



Adlib Office Connect

Axiell ALM Netherlands BV

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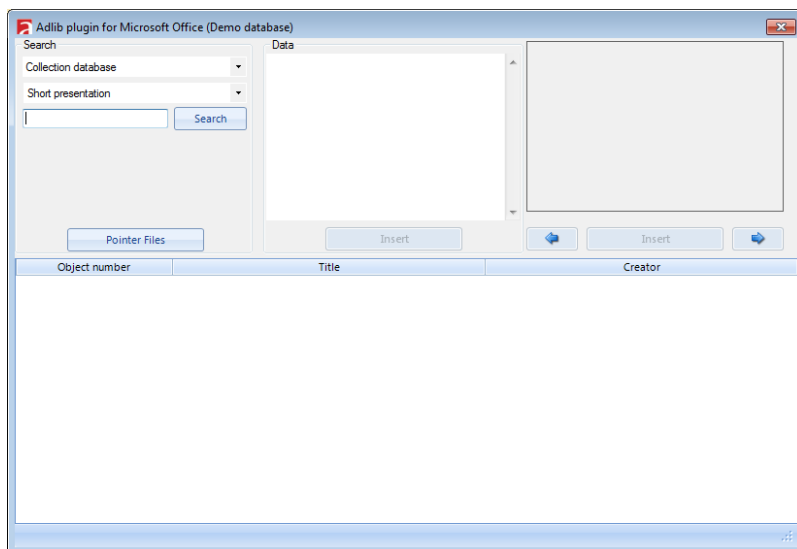
Introduction

Adlib Office Connect is a plugin for Microsoft Office 2010 and 2007. In combination with an Adlib *wwwopac.ashx* server, the plugin allows you to search your Adlib databases from within Word, PowerPoint or Excel, with a very simple search interface: no knowledge of Adlib applications and their user interface is required. Selected data from the search result can be copied to the current document with a single mouse click, where the user can change the layout as desired. An easier way to access and present data from your Adlib databases is simply not possible.

1 Searching your Adlib databases

1.1 Performing a search

1. In Microsoft Word, PowerPoint or Excel open the document in which you want to insert data (text and/or images) from your Adlib database(s).
2. Click *Adlib > Search* (or *Axiell > Search*) in the Word menu bar. The *Adlib plugin for Microsoft Office* opens.



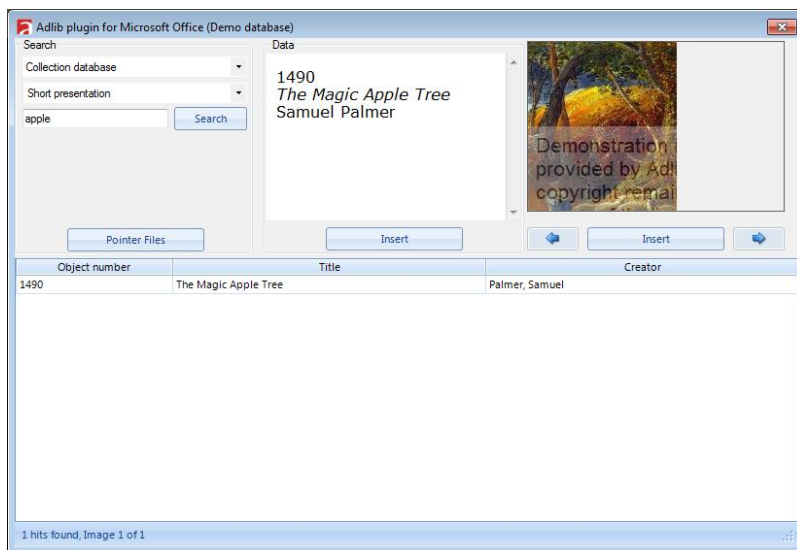
You can resize this window by dragging one of the window edges, change the width of field columns in the search result box (like the *Object number* or *Title* columns) by dragging the separator marking between the columns, or move a column to the right or left by dragging the column to the new position. Your changes will be saved for later use.

3. First select the database in which you would like to search. One or more databases may have been set up by your application manager. Just click the drop-down list directly under the *Search* box label in the top left to open it, and select another database (if present).
4. Then enter your search key in the entry field left to the *Search* button and click the *Search* button or press **Enter**.

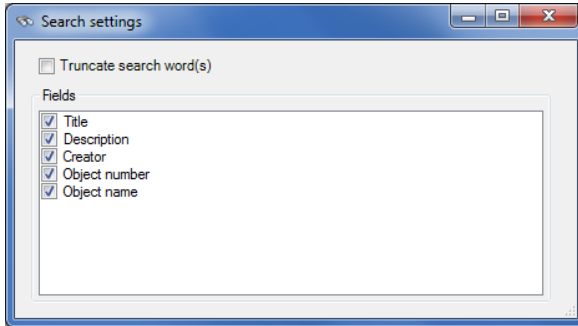
The search key can be a whole word or just the first letters of a word followed by an asterisk‡, or even a phrase consisting of multiple words (of which only the last word can be a partial word). For instance, to find the painting called “The magic apple tree”, in our demo database, your search key could be either “magic” or “appl*”, “apple tr*”, “the”, etc.

Adlib will search several fields in the database for your search key. Which fields will be searched, depends on the setup of your Adlib Office Connect Server.

‡ By default, truncation needs to be indicated explicitly, but it is possible that your server has been set up differently so that truncation is implicit: in that case you don’t need to type an asterisk (*) behind your partial search key, e.g. “appl”.



Right-click the search entry field and choose *Search properties* in the pop-up menu if you would like to see which fields will be searched and if truncation is automatic (and implicit) or not. You can change these settings easily: click any of the listed fields to unmark it, so that the relevant field will not be searched anymore, until you mark it again. A marked *Truncate search word(s)* checkbox means that every search will be truncated automatically; an unmarked checkbox means that the user will have to enter an asterisk behind a search key when he or she wants to search truncated.

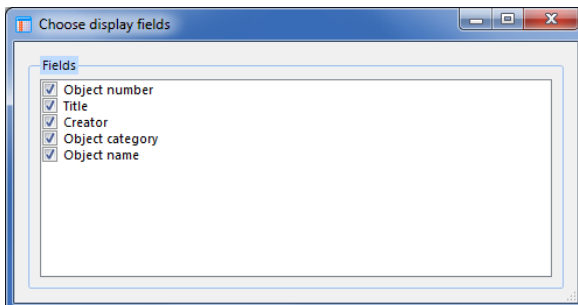




5. Instead of searching by means of a search key, you can also retrieve records from pointer files*. Click the *Pointer files* button to open a list of all pointer files present for the current database. Double-click any of the pointer files in the list to retrieve the records it points to.

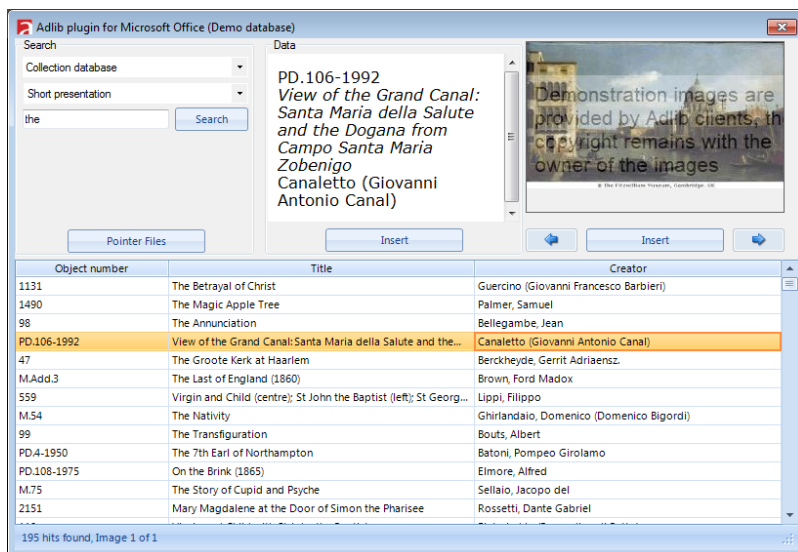
* In an Adlib application (like Adlib Museum or Library) you can store any search result in a so-called pointer file. The pointer file will only contain references to records. You can use pointer files to quickly retrieve an earlier search result.

1.2 Selecting data from the search result

6. When your search yielded results, the found database records are listed in the bottom half of the plugin window. Only some selected fields from each record are displayed in this list. Which fields are listed, is determined by your setup and by your own settings: you can change which columns are displayed by right-clicking the search result, and selecting *Choose fields* in the pop-up menu. The *Choose display fields* window will open with a list of available fields. Just mark the field names which you would like to see as columns in the search result.



7. The status bar at the bottom of the window displays the total number of records found and for the currently selected record also the number of images it contains. Use the vertical scrollbar to the right of the search result to scroll through all found records. If you first click one of the records in the search result, then you can also use your mouse wheel to scroll through the search result.
8. Click one of the records in the list to select it. The contents of the record (that is to say, a selection of fields from the record) is retrieved and displayed in the *Data* box (top middle) and *Image* box (top right). If multiple images are linked to the current record, then one or both of the blue arrow buttons underneath the *Image* box turn green:  ; click a green arrow button to display the next or previous image of the record.



9. You can also select multiple records, either by holding the **Ctrl** key while clicking the desired records, or by selecting the first record in a desired range and then **Shift**+clicking the last record in the range.

1.3 Inserting selected data into your document

10. Which fields are shown in the *Data* box is determined by your setup and by the display option you choose. (You can resize the plugin window to increase the size of the *Data* and list boxes.) The display option can be chosen from the second drop-down list in

the *Search* box (top left). Your setup determines which display modes are available.

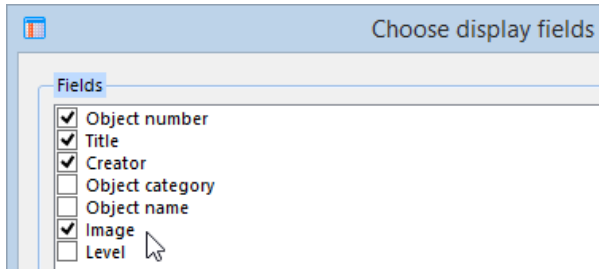
In our demo application, for the *Collection* database there is the **Short presentation** showing the object number, object name, title and creator, the **Long presentation** showing the record number, object number, object name, description, creator, production dates and place, material, and dimensions, all preceded by appropriate labels, and there is the **Table display** which shows the institution name, the object number, title, creator and material, which arranges the data in a table with field labels and borders.

Also in our demo application, for the *Library* database there is a **Table display** showing the title, the author, material type, statement of responsibility, the ISBN, publisher, place of publication, pagination, notes, the shelf mark and copy number, which arranges the data in a table with field labels and borders.

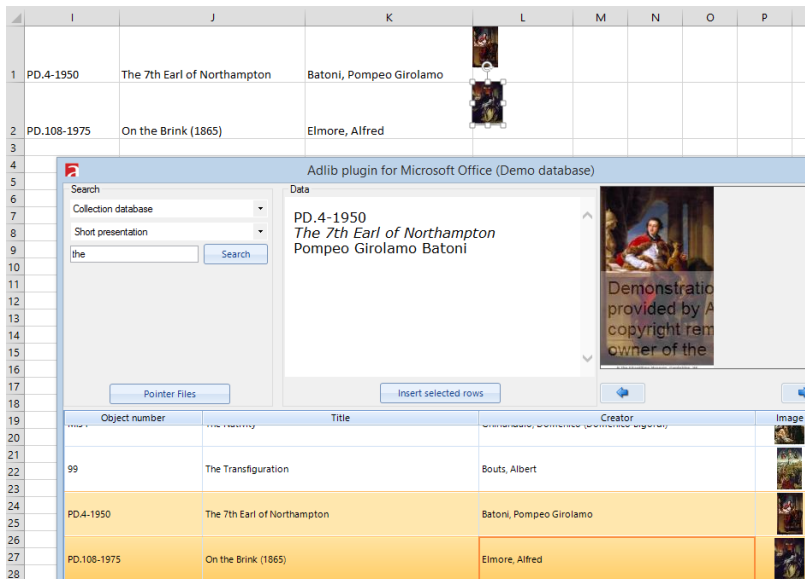
And finally, for the *Collection of the Amsterdam Museum*, there is a **Long presentation** format present, showing the object number, title, creator, object category and object name.

11. If one or more images are linked to the record, you'll see them in the *Image* box. The visible image is the selected image.
12. The data and image(s) (if present) of a single record currently shown in the *Data* or *Image* box can be inserted into your Word document by clicking the *Insert* button underneath the desired data and/or image; an image will be inserted in its original size. You can also double-click the image itself to insert it in the size in which it is displayed in the plugin. If you wish, you can switch the display mode and insert the data again, or scroll to another image (if multiple images are available) and insert that too.
If you selected multiple records, you can insert all their data and/or the first image of each record: right-click the selection and click *Insert images and text for all selected rows* to insert all data and images. Or click *Insert images for all selected rows* to insert just the images. Right-click the selection and click the *Insert selected rows* or *Insert selected rows with headers* option in the pop-up menu to insert the data without the images. In this case it is irrelevant which display option you chose: the selected records will be displayed in a simple table, one record per row. The second option also adds a header row with field names. The table will have the same columns as the search result box in the plugin window.

Insertion of data and/or images in Microsoft PowerPoint and Excel is currently more limited: in PowerPoint, only images can be inserted, not text. In Excel, by default only plain textual data is inserted, by right-clicking the selected record(s) and choosing an *Insert...* option. However, by right-clicking the search result and selecting the *Choose fields* option in the pop-up menu you can add the *Image* field to the list of displayed fields.



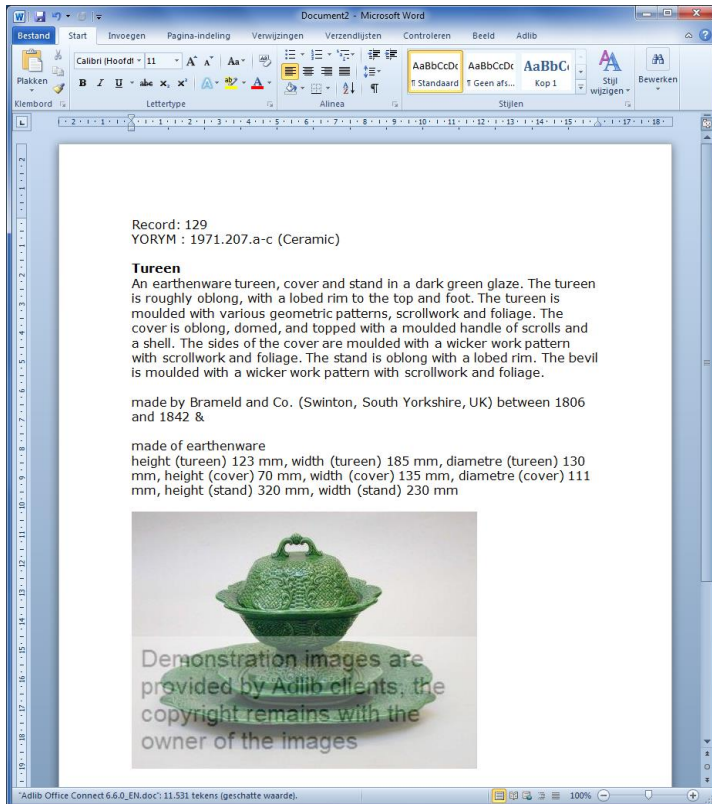
After that, inserting selected records into the spreadsheet will also insert thumbnails of the linked images.



Note that if you have opened multiple Office documents, insertion will take place at the position of the cursor in the document which has the Windows focus, or which had it last if other software has the focus.

13. The data and/or image(s) copied to your Office document can of course be edited like all texts in documents: you can delete or add text and change the layout. Any tables in a Word document which have been created by the Office Connect client can be edited like any other Word tables, so you can apply all table styles from Microsoft Word.

Naturally you can also save your document and/or print it: anything the relevant Microsoft application has to offer.



2 Installation

2.1 System requirements

- The Adlib Office Connect plugin(s) – You can install these plugins on network clients using the click-once service on our website (see chapter 2.3). However, if you downloaded a zipped installer package instead, then unzip the downloaded Adlib Office Connect package, copy the *setup.exe* to the desired network clients and run the file on each of those clients.
- The .NET Framework 4.0 (the *Extended* or *Full* version) – Open your *Control panel* and from that window open *Software* to check if the Microsoft .NET Framework 4.0 is already installed on your computer. If not, see [Microsoft's website](#) for download and installation information. Do this check for all relevant network clients.
- Microsoft Office - For an Adlib Office Connect package downloaded from our website you require at least Microsoft Office 2010 (32-bit) installed on each relevant client – older versions are not compatible currently. For Microsoft Office 2007, 2010 (64-bit and 32-bit) or higher you need the latest version of the Adlib Office Connect plugins, currently (March 2014) only available via click-once installation (see chapter 2.3).
- An Adlib Office Connect server – You need an Adlib *wwwopac.ashx* server on the network, set up for Adlib Office Connect, to be able to run the Adlib Office Connect plugin from within Microsoft Word, PowerPoint or Excel. See the next chapter for setup information.

2.2 Setting up your Adlib Office Connect server

The Adlib Office Connect server handles the search request from the Office plugin. Assuming you already have an Adlib SQL database in place, you will have to setup this server. This server comes down to a *wwwopac.ashx* installation.

2.2.1 system requirements

- See the [WWWOPAC Installation Guide](#) document for information about the requirements for *wwwopac.ashx*.
- Further, Microsoft IIS (Internet Information Services) must be configured on the machine which is going to act as the image server. (The image server is also the server on which *wwwopac.ashx* is going to run.)

- The `wwwopac.ashx` must be installed on Windows Server 2003 or higher.
- The standard `wwwopac.ashx` has been compiled in any-cpu mode, which allows it to act as a true 64-bit version on 64-bit systems and as a 32-bit version on 32-bit systems. 32-bit software can often be used normally on 64-bit systems, but if you use a 32-bit Oracle client on a 64-bit system, then the standard `wwwopac.ashx` will run into problems. For this case you will need a version of `wwwopac.ashx` compiled in 32-bit mode.

2.2.2 Adlibweb.xml and image retrieval setup

Follow the global steps below to set up your Adlib system for the retrieval of images via `wwwopac.ashx`:

1. The `wwwopac.ashx` is not a standard part of a local Adlib system and won't be installed automatically. See the *WWWOPAC Installation Guide* document and the current document for more information about the installation. The `wwwopac.ashx` must also be configured so that it knows where to look for the images and how to retrieve them; see the [adlibweb.xml file documentation](#) on the Adlib API website for related information, although not all settings relevant to an Adlib API server are also relevant to an Adlib Office Connect server, like the `authenticationConfiguration` and `highlight` settings. If you already have a working `wwwopac.ashx` installation, you can use your existing `adlibweb.xml` file or adjust it by adding database configurations which you intend to use in the Office Connect plugin. (Which of the databases specified here can actually be accessed by the plugin, is set in the *AdlibConnectPreferences.xml* file.) An example of a simple, yet complete `adlibweb.xml` file for the Adlib Office Connect server, is the following:

```
<?xml version="1.0" encoding="UTF-8" ?>
<webConfiguration>
  <globalConfiguration>
    <databasePath>D:\Apps\AdlibSQL\data</databasePath>
  </globalConfiguration>

  <imageServerConfiguration name="adlibimages">
    <servertype>FileSystem</servertype>
    <path>D:\Apps\AdlibSQL\images</path>
    <cachePath />
  </imageServerConfiguration>

  <databaseConfiguration database="collect.inf">
    <brieffields>
      <field>object_number</field>
      <field>title</field>
      <field>creator</field>
      <field>label.text</field>
      <field>administration_name</field>
    </brieffields>
  </databaseConfiguration>
</webConfiguration>
```

```

    <field>reproduction.reference</field>
  </brieffields>
<detailfields>
  <field>*</field>
</detailfields>
</databaseConfiguration>
</webConfiguration>

```

If no *<imageServerConfiguration>* has been specified, then *wwwopac.ashx* will try to use the contents of the image field (as set in the *AdlibConnectPreferences.xml* file) to retrieve the image. This will only succeed if the image field contains a URL to an image.

Note that your application pool account must have sufficient access rights to the *\data* folder set in your *databasePath*. If it doesn't, the Word plugin won't be able to retrieve records, although a server connection can be made and no error message appears after a search.

2. In Adlib Designer, for the image field in which you link images, set the *Storage path*, *Retrieval path*, and/or *Thumbnail retrieval path* with a call to *wwwopac.ashx*. (Only fill in the properties which you want to use.) See the [Designer Help](#) for an explanation of these options. See the [Adlib API website](#) for a description of the syntax for calling *wwwopac.ashx*.
3. By setting the path options above, you have specified a large part of the URL and the path to images in advance, so that in the image field in records only the name of the image for example, without path, has to be present. Therefore, you'll have to check and adjust all your records with linked images for the correct values. Use search-and-replace to remove any part from a fixed path in all links.
From now on, when you create links to images, you'll have to adjust them (if necessary) so that only the file name (or the proper part of the path to the image in your situation) is filled in, not the entire path.

2.2.3 Setting your preferences

Some stylesheets and a preferences file which came with the Adlib Office Connect package, contain example settings for the Office plugin. You must edit these files to reflect the way you want to use the plugin, and place them in the same folder as *wwwopac.ashx* and *adlibweb.xml* on your server. If you installed the click-once version of the plugin, then download the *Adlib Office Connect server files* from <http://www.adlibsoft.com/support/downloads/adlib-office-connect> to obtain these stylesheets and the preferences file.

■ XSLT stylesheets

In the folder that contains *wwwopac.ashx*, a number of XSLT stylesheets provide the means by which data retrieved by *wwwopac.ashx* (in grouped XML format) is transformed to an HTML page. This HTML page is displayed in the *Data* box in the Office Connect plugin and can be copied to the relevant Microsoft Office document by clicking a button.

Each (database-specific) XSLT stylesheet, as can be selected in the second drop-down list in the left upper corner of the plugin window, specifies a layout type of the detailed display of a retrieved record, excluding the image: the image retrieval and display is not handled by the stylesheets. Once you've retrieved a record via the Office Connect plugin, you can still choose how to present its textual data. By default the user can choose between data in table form and a long or short description. When you insert the data into a Word document, it will be copied in the layout you chose to present it in.

By editing the standard XSLT stylesheets or by creating new ones, you can specify your own data layout. New stylesheets must be placed in the same folder as the other stylesheets and must be referred to in the `<StyleSheets>` section for the proper database in the base *Adlib-ConnectPreferences.xml* file. As mentioned, do not include any image reference in these stylesheets.

As an example, consider the *simple_object_table.xslt* stylesheet which produces a result similar to:

field	data
institution.name	The Fitzwilliam Museum
object_number	PD.44-1999
title	A rider on a rearing horse
creator	Leonardo da Vinci
material	metalpoint
	brown ink
	paper

```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:output method="html" indent="yes"/>

  <xsl:template match="/adlibXML">
    <xsl:apply-templates select="recordList"/>
  </xsl:template>
```

```

<xsl:template match="diagnostic"/>

<xsl:template match="recordList">
  <font face="verdana">
    <table border="1">
      <tr>
        <td>
          <strong>field</strong></td>
        <td>
          <strong>data</strong>
        </td>
      </tr>
      <xsl:apply-templates select="record"/>
    </table>
  </font>
</xsl:template>

<xsl:template match="record">
  <xsl:apply-templates select="institution.name"/>
  <xsl:apply-templates select="object_number"/>
  <xsl:apply-templates select="Title/title"/>
  <xsl:apply-templates select="Production/creator"/>
  <xsl:apply-templates select="Material/material"/>
</xsl:template>

<xsl:template match="record//*>
  <tr valign="top">
    <td>
      <xsl:if test="position() = 1">
        <xsl:value-of select="name()" />
      </xsl:if>
    </td>
    <td>
      <xsl:value-of select="."/>
    </td>
  </tr>
</xsl:template>

</xsl:stylesheet>

```

- The `<diagnostic>` node is matched, but nothing is currently done with the metadata it contains.
- Each record will be contained in its own table. The first row contains the *field* and *data* labels in separate columns. This is specified in the `recordList` template.
- For each `<record>` node, five field templates are applied which are being matched by the `record//*` template: the `//` XPath expression selects all nodes hierarchically down from the preceding node (`<record>` in this case) that match the selection (`*` in this case, a wildcard representing any possible element node) no matter where they are.

Each of the five fields (if present in the retrieved data) will then be inserted in its own table row. In front of the first occurrence of each field, the field name will be printed: in the current standard stylesheets, field names (as defined in the data dictionary, usually not identical to screen field labels) in relevant layout types (like the table display) are always inserted in English.

Adding interface language dependent texts

The XSLT stylesheets receive a language parameter (`language`), generated by the Adlib Office Connect plugin, which contains the IETF language tag of the user interface language of Microsoft Office, e.g. 'en-US' or 'nl-NL'. This means that the standard stylesheets can be adjusted to be able to print fixed texts in the current user interface language. For example, add the following parameter declaration to *simple_object_table.xslt*:

```
<xsl:param name="language"></xsl:param>
```

Then change the `recordList` template to the following, to make the first column header interface language dependent:

```
<xsl:template match="recordList">
  <font face="verdana">
    <table border="1">
      <tr>
        <td>
          <strong>
            <xsl:choose>
              <xsl:when test="$language = 'nl-NL'">
                <xsl:text>veld</xsl:text>
              </xsl:when>
              <xsl:otherwise>
                <xsl:text>field</xsl:text>
              </xsl:otherwise>
            </xsl:choose>
          </strong>
        </td>
        <td>
          <strong>data</strong>
        </td>
      </tr>
      <xsl:apply-templates select="record"/>
    </table>
  </font>
</xsl:template>
```

Whenever the interface language of Microsoft Office is Dutch, the Dutch column header will be used:

veld	data
institution.name	The Fitzwilliam Museum
object_number	PD.44-1999
title	A rider on a rearing horse
creator	Leonardo da Vinci
material	metalpoint
	brown ink
	paper

■ AdlibConnectPreferences.xml

The *AdlibConnectPreferences.xml* file (in the server folder containing *wwwopac.ashx*) contains variable texts in all available interface languages and references to databases with each a list of fields to search in (see the `<SearchField>` nodes), a list of stylesheets to use and a list of fields to present in the record list of the search result (see the `<ListField>` nodes).

The `<SearchField>` and `<ListField>` nodes contain not only the English field names, but also a user-friendly label text translated per available language which are being used in the *Choose display fields* window, the search result column headers and the *Search settings* window. The default *AdlibConnectPreferences.xml* file should be set up manually (if changes are required) before anyone starts using Adlib Office Connect.

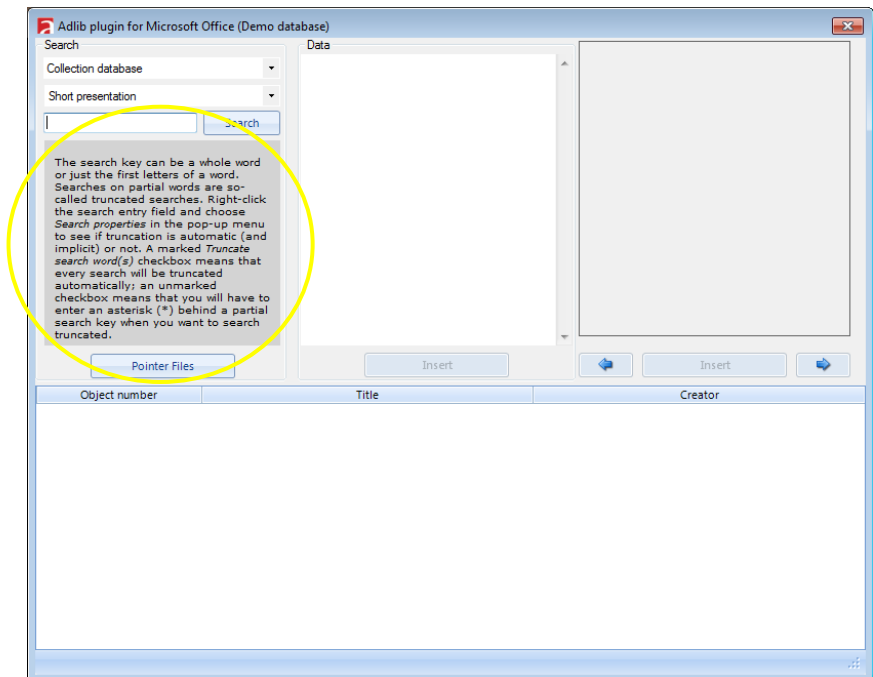
After setup has finished and someone starts using the Office plugin, like entering a term to search on or changing anything to the position or layout of the client window, these changes will be stored in a personal, local copy of the file that in principle doesn't need to be edited manually. If you installed the plugin via a downloaded *.msi* installer file, you can find it in `C:\Users\<user name>\AppData\Roaming\Microsoft Corporation\Microsoft Office 2010\<highest version number>` on the local hard drive of the network station of the user, whilst you can find it somewhere in `C:\Users\<user name>\AppData\Local\Apps\2.0\Data\<variable coded folder name>\<variable coded folder name starting with "adli..">\Data\` when you've run the installation through the Adlib click-once service (directly from the website). The personal copy of the file is also called *adlibConnectPreferences.xml*. These local settings overrule settings in the server version of *AdlibConnectPreferences.xml*, as far as this user is concerned; an exception is the presence of field column nodes in this file: if you add

or remove a `<ListField>` and/or `<SearchField>` node to or from the `AdlibConnectPreferences.xml` file on the server, then this change will be copied to a local `adlibConnectPreferences.xml` file as soon as the relevant user opens the Office plugin. Adlib Office Connect will always check that the local preferences file does not contain fields which are not present in the server version of the file. This way you can make sure that users can only see approved fields.

The `<DatabasePreferences Name="mydatabase">` nodes refer to databases set up in the local `adlibweb.xml` file (specified in `<database-Configuration>` nodes), unless this node has a `<Url>` node beneath it, containing the URL to some location on the web where another `wwwopac.ashx` server has been set up; in that case, the `<DatabasePreferences Name="mydatabase">` node refers to a database specified in the `adlibweb.xml` file on that remote server.

The `Hidden="true"` attribute in a `<Listfield>` node indicates that the relevant field column is currently not visible in the search result, but it can be selected by the user for display. Omission of this node will make the relevant field visible in the search result by default.

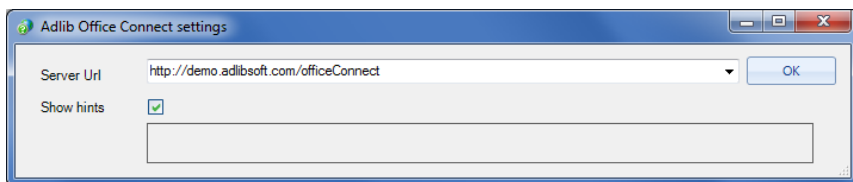
2.2.4 Showing hints



Adlib Office Connect offers the possibility to display messages, hints or tips in the Office plugin, underneath the search entry field (see the

second image below). Each message (in a single language) must be stored in its own HTML file on the server, in the same folder as *wwwopac.ashx*. The names of these files must be set per language underneath the *<Hints>* node in the *AdlibConnectPreferences.xml* file on the server. In the standard application, the English files are called *hints1.htm*, *hints2.htm* and *hints3.htm*. The number of hints may vary per language (e.g. 10 in Dutch, but only 5 in English). Every time the user starts Microsoft Word, PowerPoint or Excel, the next hint will be displayed in the Office plugin. After the last available hint, the first hint is used again.

It's up to the user though to decide if he or she wants to see these hints, via the *Show Hints* checkbox when setting the Adlib Office Connect server URL (see chapter 2.4). You'll have to restart the Microsoft application to see the effect of marking or deselecting the *Show hints* checkbox.



2.3 Installing the Office Connect plugin

The Office Connect plugin needs to be installed on every client in the network where you'd like to make use of it. Those clients of course require Microsoft Office to be present already.

There are two ways of installing the Office Connect plugin: automatically via the Adlib click-once installer service or manually by running the setup of a downloaded installer package. The click-once service automatically provides you with the very latest version every time you start the relevant Office application.

■ Automatic installation via the click-once service

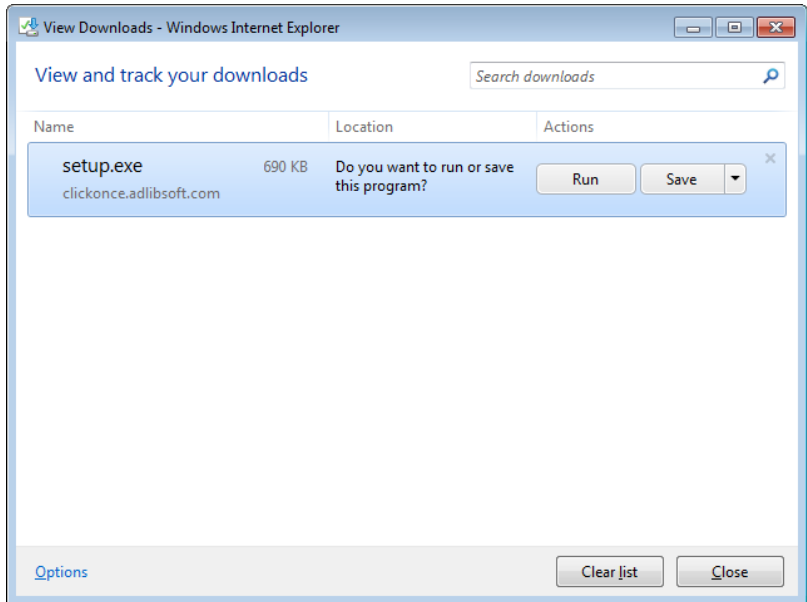
1. **Ctrl+click** one or more of the links below (or enter one in your browser), to automatically install the Office plugin for Microsoft Word, Excel and/or PowerPoint. Each link is for one particular Office application.

<http://clickonce.adlibsoft.com/adlibConnect/word/setup.exe>

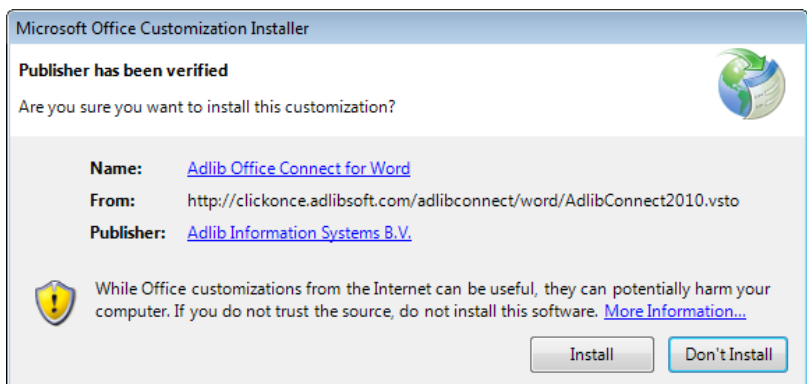
<http://clickonce.adlibsoft.com/adlibConnect/excel/setup.exe>

<http://clickonce.adlibsoft.com/adlibConnect/powerpoint/setup.exe>

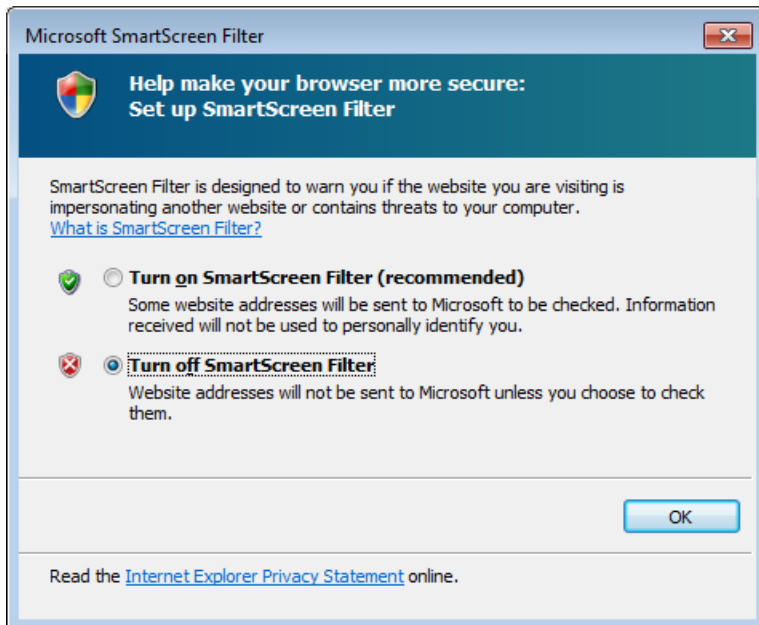
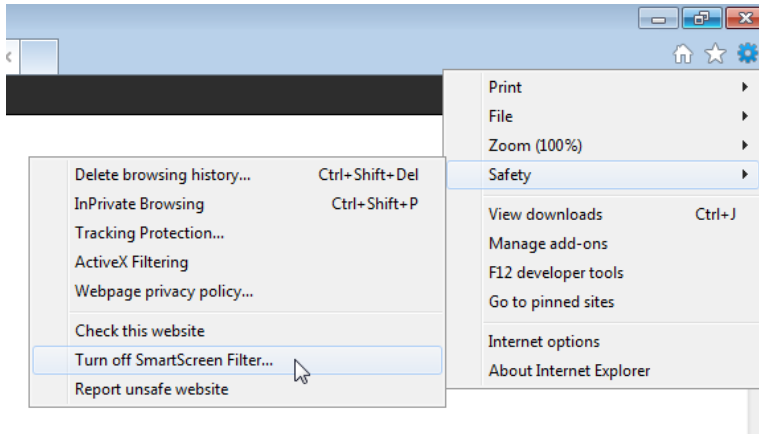
2. Internet Explorer (IE) now asks you whether it must run or save *setup.exe*. Select *Run*.



3. a. If IE is able to verify Axiell ALM Netherlands (or Adlib Information Systems) as a certified publisher, it notifies you so: click *Install* and if all goes well, Windows will report that the Microsoft Office customization was successfully installed and you are done with this installation. Note that it is not relevant exactly where the plugin has been installed on a computer: you won't ever need to change anything in that folder manually.



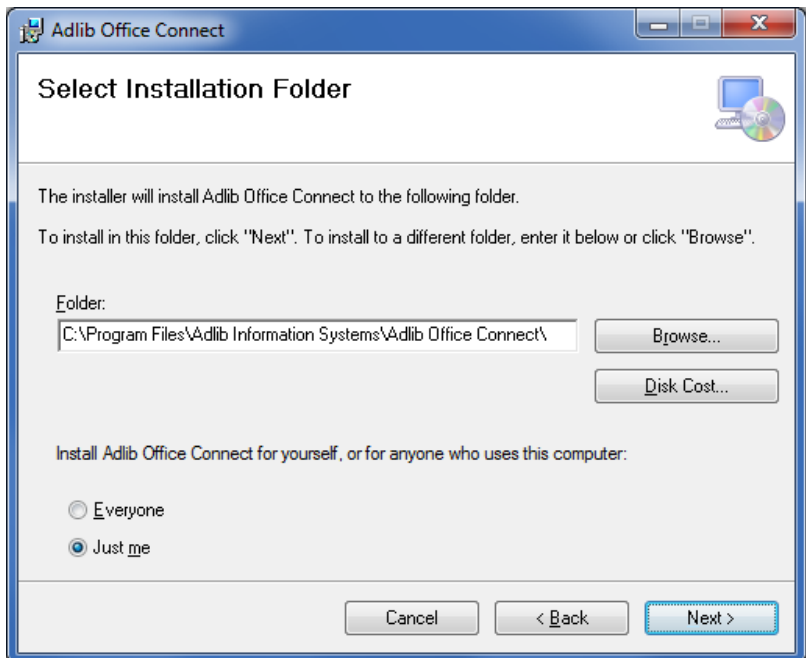
b. If IE is not able to verify our company as a certified publisher, it won't allow you to continue installing after clicking *Run*. You'll have to choose to *Delete* the download first. Then you'll have to make a temporary setting in IE. Click the *Tools* icon in the top right corner of the IE window and select *Safety > Turn off SmartScreen Filter*. You'll have to confirm your choice in the *SmartScreen Filter* window that opens.



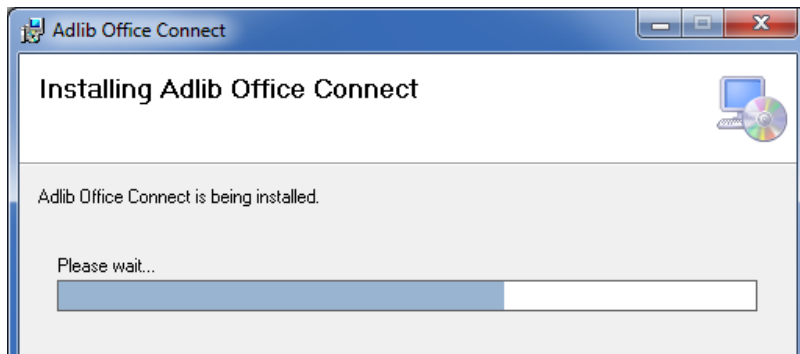
Now try the click-once installation again. Afterwards, turn your SmartScreen Filter on again, the same way as you turned it off.

■ Manual installation of an unzipped, downloaded package

1. After you've copied *setup.exe* to (some temporary folder on) a client where it must be installed, double-click it to start the installation procedure. The setup wizard starts with a welcome page. Depending on whether you installed an earlier version of this plugin before, the installer may want to install "Microsoft Visual Studio 2010 tools for Office runtime" first, which is okay; if requested, reboot your computer afterwards, otherwise click *Next* until you get to the *Select Installation Folder* page.
2. Accept the suggested installation folder or click *Browse* to select another folder on your local system. Installation will require only 2 MB of free disk space.
Also choose if everyone using your computer should be able to use Adlib Office Connect, or just you. Mark the relevant radio button.



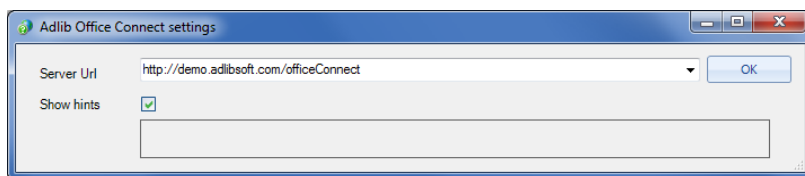
3. Click *Next*. The installer has collected enough information. Click *Next* again, to start the actual installation. The installation will proceed automatically, wait for it to finish.



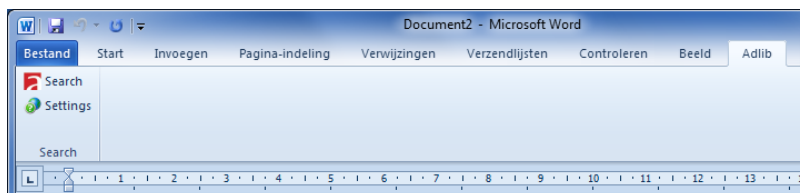
- The setup wizard will notify you when installation was succesful. Click *Close* to close the wizard.

2.4 First use of Adlib Office Connect

- Restart or open Microsoft Word, PowerPoint or Excel. The plugin will be loaded and the *Adlib Office Connect settings* window opens. Enter a URL to your Adlib Office Connect server, or choose the demo URL as shown in the image below. Click *OK* to make the connection (this may take a few seconds). If the connection was succesful, the message *Adlib server ... connected* will appear in this window and it will close automatically. If connection was not succesful, you'll have to choose another server, or check whether you installed your server correctly.



- In the menu bar of the Microsoft application, an *Adlib* or *Axiell* menu with two options has been added.



The *Settings* option opens the *Adlib Office Connect settings* window again, to allow you to set a different Adlib Connect server. The *Search* option allows you to search your Adlib database(s), after which the search result can be inserted into your current document.