

Office Add-in Troubleshooting - Installation Issues

This document will provide users with solutions to common Office Add-in problems. It could be that the solutions provided below will NOT provide a solution in all circumstances. More information about the Office Add-in can be found on the Office Add-in start page.

The Error document is divided in three sections:

- [Installation Issues](#)
- [Error messages](#)
- [Other](#)

If you have any questions, remarks or additional comments please do not hesitate to enter an [Exact Synergy Support](#) request.

Error	: The Office Add-in can not be installed: Installation failed.
Comments	: Normally users belonging to the domain user group or local user group are are not allowed to install any software on their local pc or on other pc's anywhere in the domain. This is the reason why they can't install 'SynergyOfficeAddin' on their pc.
Solution	: Please check Document : 01.685.985 - The 'MergeAddin' can not be installed: Installation failed.
More information	: -

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Error	: I can't install the Add-in for multiple users on the same machine (e.g. Citrix and Terminal server sessions)
Comments	: When I install Office Add-in on my computer, it works only for the user who has installed it. Other logins do not have the the menu option in MS Word and if they want to install it, it replies that the latest version is already installed.
Solution	: Document : 02.386.666 - How to install the Add-in for multiple users on the same machine
More information	: -

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Error	: The 'SynergyOfficeAddin' is already installed but no 'Add-in' is shown in the menu bar of MS Word
Comments	: -
Solution	: Please check Document : 01.687.155 - The 'SynergyOfficeAddin' is already installed but no 'Add-in' is shown in the menu bar of MS Word
More information	: -

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Error	: The Add-In doesn't work for one of the modules.
Comments	: Sometimes the Add-in works all modules except for one e.g. Word
Solution	: The Office Add-in could have been disabled by MS Office. Please check document 07.362.388 - "Office Add-In inactive in one of the Office applications" for a solution. In some cases this might not work. Please try to (de)activate the Office Add-in according to document 07.135.580 - "Exact Synergy Office addin: How to (de)activate the Exact Synergy office addin?". If both solution fail please uninstall the Office Add-in according to the following steps: <ol style="list-style-type: none"> 1. Make sure you have closed all Office programs (also check via Task Manager) 2. Uninstall the Add-In according to document 03.047.855 - "Office Add-in uninstall". 3. Check if all Add-in files and components are deleted via the DOS prompt. Document 03.599.851 - "Office add in files" 4. Reboot PC and reinstall Office Add-in. Document 00.877.618 - "Installation of the Exact Synergy Office Add-in". 5. Reboot PC and try Office Add-in.
More information	: -

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Error	: The Add-in does not work for any of the Office Modules <i>Invalid Syntax msxml3.dll</i>
Comments	: No version is being shown, but <i>Label2</i>
Solution	: URL Address is wrong in the settings of the Office Add-in. Please enter the right data in the settings menu of Microsoft PowerPoint.
More information	: Document: 03.598.142 - Office Add-in Settings

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Error	: Installation Office Add-In is not installed right. The following errors occur: <ul style="list-style-type: none"> • <i>Automation error</i> <i>The specified module could not be found</i> • <i>ActiveX Component can't create object</i> • No version is being shown in the settings menu, but <i>Label2</i>
Comments	: <ul style="list-style-type: none"> • User is not a local administrator (Let user have - temporary - administrator rights) • ActiveX is disabled (Enable ActiveX for zone which Exact Synergy is part of - add Exact Synergy to trusted sites)

	<ul style="list-style-type: none"> ActiveX is too old (update MDAC)
Solution	: Install new versions of VBscript en MDAC
	<ul style="list-style-type: none"> Download and install Microsoft Data Access Components (MDAC) 2.8 Download Windows and install Script 5.6 for Windows 2000 and XP
More information	: -
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Error	: After a new installation nothing happens when clicking the Exact Synergy menu in e.g. Word
Comments	: Windows XP also has a folder called 'Windows\LastGood\Downloaded Program Files' where a copy of downloaded dll's is maintained. The existence of this copy can be the reason for a failing installation.
Solution	: Please check 'Windows\LastGood\Downloaded Program Files' for Office Add-in DLL's and delete them.
More information	: -
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Error	: Saving a document shows Category information from another Exact Synergy database.
Comments	: The category information is collected from the wrong database.
Solution	: Check the file BACO.CFG in the Exact Synergy installation folder to see if there is a section that point to the right Virtual Directory for the second Exact Synergy Database. Make sure the name in BACO.CFG and the Virtual Directory in IIS are the same. E.g. 'synergy' is the name of the virtual directory: [synergy] Server=XXX Database=XXX
More information	: Document: 03.598.142 - Office Add-in Settings
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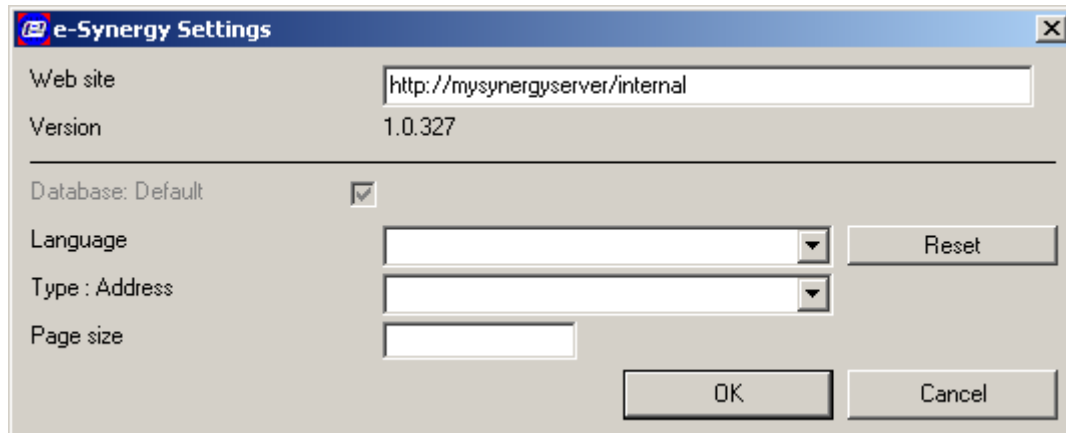
Office Add-in Settings

Introduction

When the Office Add-in is installed, **all** settings needs to be provided before the Office add in can be used. The settings for Microsoft Word and Excel are the same. Microsoft [Outlook](#) has a different settings screen, and will be explained

separately.

Explanation of the Microsoft Word & Excel add in settings



Website

The URL to the internal website should be entered here. To be sure that no typing error will cause trouble, it can be safe to enter it the following way.

1. Open the internal e-Synergy website in Internet Explorer.
2. Select the address out of the Internet Explorer address bar until '/docs'.
3. Press [Ctrl]+[C].
4. Open the settings screen of the Office Add-in in Microsoft Word or Excel.
5. Place the cursor in the Website field.
6. Press [Ctrl]+[V].

The URL will be something like this: **http://mysynergyserver/internal**

When a different e-Synergy environment needs to be accessed, the URL must be changed.

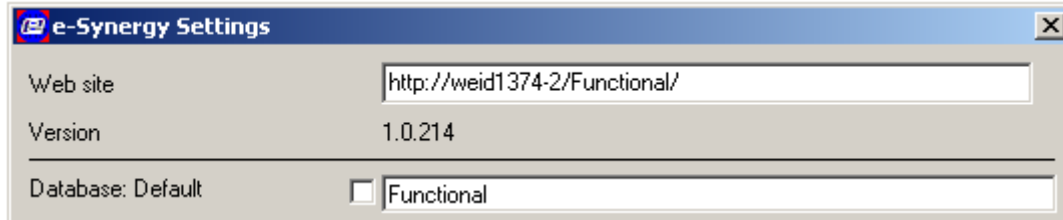
Version

For information purposes, the version of the Office Add-in is presented here. The batch number of e-Synergy and the version number of the Office Add-in might not be the same.

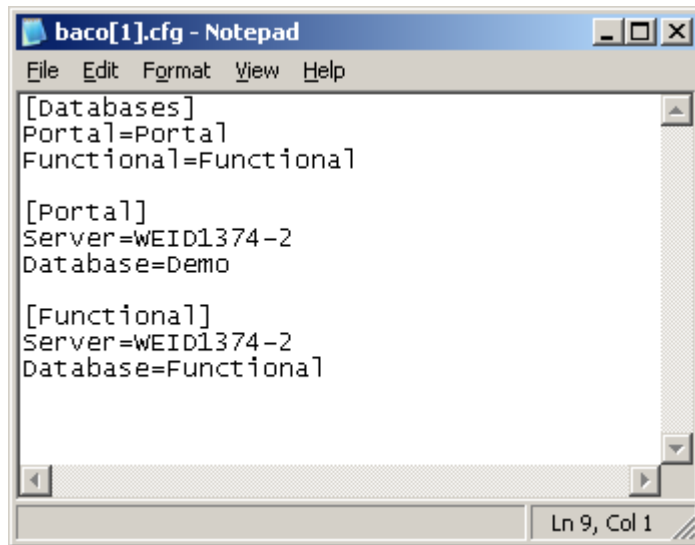
Database: Default

When this checkbox is checked, the Office Add-in assumes that the e-Synergy database you want to access is the 'Portal' database. The portal section **must** exist in the **BACO.CFG** file in your e-Synergy root folder.

When the checkbox is not checked, the database name which should be used by the Office Add-in should be entered in the emerged field.



The name entered should exist in the **BACO.CFG** file and this setting is **case sensitive**.



Language

The language setting sets the language of the Office Add-in menus. It does not have any effect on the contents of the documents uploaded and/or downloaded into e-Synergy.

Type: Address

With this field, it can be specified which address should be used when a mail merge is created in Microsoft Word using the CRM e-Synergy data. By default, an account in e-Synergy can have four different addresses;

- Visit;
- Invoice;
- Postal;
- Delivery.

Page size

This setting does not have any visual effects during the use of the Office Add-in.

The number determines how much data is downloaded for every xml page. For instance if the page size is small, and the user decides to "cancel" the download, then the time between when they click "cancel" and when it's actually cancelled is smaller than if the page size is large.

Explanation of the Microsoft Outlook Add-in settings

e-Synergy Settings

Web site:

Database: Default

Language:

Division:

Version: 1.0.327

E-mail: In | **E-mail: Out**

Upload

- Never
- Manually
- Automatically: Notify
- Automatically: Always

Ignore: Internal

Main category:

Category:

Subcategory:

Type:

Security:

Assortment:

Subject: Header:

Save as: Draft:

Include: Attachments

- Never
- Notify
- Always

E-mail

- Include: All
- Include: List
- Exclude: List

Only the specific Outlook Add-in fields will be explained.

Division

For information purposes, the division of the user is shown in the used e-Synergy environment.

Upload


This setting determines how the Outlook Add-in is used:

- Never: Outlook Add-in disabled;
- Manually: when the user wants to save an e-mail in e-Synergy, the e-Synergy pull down menu save options in Microsoft Outlook should be used;
- Automatically: Notify: a popup is displayed when a new e-mail arrives informing the user that the new e-mail has been saved;
- Automatically: Always: all e-mails are saved in e-Synergy without any notification.


Ignore: Internal

Select this to prevent internal e-mails from being uploaded to Exact e-Synergy. When this is enabled and **Upload** is set to either **Automatically: Notify** or **Automatically: Always**, a message notifying that the particular e-mail has been skipped will appear.


Main category

The  button presents a list of main categories in the linked e-Synergy environment. It is mandatory to specify in which main category the e-mails are saved.


Category

The  button presents a list of categories in the linked main category. It is mandatory to specify in which category the e-mails are saved.

Sub-category

The  button presents a list of sub-categories in the linked category. It is mandatory to specify in which sub-category the e-mails are saved.

Type

The  button gives a list of document types available in the linked e-Synergy environment. When it is set in [Document settings](#) that a document type is mandatory for every document, it is then mandatory for the document type to be specified here.

Security

The security level for the uploaded e-mails is set with this value. The security level is **not** copied automatically from the selected sub-category.

Assortment

When it is specified in the [main category](#) that an assortment is mandatory, it should then be entered here. Otherwise the upload of e-mails to e-Synergy is not possible.

Subject: Header

When an e-mail is uploaded the subject-line of the e-mail will become the document title. In this field a prefix can be entered so that all document titles for uploaded e-mails begins with the same prefix.

For example: Email in....

Save as: Draft

When this checkbox is checked, all uploaded e-mails are set to the status 'Draft'. When a document is in the status 'Draft', only the creator/owner of the document can read/edit the document.

When the checkbox is cleared, the documents are uploaded as normal document and directly visible for every e-Synergy resource with the appropriate security level. When the [sub-category](#) specified requires approval for newly uploaded documents, it will obtain the status 'Open'.

Include: Attachments

Attachments linked to an e-mail can be uploaded to e-Synergy. Three options exist:

- Never: attachments will not be uploaded;
- Notify: a popup message will ask if the attachments should be uploaded;
- Always: attachments will always be uploaded without any notification.

When an e-mail has more than one attachment, e-Synergy will store the other attachments linked as reply documents. This is because only one attachment can be linked to an e-Synergy document, but no limit exist to the amount of replies to a document.

E-Mail

This setting becomes enabled when the upload is set to 'Automatically'. It has three options:

- Include: All: all received e-mails are uploaded into e-Synergy;
- Include: List: only the e-mails from the e-mail addresses as entered in the list are uploaded into e-Synergy;
- Exclude: List: all received e-mails are uploaded to e-Synergy **except** for the e-mail addresses as entered in the list.