

# **Intrex Professional**

# **Intrex Compact**

RELEASE 5



Office Integration

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## Writing Conventions

In this handbook, text passages will be displayed in *italics* when they refer to settings in the displayed dialogs. Menu items that are available in context menus can, in addition, always be selected from the main menu. Main menu items will not be described if they are not available in the context menu. A description of the general main menu items can be found in the  *Portals* handbook. Programming code in the text will be displayed in the `Courier` font. Context menus can be opened by clicking with the right mouse button on the described element.

In the following, `<intrexx>` refers to your Intrexx installation path; under Windows, for example, this is usually  `c:\intrexx\`. On Linux, the normal install path is  `/opt/intrexx/`. The following symbols will be used for designation of special kinds of information:

-  Information
-  References to an Intrexx handbook
-  Directories
-  URLs
-  Click on buttons

## Background Knowledge

To understand this document, no special previous training is required. You can find supplemental information in the handbooks  *Applications* and  *Portals*.

## 1. Introduction

With Intrexx Office integration, you can comfortably access all unprotected documents that exist as file attachments in your Intrexx portal. The documents can be opened directly in Microsoft Office, edited, and then saved directly in the portal again without needing to take a detour through the browser. Newly created documents can also be saved just as easily in your portal.

For the following Microsoft Office products, United Planet has made an add-in for Office integration available:

- MS Word 2003 / 2007
- MS Excel 2003 / 2007
- MS Powerpoint 2003 / 2007

The add-in can access published Intrexx applications using all common authentication methods.

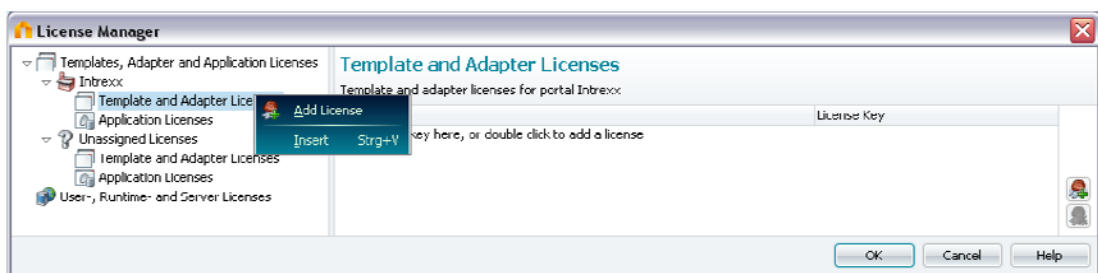
Additional information on the documents can be queried and edited in Office using input masks. These input masks can be created as usual in the module *Applications* and adjusted to your individual specifications.

## 2. System Requirements

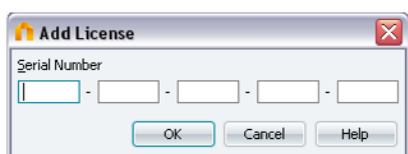
Intrexx from version 4.5,  
Microsoft Office from version 2003,  
Microsoft .NET Framework 3.5,  
Microsoft Windows XP, Vista, 7, Server 2003, Server 2008.



## 3. Licensing

In order to use the Office Integration you will need to purchase a license for it. Request the license from your software partner or from United Planet at the eMail address [info@unitedplanet.de](mailto:info@unitedplanet.de). The license key will be sent to you via eMail. In order to unlock the Office Integration, first open the Intrexx Portal Manager. Open the License Manager by clicking *Extras / License Manager*.




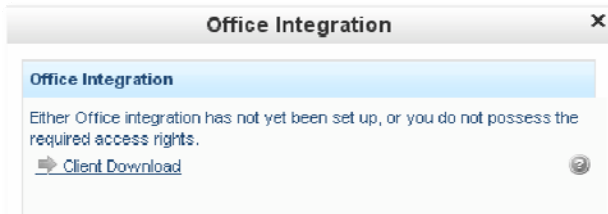
For the *Templates and Adapter Licenses* entry, select *Add License* from the context menu.



Enter your serial number here and then click  OK. The Office Integration is now unlocked. Information on this topic can be found in the  *Applications* handbook.

#### 4. Add-In Installation

You can comfortably install the add-in via a portlet, which you can add to every Intrexx portal ( *Portlets*).



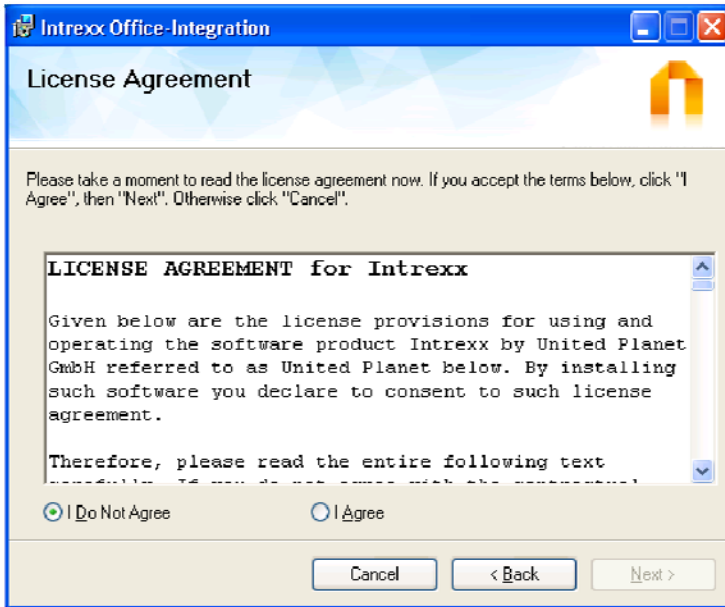
Click the link to *Client Download* here. The file *Setup.zip* can now be downloaded and saved to a local directory or to a network environment of your choice. After you have extracted the file, you can run the setup program with the file *Setup.exe*.




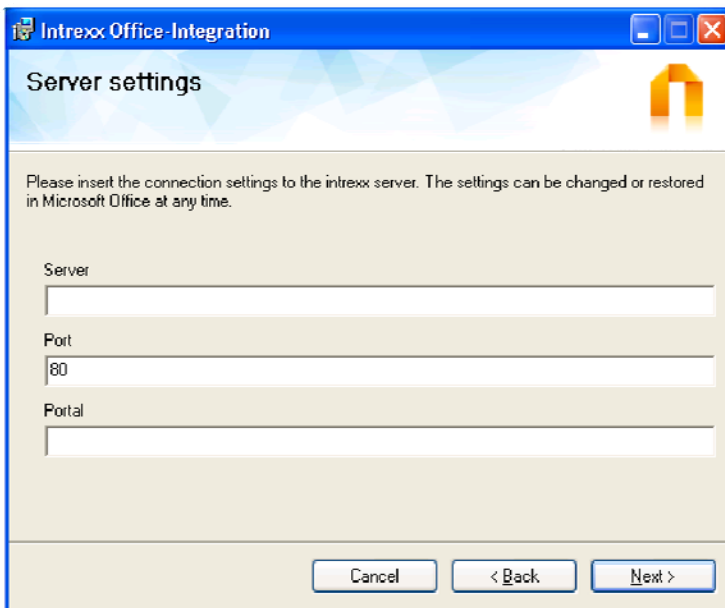
Please select the desired language here.



Click  *Next* here.

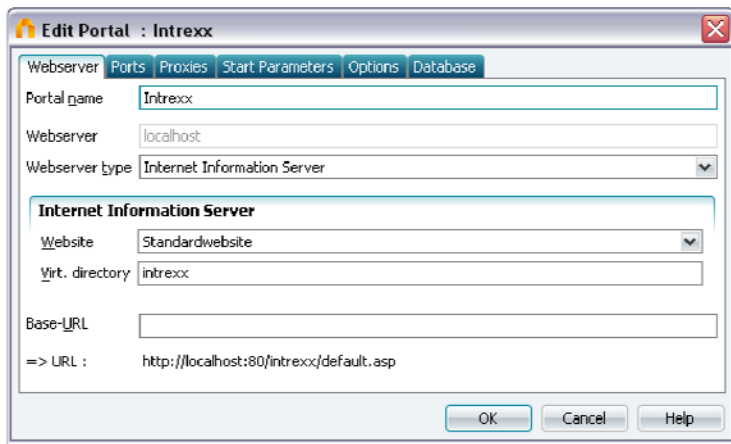



You will be informed of the license conditions here. If you have selected the option *I agree with these terms*, please click  *Next*.

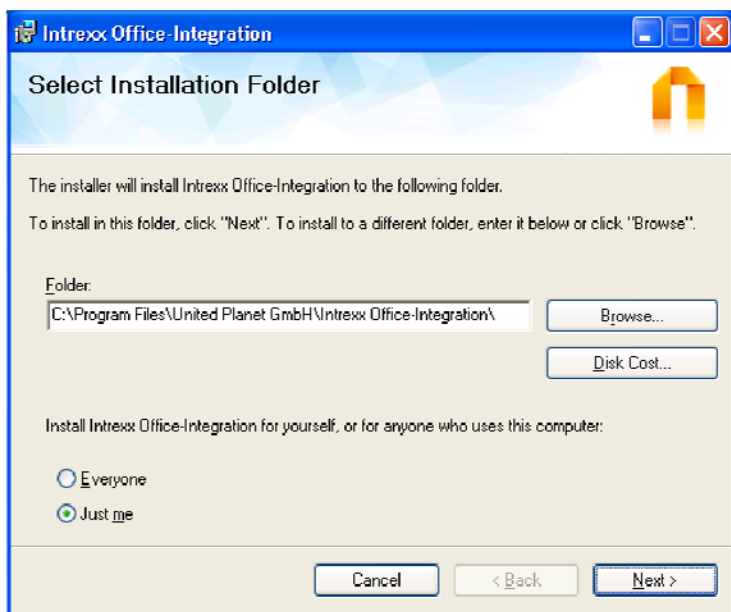



Enter the connection settings for your Intrex portal server here. The connection settings can be later changed or restored in Microsoft Office at any time.

Enter the name of the Intrex portal server. Enter the *Port*, and then the name of the virtual portal directory (IIS), or the context (Tomcat) in the *Portal* field. You can also find the portal name in the Intrex Portal Manager in the portal properties (*Menu Portal/Portal Properties*).




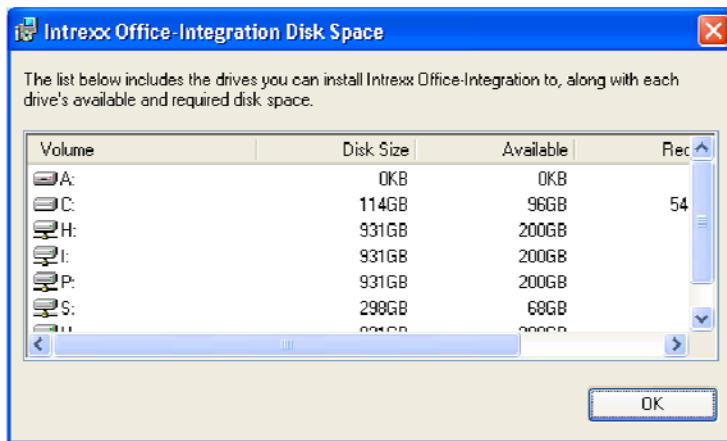
Click  *Next* to continue.



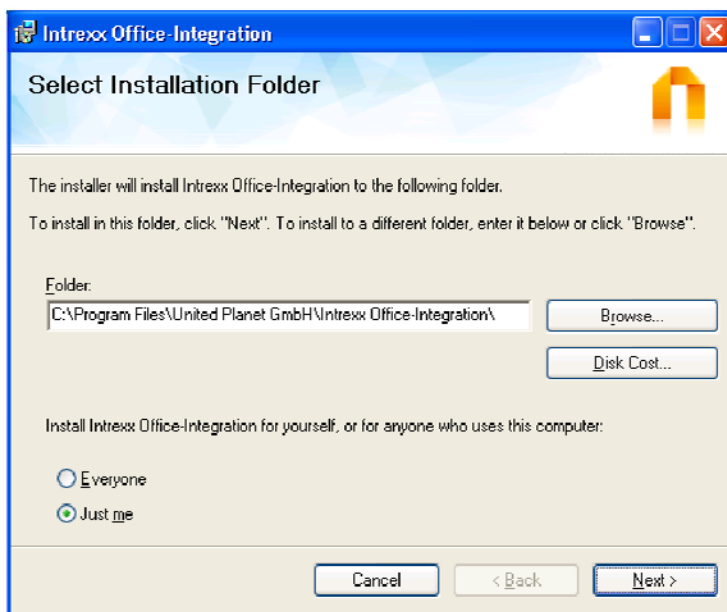
Define the *Installation Folder* for the Intrexx Office Integration here. If you do not wish to retain the suggested path, you can select a directory from your network by clicking  *Browse*.

In the lower area, the Office integration will be installed for *All Users* or only for the *Current User*, depending on the option selected.

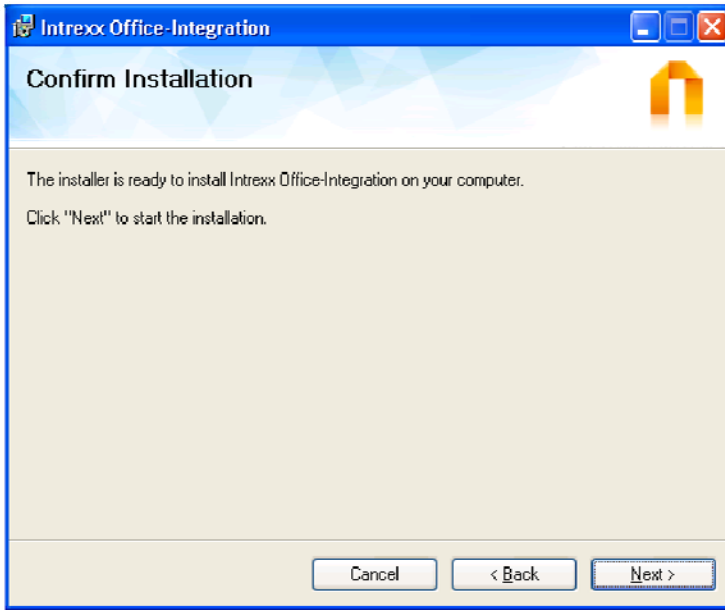
If you click  *Disk Cost*, an additional dialog will be opened, in which you will be informed of available drives and the amount of free space on them.



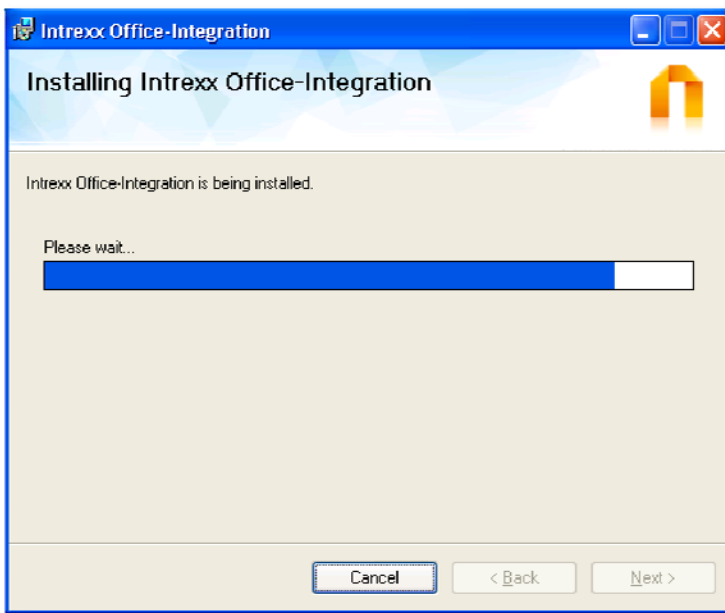
Close the dialog by clicking  **OK**.



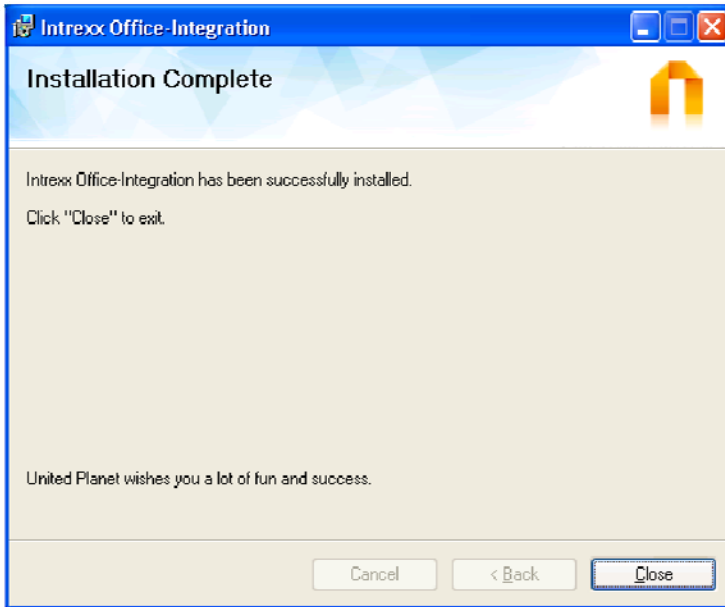
Click  **Next**.



In the next step, you will be asked to begin the installation. To do so, click  Next.



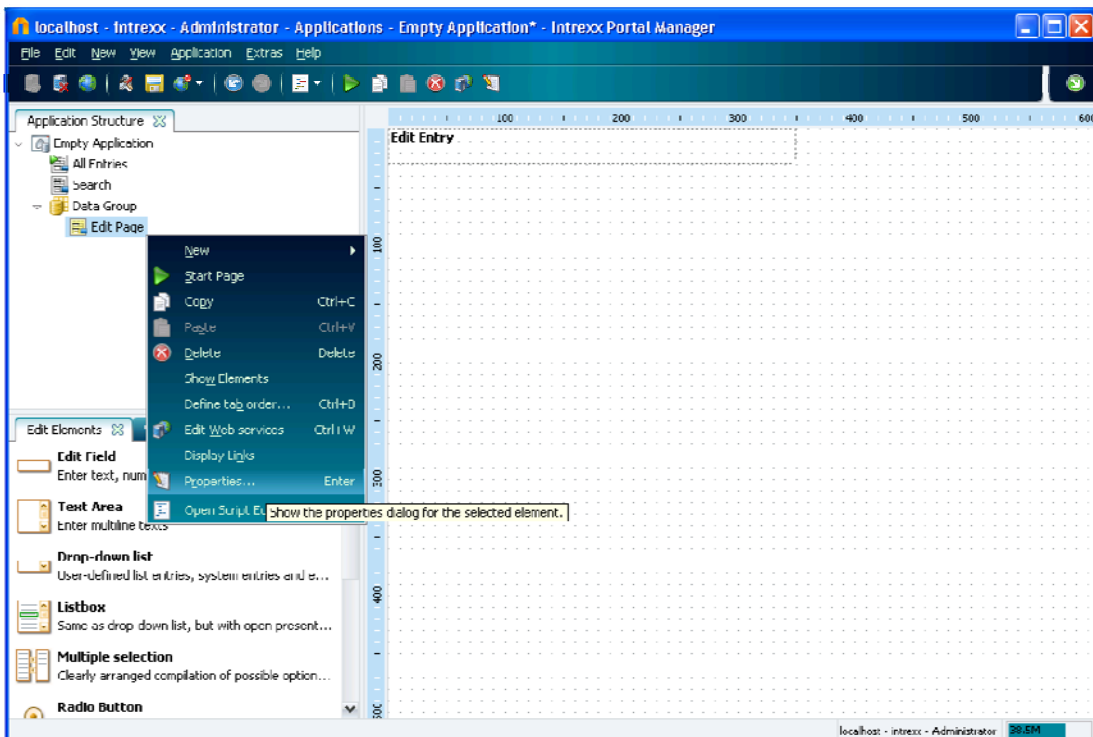
You will be informed of the progress of the installation here.



After the install is complete, please click  *Close*.

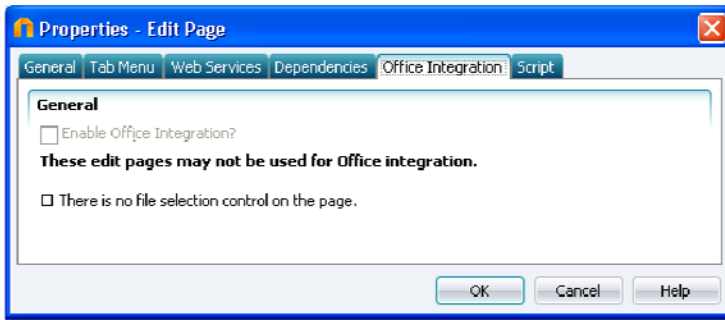
## 5. Activating Office Integration in the module Applications

Office integration can be activated and implemented in any Intrex application you choose. To do so, run the Intrex Portal Manager and log on to your portal. Next, switch to the module *Applications*.



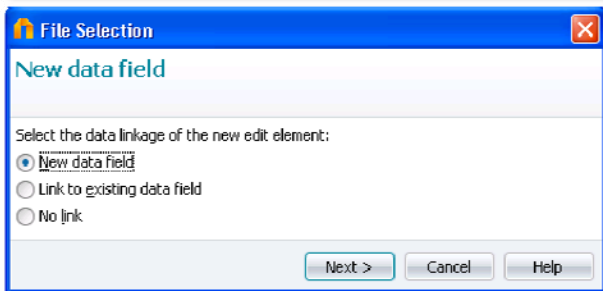
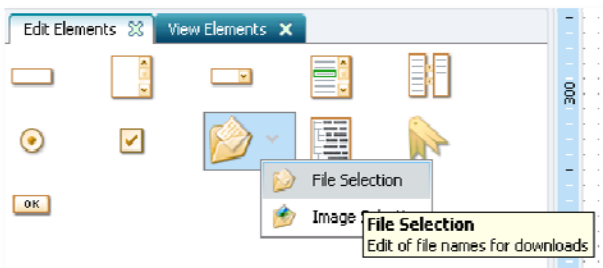
The Office integration will be activated in the properties dialog of any edit page of the application. This edit page will be loaded later when you open a Microsoft Office application via the Intrex file menu.

Select *Properties* from the context menu and switch to the *Office Integration* tab.

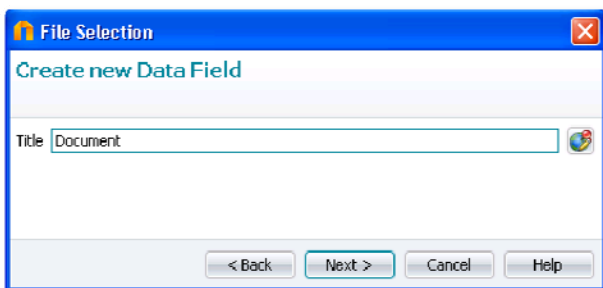


The Office integration can only be activated when a file selection control has been integrated into the edit page. With this edit element, files can be downloaded from file directories and saved with the data record that is entered on the edit page. You can find additional information on the use of edit and view elements, as well as general information on application development, in the handbook *Applications*.

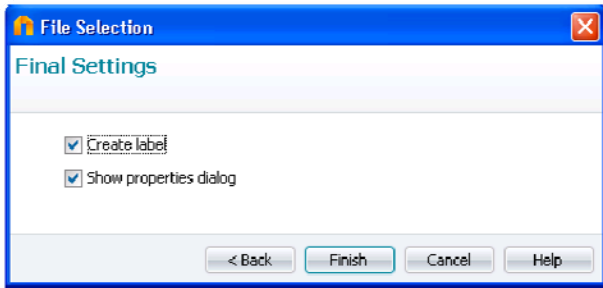
Close the properties dialog by clicking *OK*. Next, drag the *File Selection* edit element from the toolbox to the workspace.



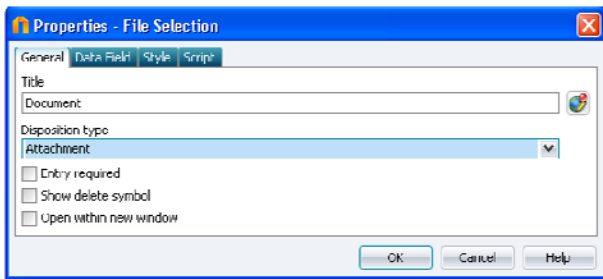
The assistant that will help you to create the element will be started automatically. Select the setting for *New data field* and click *Next*.



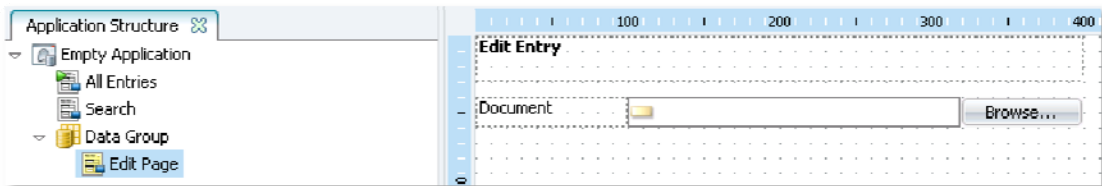
The title of the file selector can be changed here.



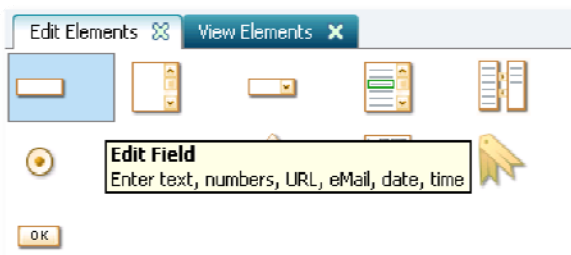
Click  *Finish* here.



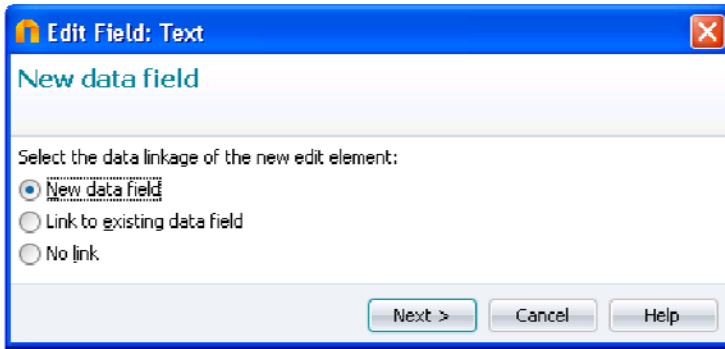
You can close the following dialog by clicking  *OK*. The edit element *File Selection* has now been entered to the workspace.



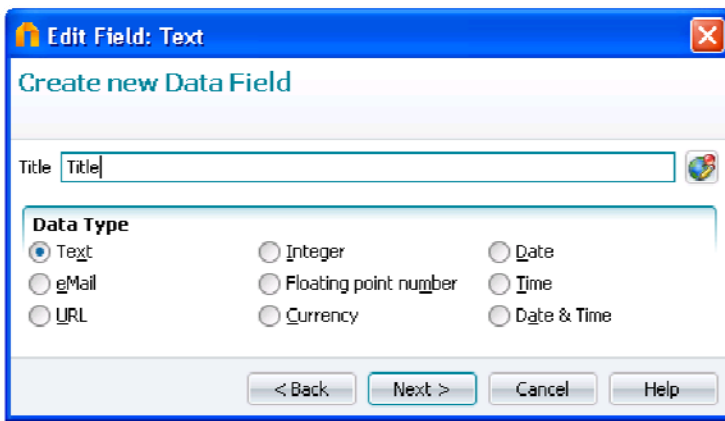
In order to compose the document title, create an additional edit field in the same way.




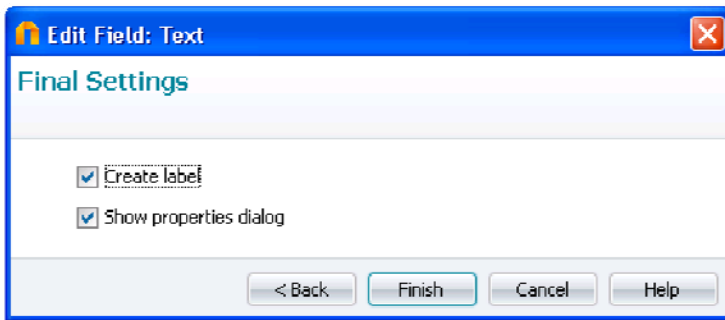
Drag it from the toolbox to a position of your choice on the workspace.



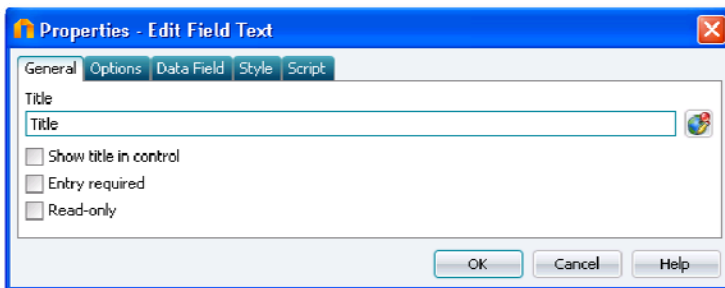
Click  *Next* here.




Enter "Title" to the *Title* field here and then click  *Next*.

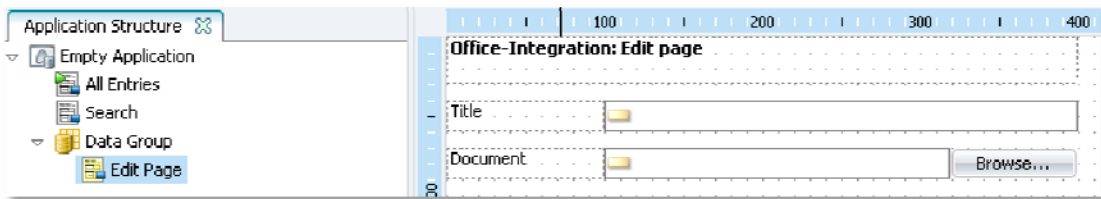


Click  *Finish* here.

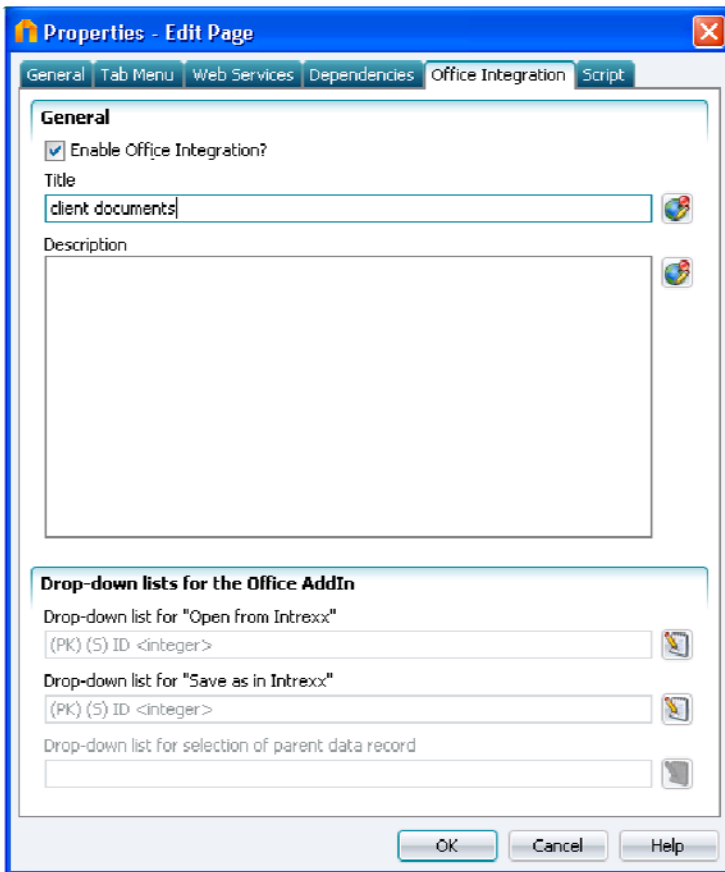


You can close this dialog by clicking  *OK*.

The edit field has now been created.




Now, switch back to the properties dialog of the edit page and there to the *Office Integration* tab.

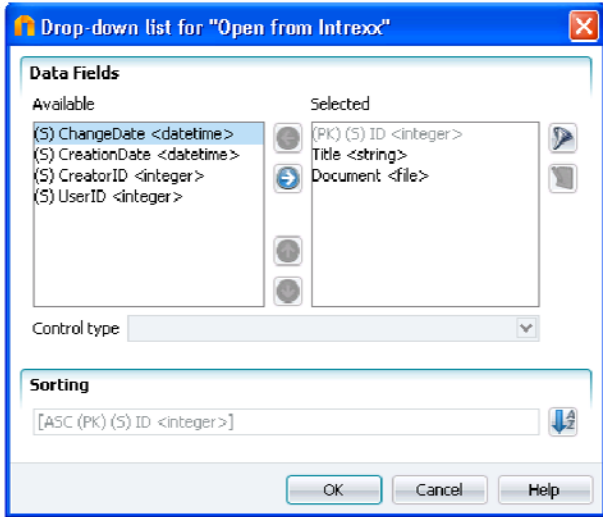




The setting to *Activate Office Integration* converts the edit page to an input mask, in which you can later enter and edit additional information in Microsoft Office, such as the title, the last edit date, and more.

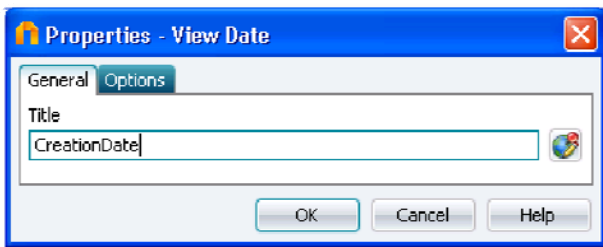
Under *Title*, enter a name that describes the type of document you will access. Under this title, you can later show and open documents in Office in a list. In *Description*, you can enter additional information.

In the lower area of the dialog you will define, in the field *Selection list for "Open from Intrexx"*, the information that the list in Office will contain, from which you can reach the documents in the portal.

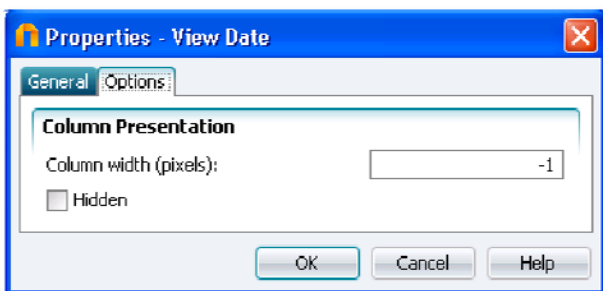
By clicking  *Edit selection list*, a dialog will be opened in which you can put together the fields for the list.



In the *Available* list, all permitted fields will be shown. Move the desired fields with the help of the  arrow buttons to the *Selected* list. The field *(PK) (S) ID* is always automatically selected. This field refers to the ID of the data record. This field cannot be deselected; however, it will not be shown later in the input mask in MS Word, as long as you do not explicitly select it to be shown in the options described in the following. If you highlight a selected field, you can change the title by clicking  *Edit*.



On the *Options* tab, settings for the display of data in the Office list can be defined.



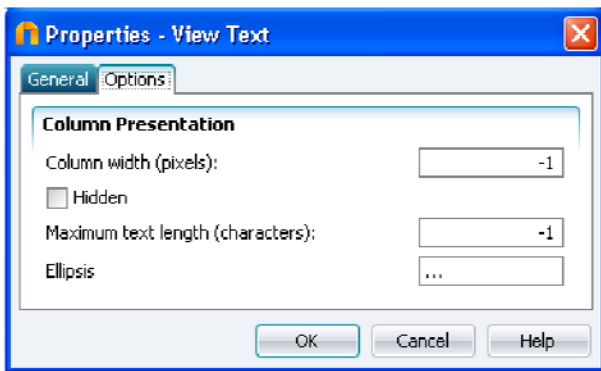
Depending on the data type of the field, the following properties can be defined here:

In the *Column width (pixels)* field, enter the width the column may take up at maximum. To do so, enter the desired number of pixels. The value -1 has the effect of displaying all characters, and adjusts the width of the column for the length of the longest entry.

The setting *Hidden* causes the column to not be shown in the list in Office.


Both of these settings can be defined for all data types.


For the data types *string* and *multiline text*, additional properties can be defined.

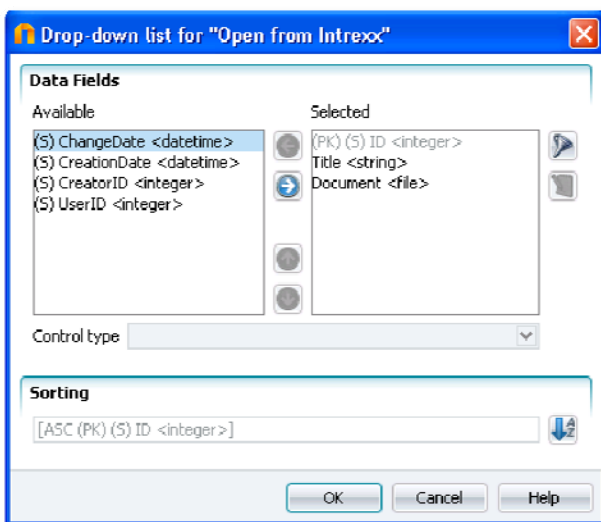


The value that you enter into *Maximum text length (characters)* defines the maximum number of characters that may be shown in the list column later. Entering a value of -1 will show all characters.

With *Ellipsis (omission character)*, you can enter characters that will be attached to the last character of the text, in order to make clear that the complete text will not be displayed.

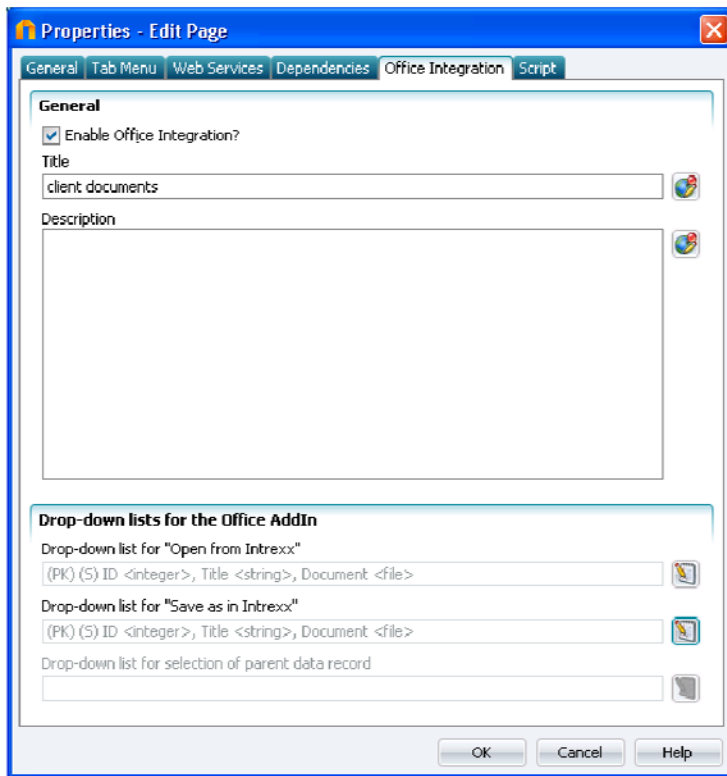
Additional information on control and data types of edit elements can be found in the  *Applications* handbook.

Click  *OK* in order to return to the dialog for field selection.



You can find out how to influence the  *Sorting* of the list in the  *Applications* handbook.

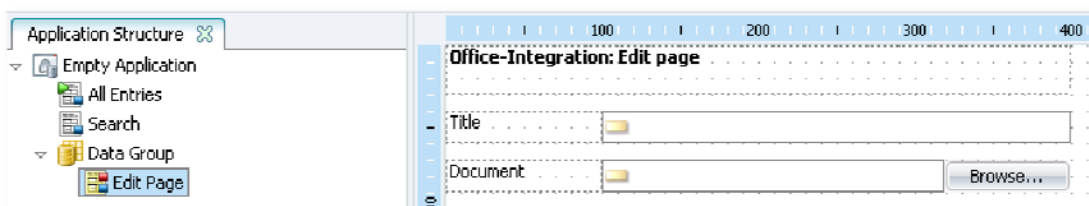
Finish the field selection by clicking  *OK*.



The selected fields will now be entered to the *Selection list for "Open from Intrexx"*, Now you will put together the fields for the *Selection list for "Save in Intrexx as"* in the same way. This list will be shown when you want to save a document in Office using the file menu item *Save as in Intrexx*.

The *Selection list for selection of parent data set* may only be edited if the edit page is located in a subordinate data group (see [Documents in subordinate data groups](#)).

Accept the new settings by clicking OK.



You can recognize an edit page with active Office integration in the application structure by the red marker.

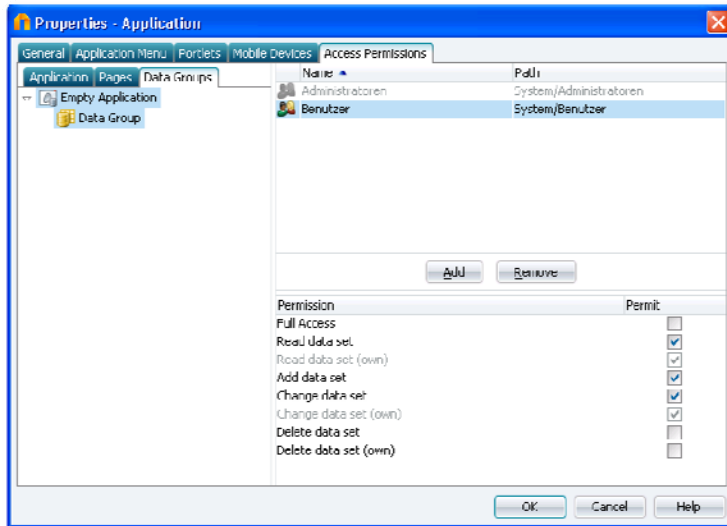
Some edit and view elements cannot be included in an Office integration. These elements will be automatically deactivated in the toolbox and may not be entered again to the edit page.

- Buttons can be created (such as in order to use the edit page in the portal), but will not be displayed upon loading the input mask in MS Office. These defined actions are, therefore, not available in Office. If the edit page is accessed in the portal via the browser, the button will be available as usual and will execute all configured actions.

Script that has been defined on the edit page or by an element on the page will likewise not be executed upon loading the page in MS Office.

Groupings can be created, but will be ignored in Office.

Finally, only the application permissions must now be set up as well. The permissions can be controlled from the properties dialog of the application.



You can find additional information on this topic in the handbook [Permissions](#).

You must assign users of Office integration at least the data group permissions *read*, *add*, and *change* to the data group in which the edit page is found. These permissions are required to edit the documents. The permissions to the edit page, which you can find on the *Pages* tab, are also required.

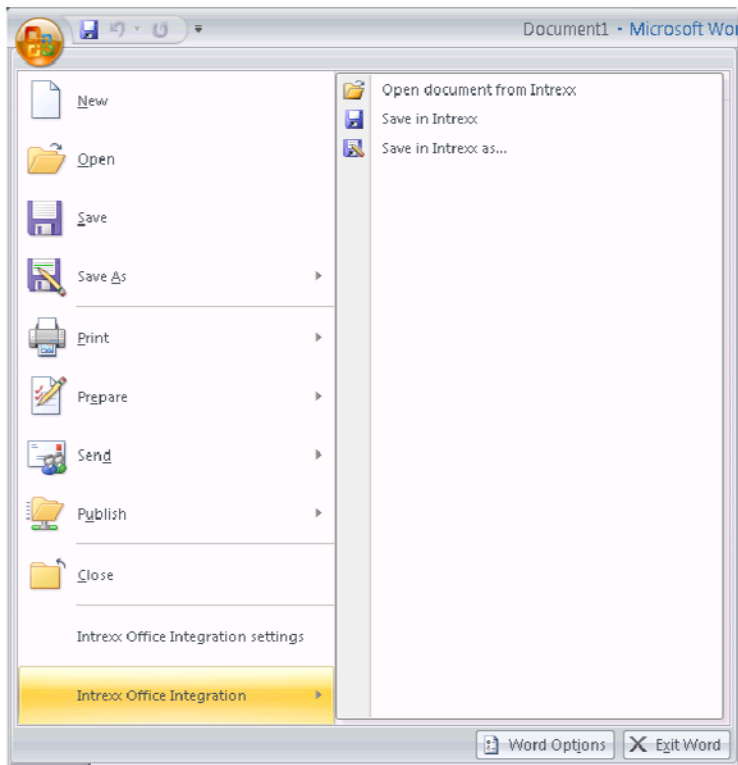
Save the application now and run MS Word.



## 6. Office Integration in MS Office

The functions and menus of the Intrexx Office Integration are the same in the MS Office products Word, Excel, and Powerpoint, and will be described in the following for MS Word.

### 6.1. Opening and Saving Documents

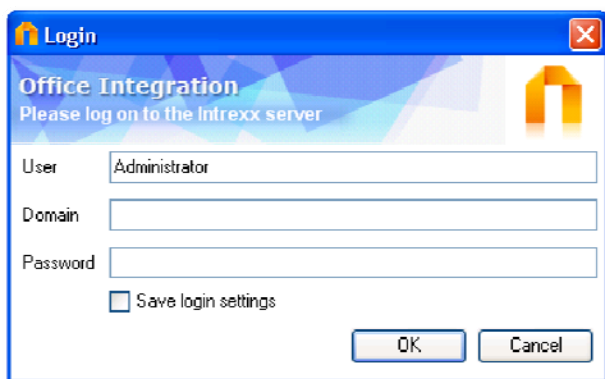
You can reach Office integration in MS Word, after successfully installing the Add-In, from the *File* menu.



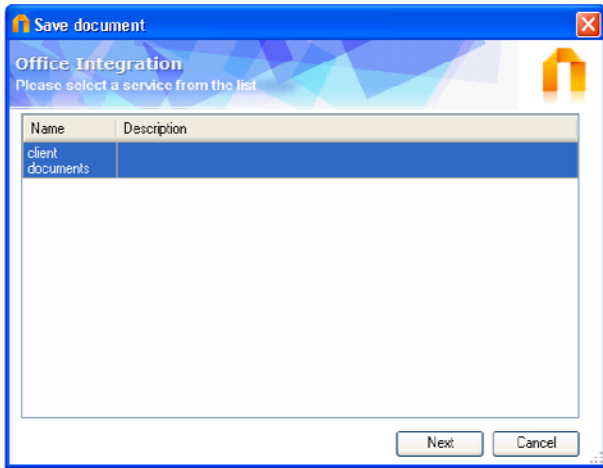
 If you do not see the menu items *Intrex Office Integration – Settings* and *Intrex Office Integration* here, please click the  double arrow symbol in order to show the complete *File* menu.

MS Word will always show in the main menus only the most often used menu items.

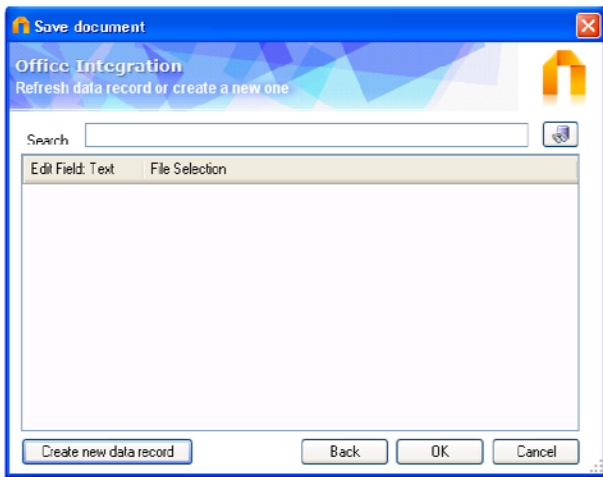
With the menu item *Intrex Office Integration / Save in Intrex*, you can now save a MS Word document of your choice.



If you select the menu item, you will first be asked to log into the portal. Log on with the desired *User*, the *Domain*, and the *Password*. With the setting to *Save login data*, the informations for the next login will be saved.

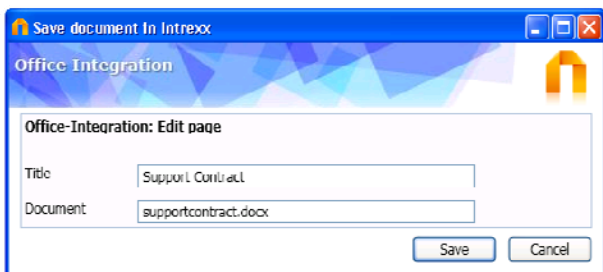


All Office integrations that have been activated in the portal will be listed here. Select the desired integration from the list and then click **Next**.



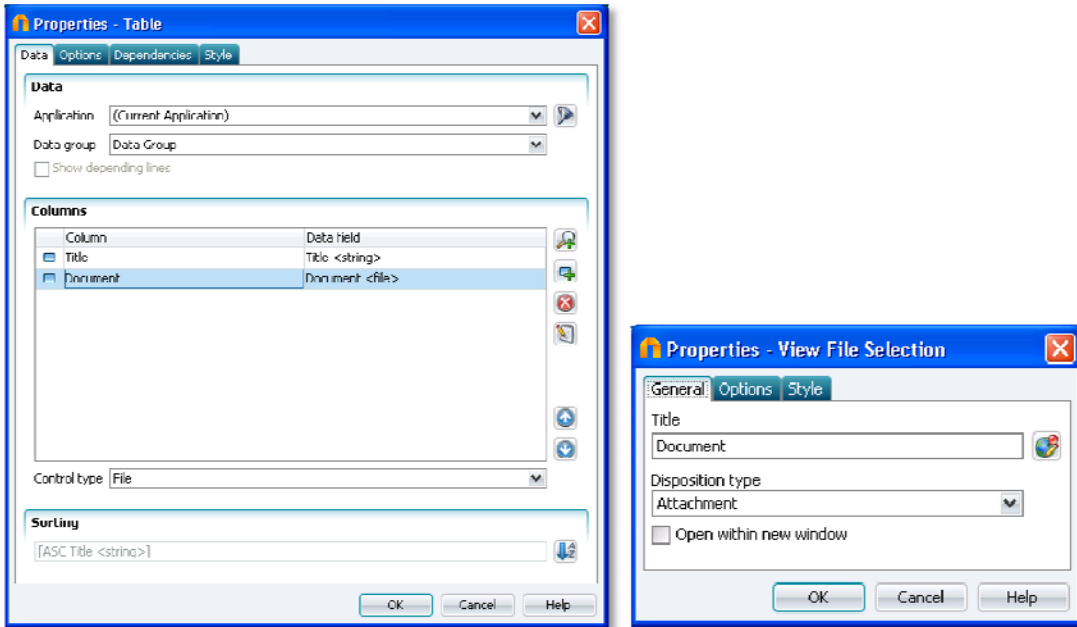
In this dialog, the *Search* field allows you to search for existing documents that have been entered into this integration. All existing documents will be listed in the table under the field. The table columns will be constructed in the way in which you have preset in the module *Applications* in the properties dialog of the edit page on the *Office Integration* tab.

In order to create a new data record, please click on *Create new data record*.

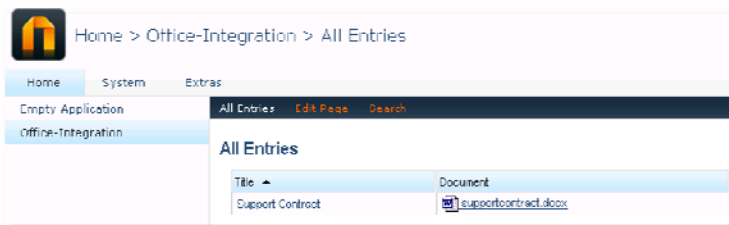


A title of your choice can be entered here. The name of the document will be automatically entered as the same as the name of the current document in Word. Note that the edit page that you use here is the exact edit page that you have created in the module *Applications*. Click **Save** after all entries are complete.

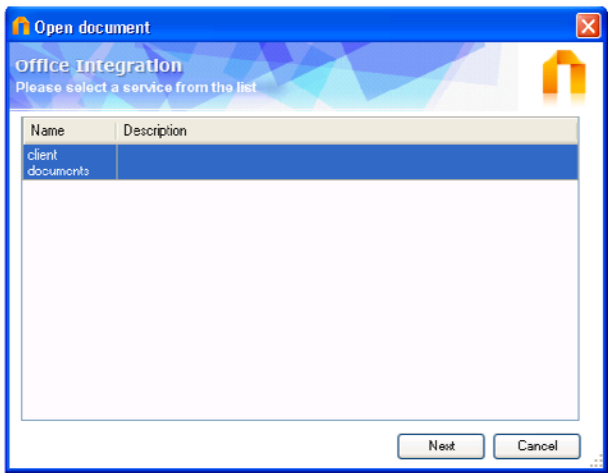
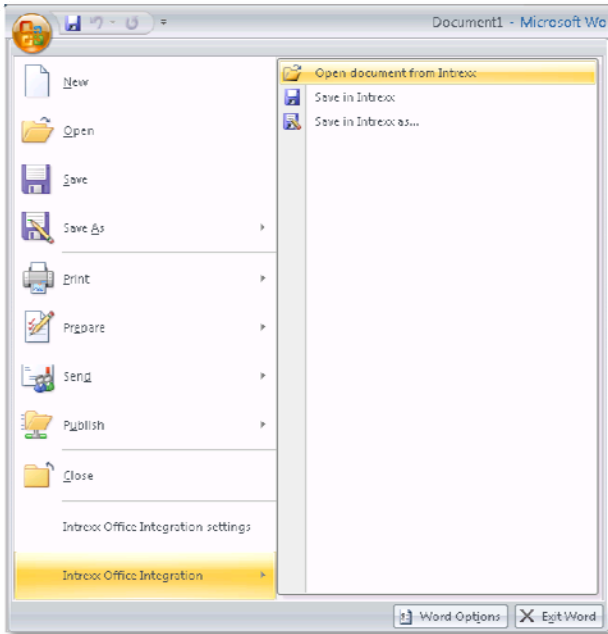
The file will now be saved to your Intrexx portal as well. If you define a view table on the main page of your application (🌐 *Applications*), you can see the list of saved documents and open them in MS Word here as well. Opening in Office will be enabled with the following column settings for the table: the disposition type must be set up as with *Attachment*, and the document will not be opened in a new window.



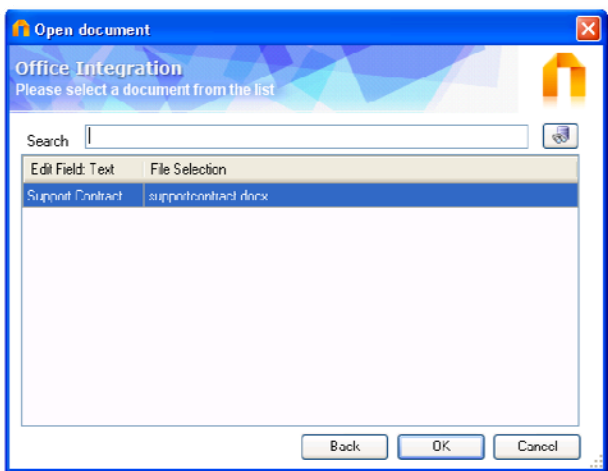
MS Word will automatically recognize the reference in this table, and will correctly assign the file if you select the menu item *Save in Intrexx* from MS Word.



The document can now be reloaded in MS Word with the menu item *Open document from Intrexx*.



First, select the desired integration here as well.

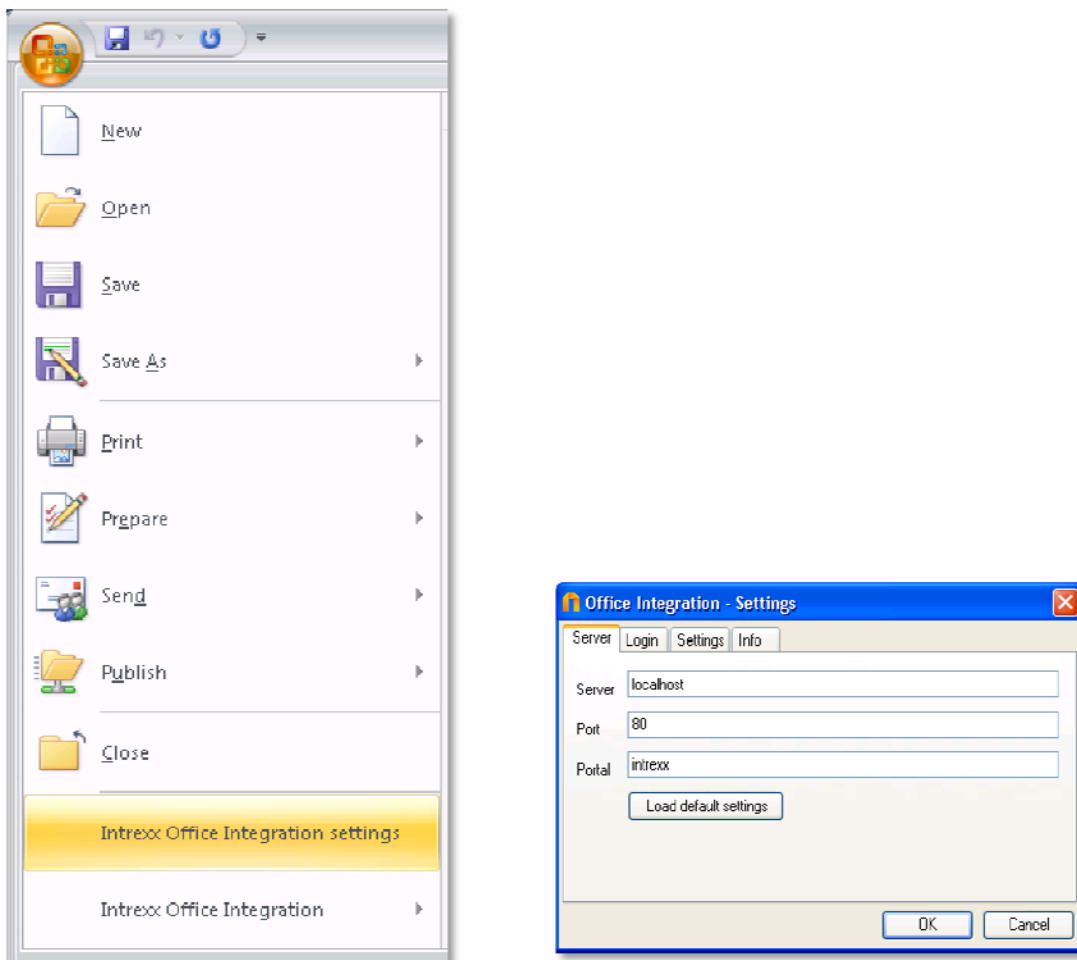


All documents that have been entered to this integration will be listed here and can be selected for editing.


The menu item *Save in Intrexx* differs from the menu item *Save in Intrexx as* only in the fact that existing files can be saved in another data record, even from another integration. The original data record will be retained in this case.

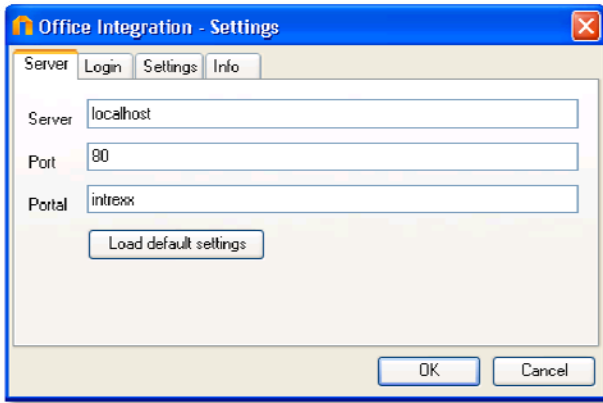
## 6.2. Settings

Via this MS Office menu, the connection settings, which you have entered during the add-in setup, can be changed.

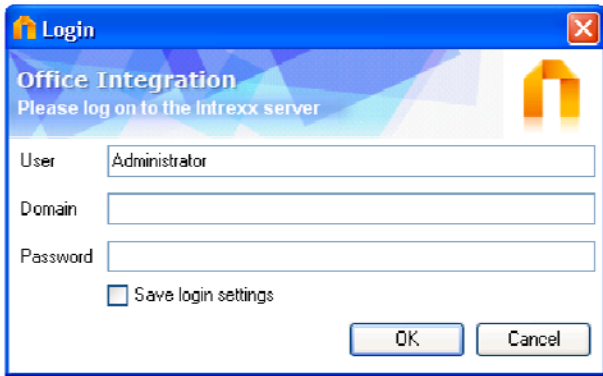


On the *Server* tab, enter the name of the Intrexx portal server. Enter the *Port* and, in the *Portal* field, the name of the virtual portal directory (IIS) or the context (Tomcat). You can ascertain the portal name in the Intrexx Portal Manager in the portal properties (menu *Portal/Portal Properties*).

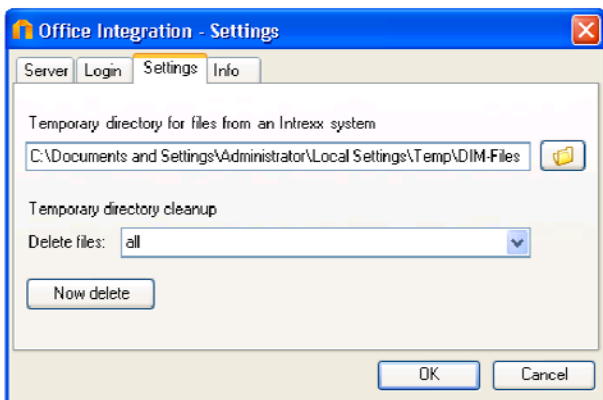
Clicking  *Load default settings* will restore the settings that you made during the course of the add-in setup.



On the *Login* tab, the authentication will be defined, in the same way as authentication is set up for the Intrexx portal (👤 *User*). With 🔄 *Reset login information*, the login information, which you will use to log into the Intrexx portal server in MS Office, will be reset.




On the *Settings* tab, the temporary directory for files from an Intrexx system will be defined.

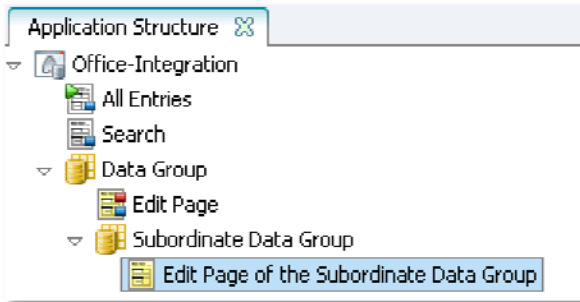


This temporary directory can be cleaned of all old and/or temporary files by clicking 🗑️ *Delete*.

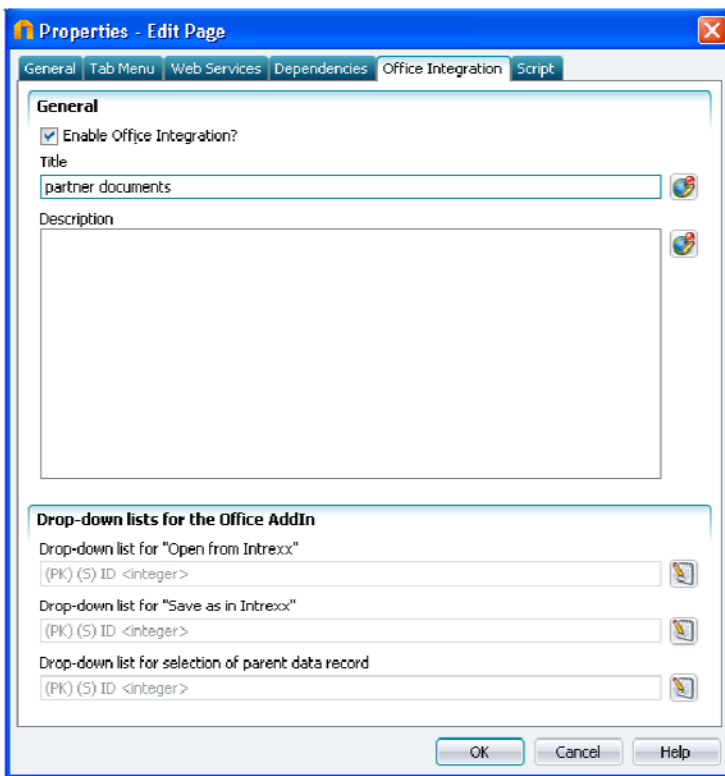
## 7. Documents in Subordinate Data Groups

The management of documents in the portal can be structured hierarchically with subordinate data groups. If you want to, for example, administer documents for business partners and documents that apply to the customers of each partner, you will create a main data group named *Partners* and a subordinate data group named *Customers*. Please

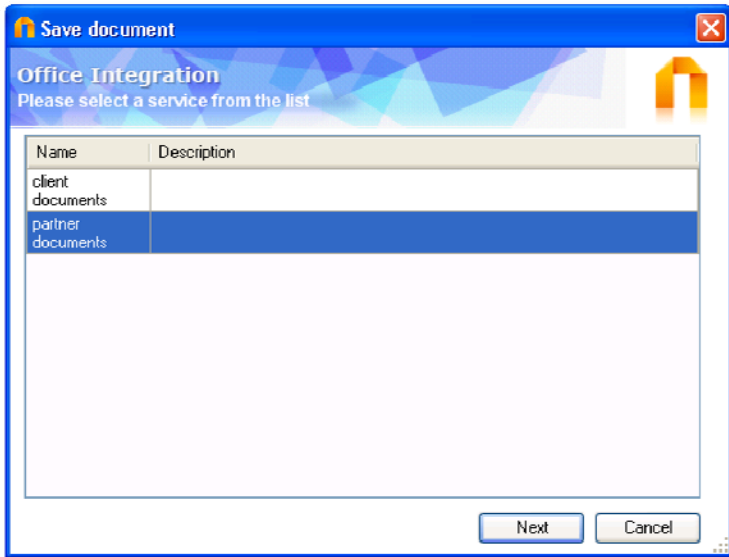
read the section in the  *Applications* handbook on this topic if you are not yet familiar with subordinate data groups in Intrexx.



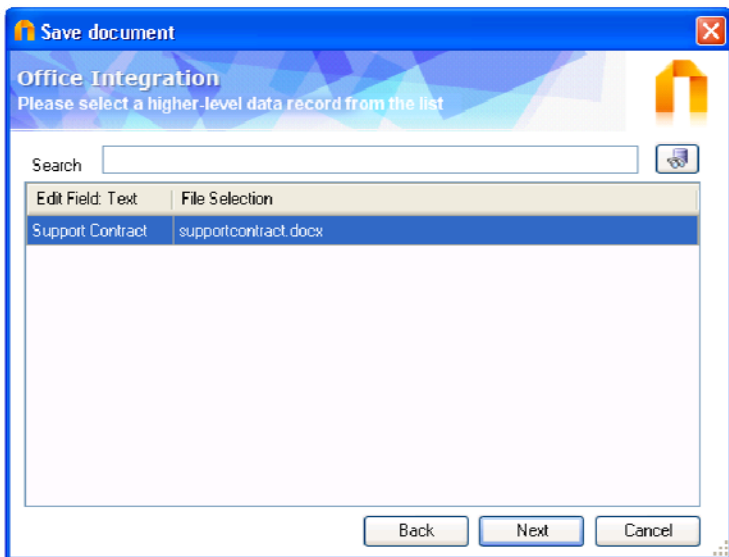
In the properties dialog of the edit page in the subordinate data group, the *Selection list for selection of parent data set* can now be edited. To do so, proceed exactly as before when setting up the lists *Open from Intrexx* and *Save in Intrexx as*, with the only difference being that all fields from the superior data groups will be selected for the columns in the list in MS Office.



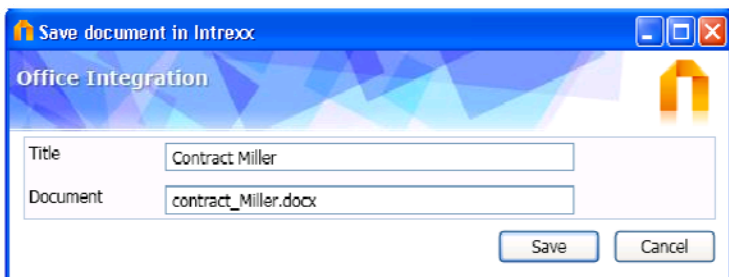
The automatic assignment of the subordinate data set to the parent data set in the MS Office dialogs will be accomplished for you by Intrexx when you save a subordinate document in Intrexx.



Select the menu item *Save in Intrexx* for a document of your choice, and here the integration that you have created for the edit page of the subordinate data group.



You can select the parent document here.

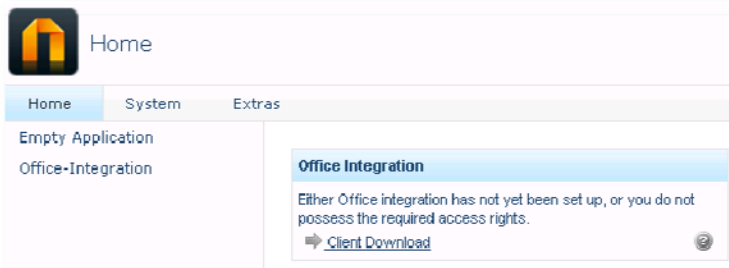


Next, define the name of the new document and save it in Intrexx.

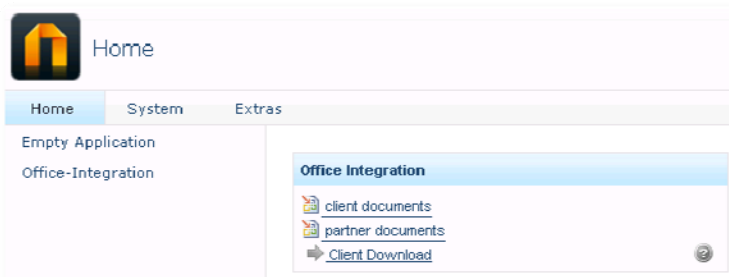
When opening a document via the menu item *Open in Intrexx*, follow the same procedure: first, the integration in the subordinate data group will be selected, then the parent


document, and finally the subordinate document. The Intrexx Office integration offers you only the documents here that were entered to the selected parent set in the superior data group.

## 8. Office Integration Portlet

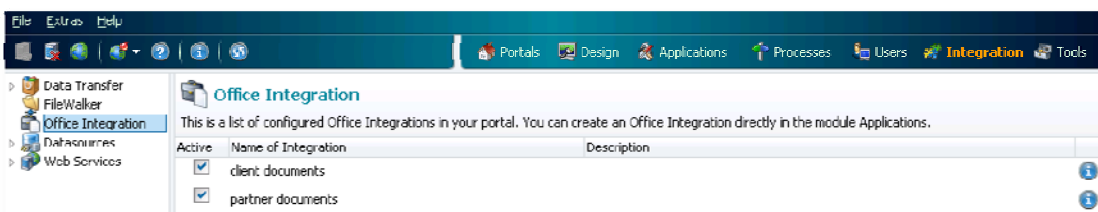


The Office integration portlet is already known to you from the installation of the Office add-in (see chapter *Addin Installation*).

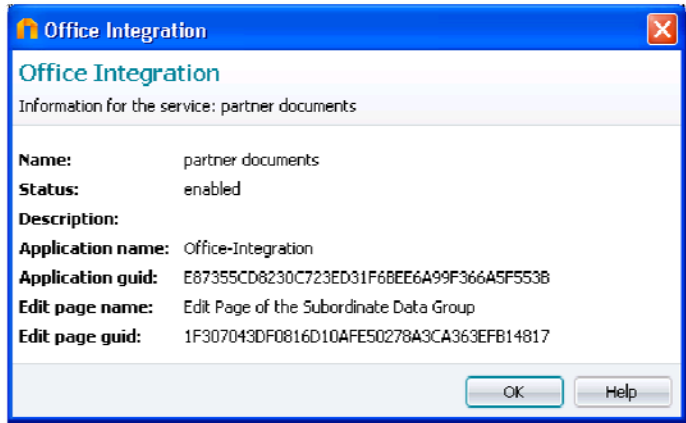
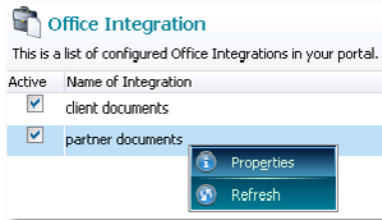


From this portlet, you can later reach all applications in which Office integration has been activated. By clicking the  symbol next to the name of an active integration, these applications can be reached directly. Simply click on the desired link.

## 9. Office Integration in the module Integration



In the module *Integration*, all Office Integrations that you have activated in the module *Applications* will be listed. By clicking in the checkbox in the *Activated* column, existing integrations can be deactivated or reactivated here. With the context menu item *Refresh*, the list can be refreshed, if you have created a new integration in the module *Applications*, and it has not yet been shown here, for example.



The *Properties* context menu item opens a dialog, in which you will be informed of the *Name*, *Status*, *Description*, *Application Name*, *Application GUID*, *Edit Page Name*, and *Edit Page GUID* of the integration.