



White Paper

Fabasoft Integration for Microsoft Office

Fabasoft Folio 2024 Update Rollup 1

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1 Introduction

This document describes how to install and configure the Microsoft Office buttons provided by Fabasoft.

Two different button types are available:

- “Save to” and “Open from” buttons
Microsoft Word, Microsoft Excel, Microsoft PowerPoint and Microsoft Visio
- Ribbon buttons
Microsoft Word, Microsoft Excel, Microsoft PowerPoint, Microsoft Visio and Microsoft Outlook

2 Software Requirements

System environment: All information contained in this document implicitly assumes a Microsoft Windows environment.

Supported platforms: For detailed information on supported operating systems and software see the software product information on the Fabasoft distribution media.

Descriptions in this document are based on the following software:

- Microsoft Office 2019

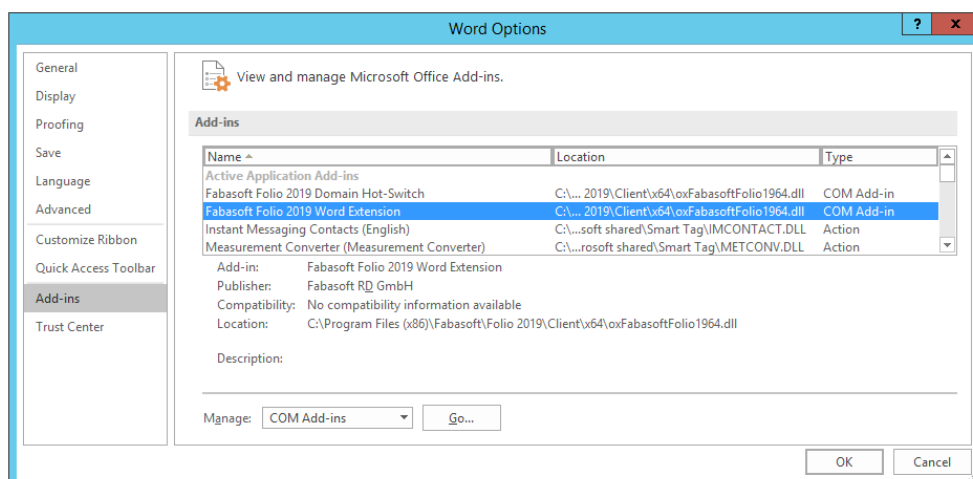
Note: Make sure that the Fabasoft Folio Client

(Setup\ComponentsBase\Client\FolioClient.msi) is installed on the work station.

3 Enabling the Fabasoft Folio COM Add-in

To be able to use the Microsoft Office buttons the Fabasoft Folio COM Add-in has to be enabled in the corresponding Microsoft Office application:

1. On the “File” tab click “Options”.
2. On the “Add-Ins” tab select “COM Add-ins” and click “Go”.

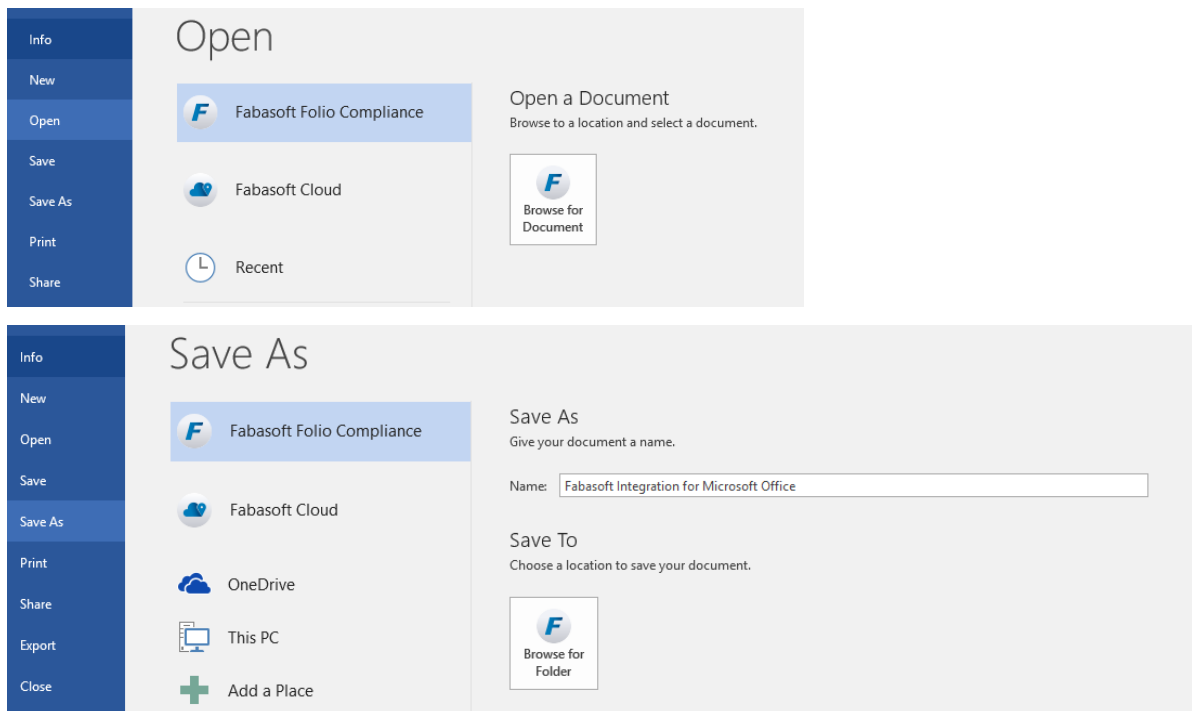


3. Check “Fabasoft Folio 2019 Word Extension” and click “OK”.

4 “Save to” and “Open from” Buttons

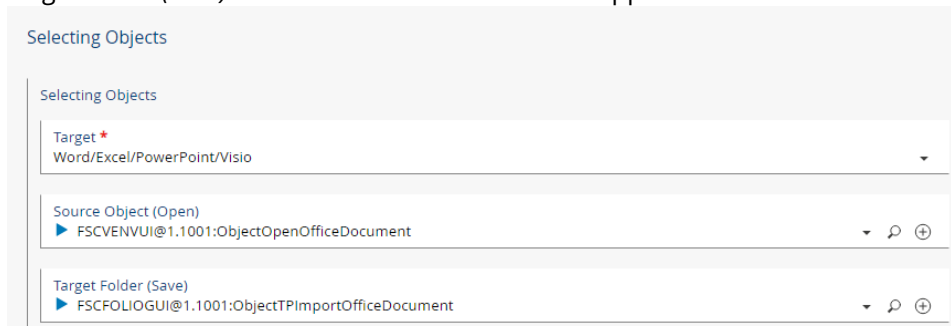
On the “File” tab, the buttons “Save to” and “Open from” are provided.

- The “save to” functionality allows storing a document directly in Fabasoft Folio. The storing location in Fabasoft Folio can be selected via a dialog.
- The “open from” functionality allows opening a document directly from Fabasoft Folio. The document can be selected via a dialog.
- The default dialogs can be overwritten in the virtual application configuration.



To configure which virtual application is executed when clicking a button, perform the following steps:

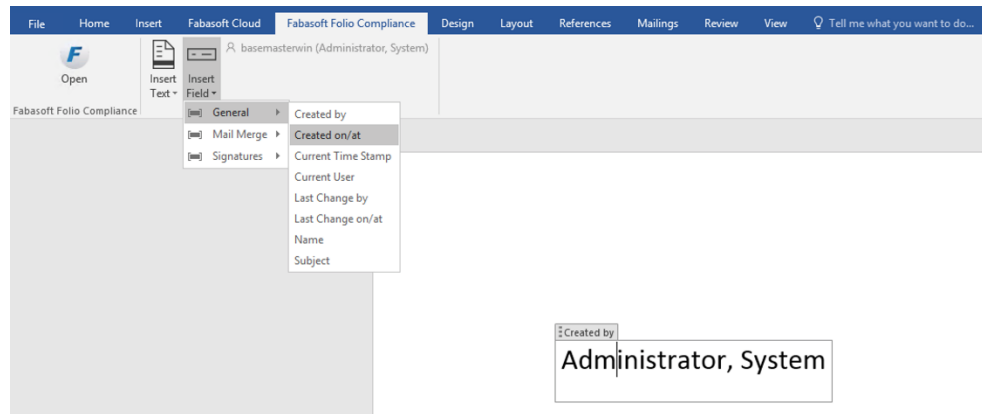
1. Open the properties of the desired *Virtual Application Configuration*.
2. On the “Third-Party Applications” tab create a new entry in the *Selecting Objects* field.
3. In the *Target* field select “Word/Excel/PowerPoint/Visio”.
4. In the *Source Object (Open)* field define the desired virtual application for the open button. In the *Target Folder (Save)* field define the desired virtual application for the save button.



Note: The defined settings are synchronized automatically to the Microsoft Windows Registry on the client, when connecting to the Fabasoft Folio Domain with the Fabasoft Folio Web Client. The entries with `FSCVAPP@1.1001:objectselectioncontext==31` are written into following key:

6.2 Working With Fields

To insert fields in a Microsoft Word document opened from Fabasoft Folio, use the *Insert Field* control on the “Fabasoft Folio” tab.



Which fields are available depends on the context in which the Microsoft Word document is opened. For example, if you open the content of an outgoing, predefined fields are available for inserting metadata of the addressees defined in the outgoing. You can also browse through the addressees by clicking the arrow buttons of the Fabasoft fields control.

Any changes you make to the fields in the Microsoft Word document are written back to the corresponding properties of the objects stored in Fabasoft Folio when you close the document.

In Fabasoft Folio it is possible to define custom fields.

Two types of fields can be distinguished:

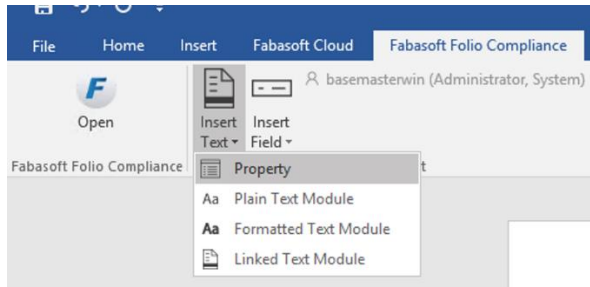
- Simple fields represent singular values, e.g. a document number or the subject of the document.
- List fields can be used for addressee fields that are bound to the list of addressees of the document. The field values are calculated and maintained for each individual addressee. When you browse through the individual addressees using the arrow buttons of the Fabasoft Folio text insertion control, the addressee fields displayed in the Microsoft Word document are updated with the values corresponding to the currently selected addressee.

6.3 Working With Document Properties

Document properties are similar to fields as they allow you to embed metadata in Microsoft Word and LibreOffice Writer documents. However, in contrast to fields, document properties cannot be edited within the third-party application but solely provide read-only information.

In addition, document properties must be updated manually (e.g. by clicking “Update Field” from the context menu of Microsoft Word) whereas fields are updated automatically.

To insert a document property into a Microsoft Word document, click “Property” on the “Fabasoft Folio” tab in the “Insert Text” menu.

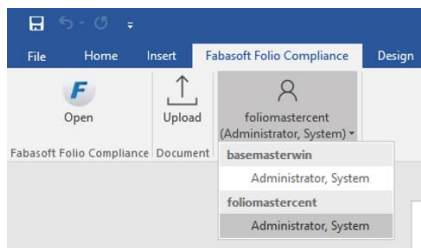


In Fabasoft Folio custom document properties can be defined.

Note: Microsoft Office restricts the length of document properties to 254 characters. By now Fabasoft Folio provides workarounds to exceed this limit, but due to the dependency on the third-party product Microsoft Office it cannot be guaranteed that these workarounds will work in the future. Keep in mind that Microsoft Office hotfixes or service packs may prevent exceeding this limit so it is recommended not using longer document properties.

7 Switching Domain and User Context

For external documents it is possible to change the actual context to upload or open documents to different domains with different users. In a standard Fabasoft Folio installation, there is the option of selecting a corresponding context via the context button.



After a new context has been selected, all buttons use the appropriate URL and the corresponding user context.