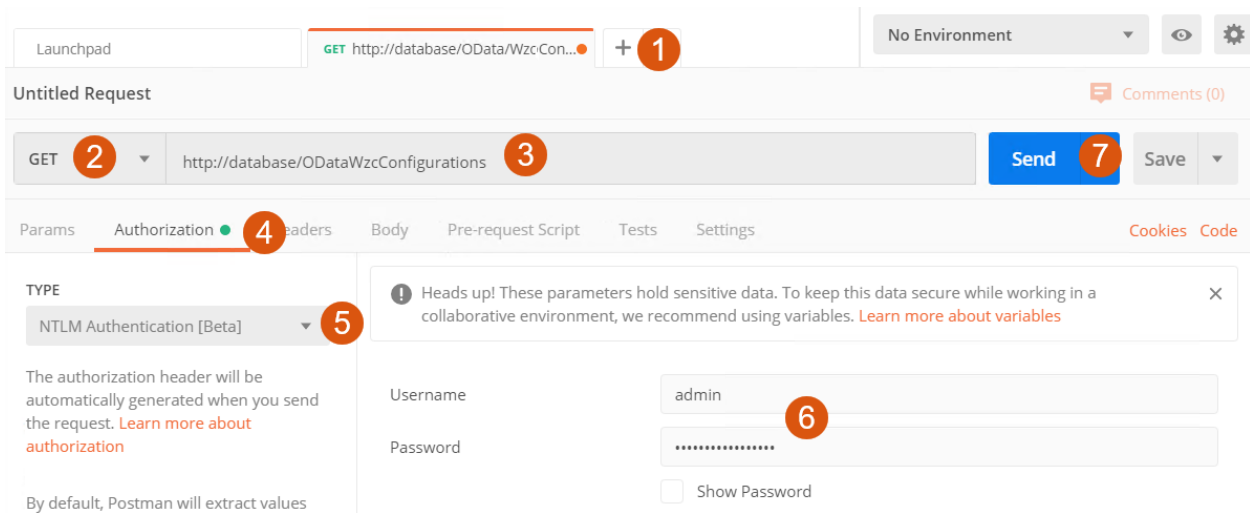
WorkZone 365 standard forms are stored in the configuration file, which is located in the installation folder. If you want to adjust a form, you must create a new request. Please be aware that you must only specify the delta (difference) of the configuration in this request. In other words, there is no need to define the entire form from scratch - you only need to specify the desired change.

Install Postman

1. Go to <https://www.getpostman.com/downloads>.
2. Expand the **Download** button and select Windows 32-bit or 64-bit version.
3. Double-click the downloaded file and then click **Run**.
4. Run the Postman application.
5. Sign up or click **Skip signing in and take me straight to the app** in the bottom of the screen. The application opens.

Configure authorization access

To configure authorization access, proceed with the following steps:



1. On the main page, click **+**.
2. Ensure that you have the GET method selected.
3. Specify the URL to OData. The URL must have the following format: `https://<host>/OData/WzcConfigurations`.
4. Click **Authorization** on the ribbon.
5. Select the **NTLM Authentication [Beta]** type.
6. Enter your credentials.
7. Click **Send** and you will get the current configuration.

Possible issues and workarounds

Disable SSL certificates verification

Your SSL certificates are most probably being blocked if you sent the request and got the following message:

[Could not get any response](#)

Could not get any response

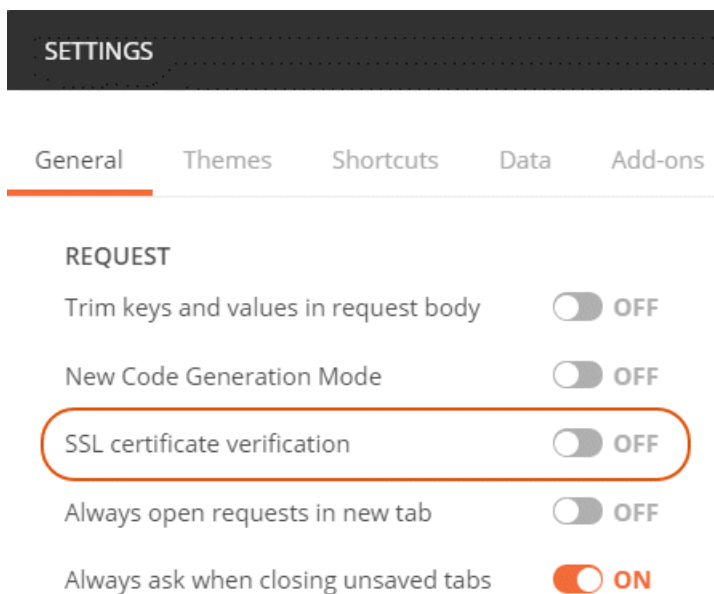
There was an error connecting to [http://database/OData/WzoConfigurations\('forms'\)](http://database/OData/WzoConfigurations('forms')).

Why this might have happened:

- **The server couldn't send a response:** Ensure that the backend is working properly
- **Self-signed SSL certificates are being blocked:** Fix this by turning off 'SSL certificate verification' in *Settings > General*
- **Proxy configured incorrectly** Ensure that proxy is configured correctly in *Settings > Proxy*
- **Request timeout:** Change request timeout in *Settings > General*

To proceed, turn off the SSL certificate verification. To do this:

1. Click **File > Settings**.
2. Turn off the **SSL certificate verification** toggle button.

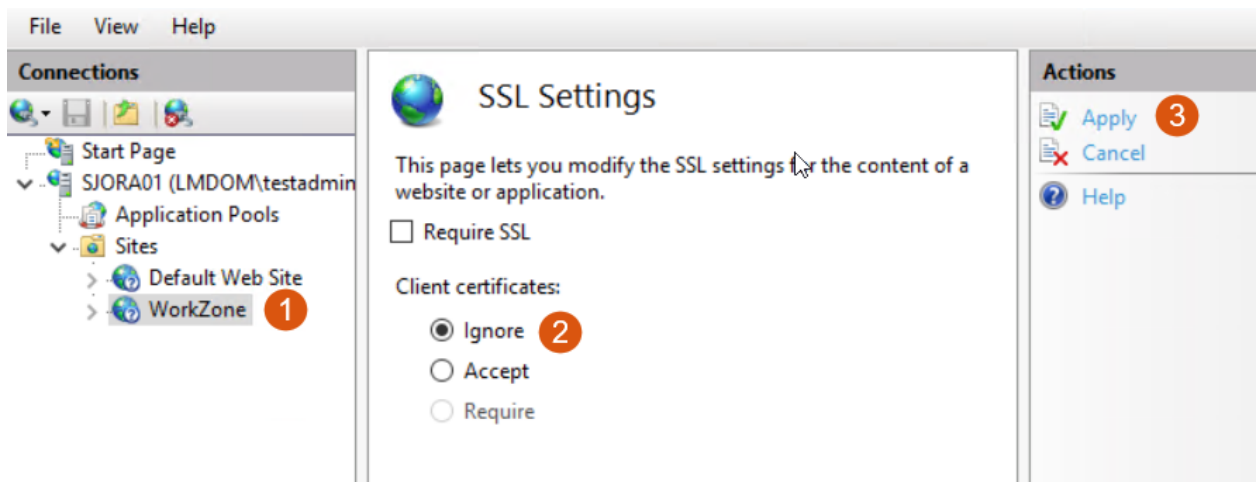


Set an unsecured connection

In some cases, even this may not be sufficient. If this is the case, the only way is to **temporarily** switch from https to http connection.

Important: Be aware that switching to an unsecured connection can be very dangerous for the entire WorkZone system. If you proceed with the following workaround, you must ensure that you set the https settings back once you finish.

1. Log in to the database machine using administrator rights.
2. Open Internet Information Services (IIS) Manager
3. Find WorkZone under Sites and select **Ignore** Client certificates.
4. Click **Apply**.



The structure of requests

The standard request has the following structure:

1. [Configuration](#)
2. [Client](#)
3. [Addressee](#)
4. [Priority](#)

You can place these properties in any order.

1. Configuration

In this section, you define fields and their properties to be shown on the **Document registration** form. All available fields and custom fields, if there are any, must be specified in the JSON request. If the field will not be used on the **Document registration** form, you must specify the following property for it: `"visible\" : \"None\"`. If the field will be used, the following property must be defined for it: `\"visible\" : \"Visible\"`.

The syntax to start defining configuration is `"Config" : .` Remember to follow JSON syntax.

Available components

This is a list of the default fields that you can use on the **Document registration** form:

- Title
- DocumentType
- Classification
- State
- CaseHandler

Other available fields are:

- ResponsibleUnit
- ActingUnit
- Case

- MainDocument
- DocumentGroup
- DocumentNumber
- Origin
- MailList
- LetterDate
- ReplyDeadline
- Keywords
- Text
- CreatedBy
- CreatedDate
- VersionNumber
- Replied
- SentFrom
- ArchivingForm
- PostalDate
- RetentionDate
- Type

Custom components

Along with the available default fields, you can define the following custom fields that are specific for your organization:

- Text
- Data
- Unique
- Droplist
- Integer
- Decimal
- Address
- Contact
- Employee

- Unit
- Case
- Document

The following validation rules can be set in the WorkZone Configurator for the **Text** and **Unique** fields: **CVR number**, **Email address**, and **Web address**.

See more about custom fields in the [Administrator Guide for WorkZone Configurator](#). You can add these fields to the WorkZone 365 configuration using Postman. See more about Postman in Work with Postman. For an example of a JSON request for creating the custom document fields, see Add custom document fields.

Common properties

In the table below you can find a list of the properties that are applicable to all fields. The required properties must be specified in the JSON request.

Properties	Required or optional	Values	Comments
label	optional	string	You can change a default name of the field.

Note:

- Be aware that the WorkZone 365 User Guide will contain the default names in descriptions, which might confuse

Properties	Required or optional	Values	Comments
			<p>users.</p> <ul style="list-style-type: none">• Once you change a label to a custom value, it will be applied to all languages. In other words, you cannot localize custom labels.
title	optional	string	<p>You can change a default title of the WorkZone 365 pane.</p> <p>Note:</p> <ul style="list-style-type: none">• Be aware that the WorkZone 365 User Guide will contain the default names in descriptions, which might confuse

Properties	Required or optional	Values	Comments
			<p>users.</p> <ul style="list-style-type: none"> Once you change a title to a custom value, it will be applied to all languages. In other words, you cannot localize custom titles.
order	required	number	To set the proper number, please see the configuration file. This is the only way to define what number is relevant for your configuration at this moment.
required	required	'true', 'false'	<ul style="list-style-type: none"> 'true' - the field is required. 'false' - the field is optional. <p>Important: You cannot set 'false' to a field that is required</p>

Properties	Required or optional	Values	Comments
			<p>in the database. Your changes will not be saved to predict a crash of basic scenarios in WorkZone.</p>
defaultValue	optional	string	Specify a default value that will be visible to users.
readOnly	required	'true', 'false'	<ul style="list-style-type: none"> 'true' - the field is read-only. 'false' - the field is available for editing. <p>You cannot set 'false' to a field that is read-only in the database. Your changes will not be saved to predict a crash of basic scenarios in WorkZone.</p>
visible	required	'Visible', 'None'	<ul style="list-style-type: none"> 'Visible' - users can see the field 'None' - users don't see the field. <p>Important: You can-</p>

Properties	Required or optional	Values	Comments
			<p>not set 'None' to a field that is required in the current request. Your changes will not be saved to predict a crash of basic scenarios in WorkZone.</p>

Properties	Required or optional	Sub-properties	Values	Comments
dataSource.Value	optional	.select	object	<p>The value will be retrieved from the OData entity for a particular item.</p> <p>Important: Due to complexity of this connection, it is not recommended to change this value without a strong need.</p>

The Select fields properties

Properties	Required or optional	Sub-properties	Values	Comments
dataSource.Items				
	optional	.odataEntity	string	Specify content of the field.
	optional	.filter	string	Define a filter for the entity. For example, you might want to only show cases with the 'Open' state.

2. Client

For WorkZone 365, always use this syntax: `"Client": "WZO"`.

3. Addressee

Define to whom the configuration must be applied. Use the following syntax: `"NameKey_Value": "XXX"`, where `XXX` value can be:

- a **user** with the current ID value
- a **unit** with the current NameKey value
- the entire **organization** if the value is empty.

4. Priority

Define a priority of the configuration by using the following syntax: "Priority": "X", where X is the integer number. The highest priority is 9, the lowest priority is 1. If multiple configurations of the same type exist, priority helps to define which configuration must be prioritized.

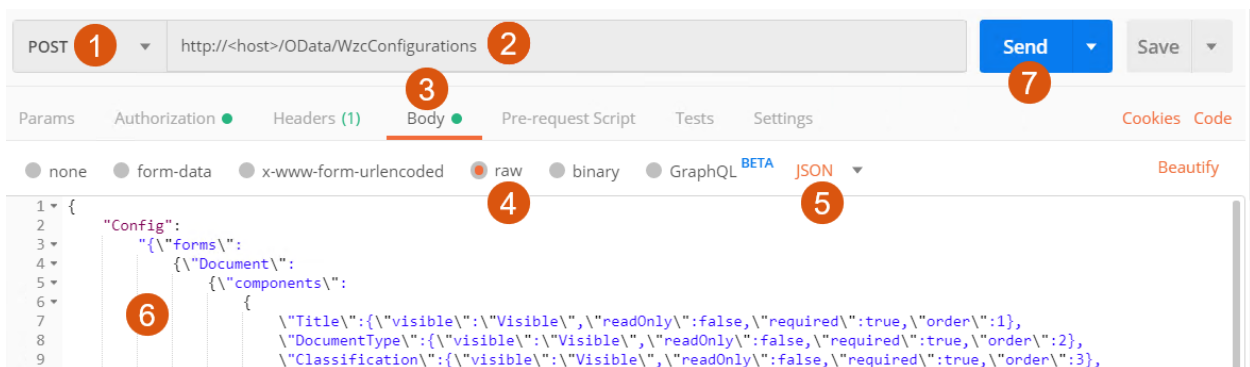
Note: Configurations cannot be of the same type with equal priority. Otherwise, WorkZone 365 issues an error and none of such configurations are applied.

Work with configurations

Create a new configuration

To create a request to change the **Document registration** form, you must strictly follow the JSON syntax used in the request.

You need a new request to send the delta with changes to WorkZone 365.



1. Set method to POST.
2. Specify the URL to OData in the following format: OData address + OData/WzcConfigurations.
3. Go to the **Body** tab.
4. Select **raw**.
5. Select **JSON**.
6. Enter the request in the JSON format. See [The structure of requests](#).
7. Click **Send**.

Add a custom component

You can add a custom field to the **Document registration** form. To do this, you must create a new component request and send it to the configuration file.

1. Compose a custom component by using available properties. See [Common properties](#). Remember to follow JSON syntax.
2. Set the property for the new component as `\ "visible\ " : \ "Visible\ "` and send it. See [Create a new request](#).

Delete a configuration

To delete a configuration from the database, proceed with the following steps:

1. Select the DELETE method.
2. Enter a URL to OData and add the configuration ID in the database.

```
Example: https://<host>/OData/WzcConfigurations('50').
```

See how to find the ID configuration below.

3. Click **Send**.

How to find the configuration ID

1. Go to the Query Builder.
2. Select **WzcConfigurations** in the **Entity** field.
3. Optionally, use **Filter** to show configurations of the specific unit or user.
4. Click Search.
5. Find the ID of the needed configuration.

WorkZone OData QueryBuilder 1

Endpoint:

Entity: 2

Filter: 3

Select:

Expand:

Order by:

V3/WzcConfigurations?\$filter=NameKey_Value eq '166'&\$select=*

XML

4

ID 5	Client	Config	ConfigKey	NameKey_Value	Priority
41	WZO	{"Document":{"components":{ } } }	41	166	3
45	WZO	{"Document":{"components":{ } } }	45	166	5
46	WZO	{"Document":{"components":{"ResponsibleUnit":{"... 46	166	4	
48	WZO	{"Document":{"components":{"State":{"readOnly"... 48	166	6	
51	WZO	{"Document":{"components":{"Title":{"maxLengt... 51	166	7	

Reset configuration to default

To reset a configuration to default, delete all configurations.

Tip: Alternatively, you can delete the configurations that you no longer need. See [Delete a configuration.](#)

Examples of JSON requests

Show all available fields

```

{"Config":
  {"forms":

```

```

        {"Document":
            {"components":
                {
                    {"Title":{"vis-
ible":{"Vis-
ible","readOnly":false,"required":true,"order":1},
                    "DocumentType":
                    {"vis-
ible":{"Vis-
ible","readOnly":false,"required":true,"order":2},
                    "Classification":
                    {"vis-
ible":{"Vis-
ible","readOnly":false,"required":true,"order":3},
                    "State":
                    {"vis-
ible":{"Vis-
ible","readOnly":false,"required":true,"order":4},
                    "CaseHandler":
                    {"vis-
ible":{"Vis-
ible","readOnly":false,"required":false,"order":5},
                    "ResponsibleUnit":
                    {"vis-
ible":{"None","readOnly":-
false,"required":false,"order":6},
                    "DocumentGroup":
                    {"vis-
ible":{"None","readOnly":-
false,"required":false,"order":7},
                    "MailList":
                    {"vis-
ible":{"None","readOnly":-
false,"required":false,"order":8},
                    "Text":

```

```

{"vis-
ible\":"None\","readOnly\":-
false,"required\":false,"order\":9},
                                \"CreatedBy\":
{"vis-
ible\":"None\","readOnly\":true,\"re-
quired\":false,\"order\":10},
                                \"CreateDate\":
{"vis-
ible\":"None\","readOnly\":true,\"re-
quired\":false,\"order\":11},
                                \"VersionNumber\":
{"vis-
ible\":"None\","readOnly\":true,\"re-
quired\":false,\"order\":12},
                                \"Type\":
{"vis-
ible\":"None\","readOnly\":true,\"re-
quired\":false,\"order\":13},
                                \"DocumentNumber\":
{"vis-
ible\":"None\","readOnly\":true,\"re-
quired\":false,\"order\":14},
                                \"Origin\":
{"de-
faultValue\":"CAP\","vis-
ible\":"Vis-
ible\","readOnly\":false,\"required\":false,\"order\":15},
                                \"RetentionDate\":
{"vis-
ible\":"None\","readOnly\":true,\"re-
quired\":false,\"order\":16},
                                \"ArchivingForm\":
{"vis-
ible\":"None\","readOnly\":-
false,\"required\":false,\"order\":17},

```



```

        "PostalDate": {"vis-
ible": "None", "readOnly": -
false, "required": false, "order": 18},
        "SentFrom":
{"vis-
ible": "None", "readOnly": -
false, "required": false, "order": 19},
        "Replied":
{"vis-
ible": "None", "readOnly": true, "re-
quired": false, "order": 20},
        "LetterDate":
{"vis-
ible": "None", "readOnly": -
false, "required": false, "order": 21},
        "ActingUnit":
{"vis-
ible": "None", "readOnly": -
false, "required": false, "order": 22},
        "Case":
{"vis-
ible": "None", "readOnly": true, "re-
quired": false, "order": 23},
        "MainDocument":
{"vis-
ible": "None", "readOnly": -
false, "required": false, "order": 24},
        "ReplyDeadline":
{"vis-
ible": "None", "readOnly": -
false, "required": false, "order": 25},
        "Keywords":
{"vis-
ible": "None", "readOnly": -
false, "required": false, "order": 26}
    }

```

```
        }
    }
    },
    "Priority": "7",
    "Client": "WZO",
    "NameKey_Value": "158"}
```

Set 'Document state' as read-only field and define its default value

```
    \"State\": {\"readOnly\": true, \"defaultValue\": \"UÅ,
Draft\", \"visible\": \"Visible\", \"required\": true, \"order\": 3}
```

Set 'Document type' as an optional field and 'Text' as a required field

```
    \"DocumentType\": {\"re-
quired\": -
false, \"order\": 2, \"visible\": \"Visible\", \"readOnly\": false},
    \"Text\":
    {\"re-
quired\": true, \"order-
\": 9, \"visible\": \"Visible\", \"readOnly\": false}
```

Add custom document fields

```
    \"TextField_Value\": {\"vis-
ible\": \"Vis-
ible\", \"readOnly\": false, \"required\": false, \"order\": 9},
    \"DateField_Value\":
    {\"vis-
ible\": \"Vis-
ible\", \"readOnly\": false, \"required\": true, \"order\": 10}
```

The code related to the custom document fields is modified according to the following rules:

Rule	Example
The first letter of every word in the field code is capitalized.	"textCode" > "TextCode"
The underscore and space symbols "_", " " are deleted from the field code.	"Text_field" > "TextField" "Text field" > "TextField"
The "_Value" part is added after the field code.	"TextField" > "TextField_ Value "
All uppercase letters except the first one are lower-cased.	"CVR Number" > "CvrNumber_Value"

Merge configurations

About configuration types

In WorkZone 365, you can apply and merge WorkZone configurations similarly to how it's done with WorkZone Client configurations. There are four types of WorkZone Client configurations (from the highest to lowest priority):

1. Personal
2. Distributed-to-user
3. Distributed-to-unit
4. Organizational

Tip: See [Configuration types](#) and priorities in WorkZone Client Administrator Guide to get detailed information on each of the type.

In WorkZone 365, **Personal** and **Distributed-to-user** configurations are combined to the **User** configuration. All in all, there are three types of configurations in WorkZone 365 (from the highest to lowest priority):

1. User
2. Unit
3. Organizational

When more than one configuration exists for a user or a unit, the configurations are merged.

- If there are no conflicts between settings of applied configurations, they are all applied.
- If there is a conflict between settings of applied configurations, the settings of a configuration with a higher priority will be applied.

Example of the configuration merging

Important: Ensure that you don't send configurations of the same type with equal priority. In such case, WorkZone 365 issues an error and none of such configurations are applied.

There are two configurations for unit A.

The first one has priority 9. It states that **Case** is a required field, and the **Keywords** field is a read-only field.

The second one has priority 3. It states that **Case** is not a required field and the **Keywords** field is not a read-only field.

A developer creates two requests. When configurations are merged, the first configuration is prioritized. As a result, unit configuration will have **Case** as a required field and **Keywords** as a read-only field.

The first request:

```

28  \ActingUnit\:{\"visible\": \"None\", \"readOnly\": false, \"required\": false, \"order\": 22},
29  \Case\:{\"visible\": \"None\", \"readOnly\": true, \"required\": true, \"order\": 23},
30  \MainDocument\:{\"visible\": \"None\", \"readOnly\": false, \"required\": false, \"order\": 24},
31  \ReplyDeadline\:{\"visible\": \"None\", \"readOnly\": false, \"required\": false, \"order\": 25},
32  \Keywords\:{\"visible\": \"None\", \"readOnly\": true, \"required\": false, \"order\": 26}
33  }
34  }
35  }
36  },
37  \"Priority\": \"9\",
38  \"Client\": \"WZO\",
39  \"NameKey_Value\": \"A\"
40  }
  
```

The second request:

```

28  \ActingUnit\:{\"visible\": \"None\", \"readOnly\": false, \"required\": false, \"order\": 22},
29  \Case\:{\"visible\": \"None\", \"readOnly\": true, \"required\": false, \"order\": 23},
30  \MainDocument\:{\"visible\": \"None\", \"readOnly\": false, \"required\": false, \"order\": 24},
31  \ReplyDeadline\:{\"visible\": \"None\", \"readOnly\": false, \"required\": false, \"order\": 25},
32  \Keywords\:{\"visible\": \"None\", \"readOnly\": false, \"required\": false, \"order\": 26}
33  }
34  }
35  }
36  },
37  \"Priority\": \"3\",
38  \"Client\": \"WZO\",
39  \"NameKey_Value\": \"A\"
40  }
  
```

See also

[Create a new configuration](#)

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