BEA AquaLogic™ Interaction Portlet Framework for Microsoft Excel

User Guide

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CHAPTER 1

Welcome

The AquaLogic Interaction Portlet Framework - Microsoft Excel lets business users create portlets that display information from existing Excel spreadsheets, tables and charts.

Building a portlet with the Excel Portlet Framework requires no programming. Portal users simply specify the Excel file to use and how to display the information in the portlet. The display is updated whenever the data in the Excel file changes.

Portlets can be created by Community owners as well as portal users. The Framework is comprised of the Excel Framework API which provides an interface allowing end users to publish Excel information easily by creating portlets from existing Excel charts, tables, and ranges. The Framework utilizes the COM-based Excel API to integrate Microsoft Excel with the portal. The Framework API copies and stores Excel files, retrieves and caches Excel data, compares last-modified date information, returns a list of files linked or uploaded by the user, exports chart objects and sheets as image files, performs sorting operations, and handles other non-UI functionality.

Note: Excel portlets are created in the portal using an Excel Portlet Template.

How to Use This Book

This guide details how to build and manage portlets using the Excel Portlet Framework. See *Installation and Upgrade Guide for AquaLogic Interaction Portlet Framework - Microsoft Excel* for detailed installation instructions. For information on creating Excel spreadsheets, tables and charts, see the documentation for Microsoft Excel.

Audience

This guide is written for the user responsible for creating and configuring Excel portlets. This user must have knowledge of how to administer objects in the portal and an understanding of Microsoft Excel.

Organization

This guide includes the following chapters:

- This chapter provides information on how to use this guide and describes other resources available to help install, deploy, upgrade, and administer Excel Portlet Framework.
- Chapter 2, "Creating Excel Portlets" provides detailed instructions for creating Excel portlets with the Excel Portlet Framework.
- Chapter 3, "Troubleshooting and Limitations" provides troubleshooting for common problems.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
• File names • Folder names • Screen elements	**bold**	• Upload **Procedures.doc** to the portal. • The log files are stored in the **logs** folder. • To save your changes, click **Apply Changes**.
• Text you enter	`computer`	Type `Marketing` as the name of your community.
• Variables you enter	`computer with angle brackets (<>)`	Enter the base URL for the Remote Server. For example, `http://<my_computer>/`.
• New terms • Emphasis • Object example names	*italic*	• *Portlets* are Web tools embedded in your portal. • The URI *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

BEA Documentation and Resources

This section describes other documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Installation and Upgrade Guide	This book is written for system administrators responsible for installing or upgrading AquaLogic Interaction Portlet Framework - Microsoft Excel. It is available on edocs.bea.com and on the application CD.
Release Notes	These files are written for Excel Portlet Framework administrators. They include information about new features and known issues in the release. They are available on edocs.bea.com and on the application CD.
Online Help	The online help is written for all levels of Excel Portlet Framework users. It describes the user interface for Excel Portlet Framework and gives detailed instructions for completing tasks in Excel Portlet Framework. To access online help, click the help icon.
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.
Deployment Guide	This document is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment. It is available in electronic form (PDF) on edocs.bea.com.

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction Support Center	The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities: **Technical Support Center** Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes. **User Group** Visit the User Group section to collaborate with peers and view upcoming meetings. **Product Center** Download products, read Release Notes, access recent product documentation, and view interoperability information. **Developer Center** Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups. **Education Services** Find information about available training courses, purchase training credits, and register for upcoming classes. If you do not see the Support Center when you log in to http://support.plumtree.com, contact ALUIsupport@bea.com for the appropriate access privileges.

Table 1-2 BEA Documentation and Resources

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
Technical Support	If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs. E-mail: ALUIsupport@bea.com Phone Numbers: U.S.A. +1 866.262.PLUM (7586) or +1 415.263.1696 Europe +44 1494 559127 Australia/NZ +61 2.9923.4030 Asia Pacific +61 2.9931.7822 Singapore +1 800.1811.202

CHAPTER 2

Creating Excel Portlets

This chapter includes the following topics:

- Creating Excel Portlets in Portal 6.x
- Creating Excel Portlets in Plumtree Corporate Portal 5.0.x

Creating Excel Portlets in Portal 6.x

This section discussion how to create Excel portlets in Plumtree Foundation 6.0 or BEA AquaLogic Interaction 6.1.

You creating Excel portlets using the Excel Portlet Template that was imported using the 6.x migration package.

To create an Excel portlet:

1. Select **Administration**.
2. Navigate to the Excel Portlet Framework administrative folder.
3. From the Create Object menu, select **Portlet**

   The Choose Template or Web Service dialog box appears.
4. Expand the Excel Portlet Framework folder.
5. Select **Excel Portlet Template**.
6. Click **OK**.

The Main Settings screen appears.

7. Configure the portlet's main settings.
8. Click **Properties and Names**.

   The Properties and Names screen appears.

9. Configure the portlet's properties and names.
10. Click **Finish**.

Creating Excel Portlets in Plumtree Corporate Portal 5.0.x

Creating Excel portlets in Plumtree 5.x using the Excel Portlet Template that was imported using the 5.0 migration package. To create a new Excel Portlet in Plumtree 5.0.x:

1. Select **Administration** | **Create Object …** | **Portlet**.
2. Navigate to the administrative folder that contains the Excel Portlet Template that was imported through migration.
3. Select Edit in the Portlet Editor to configure the Excel Portlet.

   Follow the steps to configure an Excel Portlet.

4. Set the appropriate security for the Excel Portlet.

CHAPTER 3

Troubleshooting and Limitations

This chapter includes the following topics:

- Hyperlinks
- Special Phone Number and Time Cell Properties
- Non-US Currency Formats
- Installation of Excel Components
- Chart Images Do Not Display Properly

Hyperlinks

Excel portlets will not detect a hyperlink that is not active within the source Excel file. You must create an active hyperlink (URL) in the source file if one should be displayed within the portlet.

Special Phone Number and Time Cell Properties

Excel portlets do not properly display data stored in Excel files using the Special Phone Number format or the Time format. Excel portlets convert data stored using the Special - Phone Number and Time cell properties to a number.

- To properly display telephone numbers in Excel portlets, store phone numbers in the Microsoft Excel file using the Text cell property.

- To display time formatted data in Excel portlets, BEA recommends using an Excel Date cell property in the date-time format.

Non-US Currency Formats

Non-US currency formats that do not include a locale qualifier are not properly displayed in Excel portlets.

Microsoft Excel uses two types of symbols in the currency cell format property. In the Symbol list on the "Format Cell" dialog box, there are entries that include only the currency symbol, "$" (machine locale is US English), in addition to "$ English" (United States). Similarly, when the machine locale is Korean, multiple currency symbol options are listed including: "W" (won sign) and "W Korean". If the option "W" is chosen and not "W Korean", the Korean currency format will be converted to a number when displayed in the Excel portlet. This issue occurs in all non-US locale for currency formats.

Workaround

For non-US locales, choose the currency format in the Excel file that displays the locale next to the respective currency symbol (e.g., "W (Korean)", "C Spanish (Costa Rica)").

Installation of Excel Components

If a Method '~' of object '~' failedmessage is displayed when access the Excel Portlet Framework, it is an indication that not all Excel components were installed correctly on the Remote Server.

Workaround

Re-run the installer for Microsoft Excel on the Remote Server.

Chart Images Do Not Display Properly

Scenario 1

If the message, "You do not have permission to view this content" is displayed in place of the chart image, it is an indication that the set of gateway URLs specified in the portlet registration is incomplete.

Workaround

Update set of gateway URLs in gadget registration to include:

`gadget/`

`images/`

Scenario 2

If a red X is displayed in place of the chart image, it is an indication that the ISAPI filter is not properly installed in Microsoft Internet Information Server (IIS) on the Remote Server.

Workaround

Remove and reinstall the ISAPI filter in Microsoft IIS on the Remote Server.