Configuration

Excel Writer · https://extensionkit.unitfly.com/documentation/excel-writer-configuration/

After you have successfully installed the application, you should configure Excel Writer.

1. Open M-Files Admin.
2. In the left-side tree view, expand the desired connection to M-Files Server.
3. In the left-side tree view, expand the *Document Vaults*.
4. Still in the left-side tree view, expand the vault where you installed the connector and select **Configurations**.
5. Expand *Other Applications*.
6. Expand *Extension Kit*.
7. Click on **Excel Writer**.

Field description

Field	Value	Description
Enabled	Yes/No	Specifies whether the module is in use.
Configuration mode	Simple/Advanced	Display basic or advanced configuration options for module.
Rule Groups> Group		
Name	Text	Specifies group name.
Rule Groups>Group>Rule		
Name	Text	Custom rule name.
Description	Text	Optional rule description.
Enabled	Yes/No	Specifies whether the rule is in use.

Field	Value	Description
Configuration mode	Simple/Advanced	Display simple or advanced configuration options for rule.
Trigger	One of the following: • Object metadata changed • Object changed state • Object entered state • Object left state • OnComment	Type of event that triggers the execution of this rule. **Object metadata changed.** If this option is selected, rule will be executed only on any metadata change but not on file change. **Object changed state**. If this option is selected, rule will be executed when source object changes workflow state. **Object entered state**. If this option is selected, rule will be executed when source object enters specified workflow state. **Object left state**. If this option is selected, rule will be executed when source object lefts specified workflow state. **On comment**. If this option is selected, rule will run whenever a comment is added to the source object.
Rule Groups>Group>Rule>Source filename wildcard		
Filename wildcard [n]	Text	Filename wildcards used to select files from object on which action will be executed.
Rule Groups>Group>Rule>Monitored property condition		

Field	Value	Description
Property	Property definition	Property whose value will be checked.
Monitor type	One of the following: • AnyChange • WithCondition	**Any change** – all changes will be monitored, and rule will be triggered on any property change. **With condition** – rule will be triggered on property change only if specified condition is satisfied.
Rule Groups>Group>Rule>Monitored property condition>WithCondition		
Value from	One of the following: • CurrentVersion • PreviousVersion	Execute condition for property value in selected object version.
Operator	One of the following: • = • != • > • < • >= • <= • Contains • Does not contain • Starts with • Does not start with	Operator for monitored property condition.
Value mode	One of the following: • Dynamic value • Static value • Empty value	Property value to use in condition. Can be static or dynamic (from current object).
Value	Value	Property value to use in condition.

Field	Value	Description
Rule Groups>Group>Rule>Trigger source		
Object type	List of object types	Object type of source object.
Class	List of classes	Class of source object.
Workflow	Workflow	Workflow of source object.
State	Workflow state	Workflow state of source object. Note! If you have entered a state, you must also enter the workflow above.
Rule Groups>Group>Rule>Trigger source>Search filters		
Search condition	Search conditions	Optional additional conditions that source object needs to satisfy. Conditions inside a single filter are combined with AND, while multiple filters are combined with OR operator.
Look in	One of the following: • Latest obj version • All obj versions	When trying to match the above source conditions, look in all object versions, or only the latest one. **Latest obj version**. If this option is selected, the current object version must match the specified conditions for object to be treated as source for this rule. **All obj versions**. If this option is selected, any object version must match the specified conditions for object to be treated as source for this rule.

Field	Value	Description
Rule Groups>Group>Rule>File action		
Name	Text	Unique action name
Description	Text	Optional action description
Enabled	Yes/No	Specifies whether the action is in use.
Action	One of the following: • CopyContent • Cell	**CopyContent**. If this option is selected cell range or entire sheet from source Excel file will be copied in target Excel file. **Cell**. If this option is selected value from M-Files object property will be inserted in selected cell.
Map mode	One of the following: • SourceObject • SpecifyTargetObject	**SourceObject.** If this option is selected file action will be executed on source object. **SpecifyTargetObject**. If this option is selected file action will be executed on specified target object.
Target object		Target object search configuration when Map mode SpecifyTargetObject is selected.
Target filename wildcards	Text	Filename wildcards used to select target files to which content will be copied to.
Rule Groups>Group>Rule>File action>Configuration>Cell		

Field	Value	Description
Action type	One of the following: • Header • Footer • Cell	Type of cell that you want to set on Excel document.
Set cell value by cell alias	Yes/No	Determines whether cell value will be set by cell alias or the defined sheet, row and column.
Cell alias	Text	Optional alias of the cell, value will be set to, if set.
Sheet	Text	Name of the sheet property value will be set to.
Position	One of the following: • Left • Center • Right	Choose header/footer cell position that value from M-Files property will be set to.
Column	Column	Excel column of cell, value will be set to (A, B, C, ...).
Row	Row	Excel row of cell, value will be set (1,2,3, ...).
Cell value	Text with placeholders	Specifies value to set using properties from source object.
Rule Groups>Group>Rule>File action>Configuration>CopyContent		

Field	Value	Description
Action type	One of the following: • Range • Sheet	Type of content copy action that you want to execute from source excel document to target excel document. **Range** If this option is selected file action will find defined range by alias in source file and copy its content to the defined range by alias in the target file. **Sheet** If this option is selected file action will find defined sheet by name in source file and copy its content to the defined sheet by name in the target file.
Range name	Text	Cell range alias content will be copied from.
Target range name	Text	Cell range alias content will be copied to. When alias of target range is the same as in source document you can leave it empty.
Sheet	Text	Name of the sheet content will be copied from.
Target sheet	Text	Name of the sheet content will be copied to. When name of target sheet is the same as in source document you can leave it empty.