

Templafy Add-ins for Microsoft Office

Tech brief

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Authors	Henrik Printzlau (CTO)

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Intro

With Templafy Add-ins for Microsoft Office, Templafy is available directly from the Microsoft Office applications and adds extra features which are integrated in user workflow in these applications.

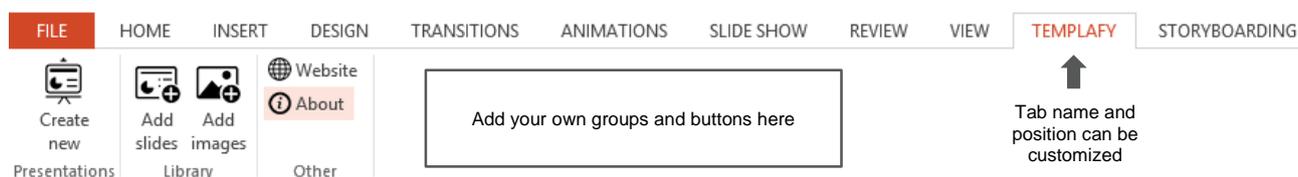
Application support

Office versions	2007, 2010, 2013 and Office 365 Pro Plus
Architecture	32-bit and 64-bit versions of Office
Windows versions*	Vista, 7, 8, 8.1, (10)
Windows architecture	32-bit and 64-bit
.Net Framework	4.5
Browser support*	Microsoft Internet Explorer 9+
Pre-requisites (Office 2007 and 2010)	<p>Microsoft Visual Studio 2010 Tools for Office http://download.microsoft.com/download/C/0/0/C001737F-822B-48C2-8F6A-CDE13B4B9E9C/vstor_redist.exe (Download includes MSI for x86 and x64 OS version)</p> <p>Microsoft Visual C++ 2010 Redistributable (x86): http://www.microsoft.com/en-us/download/details.aspx?id=5555 (x64): http://www.microsoft.com/en-us/download/details.aspx?id=14632</p> <p>Microsoft .NET Framework 4.5 Client (or Full) http://www.microsoft.com/en-us/download/details.aspx?id=30653</p>
Pre-requisites (Office 2013)	<p>Microsoft .NET Framework 4.5 Client (or Full) http://www.microsoft.com/en-us/download/details.aspx?id=30653</p>

* Since the Add-ins use the Internet Explorer control in Forms and Task Panes, Windows XP is not supported as only Internet Explorer 8 runs on Windows XP.

Features

- Templafy Ribbon on which our customers can add their own groups and buttons.
- Create documents directly from Office applications (Templafy website will open in Form or Task Pane).
- Add slides to active presentation from slide library.
- Add images to active presentation from image library.



Deployment

Templafy Add-ins can be deployed in several ways. We recommend using the Templafy FileUpdater.

In the following we will describe some of the various options for deployment.

Installation components

Each Add-in is built in VSTO (Visual Studio Tools for Office) and requires four components to be installed:

Application files	Add-in Application files for each Office application must be copied to destination folder on client machine (e.g. %programdata%\Templafy\Templafy Word Add-in\ or %PROGRAMFILES%\Templafy\Templafy Word Add-in\).
Setting files	JSON and XML files to tweak default behavior of Add-ins. Folders with settings files must be placed on same level as Application files.
Registry entries	The Add-in must be registered in Windows registry: <ul style="list-style-type: none"> • Manifest file e.g. in HKEY_CURRENT_USER\Software\Microsoft\Office\Word\Addins\
Certificate*	The Templafy Certificate with which the Add-in are signed must be installed in the Trusted Publishers certificate Store.

* Certificate is only required if Application files are placed outside %programfiles% folder.

Deploying using Templafy FileUpdater

We recommend that the Add-ins are distributed using the Templafy FileUpdater.

Templafy FileUpdater is a Windows SysTray component that at every log-in connects to our unique customer storage in Azure, searches for new files to update and then takes care of caching and installation of Add-ins, registry entries, certificate and other relevant files.

The Templafy FileUpdater is delivered as a MSI package and can be distributed by normal means of software distribution. Settings for the Templafy FileUpdater can be added either as installation arguments for the installation or distributed to registry via GPO.

Deploying in Citrix and App-V environments

Pre-requisites	Install prerequisites on servers or build them into the server image.
Registry entries	Distribute registry settings using a GPO.
Application files	Do not build application files into the server image. Choose one of two methods instead: <ol style="list-style-type: none"> 1. Place the application files on a network share and update the relevant paths in registry entries to point to the network share. 2. Distribute the files to %PROGRAMFILES%\Templafy folder on the server.

Deploying using Windows Installer

Building an installer needs to take all application items into account. Here are some general considerations and decisions to take.

Overall considerations

Granting trust to the solution	Office solutions must be granted trust in one of two ways (otherwise users must respond to a trust prompt when starting Word, Excel and PowerPoint): <ol style="list-style-type: none"> 1. By deploying the certificate that the application manifest is signed with. 2. By installing the solution to the Program Files directory. <p>For simplicity, we recommend installing the solution to the Program Files directory as the Windows installer will have write access to the Program Files directory.</p>
Per-user or per-computer installation	Office solutions are loaded based on registry entries in the following paths: <p>Per-user:</p> <pre>HKEY_CURRENT_USER\Software\Microsoft\Office\[OFFICE APPLICATION]\Addins\[ADD-IN NAME]</pre> <p>Per-computer (32-bit) for 32-bit Office:</p> <pre>HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Office\[OFFICE APPLICATION]\Addins\[ADD-IN ID]</pre> <p>Per-computer (64-bit) for 32-bit and 64-bit Office:</p> <pre>HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office\[OFFICE APPLICATION]\Addins\[ADD-IN ID]</pre> <pre>HKEY_LOCAL_MACHINE\Software\Microsoft\Office\[OFFICE APPLICATION]\Addins\[ADD-IN ID]</pre> <p>For simplicity, we recommend using the per-computer option.</p>
Recommendation	For simplicity, we recommend deploying the Templafy Add-ins to this folder: <pre>%PROGRAMFILES%\Templafy</pre> <p>Using these registry entries:</p>

HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office\{OFFICE APPLICATION}\Addins\[ADD-IN ID]

HKEY_LOCAL_MACHINE\Software\Microsoft\Office\{OFFICE APPLICATION}\Addins\[ADD-IN ID]

In this way there is no need to distribute Trusted Publisher certificate nor to take Windows or Office version into consideration.

Configuration of package

Installation path for Application Files

Install the solution to the Program Files directory on the user's computer

Registry entries

[HKEY_LOCAL_MACHINE\Software\Microsoft\Office\PowerPoint\Addins\Templafy.TemplateSystem.PowerPointAdd-in]

Must be made for Word, Excel and PowerPoint

"Description"="Templafy.TemplateSystem.PowerPointAdd-in"
 "FriendlyName"="Templafy PowerPoint Add-in"
 "LoadBehavior"=dword:00000003
 "Manifest"="file:///C:/Program Files/Templafy/Templafy PowerPoint Add-in/Templafy.TemplateSystem.PowerPointAdd-in.vsto|vstolocal"

[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office\PowerPoint\Addins\Templafy.TemplateSystem.PowerPointAdd-in]

"Description"="Templafy.TemplateSystem.PowerPointAdd-in"
 "FriendlyName"="Templafy PowerPoint Add-in"
 "LoadBehavior"=dword:00000003
 "Manifest"="file:///C:/Program Files/Templafy/Templafy PowerPoint Add-in/Templafy.TemplateSystem.PowerPointAdd-in.vsto|vstolocal"

Pre-requisites

Add the .NET Framework 4.5 (client) as pre-requisite

Add the Visual Studio 2010 Tools for Office Runtime as pre-requisite (For Office 2010) BUT beware that your Windows installer builder may not reference the correct version and you might need to add the reference manually.

References

Deploying an Office Solution by Using Windows Installer

<https://msdn.microsoft.com/en-us/library/cc442767.aspx>
 (example using InstallShield limited edition)

Registry Entries for Application-Level Add-Ins

<https://msdn.microsoft.com/en-us/library/bb386106.aspx>

Deploying your VSTO add-ins to All Users

<http://blogs.msdn.com/b/vsto/archive/2010/03/08/deploying-your-vsto-add-ins-to-all-users-saurabh-bhatia.aspx>

Manual installation (for: all users, application files in: %PROGRAMFILES%)

Intro

This will describe how to install for the current user in %PROGRAMFILES%\Templafy folder.

This requires leveraged privileges (write access) to the %PROGRAMFILES% folder.

Default installation path

% PROGRAMFILES%\Templafy\

Change installation path

To change the installation path, update the path in each registry file accordingly.

Open (by right-clicking and choosing edit) each *.reg file in the "...\Templafy Add-ins Registry entries All-users ProgramFiles" folder and edit the path in these two places:

```

1 Windows Registry Editor Version 5.00
2
3 [HKEY_LOCAL_MACHINE\Software\Microsoft\Office\PowerPoint\Addins\Templafy.TemplateSystem.PowerPointAdd-in]
4 "Description"="Templafy.TemplateSystem.PowerPointAdd-in"
5 "FriendlyName"="Templafy PowerPoint Add-in"
6 "LoadBehavior"=dword:00000003
7 "Manifest"="file:///C:/Program Files/Templafy/Templafy PowerPoint Add-in/Templafy.TemplateSystem.PowerPointAdd-in.vsto|vstolocal"
8
9 [HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Office\PowerPoint\Addins\Templafy.TemplateSystem.PowerPointAdd-in]
10 "Description"="Templafy.TemplateSystem.PowerPointAdd-in"
11 "FriendlyName"="Templafy PowerPoint Add-in"
12 "LoadBehavior"=dword:00000003
13 "Manifest"="file:///C:/Program Files/Templafy/Templafy PowerPoint Add-in/Templafy.TemplateSystem.PowerPointAdd-in.vsto|vstolocal"
14

```

1. Verify pre-requisites

Verify that the correct pre-requisites are installed:

How to: Determine Which .NET Framework Versions Are Installed:

https://msdn.microsoft.com/en-us/library/hh925568%28v=vs.110%29.aspx#net_a

Installation of "Microsoft Visual Studio Tools for Office Runtime" can be verified in the list of installed programs in Control Panel\Programs\Programs and Features.

2. Copy Add-ins files to destination path

Copy the all folders this folder

...\Templafy Add-ins\Templafy Add-in files\Templafy

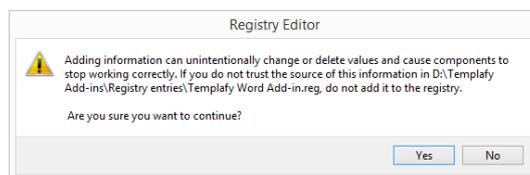
to

%PROGRAMFILES%\Templafy

3. Install Registry entries

For each.reg file in the "...\Templafy Add-ins Registry entries All-users ProgramFiles" folder:

1. Right-click the .reg file and choose Merge.
2. Click Yes in the User Account Control dialog to allow the regedit program to make changes to your computer.
3. Click Yes in the Registry Editor to add the registry entry



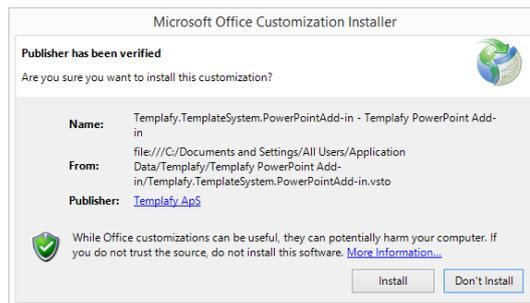
4. Verify installation

Start Microsoft PowerPoint and verify that you see a Templafy tab on the Ribbon.



NB: Your settings might have changed the name of the tab.

During launch of PowerPoint you must NOT receive this message (it means that the certificate is not installed properly):



Manual installation (for: current user, application files in: %PROGRAMDATA%)

Intro

This will describe how to install for the current user in %PROGRAMDATA%\Templafy folder.

Since application files are not placed in %PROGRAMFILES% or %PROGRAMFILES(X86)% the Trusted Publishers certificate needs to be installed.

Default installation path

%PROGRAMDATA%\Templafy\

Change installation path

To change the installation path, update the path in each registry file accordingly. Open (by right-clicking and choosing edit) each *.reg file in the "...\Templafy Add-ins\Registry entries Per-user ProgramData" folder and edit the path in these two places:

```

1  Windows Registry Editor Version 5.00
2
3  [HKEY_CURRENT_USER\Software\Microsoft\Office\PowerPoint\Addins\Templafy.TemplateSystem.PowerPointAdd-in]
4  "Description"="Templafy.TemplateSystem.PowerPointAdd-in"
5  "FriendlyName"="Templafy PowerPoint Add-in"
6  "LoadBehavior"=dword:00000003
7  "Manifest"="file:///C:/Documents and Settings/All Users/Application Data/Templafy/TemplateSystem.PowerPointAdd-in/Templafy.TemplateSystem.PowerPointAdd-in.vsto|vstolocal"
8
9  [HKEY_CURRENT_USER\Software\Microsoft\VSTO\Security\Inclusion\A4056F48-9BB5-4656-9E0A-E76E628AD4D]
10 "Url"="file:///C:/Documents and Settings/All Users/Application Data/Templafy/TemplateSystem.PowerPointAdd-in/Templafy.TemplateSystem.PowerPointAdd-in.vsto"
11 "PublicKey"=

```

1. Verify pre-requisites

Verify that the correct pre-requisites are installed:

How to: Determine Which .NET Framework Versions Are Installed:
https://msdn.microsoft.com/en-us/library/hh925568%28v=vs.110%29.aspx#net_a

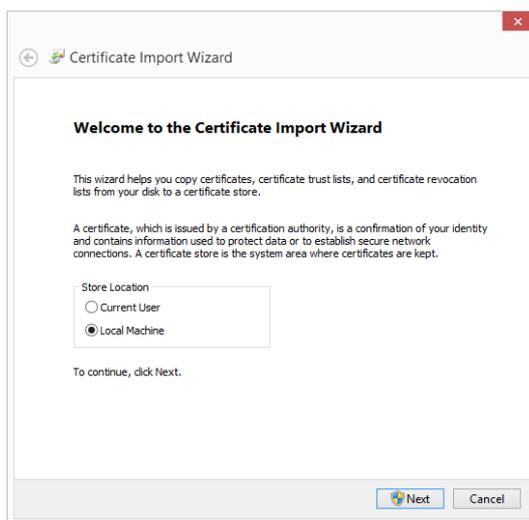
Installation of "Microsoft Visual Studio Tools for Office Runtime" can be verified in the list of installed programs in Control Panel\Programs\Programs and Features.

1. Install Certificate

Note: In order to install certificate correct, internet access is required during certificate installation

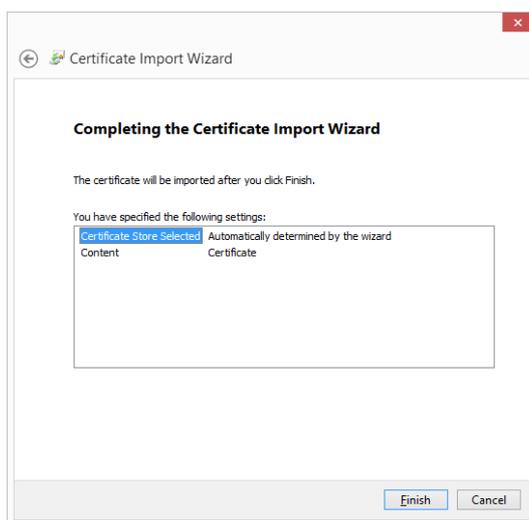
Install the TemplafyApS.cer certificate in the Trusted Publishers Local Machine store:

1. Right-click the certificate file (...\\Trusted Publisher Certificate\\TemplafyApS.cer) and choose "Install certificate"
2. Choose Local Machine in the Certificate Wizard and press Next

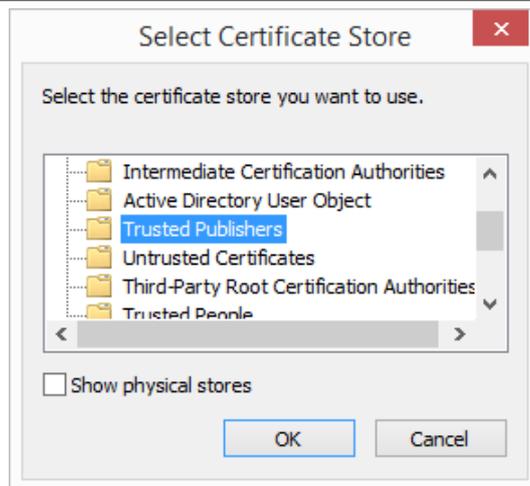


NB: If you do not have elevated privileges on the machine, choose Current User. In this case, other users on your machine will be prompted to install the Add-in when starting Word, Excel or PowerPoint.

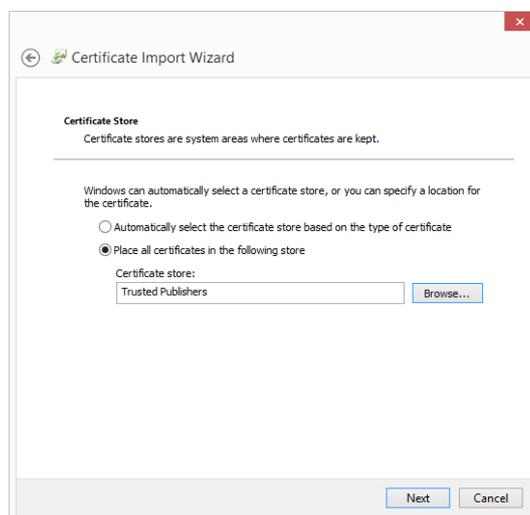
3. Choose "Place all certificates in the following store" and click Browse



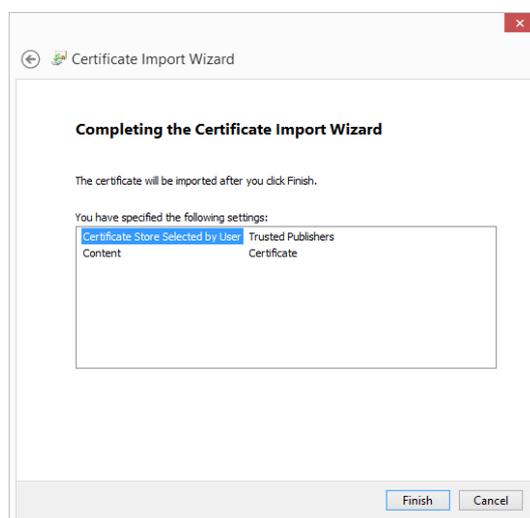
4. Scroll down, choose "Trusted Publishers" in the list and click OK
-



5. Click Next in the Certificate Import Wizard



6. Click Finish to install the certificate



2. Copy Add-ins files to destination path

Copy all folders *from*:

...\Templafy Add-ins\Templafy Add-in files\Templafy

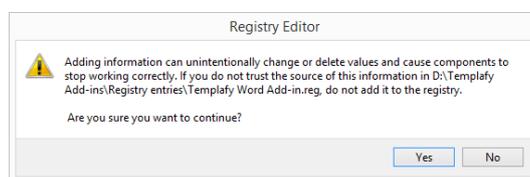
to:

%PROGRAMDATA%\Templafy

3. Install Registry entries

For each .reg file in the “...\Templafy Add-ins\Registry entries Per-user ProgramData” folder:

1. Right-click the .reg file and choose Merge.
2. Click Yes in the User Account Control dialog to allow the regedit program to make changes to your computer.
3. Click Yes in the Registry Editor to add the registry entry



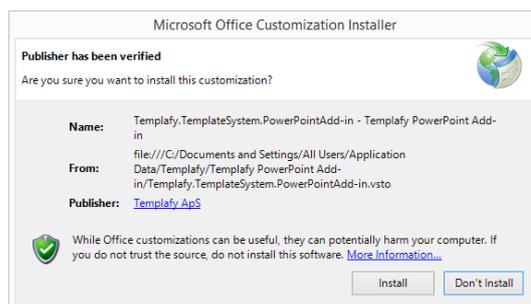
4. Verify installation

Start Microsoft PowerPoint and verify that you see a Templafy tab on the Ribbon.



NB: Your settings might have changed the name of the tab.

During launch of PowerPoint you must NOT receive this message (it means that the certificate is not installed properly):



Add-in settings

There are two types of settings files available to tweak the default behavior of the Add-ins:

LocalAppSettings.json

Provides the source URL to access Templafy. This file can be common to all Add-ins or a specific one can be distributed for each Add-in:

```
{ "FileServerUrl": "https://customername.templafy.com/" }
```

Path for all Add-ins: ...\\Templafy\\Common

Path for specific Add-ins: ...\\Templafy\\Settings Word
 ...\\Templafy\\Settings Excel
 ...\\Templafy\\Settings PowerPoint

RibbonSettingsTemplafy.xml

This file can be used to change appearance of Ribbon tabs, groups and controls in each Add-in.

Example for overriding tab settings for the Templafy tab in Word:

```
<Control>
  <Id>1</Id>
  <IdQ>t:TemplafyWordMainTab</IdQ>
  <Label>CHANGE LABEL HERE</Label>
  <Ribbon></Ribbon>
  <Type>tab</Type>
  <Visible></Visible>
  <Enabled></Enabled>
  <Size></Size>
  <KeyTip>CHANGE KEYTIP HERE</KeyTip>
  <ImageMso>CHANGE IMAGEMSO HERE</ImageMso>
  <Image></Image>
  <InsertAfterMso>CHANGE TAB POSITION HERE (E.G. 'TabHome')</InsertAfterMso>
  <InsertBeforeMso></InsertBeforeMso>
  <InsertAfterQ></InsertAfterQ>
  <InsertBeforeQ></InsertBeforeQ>
  <Namespace></Namespace>
</Control>
```

Ribbon integration

It is possible for each client to integrate to the ribbon in two ways:

Add customer content

Ribbon groups and buttons can be added to the Templafy ribbon by adding a customer Add-in (either as a Global template or VSTO customization) and make changes to the "t:TemplafyOfficeAddin" namespace in Ribbon XML there.

Using this technique it is also possible to alter the name of the Templafy ribbon tab.

Change the Templafy Ribbon namespace

It is possible to change the "t:TemplafyWordAddin", "t:TemplafyExcelAddin" and "t:TemplafyPowerPointAddin" namespaces in Ribbon XML via a configuration file. In this way the buttons from the Templafy Add-ins can be added to the customer's own Ribbon.