Office Adapters for Quark Publishing Platform
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Getting started

This supplement to A Guide to Quark Publishing Platform describes the functionality that the Office Adapter for Quark Publishing Platform® adds to Microsoft® Word, Excel, PowerPoint and Visio.

Using these plugins, a user can:

- Store all Word, Excel, PowerPoint and Visio documents on Quark Publishing Platform using version control.
- Use a Quark Publishing Platform workflow to assign status and route Microsoft Word, Excel, PowerPoint and Visio digital assets.
- Create new Word, Excel, PowerPoint and Visio files from existing files or templates checked-in to the Quark Publishing Platform server.
- Create components from existing local Excel files and check in the components to the server.

About Quark Publishing Platform

Quark Publishing Platform is a highly configurable solution for complete, automated, end-to-end multichannel publishing. Quark Publishing Platform is purpose-built to support end-to-end publishing needs, from complete manual publishing systems to highly automated workflows.

Platform consists of a set of core modules that can be combined in various ways and integrated with third-party systems to accommodate almost any workflow. Its capabilities can be described in terms of content creation, management, publishing, and delivery.

Create

Quark Publishing Platform lets you:

- Design professional templates for different publications.
- Author structured content in the familiar Microsoft Word environment.
- Integrate content from databases with other forms of content.
- Utilize multimedia content such as video, audio, images, and slideshows.
Manage

Quark Publishing Platform provides:

- Workflow and collaboration tools.
- Task and update notifications.
- Component management.
- Automated checks.
- Version control.

Publish

With Quark Publishing Platform, you can:

- Automatically assemble components of various types from various sources into sophisticated layouts.
- Automatically publish layouts in a variety of formats for a variety of devices.

Deliver

The automation features built into Quark Publishing Platform make it easy for you to deliver content to your content consumers in both public and secure environments.
System requirements

The Office Adapters for Quark Publishing Platform require the following minimum hardware configuration:

- Processor: Intel Core i5, 2.5 Ghz (Intel Core i7, 3.4 Ghz recommended)
- 8 GB of RAM (16 GB recommended)
- 10 GB of available hard disk space
- Display with 1024 x 768 or higher resolution monitor
- Peripherals suitable for Microsoft® Office authoring
- DVD-ROM drive for installation from DVD (not required for installation from download)

The Office Adapters for Quark Publishing Platform require the following minimum software configuration:

- Windows 7® 32-bit (Enterprise, Professional or Ultimate)
- Windows 7® 64-bit (Enterprise, Professional or Ultimate)
- Windows 8® 32-bit
- Windows 8® 64-bit
- Windows 8.1® 32-bit
- Windows 8.1® 64-bit
- Windows 10® 32-bit
- Windows 10® 64-bit

The Office Adapters for Quark Publishing Platform require one of the following versions of Microsoft® Office:

- Microsoft Office 2010 32/64 bit, Professional Edition
- Microsoft Office 2013 32/64 bit, Professional Edition (Build 4849.1000 or later)
- Microsoft Office 2016 32/64 bit, Professional Edition (Deferred Channel: Version 1602, Build 6741.2071. Released on September 13, 2016)

In addition, the following components are required for installation:
SYSTEM REQUIREMENTS

- Microsoft .NET Framework 4.6.2. It is available for download at Microsoft’s Download Center:

Once the required installation of Office is complete, you may install the Office Adapters for Quark Publishing Platform.
Installing the Office Adapters for Quark Publishing Platform

Installing the Office Adapters for Quark Publishing Platform is a straightforward process. The installation wizard will guide you through each step of the process. These adapters can either be installed using a standard installer that installs all the selected adapters in one go, or using the ClickOnce installation method that can be run from your Quark Publishing Platform landing page. The ClickOnce installation method has the added advantage of allowing updates to be managed and pushed to the user by the server administrator, ensuring that all users use the same version of the adapter.

Before you begin to install the Office Adapters for Quark Publishing Platform, be certain that all required software including Microsoft Office have already been installed. Also, run Office Updates at Microsoft.com to ensure the latest version is installed. Close all running instances of Microsoft Office.

**ClickOnce Installation**

To install the Office Adapter for Quark Publishing Platform using the ClickOnce installer:

1. Ensure that you have internet access. If any of the common Microsoft libraries are not installed on your system, the installation process attempts to download them.

   ➤ If previous versions of the Office Adapter for Quark Publishing Platform have been installed from the same ClickOnce location, the Office application will auto update on launch.

   ➤ If previous versions of the Office Adapter for Quark Publishing Platform have been installed from a location other than the current ClickOnce location, use Control Panel to uninstall all previous versions.

2. Open the Quark Publishing Platform installation landing page in the browser.

   ➤ This section on the Quark Publishing Platform landing page will only be available if Platform Adapters for Microsoft Office components have been configured for web sharing. For further information on setting up the Platform Adapters for Microsoft Office components for web sharing, see the Quark Publishing Platform System Administration Guide.
3. Select the Microsoft Office product for which you wish to install the Platform Adapter

4. Click Download and Install.

5. Click Accept and Install to accept the terms of the license agreement.

6. Double-click the setup.exe file and follow the instructions on the screen. Office Adapters for Quark Publishing Platform have been successfully installed.

- This installation method will only install the Platform Adapter for the selected Office product. The installation needs to be repeated for each product that requires the adapter.
- Updates to the installed version of the adapters will be installed automatically on launch.

### Standard Installation

To install the Office Adapter for Quark Publishing Platform using the Windows installer:

- From the installation media, double-click the setup.exe file and follow the instructions on the screen. Office Adapters for Quark Publishing Platform have been successfully installed.

- If previous versions of the Office Adapter for Quark Publishing Platform have been installed, use Control Panel to uninstall all previous versions and patches.
- Updates for each of the adapters need to be installed manually.
System setup and preferences

The System Setup and Preferences section provides details on connecting to the repository and specifying user preferences.

Some preferences are not modifiable when a server connection is currently established. In that case, close all open documents and then try again.

Logging in to the repository

To use repository features such as Check In (Save) or Check Out (Open), you must be logged on. Set your login information so that the system can automatically log you on.

If you do not have the log on information, please contact your system administrator.

To specify log on information:

1 Choose File > Preferences.
2 Click the Connection Settings tab.

![Preferences](image)

3 Specify the repository log on information provided by your system administrator.
If you do not specify login information, then the credentials of the user that is logged on to the machine are used.

4 Click OK.

Your login information is set.

If a server connection is currently established, you will be unable to change some preferences. In this case, close all open documents and try again.

**Platform Adapter for Microsoft Office preferences**

You can use the Preferences tab of the File menu (File > Preferences) to set your Quark Publishing Platform Adapter for Microsoft Office preferences.

All other Quark Publishing Platform preferences are stored on the Quark Publishing Platform server.

**Platform adapter for Microsoft Office preferences: General tab**

The General tab of the Preferences dialog box allows you to specify the local folder that documents you check out will be located in. The Deletion Options drop-down menu displays the following deletion options:

- **Ask Before Deleting**: to display an alert each time you attempt to delete a checked-out document.
- **Never Allow Deletion**: to protect against deleting checked-out documents.
- **Delete Without Warning**: to delete checked-out documents without displaying a warning.

![General tab of the Preferences dialog box.](image)
Platform adapter for Microsoft Office preferences: Connection Settings tab

- The Connection Settings tab of the Preferences dialog box allows you to specify the connection settings for Quark Publishing Platform. To specify connection settings:

- Enter the Quark Publishing Platform server’s IP address or name and port number in the Server Name fields.

- The Protocol controls let you choose whether to use HTTP or HTTPS for communication with Quark Publishing Platform server.

  ➤ If you’re not sure which setting to use, ask your Quark Publishing Platform administrator

- You can choose to automatically log in with your current user credentials, or you can choose to provide your log in credentials by specifying a User Name and Password.

- The values in the User Name and Password field are defined for each user by the Quark Publishing Platform administrator. For Quark Publishing Platform sites that use Lightweight Directory Application Protocol (LDAP) to manage user lists, Quark Publishing Platform users log on with their network user names and passwords. Log-on passwords may or may not be case-sensitive, depending on the Quark Publishing Platform administrator’s specifications.

![Connection Settings tab of the Preferences dialog box](image)

Platform adapter for Microsoft Office preferences: Search tab

The Search tab of the Preferences dialog box enables you to specify the search settings and to control how revision comments are displayed.

The Search Options allows you to specify what to search for. The drop-down menu displays the following options:

- Name
- Content
SYSTEM SETUP AND PREFERENCES

- Name and Content

**Revision Comments** allows you to specify when to display revision comments.

The drop-down menu displays the following options:

- Always
- Never
- New Assignments Only

Search tab of the Preferences dialog box
Working with the Platform repository

Creating a new document from a repository template

You can create new documents from an existing repository template.

You can create documents from “templates” that contain the minimum required elements and attributes for a given document type. Documents may also contain custom guidance text or instructions.

To create a new document:

1. Choose File > New Document from Server

2. In the Available Templates menu, choose New Document from Server Template.

The Select Template dialog displays.

3. Navigate to the repository folder that contains the desired template. Or, in the dialog box, use the Quick Search feature to locate the desired document.

   - To use the Quick Search feature, type a search term in the box in the upper right corner of the Open from Server dialog box.
The search results are displayed.

You can choose to view the results in either list view or snippet view. The Quark Publishing Platform server manages version control for checked-in documents. The revision history of an asset can be viewed and an older version can be opened by selecting the asset and clicking View Revisions.

4. Select the template.
5. Click OK.

The document is created and is ready for authoring. When you are finished authoring, save the document to the repository.

Creating a new document from an existing document

You can create new documents from existing documents available in the Platform server repository.

To create a new document:

The Select Document dialog displays.

3 Navigate to the repository folder that contains the desired document. Or, in the dialog box, use the Quick Search feature to locate the desired document.

- To use the Quick Search feature, type a search term in the box in the upper right corner of the Open from Server dialog box.

The search results are displayed.

You can choose to view the assets in either list view or snippet view. The Quark Publishing Platform Server manages version control for checked-in documents. The revision history of an asset can be viewed and an older version can be opened by selecting the asset and clicking View Revisions.

4 Select the document.

5 Click OK.

The document is created and is ready for authoring. When you are finished authoring, save the document to the repository.

The Checked Out by field is set to your User Name.

Opening a repository document for viewing

You can open repository documents from any Office application that has the adapter installed.

To open a document for viewing:

1. Choose File > Open from Server
2. In the Open from Server dialog box, navigate to the repository folder that contains the desired document.

Or, in the dialog box, use the search feature to locate the desired document.
WORKING WITH THE PLATFORM REPOSITORY

- To use the **Quick Search** feature, type a search term in the box in the upper right corner of the **Open from Server** dialog box.
- To use an existing search, the **Searches** folder displays all Saved and Shared Searches stored at the repository. Select the desired search.

You can choose to view the results in either list view or snippet view. The Quark Publishing Platform server manages version control for checked-in documents. The revision history of an asset can be viewed and an older version can be opened by selecting the asset and clicking **View Revisions**. Earlier versions may only be opened read-only.

3. Select the document.
4. Click **Open as Read Only**.

The document displays, ready for viewing. The view in your repository software and the **Open from Server** dialog show the file without the checked out icon. The **Checked Out by** field remains cleared.

### Checking out a document

You can check out and edit documents that are opened for viewing.

The document must already be open in read-only mode in the Office application.

If the currently open document is not the latest version, it will be closed. The latest version will be opened and checked out.

To check out an open document:

- **Choose File > Edit**.

The document is checked out and ready for editing.

You can also check out and edit documents from the Platform server.

1. **Choose File > Open from Server**

The **Open from Server** dialog displays.

2. Navigate to the repository folder that contains the desired document. Or, in the dialog box, use the quick search feature to locate the desired document.

3. Select the desired document and click **Open**.

The document is checked out and ready for editing.

The view in your repository software and the **Open from Server** dialog show the file with the checked out icon. The **Checked Out by** field is set to your User Name.
When you are finished authoring, save the document to the repository.

**Saving document revisions**

You can save and check in a document from the Office application it is open in. Components within the document will be available for referencing by other documents. For new documents, specify the desired repository folder and filename.

You can choose to check in and close the document or keep it checked out and open for further editing.

To save a revision of a document:

1. Perform one of the following:
   - To keep the document open: Choose **File > Info > Save Revision to Server**.
   - To close documents: Choose **File > Info > Save to Server & Close**.

   The **Save** dialog box displays. The dialog box displays repository-related information about the document you are saving.

   You are not allowed to change the collection that the document is located in when you are saving a revision. This can only be done when you are doing a Save/Close of a document.

2. If you do not need the **Repository View** it can be collapsed. This is useful if a **Form view** displays which can make the vertical length of the dialog extend beyond the screen.

3. Specify whether to check the file in as a **Major Version** or **Minor Version**.

4. Click **More Options** and modify any other available attribute fields as appropriate.
For new documents, choose a content type from the **Content Type** drop-down menu.

From the **Workflow** drop-down menu, choose which workflow should be applied to the document.

In **Status**, choose the status which should be applied to the document based on your established processes.

To send the asset to a particular user or group or to **No One**, choose an option from the **Routed To** drop-down menu.

If your workflow relies on automatic status-based routing, the **Routed To** drop-down menu value might change automatically when you choose an option from the **Status** drop-down menu.

In **Revision Comments**, explain what was changed in the document.

These revision comments are shown when the document is opened for viewing or editing.

- If the dialog box includes a **Form View**, complete the additional fields.
- For new documents, specify the desired repository folder and filename.
- Click **Save**.

The current version of the document is saved to the repository. If you chose to keep the document open, the document status is checked out and the view in your repository software and the **Open** dialog show the file with the checked out icon.

If the document includes validation rules, these are evaluated when you attempt to save the document. The system will notify you of any rules that have been violated. For example, certain fields that are empty that must be completed.

When a document is checked in, any references to local images are converted to server references. These images will be checked in first and then will be related/referenced to the document on the server.

For further information on saving document revisions, setting attribute values and workflows, see the *Quark Publishing Platform Guide*.

**Discarding changes and check out**

You can use the **Discard Check Out** feature to cancel the checkout of a document. All authoring changes will be discarded.

The document must already be open in the application.

To discard check out:

1. Choose **File > Info > Discard changes**.
2. The system prompts, **Do you want to revert changes?**. Click **Yes**.
Changes made to the document since it was checked out are discarded, and the document is closed.

The view in your repository software and the Open from Server dialog show the file without the checked out icon. The Checked Out By field is cleared. The document status changes from checked out to checked in.
The Quark Publishing Platform User Interface (PowerPoint, Word, Visio and Excel)

Users can access their Quark Publishing Platform workflow through the Office® adapters for Quark Publishing Platform. This chapter provides details of the Quark Publishing Platform user interface available in PowerPoint, Word, Visio and Excel on Microsoft Windows®. For more information about the Quark Publishing Platform user interface, see A Guide to Quark Publishing Platform.

The PowerPoint Adapter for Quark Publishing Platform

The PowerPoint Adapter for Quark Publishing Platform allows users to create new documents using a document or a template available on the server and check in and check out files from the Platform repository.

Supported File Types

The PowerPoint Adapter for Quark Publishing Platform currently supports the following formats:

- .pptx (PowerPoint Presentations)
- .potx (PowerPoint Templates)

Slides from checked-in documents will be available for referencing in Quark XML Author or Quark Author.

The Word Adapter for Quark Publishing Platform

The Word Adapter for Quark Publishing Platform allows users to create new documents using a document or a template available on the server and check in and check out files from the Platform repository.

Supported File Types

The Word Adapter for Quark Publishing Platform currently supports the following formats:

- .docx (Word Document)
THE QUARK PUBLISHING PLATFORM USER INTERFACE (POWERPOINT, WORD, VISIO AND EXCEL)

- .dotx (Word Template)

Component referencing is currently not supported for Microsoft Word documents.

The Visio Adapter for Quark Publishing Platform

The Visio Adapter for Quark Publishing Platform allows users to create new documents using a document or a template available on the server and check in and check out files from the Platform repository.

Supported File Types

The Visio Adapter for Quark Publishing Platform currently supports the following formats:

- .vsdx (Visio Drawing)
- .vstx (Visio Template)
- .vsdm (Visio Macro-Enabled Drawing)
- .vstm (Visio Macro-Enabled Template)

Checked-in Visio drawings from these documents will be available for referencing in Quark XML Author or Quark Author.

The Excel Adapter for Quark Publishing Platform

The Excel Adapter for Quark Publishing Platform allows users to create new documents using a document or a template available on the server and check in and check out files from the Platform repository.

Supported File Types

The Excel Adapter for Quark Publishing Platform currently supports the following formats:

- .xslx (Excel Workbook)
- .xltx (Excel Template)
- .xlsb (Excel Binary Workbook)
- .xlsm (Excel Macro-Enabled Workbook)

Componentization in Microsoft Excel

Componentization in Microsoft Excel is aimed at editorial flows that may require the source documents to be independent of exported components, yet retaining the capability to update them.

Data in Microsoft Excel workbooks can be exported to multiple formats as components. These components can be referenced directly in Quark XML Author and Quark Author Web Edition.
Components can be exported from local Excel workbooks without checking in the source documents to the Platform server, preserving the formatting and content of the source document.

The formatting and content of ranges or charts exported as Microsoft Excel can be altered, although a link to the original document is maintained. If the source requires changes to its structure or content, all linked components can automatically be updated. Any components that do not require to be linked to the source document can be delinked.

**Exporting Ranges from Microsoft Excel**

Selected ranges in Microsoft Excel can be exported as various content types. To export a selected range:

1. Select a range of cells.
2. Invoke the contextual menu and choose **Smart Content > Export As**.

Choose one of the following options:

- **Microsoft Excel**
  - Ranges are exported as a new Excel workbook with all formatting information and values. Formulas and references are not exported.

- **Smart Table**
  - Exports ranges in the native Quark Author table format.

- **Structured Table**
  - Exports the selected range in the native Quark XML Author table format.

- **JPG**
  - Exports the selected range as an image (jpg).

- **PDF**
  - Exports the selected range as an image (pdf).
• PNG
  • Exports the selected range as an image (png).

出口一个包含公式的范围会只导出其值。

出口一个范围会改变上下文菜单为 Smart Content > Export Again As

本地的编辑会在重新导出时被覆盖。

如果选中的范围没有命名，将会显示一个命名的对话框。

3. 输入一个范围的名称或使用建议的名称。

4. 设置范围的范围。范围的范围可以限制在当前工作表或在整个工作簿。点击 OK。

名称下拉菜单只显示范围的范围设置在当前工作表或整个工作簿的范围。

5. 保存对话框显示。导航到所需的存储库文件夹并点击 Save。
If a component with the same name exists in the destination, an alert with an option to change the name of the asset displays.

The selected range is saved to the server with the specified name.

Exported components contain an attribute with information about the local path of the file from which the component was exported. If changes are required in the original file, the local file can be edited by choosing Edit Original from the contextual menu in Quark XML Author.

**Exporting Charts from Microsoft Excel**

Charts in Microsoft Excel can be exported as various content types.

To export a chart:

1. Select the chart.
2. Invoke the contextual menu and choose Smart Content > Export As>
Choose one of the following options:

- **Microsoft Excel**
  - Charts are exported as a new Excel workbook with all formatting information and values.

- **JPG**
  - Exports the selected chart as an image (.jpg).

- **PDF**
  - Exports the selected chart as an image (.pdf).

- **PNG**
  - Exports the selected chart as an image (.png).

Exporting a chart again will change the contextual menu entry to **Smart Content > Export Again As**.

3. Enter a name for the chart or use the suggested name.

If a chart with the same name exists in the Excel document, an alert with an option to change the name of the chart displays.
The save process needs to be re-initiated once the name of the chart is changed.

4. The **Save** dialog displays. Navigate to the required repository folder and click **Save**.

If a component with the same name exists in the server, an alert with an option to change the name of the component displays.

The component is saved to the server with the specified name.
The Smart Content Pane

The Smart Content pane lists the components that have been exported from the currently open document.

To show/hide the Smart Content pane, click Smart Content Pane in the Home ribbon.

The Smart Content pane allows the following operations to be performed on the listed components:

- **Update Component**
  
  Saves a revision of the component to the Platform server that includes any changes made to the component.

- **Edit Component**
  
  Opens the selected component for editing in Microsoft Excel. The component will be updated once checked in to the server.
  
  This option is only available for Microsoft Excel components.

- **Break Component Link**
  
  Breaks the link between the exported component and the document the range was exported from.

- **Link Component to Selected Range**
  
  Links the exported component to currently selected range other than the originally exported range. If no name has been specified for the range, a name must be set for the new range. The components of the range need to be updated by invoking the contextual menu from the worksheet or from the Smart Content pane.

- **View Revisions**
  
  Displays a list of revisions a component has undergone.

- **Where Used**
  
  Displays a list of documents where this component has been referred.

- **Properties**
  
  Displays the attributes of the components from the server.
• Preview
Displays a preview of the selected component. Multiple preview channels can be configured.
Contacting Quark

The support portal allows you to log support tickets, track tickets, receive status notifications, chat with a technical support representative, search the Knowledge Base, and access product documentation.

With direct access to documentation across all Quark software - from QuarkXPress and App Studio to Quark Enterprise Solutions - you can find answers to your questions at your convenience. Our support team is also available to help, either through our support portal, or via phone for our maintenance contract customers.

If you are a Quark customer and have a current maintenance or support contract your account has already been created for you using your registered email address. If you do not have a support contract you can purchase a single support incident to get your problem resolved. If you have purchased or registered a supported product, you are eligible for free support for the first 90 days.

In the Americas

For more details, please check out our support website

Outside the Americas

For countries outside the Americas, please visit the following sites to access your support account:

Support Website

- France - www.quark.com/fr/support
- Germany - www.quark.com/de/support
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