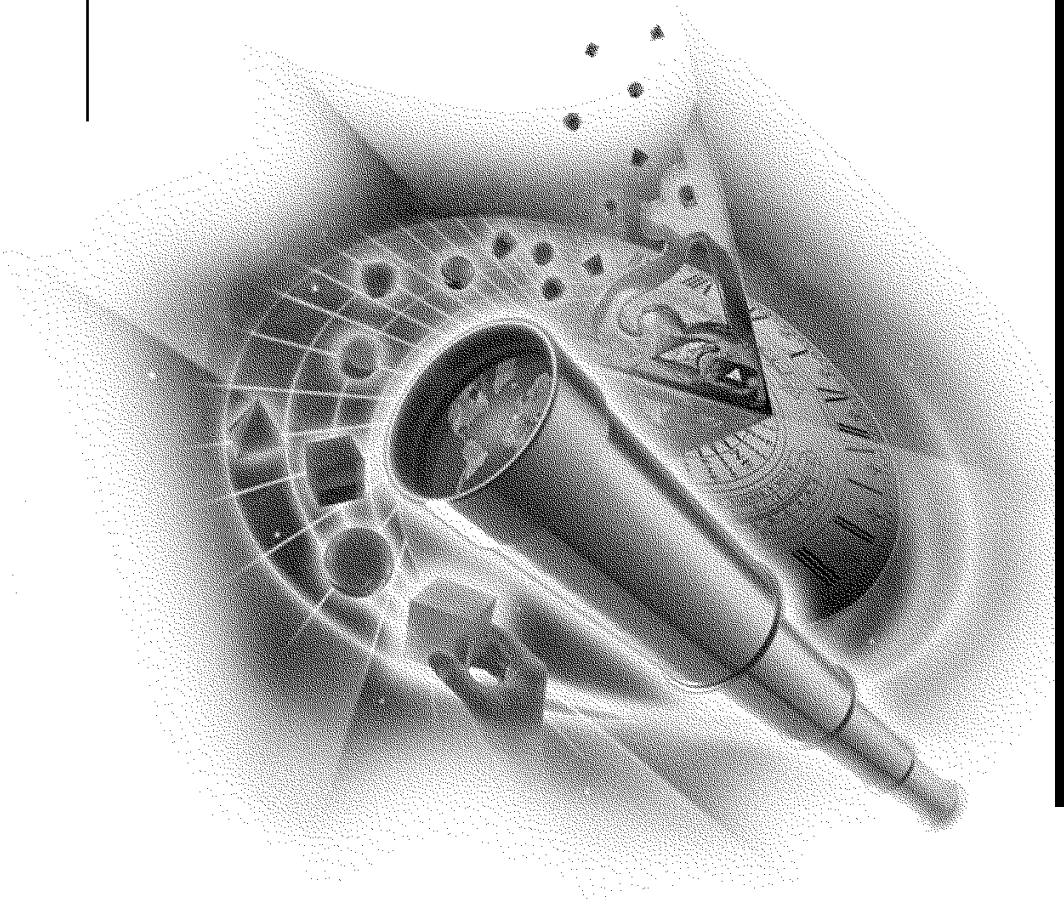
NDS-Enabled Office

NDS-Enabled Office Administration



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About NDS-Enabled Office

NDS-Enabled Office is a convenient and practical utility that allows you to provide your users with standard forms and documents that will automatically be filled in with data from their NDS® objects. By implementing NDS-Enabled Office, your users will no longer need to complete tedious forms that ask for the same user and department information over and over again.

Using ActiveX* controls and Visual Basic scripts, NDS-Enabled Office is compatible with forms and documents created with MS Office applications such as Word* and Excel*. NDS-Enabled Office also supports Web forms via the Internet Explorer* and Netscape Communicator* browsers.

This guide provides all the information you need to install and use NDS-Enabled Office. You will find step-by-step instructions on installing the NDS-Enabled Office software on your users' workstations, creating MS Office documents and Web forms that will read data from the directory, as well as example templates, and help on how to use the Profile Manager tool.

1 Installing NDS-Enabled Office

This chapter explains the prerequisites for installing NDS-Enabled Office, how to run the installation program, and what to expect when you perform the installation.

Installation Prerequisites

Before installing NDS-Enabled Office, ensure that the following requirements are met:

- The NDS-Enabled Office software must be installed and run on Windows* workstations (Windows 95/98, or Windows NT* 4.0)
- Novell® Client™ software must be installed on the workstation.
- NDS® must be running on your NetWare® server (NetWare 4.1, NetWare 5.*x*).

Installing NDS-Enabled Office

Installing NDS-Enabled Office is a quick and easy process. After you have downloaded the Install program, simply follow these steps:

1. Double-click the NEOINSTALL.EXE file.
2. At the prompt, click Yes to proceed with the installation.
3. Follow the prompts to install the software. The default install location is the C:\NEO directory.

   The NDS-Enabled Office software will be copied to the workstation's hard drive and can be accessed from the Start menu, in the Program folder named NDS-Enabled Office.

Distributing NDS-Enabled Office to Users

In order for your users to take advantage of the automatic form-fill capabilities offered by NDS-Enabled Office (as well as the ability to edit their own user information that will be used to fill in the forms), the NDS-Enabled Office software needs to be installed on each workstation.

You can distribute the install program (NEOINSTALL.EXE) to your users by your preferred method that best suits your environment. For example, you can place the file in a location accessible to all your users and have them copy and run the install program by themselves. Or, you can send the file as an e-mail attachment, with instructions for saving and running the install program.

For large numbers of users, you may want to use another method of software distribution. Novell ZENworks™, with its Application Launcher software distribution solution, is a perfect way to distribute a program such as NDS-Enabled Office to a large group of users. If you aren't currently using ZENworks, you can find out more about the many benefits it offers by visiting Novell's Product Web site (http://www.novell.com/products).

Description of Installed Files

After you run the NDS-Enabled Office Install program, the following components are copied to the client workstation:

- "Profile Manager" on page 10
- "Sample Form Templates" on page 11
- "Documentation" on page 12
- "Netscape Plug-in" on page 12
- "Tools Menu Access" on page 13

Profile Manager

The Profile Manager is the most visible piece of NDS-Enabled Office from the user perspective. The Profile Manager tool provides a graphical interface where users can view and customize their own NDS profiles and attributes (based on user authentication through the client login).

The Profile Manager tool can be accessed by any of these three methods:

- Click the Windows Start menu > Programs > NDS-Enabled Office > Profile Manager.
- Open a DOS window > change to the NDS-Enabled Office install directory (C:\NEO, by default) > type **`neo /gui`**.
- In Word or Excel, click Tools > NDS-Enabled Office. This option will work only if you have installed NDS-Enabled Office *after* MS-Office was installed on the workstation. See "Tools Menu Access" on page 13 for more information.

Sample Form Templates

NDS-Enabled Office reads user and departmental data from your NDS directory (more specifically, from the User and OU objects) and places the data into forms that have been enabled to receive it. See Chapter 2, "Understanding How NDS-Enabled Office Works," on page 15 for more details. Because this functionality is based on ActiveX controls and Visual Basic scripts, NDS-Enabled Office is primarily designed to be used with MS-Office applications such as Word and Excel. NDS-Enabled Office will also work with specially written Web forms.

As a network administrator, you need to know how to create these enabled documents. To assist you in this task, the NDS-Enabled Office install includes sample templates that illustrate how enabled documents look and function. The template files are:

- NEO_EXPENSEREPORT.XLT: Sample Excel spreadsheet.
- NEO_FAX.DOT: Sample Word form.
- NEO_MULTIVALUES.XLT: Another sample Excel spreadsheet that shows how multi-valued NDS attributes (such as the Department attribute) can be parsed by NDS-Enabled Office and inserted into separate spreadsheet cells.
- NEOWEBDEMO.HTML: Sample HTML Web form.

These files can be found in the NDS-Enabled Office installation directory or accessed through the Start menu. You can learn more about how to create your own enabled documents in Chapter 3, "Creating Documents For NDS-Enabled Office," on page 21.

Documentation

NDS-Enabled Office includes two pieces of user documentation to help you understand how NDS-Enabled Office works and how to use it. One of these pieces is this Administration Guide (NEO_ENU.PDF), which provides information on installing the NDS-Enabled Office software on your users' workstations, how NDS-Enabled Office works with NDS, and how to create Word, Excel, and HTML documents that can utilize the auto-fill capabilities of NDS-Enabled Office.

In addition to this Administration Guide, the Profile Manager tool has an online Windows Help file (NEO.HLP). The help file is accessed by clicking the Help button located at the bottom of the Profile Manager window. The Profile Manager is a graphical-interface tool that allows users to edit their own profile information. The accompanying help file describes the steps for performing common profile management tasks.

Netscape Plug-in

NDS-Enabled Office works with Web forms viewed in both the Internet Explorer* and Netscape Communicator* browsers. However, in order to work with Netscape, a browser plug-in is required. The plug-in includes two files:

- NPNEO.DLL
- NPNEO.CLASS

If you have Netscape installed, the install program copies these two files into Netscape's PROGRAM/PLUGINS folder.

Tools Menu Access

One way to access Profile Manager tool is through the Tools menu in Word and Excel (see "Profile Manager" on page 10). If the workstation where you are installing NDS-Enabled Office already has Word or Excel installed, the NDS-Enabled Office Install will copy the following two files to the required locations:

- NEO.DOT: File for the Tools Menu in Word. This file will be copied to the OFFICE/STARTUP folder. The presence of NEO.DOT in the startup folder makes the Profile Manager accessible from the Tools menu in Word.
- NEO.XLA: File for the Tools Menu in Excel. This file will be copied to the OFFICE/XLSTART folder. The presence of NEO.XLA in the XLSTART folder makes the Profile Manager accessible from the Tools menu in Excel.

IMPORTANT: If you install (or upgrade) Word or Excel *after* NDS-Enabled Office has been installed on the workstation, you can simply copy these two files from the NDS-Enabled Office installation directory back into the appropriate folder to restore Tools menu access.

2 Understanding How NDS-Enabled Office Works

This chapter explains the functionality of NDS-Enabled Office, including how specific NDS® attributes are mapped by NDS-Enabled Office to ActiveX* properties.

Automating Forms with NDS-Enabled Office

NDS-Enabled Office is an extremely useful tool for automating the task of filling in standard forms with user and departmental data from your NDS directory. NDS-Enabled Office is based on ActiveX controls and uses Visual Basic scripts to feed that data into your forms.

To use NDS-Enabled Office, you must create Microsoft* Word* or Excel* templates that contain Visual Basic script macros that call users' NDS data, such as their names or departments. You can then send your templates to any employee in the company, and when the employee opens the template, the document will be filled in automatically with that employee's NDS information.

The NDS-Enabled Office installation includes sample templates. One is a Word Fax template, and the other is an Excel Expense Report template. See Chapter 3, "Creating Documents For NDS-Enabled Office," on page 21 for more information about viewing these sample templates.

NDS-Enabled Office also supports Web forms that are prepared to read the data from NDS. See Chapter 3, "Creating Documents For NDS-Enabled Office," on page 21 for more information.

User and Organizational Unit Information

In order to fill in forms, NDS-Enabled Office reads attribute values from two NDS objects, User and Organizational Unit, and converts the attributes into ActiveX properties.

By accessing both of these NDS objects, NDS-Enabled Office can fill in forms that ask for any user information such as full name and personal office phone number, as well as organizational information such as a department fax number. These two ActiveX objects are named NEO.User and NEO.OrgUnit.

Local Caching of NDS Data

NDS-Enabled Office caches users' NDS information to their local hard drive so that it can be accessed even when users aren't connected to the network. In essence, this allows users to take NDS with them. The cache, which is located in the Windows* registry, is refreshed every time the user uses NDS-Enabled Office in a macro and every time the user opens the Profile Manager.

By caching the NDS data to the local hard drive, users also have the flexibility of modifying their own personal data for a particular form. Modifications are made with the Profile Manager tool (NEO.EXE), which is installed with the NDS-Enabled Office install program. See Chapter 4, "Using Profile Manager," on page 25 for more information.

Users can also synchronize their data with NDS if they want to restore the values from the directory. Additionally, they can change the values in NDS to match their local data if they have the necessary NDS rights.

Mapping ActiveX Properties to NDS Attributes

NDS-Enabled Office can access all user and organizational attributes in NDS. However, the NDS attribute name is not necessarily the same name as that of the ActiveX property. The reason for this is because ActiveX properties need to be one word, and many NDS attributes are named with more than one word.

Additionally, NDS attributes occassionally use cryptic names, such as OU which is Organizational Unit (department), and SA which is Street Address. In order to make this information easier for you to understand when you write the Visual Basic scripts in your forms to call the data, NDS-Enabled Office maps the NDS attribute names to more intuitive names (such as Department and StreetAddress).

The following tables list the ActiveX properties and corresponding NDS attributes for both the NEO.User object and the NEO.OrgUnit object, respectively.

NEO.User Object	
Exported Property	**NDS Attribute Name**
City	Physical Delivery Office Name
Department	OU
Description	Description
Email	Email Address
EmployeeID	Employee ID
Fax	Facsimile Telephone Number
FirstName	Given Name
FullName	Full Name
GenerationalQualifier	Generational Qualifier
HomeDirectory	Home Directory
Initials	Initials
InternetEmail	Internet Email Address
Language	Language
LastName	Surname
Location	L
LoginName	CN
LoginScript	Login Script
POBox	Postal Office Box
PostalAddress	Postal Address
StateOrProvince	S
StreetAddress	SA

NEO.User Object	
Exported Property	**NDS Attribute Name**
Telephone	Telephone Number
Title	Title
ZipCode	Postal Code
NetworkConnected	NetworkConnected is not an NDS attribute. It is true if connected to the network, false if not connected to the network.
DistinguishedName	DistinguishedName is not an NDS attribute. It is the user's NDS distinguished name. Example: "JohnDoe. Marketing. Novell"

NEO.OrgUnit Object	
Exported Property	**NDS Attribute Name**
City	Physical Delivery Office Name
Description	OU
Email	Email Address
Fax	Facsimile Telephone Number
Location	L
LoginScript	Login Script
POBox	Postal Office Box
PostalAddress	Postal Address
StateOrProvince	S
StreetAddress	SA
Telephone	Telephone Number
ZipCode	Postal Code

NEO.OrgUnit Object	
Exported Property	**NDS Attribute Name**
NetworkConnected	NetworkConnected is not an NDS attribute. It is true if connected to the network, false if not connected to the network.
DistinguishedName	DistinguishedName is not an NDS attribute. It is your NDS distinguished name. Example: "JohnDoe. Marketing. Novell"

Using ActiveX Methods to Retrieve Data

In addition to reading properties, the ActiveX control can also retrieve data by means of ActiveX methods.

The following table shows the two ActiveX methods that are supported by the NEO ActiveX control. These methods will work with both the NEO.User object and the NEO.OrgUnit object.

Methods NEO.User object & NEO.OrgUnit object	
Method Name	**What It Does**
GetAttribute("name")	Used to retrieve attributes not exported as properties
UserInterface()	Launches the Profile Manager

Accessing the Data

Now that you understand how the NDS attributes are represented by ActiveX properties and methods, you need to know how to enable documents to access that information. For the MS-Office applications Word and Excel, you do this with simple Visual Basic scripts.

Below are the script commands used to create the User and OrgUnit ActiveX objects and to access property values. For more detailed information, you can view the sample templates in Chapter 3, “Creating Documents For NDS-Enabled Office,” on page 21.

Creating the User and OrgUnit Objects
Use the following syntax to create the User and OrgUnit objects:

```
Dim oUser as Object
Set oUser = CreateObject("NEO.User")
```

or

```
Dim oOrgUnit as Object
Set oOrgUnit = CreateObject("NEO.OrgUnit")
```

Accessing the Objects' Property Values
Use the following syntax to access the objects' property values (these are just two exmples of property values that can be accessed):

```
oUser.Title
```

or

```
oUser.City
```

Accessing Other NDS Attributes

There may be other NDS attributes that are not included in the tables above. For example, you may have created new NDS attributes by extending the directory's schema. In order to access custom NDS attributes of this type, or other attributes not listed as ActiveX properties, you need to use the GetAttribute ActiveX method (see the sample templates in Chapter 3, "Creating Documents For NDS-Enabled Office," on page 21 for detailed examples).

Use the following syntax to access attributes with the Get Attribute method:

```
oUser.GetAttribute("the name of the attribute")
```

or

```
oOrgUnit.GetAttribute("the name of the attribute")
```

3 Creating Documents For NDS-Enabled Office

This chapter provides instructions on creating Word* and Excel* documents that will work with NDS-Enabled Office.

Sample Templates

The NDS-Enabled Office Install program copies sample templates that illustrate how NDS®-enabled documents look and function. The template files are:

- NEO_EXPENSEREPORT.XLT: Sample Excel spreadsheet.
- NEO_FAX.DOT: Sample Word form.
- NEO_MULTIVALUES.XLT: Another sample Excel spreadsheet that shows how multi-valued NDS attributes (such as the Department attribute) can be parsed by NDS-Enabled Office and inserted into separate spreadsheet cells.
- NEOWEBDEMO.HTML: Sample HTML Web form.

You must have Word and Excel installed to use these templates. The MS-Office templates contain Visual Basic script macros that run when the template is accessed. These Visual Basic macros use ActiveX* controls to fill in the document with data from NDS. You can refer to these sample templates when creating your own NDS-enabled documents.

Viewing the Word Template

The NDS-Enabled Office install program places the Word and Excel templates on the Start menu. To view the Word template and its script macro:

1. Click Start > Programs > NDS Enabled Office > Fax Sample Template.
2. At the prompt, click Enable Macros. The template will open in Word. If NDS-Enabled Office is installed, the fields on the form will automatically be filled in with your NDS data.
3. From the Tools menu, click Macro > Visual Basic Editor.
4. Open the NEOMacros module to see the contents of the macro.

The macro will look similar to this:

```
Sub AutoNew()
 Set oUser = CreateObject("NEO.User")
 Set oOrgUnit = CreateObject("NEO.OrgUnit")
 With ActiveDocument
  .Bookmarks("a01").Range = oUser.FullName
  .Bookmarks("a02").Range = oUser.Title
  .Bookmarks("a03").Range = oOrgUnit.StreetAddress
  .Bookmarks("a04").Range = oOrgUnit.City & " " &
  oOrgUnit.StateOrProvince & " " & oOrgUnit.ZipCode
  .Bookmarks("a06").Range = "Telephone: " &
  oOrgUnit.telephone
  .Bookmarks("a07").Range = "Facsimile:  " & oUser.Fax
  .Bookmarks("a08").Range = "Direct: " & oUser.telephone
 End With
End Sub
```

Sub AutoNew(): Called automatically when someone creates a new document based on this template.

Set oUser = CreateObject("NEO.User"): Creates the ActiveX User object NEO.User.

Set oOrgUnit = CreateObject("NEO.OrgUnit"): Creates the ActiveX OrgUnit object NEO.OrgUnit.

Bookmarks: The Bookmarks lines indicate the name of the Word bookmark where the data will be inserted. The name of the bookmark is inside the parentheses and quotation marks (""). The data that will be inserted at that bookmark in the Word document is represented by the ActiveX object and

property. See “Mapping ActiveX Properties to NDS Attributes” on page 16 for a list of these properties and their NDS equivalents.

Viewing the Excel Template

The NDS-Enabled Office Install program places the Word and Excel templates on the Start menu. To view the Excel template and its script macro:

1. Click Start > Programs > NDS Enabled Office > ExpenseReport Sample Template.
2. At the prompt, click Enable Macros. The template will open in Excel. If NDS-Enabled Office is installed, the fields on the form will automatically be filled in with your NDS data.
3. From the Tools menu, click Macro > Visual Basic Editor.
4. Open the NEOMacros module in the Modules folder to see the contents of the macro.

The macro will look like similar to this:

```
Sub Auto_Open()
 Set oUser = CreateObject("NEO.User")
 Set oOrgUnit = CreateObject("NEO.OrgUnit")
  Range("B3") = oOrgUnit.StreetAddress ’fill the cell with the
   OrgUnit’s street address
   Range("B4") = oOrgUnit.City & ", " &
   oOrgUnit.StateOrProvince & "  " & oOrgUnit.ZipCode
   Range("B5") = "Telephone :" & oOrgUnit.Telephone
   Range("B6") = "Facsimilie : " & oOrgUnit.Fax
   Range("B9") = oUser.FullName
   Range("B10") = oUser.Department
   Range("D9") = oUser.EmployeeID
   Range("D10") = oUser.Location
End Sub
```

Sub Auto_Open(): Called automatically when someone makes a new document based on this template.

Set oUser = CreateObject("NEO.User"): Creates the ActiveX User object NEO.User.

Set oOrgUnit = CreateObject("NEO.OrgUnit"): Creates the ActiveX OrgUnit object NEO.OrgUnit.

Range: The Range lines indicate the location of the spreadsheet cell where the data will be inserted. The location of the cell is noted inside the parentheses and quotation marks (""). The data that will be inserted in that cell is represented by the ActiveX object and property. See "Mapping ActiveX Properties to NDS Attributes" on page 16 for a list of these properties and their NDS equivalents.

Viewing the Sample Web Form

The NDS-Enabled Office Install program places the sample HTML Web form on the Start menu. To view the Web form:

1. Click Start > Programs > NDS Enabled Office > Web Demo.
2. The file will open in your default browser. If NDS-Enabled Office is installed, you can click Fill This Form From NDS to have the fields on the form automatically filled in with your NDS data.
3. Click View My NDS Profile to open the Profile Manager.
4. Click How Does It Work? to read more about the HTML and Javascript required to enable Web forms for NDS-Enabled Office.
5. Click Problems for troubleshooting tips.

4 Using Profile Manager

This section discusses the Profile Manager, a component of NDS-Enabled Office. The Profile Manager is a graphical-interface tool that allows your users to edit their personal profiles (a profile contains user and organizational data from NDS®, and is stored in a local cache).

The Profile Manager includes online help that describes the steps for performing common profile management tasks. Please refer to the online help for more information about the Profile Manager.

Starting Profile Manager

The Profile Manager tool can be accessed by any of these three methods:

- Click the Windows Start menu > Programs > NDS-Enabled Office > Profile Manager.
- Open a DOS window > change to the NDS-Enabled Office install directory (C:\NEO, by default) > type **`neo /gui`**.
- In Word or Excel, click Tools > NDS Profile Manager. This option works only if you have installed NDS-Enabled Office *after* MS-Office was installed on the workstation. See "Tools Menu Access" on page 13 for more information.

Modifying Profiles with Profile Manager

Profile Manager lets users decide which NDS account (if a user is logged in using more than one) to read user data from, and which NDS context to read departmental data from (immediate parent, parent of parent, etc.). Profile Manager also lets users read user data from an NDS organizataional role object instead of the user object.

Users can edit their profiles by clicking the Edit User and Edit OrgUnit buttons in Profile Manager. They can then customize their own NDS attributes in the local cache (and in NDS if they have rights to do so).

Setting the Local Override and Use OrgUnit Flags

By default, when NDS-Enabled Office runs, it overwrites the values contained in the local cache with values from NDS. To prevent this from happening, users can set a Local Override flag on individual attributes. Additionally, if a user modifies the local (cached) value so that it is different than the value in NDS, the Local Override flag is set *automatically* so that the new value won't get overwritten by NDS. Users can set or clear the Local Override flag by selecting an attribute and clicking Properties.

If a user sets the Use OrgUnit flag on any of his or her attributes, when a macro accesses that user attribute, it will use the value from the default OrgUnit instead. The Use OrgUnit flag does not apply to OrgUnit attributes.

Using Roles

The NDS-Enabled Office Profile Manager provides the option of using an NDS Organizational Role object in place of the User object. NDS-Enabled Office determines whether the user occupies any such roles and lists them in a drop-down list directly below the User drop-down list in Profile Manager.

If users check the box indicating to use a role, the role's NDS information will be used when a macro creates an NEO.User object and accesses its NDS attributes. If the role object does not provide some piece of data, a name for example, then the name is taken from the user object instead. In other words, the role is used when possible, but the user object is used when the role doesn't provide data.

Changing the Default User

The Default User is the NDS user object that is used when a Visual Basic macro creates an NEO.User object (unless the user has indicated that he or she wants to use a role instead). If the user is logged in using two or more NDS accounts, he or she can designate one of them as the default user.

When a macro creates a NEO.User object and accesses its NDS attributes, the default user is the object from which the NDS data will be retrieved. Users can change their default user at any time in Profile Manager.

Changing the Default OrgUnit

The Default OrgUnit is the NDS Organizational Unit or Organization object that is used when a Visual Basic macro creates an NEO.OrgUnit object. By default, this is the immediate parent container of the user object. Users may change this to be any container above the parent container in the NDS tree.

When a macro creates a NEO.OrgUnit object and accesses its NDS attributes, the default OrgUnit is the object from which the NDS data will be retrieved. Users can change their default OrgUnit at any time in Profile Manager.

5 Troubleshooting

This chapter provides solutions to common problems with NDS-Enabled Office.

Unexpected Error Occurs

Possible Cause	Solution
You are running NDS-Enabled Office for the first time but you aren't logged in to NDS.	The first time you run NDS-Enabled Office, you must be logged in to NDS so NDS-Enabled Office can get your NDS information and place it in a local cache. Once this local cache has been established, you need not be logged in to use NDS-Enabled Office.
You tried to edit attributes in NDS-Enabled Office's cache before NDS-Enabled Office was done filling the cache.	This can occur the first time you run NDS-Enabled Office. Simply exit and restart the Profile Manager and it should work.

Some User Objects Aren't Listed in Profile Manager

Possible Cause	Solution
You must be logged in as each user object that you want listed in Profile Manager.	Exit Profile Manager, log in as the users you want, and then restart Profile Manager.
You logged in as another user after starting Profile Manager.	Exit and restart Profile Manager. Profile Manager only checks which users you are logged in as during its startup. You might have to exit and restart twice.

Synchronization Problems

Symptoms	Solution
◆ The option to update NDS from my local cache is disabled. ◆ The attributes didn't synchronize as expected.	There might be various causes for this. It will usually correct itself if you exit and restart Profile Manager once or twice.