

## Configuring Microsoft Office Integration

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## Synopsis

The purpose of this document is to provide guidance on configuring Privia's integration with Microsoft Office. Normally Privia integrates automatically into the Microsoft Office suite on installation. This behavior is controlled by Privia System Administrators who set the initial integration when they package the Privia client download/installation. After installation the user can turn this integration on or off in Privia User Options. Integration into Microsoft Office provides a Publish to Privia button on the toolbar and a Publish to Privia option on the File menu. Privia's Integration with the Office applications was built to make it easier for users to upload documents through Microsoft Office. Use this document to manually add the integration if it does not automatically happen when the Microsoft Office integration option is selected in the Privia User Options tool.

## Enabling Office Integration

To check and see if the Microsoft Office Integration is currently configured on the computer:

- Click the Windows Start button
- Select "All Programs"
- Click the "Privia" folder in the list of applications
- Select the "Privia User Options" tool

Once the Privia User Options tool displays, look at the

checkbox beside "Microsoft Office" and make sure that it is selected. If the checkbox is not selected, please click this option and then click the "OK" button. Microsoft Office integration is now enabled on the local machine. Now that the Microsoft Office integration is enabled, a "Publish to Privia" button should display in the ribbon of the following applications:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint

Figure 1. Select Privia User Options

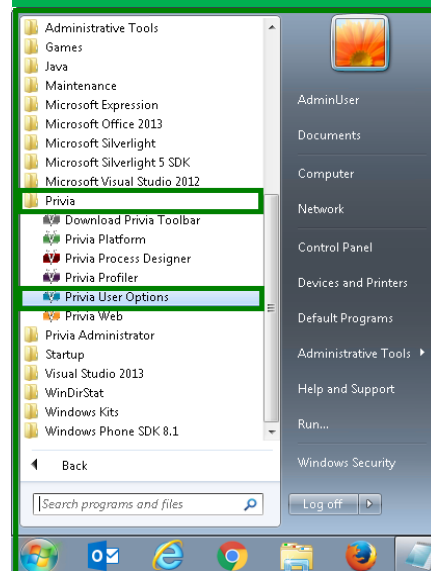
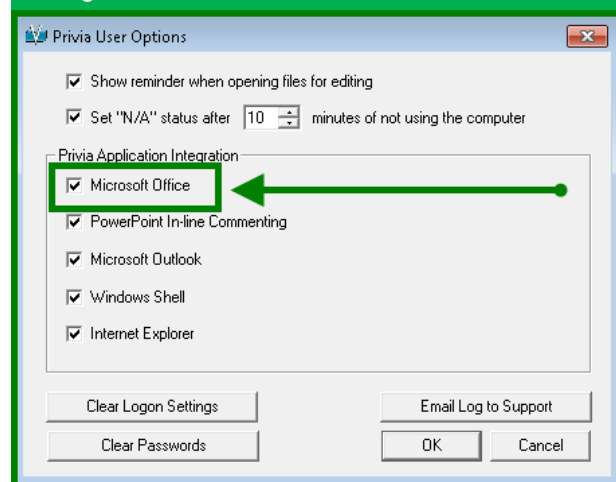


Figure 2. Ensure Microsoft Office is Selected

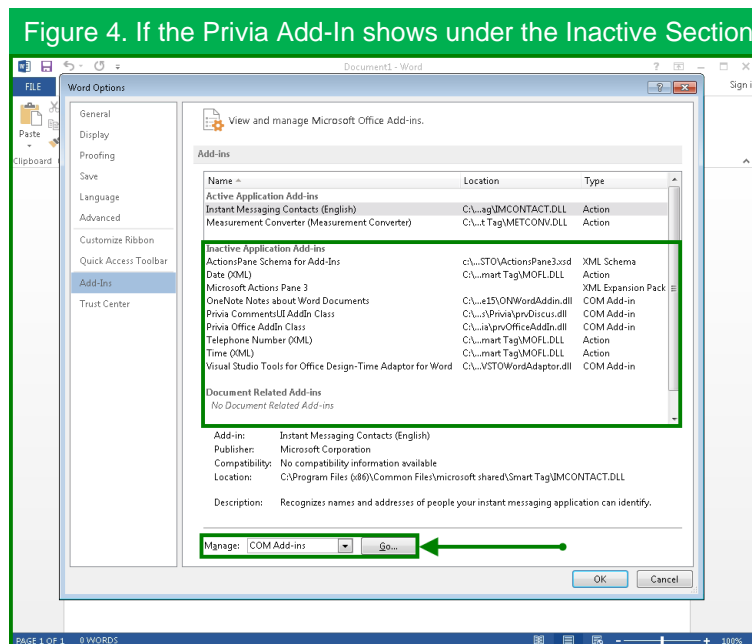
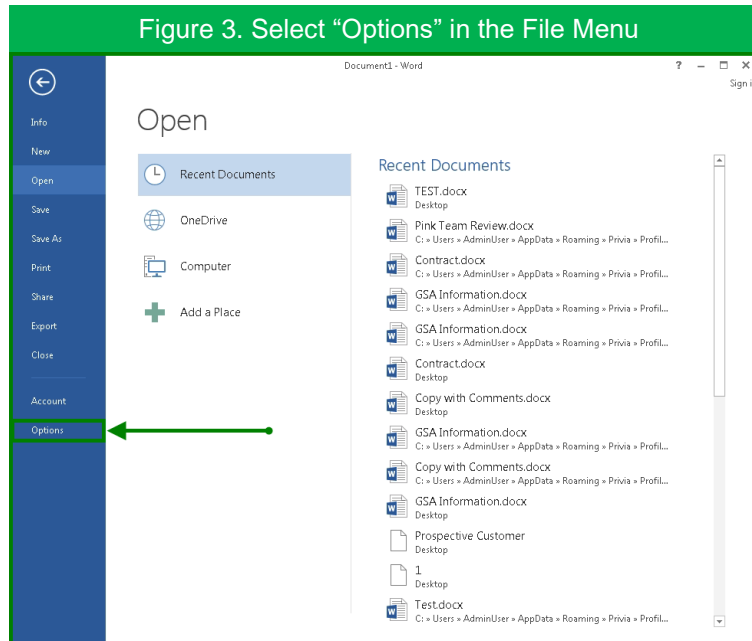


Now it is time to verify that the Publish to Privia button displays correctly:

- Open either of the Office applications listed above and select the “File” menu along the top of the application.
- Click “Options” along the left pane (shown in Figure 3)
- Along the left pane, select the “Add-Ins” option

On the right side of the window, under the “Active Application Add-Ins” section, the “Privia Office Add-In Class” should display (Microsoft Office Integration was selected before as shown in Figure 2). If it turns out that this Add-In class does not display as expected under this section, then it more than likely can be seen under “Inactive Application Add-ins” (as shown in Figure 4). If this option does not show under either heading, please see the section [“Manually Fixing Office Add-Ins.”](#) To enable the “Privia Office Add-In Class”:

- If “COM Add-ins” is not already selected, click the dropdown arrow beside “Manage” along the bottom of the dialog
- Select “COM Add-ins”
- Click the “Go” button

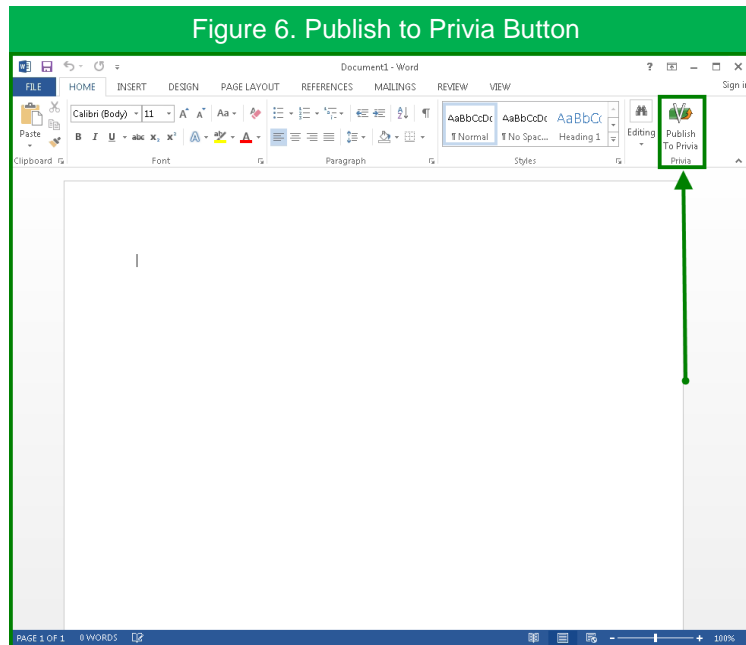
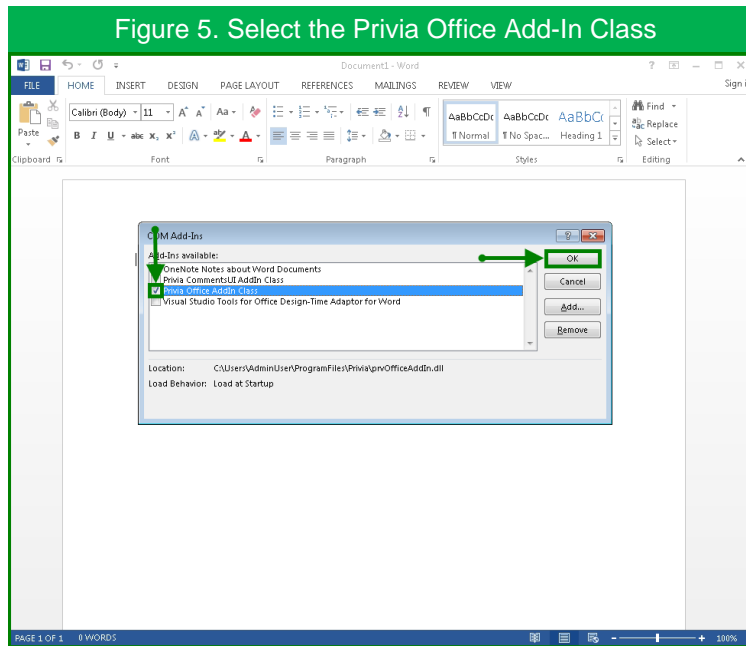


A separate dialog will display that is entitled “COM Add-Ins.” Here is a list of all the add-ins that is recognized by Microsoft Office. Please note that there might be a lot of options listed here, that is ok; the purpose of this document is to look at the “Privia Office Add-In Class” only.

- Select the checkbox beside “Privia Office Add-In Class” to enable the feature
- Click the “Ok” button once the checkbox is selected

The “Privia Office Add-In Class” dialog will close and the main Office application will be in view. Along the ribbon of the Office application (Word, Excel and PowerPoint), there will be a button that displays at the end of this that says “Publish to Privia” (shown in Figure 6).

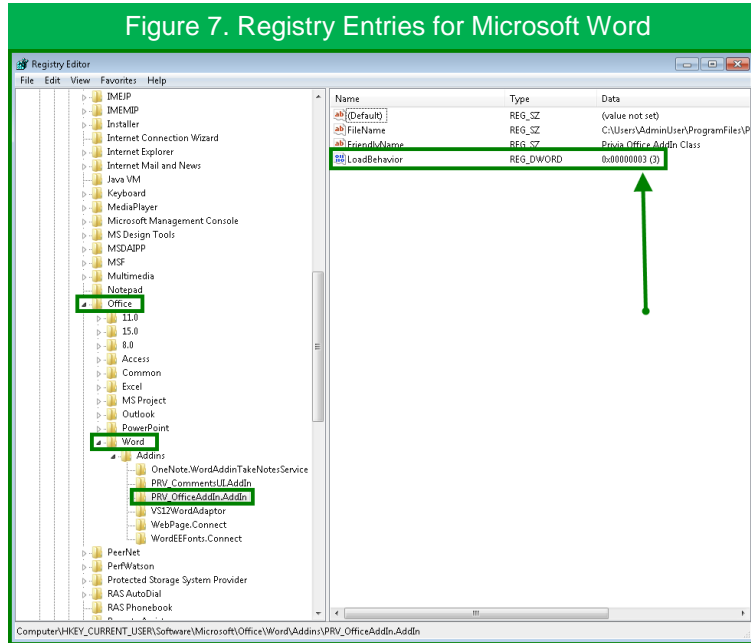
Now Privia’s integration with Microsoft Office is complete.



## Manually Fixing Office Add-Ins

If the “Privia Office Add-In Class” does not display under “Active Application Add-Ins” or “Inactive Application Add-Ins” in the respective Microsoft Office application, then the Add-In Class will need to be manually configured. To check the registry entries, you will need Administrative access on the local system:

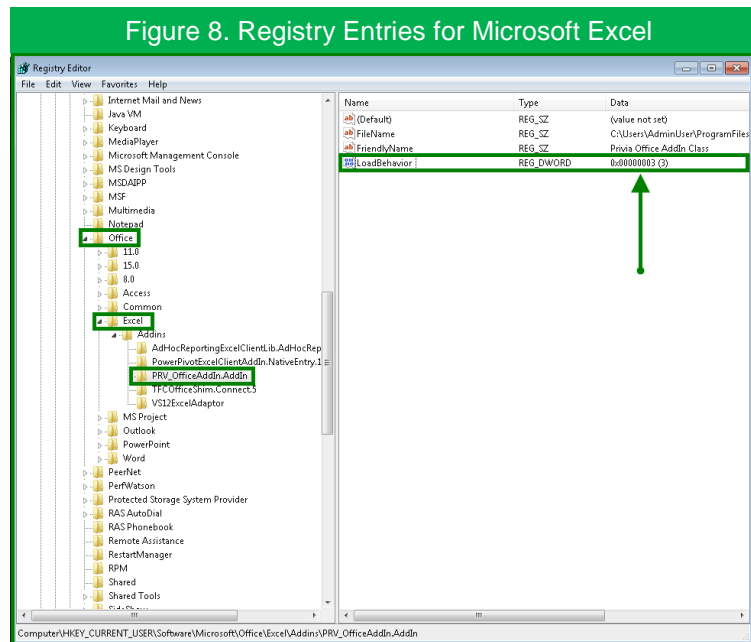
- Click the Windows Start menu
- Along the right of the Start menu click “Run” (or type “Run” in the search box)
- In the “Run” dialog, type “regedit” (no quotes)
- Expand the nodes in this order to check Microsoft Word:
  - HKEY\_CURRENT\_USER
  - Software
  - Microsoft
  - Office
  - Word
  - Add-Ins
  - PRV\_OfficeAddIn.AddIn



Please reference Figure 7 to ensure that the registry entries match. Make sure that the “LoadBehavior” for the PRV\_OfficeAddIn.AddIn is set to “3”.

To check the status of Microsoft Excel entries, expand the nodes in this order:

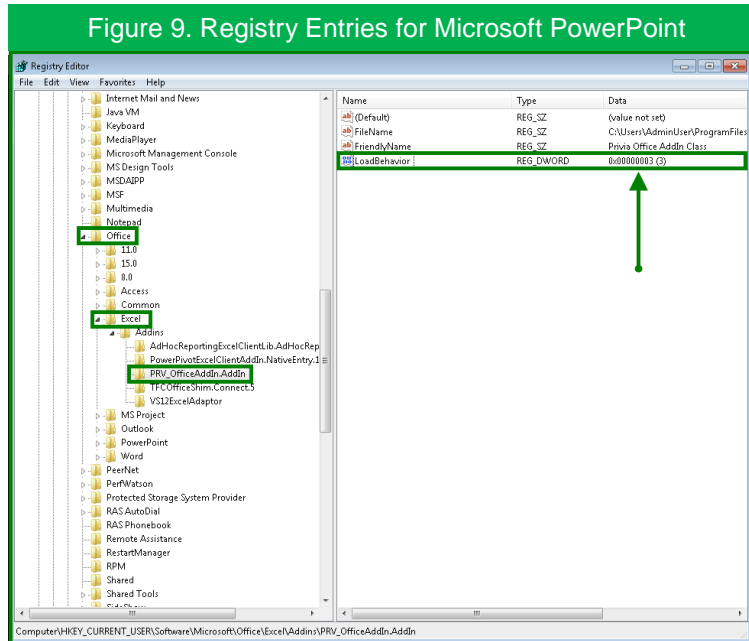
- HKEY\_CURRENT\_USER
  - Software
  - Microsoft
  - Office
  - Excel
  - Add-Ins
  - PRV\_OfficeAddIn.AddIn
- Please reference Figure 8 to ensure that the registry entries match. Make sure that the “LoadBehavior” for the PRV\_OfficeAddIn.AddIn is set to “3”.



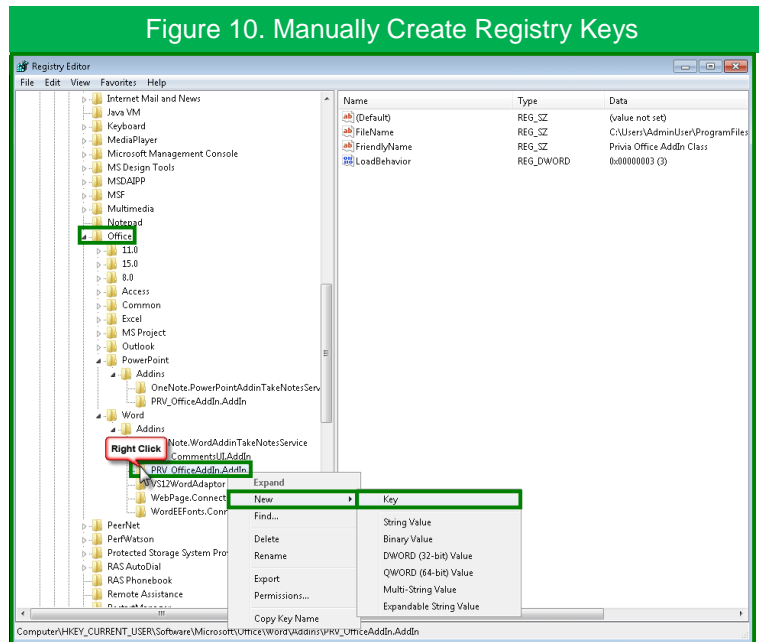
To check the status of Microsoft PowerPoint entries, expand the nodes in this order:

- HKEY\_CURRENT\_USER
- Software
- Microsoft
- Office
- PowerPoint
- Add-Ins
- PRV\_OfficeAddIn.AddIn

Please reference Figure 9 to ensure that the registry entries match. Make sure that the “LoadBehavior” for the PRV\_OfficeAddIn.AddIn is set to “3”.



Another possible reason for the “Privia Office Add-In Class” not displaying in the Microsoft Office application is that the Word/Excel/PowerPoint Add-in structure wasn’t in the registry at the time that Privia was installed. If the Add-In structure is not in the registry under HKEY\_CURRENT\_USER\Software\Microsoft\Office, then the Add-In keys will need to be manually created. To create these keys, right-click on the PRV\_OfficeAddIn.AddIn folder in the registry (as shown in Figure 10). After all the keys shown in Figure 10 are created, use the “Privia User Options” tool and uncheck the office integration and then check this option again to build the structure.



It is also helpful to checkup on the status of the Microsoft Outlook add-in, to do this, expand the nodes in this order:

- HKEY\_CURRENT\_USER
- Software
- Microsoft
- Office
- Outlook
- Add-Ins
- PRV\_OutlookAddIn.AddIn

Once this folder is exposed, double-click on “Load Behavior” and change this value from ‘1’ to ‘3’.

## Summary

Privia’s Integration with Microsoft Office is a powerful tool that allows for seamless transfer between the two applications. If there are still problems viewing the “Publish to Privia” button after going through this document, please contact the Privia Administrator.