Novell
eGuide

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Novell eGuide 2.1 Administration Guide
November 7, 2002

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Contents

About This Guide

This documentation describes how to create and use Novell® eGuide 2.1. The guide is intended for network administrators and is divided into the following sections:

Multiple appendicies that describe specific configuration scenarios are also included:

Related Documentation

Novell eGuide works with many Novell products, including eDirectory™ and iManager.

For documentation on installing and running Novell eDirectory and iManager, see the Novell documentation web site (http://www.novell.com/documentation).

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In this documentation, a greater-than symbol (>) is used to separate actions within a step and items within a cross-reference path.

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1 eGuide Product Overview

This chapter provides the following general overview of the Novell® eGuide 2.1 software:

Product Description

Novell® eGuide 2.1 is a Web application that provides a simple browser-based solution to search for all of the important people, places, and things your employees need to know, regardless of the location of your LDAP data source.

Novell eGuide looks like an address book. But unlike an ordinary address book, eGuide is independent of platform or a particular application. It can be accessed by any user with rights to your Web server via a standard Web browser.

In addition to searching Novell eDirectory™, you can use eGuide to search multiple LDAP data sources at the same time. This means, for example, that if your company suddenly purchases another company, you can easily provide a combined white pages view of both companies using eGuide pointing at two separate directories at the same time.

eGuide runs on the most widely used platforms and is compatible with e-mail, instant messaging, and real-time collaboration tools, such as Microsoft* NetMeeting* or AOL* Instant Messenger*. When users find the people they are looking for, eGuide allows them to launch whatever type of communication fits their current needs—e-mail, instant messaging, and even video conferencing.

Major Features

- Standards-based display and administration using HTML, XML, and XSL make configuration and use simple, convenient, and highly customizable.

- Advanced Search capabilities allow searches on any attribute.

- Data handler controls allow you to display the information the way you want.

- Organizational Charts are automatically generated based on eDirectory attributes.

- Anonymous and User Authentication modes are supported, including contextless login, cookies, and support for eDirectory password restrictions.

- Authenticated Searching utilizes access control lists in eDirectory to determine if a user can access particular attribute information, such as home phone numbers.

- Works seamlessly with Novell iChain® and Novell Portal Services. Novell eGuide is also an excellent add-on to DirXML synchronization projects.

- Compatible with eDirectory or any other LDAP-enabled directory service.

New Features for Version 2.1

- Self-management feature, configured using iManager, enables users to manage their own attributes based on role assignment (available with eDirectory 8.7).

- Modularized templates allowing for easier development.

- Enhancements to organizational charts, including the ability to define for any category, improved editing capabilities, and the ability to print.

- Monitor to track the number of daily eGuide hits.

- E-mail notifications when directory changes are made.

- User name displayed instead of DN.

- Ability to upload any file type and place a link in the directory.

- Improved scalability and performance for larger and quicker searches.

- Enhanced XML configuration for easy upgrades.

What's Next

- To install eNovell Guide, see Chapter 2, "Installing eGuide," on page 15.
- To configure and administer eGuide, see Chapter 3, "Using the eGuide Administration Utility," on page 21.
- To use the eGuide client, see Chapter 4, "Accessing the eGuide Client," on page 43

2 Installing eGuide

Novell® eGuide installation includes the following steps:

1. Make sure your network meets the necessary requirements. See "System Requirements" on page 15.
2. Install the software. See "Running the Install Program" on page 17.
3. Configure your eGuide software using the eGuide Quick Setup Wizard (first time setup only). See "Running the eGuide Quick Setup Wizard" on page 18.

HINT: If you are upgrading your current version of eGuide to version 2.1, it is recommended that you review the information in "Upgrading to eGuide 2.1" on page 19.

System Requirements

Minimum Requirements

The following are the minimum system requirements for running Novell eGuide software:

System Component	Requirement
Operating System	◆ NetWare® 6 with Support Pack 1 or later
	◆ Windows* NT*/2000/XP
	◆ Red Hat* Linux* 7.1
	◆ Solaris* 8

System Component	Requirement
Web Server	• Internet Information Server (IIS) (tested on Windows platforms) • Apache 1.3 (tested and recommended on all platforms) If you need help installing Apache, see Appendix A, "Using Web Services," on page 51.
Web Application Server	Tomcat 3.2 (tested and recommended) or any that supports the 2.2 Java Servlet Specification For help installing Tomcat, visit the Apache Software Foundation web site (http://www.apache.org).
Java* Virtual Machine (JVM)	Version 1.3 or later (1.3.1 recommended)
LDAP Directory	• Supports LDAP v3 • Uses clear text passwords for clear text connections; clear text passwords are disabled by default in eDirectory 8.7 The clear text requirement is necessary for installation only. You can configure the directory to use SSL after eGuide installation. **IMPORTANT:** If you plan to use eGuide with eDirectory (formerly called NDS®), version 8 or later is the minimum requirement; version 8.5 or later is required to support password security; version 8.6.2 or later is required to support Role Based Services (version 8.7 recommended).
Browser for eGuide Administration Utility	• Netscape* 6.2 or later • Internet Explorer 5.5 or later
Browser for eGuide Client	• Netscape 4.78 or later (6.2 recommended) • Internet Explorer 5.0 or later (5.5 recommended)

Tested Environments

Novell tested and supports the following environments:

Operating System	Web Server	Web Application Server
NetWare 6	Apache (version included with NetWare 6)	Tomcat (version included with NetWare 6)
Windows NT 4.0 with Support Pack 6a or later	◆ IIS 4.0 ◆ Apache 1.3	Tomcat 3.3
Windows 2000 with Support Pack 1 or later and JVM 1.3.1	◆ IIS 4.0 ◆ Apache 1.3	Tomcat 3.3
Red Hat Linux 7.1	Apache 1.3	Tomcat 3.3
Solaris 8 with appropriate patches	Apache 1.3	Tomcat 3.3

Running the Install Program

The way you run the Install program depends on the platform of the server you are installing Novell eGuide on.

IMPORTANT: If you are upgrading your existing version of eGuide to version 2.1, review "Upgrading to eGuide 2.1" on page 19.

On NetWare

1 Copy the following file to the SYS: volume of the NetWare server:

\INSTALL\NETWARE\EGUIDEINSTALL.JAR

This path is relative to the directory where you extracted the eGuide files.

2 At the NetWare server console, enter the following command:

java -cp *full_path/***eGuideInstall.jar install**

Replace *full_path* with the path to the directory where you downloaded the EGUIDEINSTALL.JAR file.

3 Follow the prompts.

On Windows

1 Using Windows Explorer or Run, run the following file:

\INSTALL\WIN\EGUIDEINSTALL.EXE

This path is relative to the directory where you extracted the eGuide files.

2 Follow the prompts.

On Solaris/Linux

1 Open a shell and change to the /install/unix directory.

This path is relative to the directory where you extracted the eGuide files.

IMPORTANT: For the Install program to run, your PATH environment variable must point to the location of a Java* virtual machine (for example, /usr/java/bin).

2 Enter the following command:

```
sh ./eguideinstall.bin
```

3 Follow the prompts.

Running the eGuide Quick Setup Wizard

Before you can use Novell eGuide, you must run the Quick Setup Wizard. Complete the following after you've installed eGuide:

1 Enter the following URL in your browser:

http://*web_server*/eGuide/admin/index.html (case sensitive)

Replace *web_server* with the host name or IP address of the Web server where you installed eGuide.

IMPORTANT: The "eGuide" portion of the URL shown above is case sensitive. You must type it exactly as shown (with a capital "G" and all other letters in lowercase). Also, depending on how your Web server and Web application server are configured, you might need to include a port number with the Web server name/IP address (in the format *web_server:port_number*). The port number depends on your Web server configuration.

NOTE: If the Quick Setup Wizard fails to start, you might need to modify the configuration of your Web server or servlet engine in order to make the eGuide application accessible. The configuration requirements vary depending on the specific Web server. Consult your Web server documentation for details. Be aware that you might need to restart your Web server and servlet engine after reconfiguring them.

2 Follow the prompts to set up the first LDAP data source you want to search with eGuide.

The Quick Setup Wizard automatically launches the eGuide Administration Utility when it is finished. You can use the Administration Utility to further configure and customize eGuide. For details, see Chapter 3, "Using the eGuide Administration Utility," on page 21.

Though further configuration is usually not necessary in order to begin using eGuide, it might be necessary if

◆ The LDAP data source you configure in the wizard does not contain the same schema classes that eGuide uses by default.

By default, eGuide creates a User search category and attempts to add the following schema classes to that category: InetOrgPerson, OrganizationalPerson, and Person. If any of these classes does not exist in the LDAP data source you configure in the Quick Setup Wizard, you might need to add one or more schema classes to the User search category so eGuide can access all the needed information in the LDAP data source. For details on adding a schema class to a search category, see "Adding and Removing Schema Classes from a Search Category" on page 29.

◆ You do not want the authentication credentials you entered in the wizard used as the default proxy credentials in eGuide. For details on setting additional proxy credentials in eGuide, see "Editing LDAP Settings" on page 25.

Upgrading to eGuide 2.1

If you are upgrading to eGuide 2.1, you have an option to keep or to overwrite your existing eGuide directory structure.

During the eGuide 2.1 installation program, a Backup Existing Settings (Recommended) checkbox is made available. If you check this box, the following occurs:

◆ The config, plugins, and templates directories are renamed to config_old, plugins_old, and templates_old. New versions of the config, plugins, and templates directories are created.

If the config_old, plugins_old, and templates_old directories already exist, then your current versions of the config, plugins, and templates directories are renamed to config_old2, plugins_old2, and templates_old2. If *directoryname*_old2 already exists, the files will be renamed in sequential order all the way to the number 99. If you are

unsure what your newest installation backup directories are, look at the directory timestamp.

◆ All serial (*.SER) files in the properties directory are deleted.

NOTE: In eGuide 2.1, XML files are being used instead of SER files.

◆ All new key-value pairs are merged into existing resource bundles contained in the \WEB-INF\classes\com\novell\eguide\language directory.

If you don't check the Backup Existing Settings (Recommended) box, your existing properties directory is deleted and the installation continues.

Uninstalling eGuide

To uninstall eGuide, delete the "eguide" directory created during the eGuide install. The default location of this directory relative to where you installed it is ...\webapps\eguide.

What's Next

◆ To configure and administer the eGuide client, see Chapter 3, "Using the eGuide Administration Utility," on page 21.

◆ To use the eGuide client, see Chapter 4, "Accessing the eGuide Client," on page 43.

3 Using the eGuide Administration Utility

Novell® eGuide is administered and configured with the eGuide Administration Utility. This chapter gives an overview of the functionality available in the utility.

Compatible Browsers

To configure and administer eGuide, you must use a machine running Internet Explorer 5 or later or Netscape 6 or later.

IMPORTANT: The eGuide software cannot be configured using NetWare Remote Manager on the NetWare 6 console at this time.

Accessing the eGuide Administration Utility

IMPORTANT: The eGuide Administration Utility icon is available only to authenticated users designated as eGuide administrators. For details, see "Managing Administration Roles" on page 31.

To access the Administration Utility, do one of the following from a compatible browser (see "Compatible Browsers" on page 21):

* Enter the following URL (case sensitive):

  `http://web_server/eGuide admin/index.html`

  Replace *web_server* with the host name or IP address of the Web server where you installed eGuide. The port number might be required as well.

* Log in to the Novell eGuide client as the administrative user you designated in the Quick Setup Wizard and click the Administration Utility icon.

Configuring LDAP Data Sources

The following LDAP data source configuration tasks are covered in this section:

Adding an LDAP Data Source

When you add an LDAP data source, Novell eGuide creates a User category for the new directory using the User attribute settings and mappings in the first directory added when you ran the eGuide Setup Wizard. It is therefore recommended that you make any desired changes to the initial directory's User attribute settings and mappings before adding other directories. For details, see "Editing LDAP Attributes" on page 27.

You can use directory configurations to increase search performance by taking advantage of eGuide's multithreaded search capability. For example, you can break up a single large directory into multiple directory configurations within eGuide, with each pointing to a different search root. If the directory you are splitting up in this way requires user authentication, be sure to designate each directory configuration as part of the authentication group. For details on the Authentication Group feature, see "Changing a Directory's Authentication Settings" on page 23.

To add an LDAP data source configuration to the list of directories eGuide searches:

1 Click LDAP Data Sources > New.

2 On the LDAP Settings page, enter at least the directory name, the host name (DNS name or IP address), and the port number.

All other settings are optional. For details, see "Editing LDAP Settings" on page 25.

IMPORTANT: The directory name can contain only letters, numbers, and underscore (_) characters. This name is used only as an identifier within the Administration Utility and cannot be changed once the directory has been added.

3 Click Save.

You must provide the mandatory information and click Save before you can access the Attributes or Advanced page.

4 Click Attributes and configure the LDAP attributes you want eGuide users to be able to view and search on.

For details, see "Editing LDAP Attributes" on page 27.

5 Click Save.

6 Click LDAP Data Sources and then make desired changes to the Login Server, Authentication Group, and Enabled settings for the directory you just added.

For details on these settings, see "Changing a Directory's Authentication Settings" on page 23 and "Enabling/Disabling an LDAP Data Source" on page 23.

7 Click Save.

Enabling/Disabling an LDAP Data Source

The Enabled setting determines whether a directory is available for user searches.

1 Click LDAP Data Sources.

2 Select or unselect Enabled for the desired directory.

Removing an LDAP Data Source

1 Click LDAP Data Sources.

2 Click Remove for the desired directory.

Novell eGuide will not let you remove the directory designated as the login server.

Changing a Directory's Authentication Settings

1 Click LDAP Data Sources.

2 Click Login Server for the directory you want to designate as the login (authentication) server.

The distinguished names and passwords for all users and user administrators who must authenticate to Novell eGuide must reside in the login server directory. Authentication is required, for example, if users or user administrators want to modify editable attributes. You can also choose to require authentication before users can access eGuide. For details, see "Setting Restrictions" on page 32.

WARNING: Changing the login server designation to a different directory could invalidate your Administration Roles settings if the distinguished names of all user administrators and eGuide administrators are not in the newly designated directory.

3 (Conditional) If you changed the Login Server designation, complete the following steps:

3a Click LDAP Data Sources > Edit (for the directory newly designated as the login server) > LDAP Settings.

3b Make the appropriate changes to the Authentication User Name, Authentication Password, and Authentication Search Root settings, and then click Save.

For details, see "Editing LDAP Settings" on page 25.

3c Select General, select a valid User Authentication Key, then click Save.

3d Click Administration Roles and make the needed changes to the administrator role lists with users from the new login server.

4 Select or unselect Authentication Group for the desired directory.

When Authentication Group is selected, users' authenticated credentials are used for searches in this directory. A directory must be part of the authentication group if you want users and user administrators to be able to modify editable attributes in that directory.

IMPORTANT: Make sure you select Authentication Group for a directory only if intended users' distinguished names and passwords are applicable within both that directory and the login server directory.

If Authentication Group is unselected, the directory's default proxy credentials are used.

5 Click Save.

Editing LDAP Data Source Settings and Attributes

Configuring an LDAP data source for use in Novell eGuide includes adjusting various settings, mapping attributes to template key names, deciding which attributes you want users to be able to search on, and deciding which attributes you want to allow users to modify themselves.

Editing LDAP Settings

1 Click LDAP Data Sources > Edit (for the desired directory) > LDAP Settings.

2 Make the desired changes.

See Table 1 for details on the LDAP settings.

3 Click Save.

Table 1   LDAP Settings

Setting	Purpose
Enabled	Select to make the directory searchable.
	HINT: The Enabled setting also appears on the LDAP Data Sources page.
Directory Name	Specified when the directory was added and cannot be changed.
Host Name	Enter either the LDAP server's IP address or DNS host name.
	IMPORTANT: You can change the host name to refer to a different LDAP server after initial configuration if the new server has the same schema configuration. If it does not, remove the current directory and add a new one with the new host name information.
Port	Enter the LDAP server's port number.
Enable SSL	Select to enable SSL.
	IMPORTANT: Enabling SSL will work only if you have already set up SSL on the LDAP server. For details, see Appendix C, "Configuring and Using SSL for LDAP Connections," on page 55.
Secure Port	If Enable SSL is selected, enter the secure port number.
Search Root	Enter the distinguished name of the container you want as the search root (o=acmecorp, for example).

Setting	Purpose
Search Subcontainers	Lets you specify which subcontainers within the root container to include in searches. Choose one of the following options: ◆ One: Includes the root distinguished name and all entries at the search root level. ◆ Sub: Includes the root distinguished name and all entries at all levels below it.
Max Search Entries	Enter the maximum number of search result entries you want returned with each search. **HINT:** For greatest search efficiency, use a setting of 100 to 200. Do not set to more than 1000.
Proxy User Name	Enter the search proxy distinguished name using LDAP format (for example, cn=admin,o=acmecorp). If you leave this field blank, Novell eGuide uses anonymous credentials or the LDAP server's proxy credentials (if defined) on LDAP queries.
Proxy Password	Enter the search proxy password.
Authentication Group	Select to include the directory in the authentication group. eGuide uses the user's authenticated credentials to access directories in the authentication group. For those directories not included in the authentication group, eGuide uses default proxy credentials.
Authentication User Name	(Available only when configuring the directory designated as the login server.) Enter the distinguished name of the authentication proxy using LDAP format (for example, cn=admin,o=acmecorp). eGuide uses this User object to search for and identify fully distinguished names during a contextless login. If you leave this field blank, eGuide uses anonymous credentials on all contextless login attempts. **IMPORTANT:** The User object assigned as the authentication proxy must have the Read right to all distinguished names and to the attribute designated in eGuide as the user authentication key on the login server. For details on the user authentication key, see "Changing General Customization Settings" on page 33.
Authentication Password	(Available only when configuring the directory designated as the login server.) Enter the authentication user's password.

Setting	Purpose
Authentication Search Root	(Available only when configuring the directory designated as the login server.)
	Enter the distinguished name of the container where the authentication credentials search should begin.

Editing LDAP Attributes

IMPORTANT: Whenever making changes to attribute mappings and settings, be sure to check all other eGuide settings where those attributes are referenced, especially in Display Layout.

1 Select the search category you want to edit attributes for. Unless you have added a search category (see"Modifying Search Categories" on page 29) only the default User category is available

2 Click LDAP Data Sources > Edit (for the desired directory) > Attributes.

3 Make the desired changes.

See Table 2, "LDAP Attributes," on page 27 for details on each setting.

4 Click Save (at the bottom of the page).

The following table describes the purpose of each attribute setting.

Table 2   LDAP Attributes

Setting	Purpose
Enable	Select to add this attribute to the Details panel displayed when a user clicks a search results entry.
	WARNING: To avoid XSL/browser rendering errors, do not select Enable for attributes containing binary information. The only exception to this rule is the Photo attribute, which Novell eGuide treats differently than other binary attributes.

Setting	Purpose
Template Key	Provides a means for eGuide to treat similar attributes from different LDAP directories the same even though they have different names in their respective directories. For example, if one LDAP data source uses "lastname" and another uses "sn" for the attribute containing users' last names, you could create a template key name, such as LastName, and map both the LastName and SN attributes to that same key name.
	By default, eGuide uses the Novell eDirectory™ attribute names as the template key names for the User category of the first directory you add when running the eGuide Setup Wizard.
	WARNING: Do not assign the same template key name to more than one attribute.
Searchable	Select to add this attribute to the search filter list, thus allowing users to search on the attribute.
Editable	Available only for directories designated as the login server or as part of the authentication group. For details, see "Changing a Directory's Authentication Settings" on page 23.
	Select if you want to allow users and user administrators to edit this attribute. For details on enabling self administration, see "Setting Restrictions" on page 32. For details on designating user administrators, see "Managing Administration Roles" on page 31.
	IMPORTANT: Selecting Editable for an attribute in eGuide does not grant users and user administrators the necessary rights within the LDAP data source. You must have already granted those rights at the directory level for this feature to work properly. You must also enable Self Administration if you want users to be able to edit the attribute. For details, see "Setting Restrictions" on page 32.

Mapping and Enabling Attributes for Instant Messaging and NetMeeting

If you want users to have the ability to send instant messages and start a NetMeeting directly from the Novell eGuide Details panel, you must map several special template key names and enable the associated attributes.

Table 3   Instant Messaging and NetMeeting Attribute Mappings

Map This Template Key Name	To the LDAP Attribute Containing This Information
InstantMessagingID	AOL Instant Messaging screen names

Map This Template Key Name	To the LDAP Attribute Containing This Information
NetMeetingID	NetMeeting IDs
YahooIMID	Yahoo!* IDs

Refreshing the LDAP Schema

Novell eGuide reads the schema of an LDAP data source only when you first add the directory. If you make a change to the schema (such as adding an attribute to a schema class) and want that change reflected in eGuide, you must refresh the schema. Click LDAP Data Sources > Edit (for the desired directory) > LDAP Settings > Refresh Schema.

NOTE: eGuide never changes an LDAP data source's schema.

Modifying Search Categories

A search category is an entity Novell eGuide uses to represent a combination of LDAP classes.

For example, when you add the first directory to eGuide, the User search category is created which, by default, is comprised of the following classes: InetOrgPerson, OrganizationalPerson, and Person. The attributes within these User classes appear in the Attributes page where you configure how eGuide uses them in the eGuide client. Also, the User category label—Find People—appears in the first search filter drop-down list in the eGuide client.

NOTE: The InetOrgPerson, OrganizationalPerson, and Person classes mentioned above are used only if they existed in the first directory you added.

If desired, you can add and remove schema classes within an existing category. You can also add or remove entire search categories.

Adding and Removing Schema Classes from a Search Category

1 Click LDAP Data Sources > Edit (for the desired directory) > Advanced.

2 Select the category you want to modify.

3 To add a schema class to the category, select the class from the Available box, and click the right-arrow to move it to the Selected box.

4 Reverse the process in Step 3 to remove a class.

5 Click Save after making all desired changes to this category.

If you only removed one or more schema classes, you are done. If you added one or more classes, continue with Step 6.

6 Click the Attributes tab and edit the settings and mappings for the attributes of the newly added classes.

For details, see "Editing LDAP Attributes" on page 27.

IMPORTANT: If you just added one or more schema classes to a newly added search category, you must enable at least one attribute and make at least one attribute searchable before users can access that category from the Novell eGuide client.

7 Use Display Layout to indicate what attributes should be displayed in the Search, List, Details, and Org Chart forms in the eGuide client.

For details, see the following sections:

◆ "Attributes Filter List" on page 35

◆ "Advanced Search Settings" on page 36

◆ "Search Results Panel Display" on page 36

◆ "Information Tab Display" on page 37

8 Change the text displayed in the Category drop-down list in the eGuide client.

8a Click Display Labels > Edit (for the desired resource bundle).

8b Find the Object.*category_name*.Label template key (where *category_name* is the name you gave the new category), and enter the text you want displayed.

8c Click Save.

Adding a Search Category

1 Click LDAP Data Sources > Edit (for the desired directory) > Advanced > New.

2 Enter the name of the new category.

3 Add at least one schema class and configure its associated attributes.

For details, see "Adding and Removing Schema Classes from a Search Category" on page 29.

4 Click Save.

Removing a Search Category

1 Click LDAP Data Sources > Edit (for the desired directory) > Advanced.

2 Select the desired category.

User is a mandatory category; Novell eGuide will not let you remove it.

3 Click Remove *category_name*.

eGuide Security

Novell eGuide security features let you specify who has rights to change eGuide configuration and LDAP data source attributes. You can also enforce or remove various security restrictions.

Managing Administration Roles

Novell eGuide supports two administrator roles: eGuide administrator and user administrator.

eGuide Administrators

Anyone designated as a Novell eGuide administrator sees the Administration Utility icon after logging in to eGuide and thus has full access to all administration features.

User Administrators

Those designated as user administrators can see the Edit Information button in the Details panel in the Novell eGuide client. After clicking Edit Information to display the Edit panel, a user administrator can edit any attribute that meets the following conditions:

- Is marked Editable in the Attributes page of the Administration Utility

- Belongs to a directory designated as the login server or as part of the authentication group in the Administration Utility

- Can be modified because Write privileges to this attribute have been granted to the user administrator within the LDAP data source

In the Edit panel, user administrators can see an icon next to the Manager field. Clicking the icon brings up a secondary browse window where the user administrator can search for and select a username to insert that user's distinguished name in the Manager field.

IMPORTANT: For the browse feature to work, the Manager and IsManager attributes in the User category must be designated as both Enabled and Editable in the Administration Utility.

Adding a User to an Administrator List

1 Click Administration Roles > Edit (for the desired administrator list).

2 Enter any portion of the user's login ID and then click Search.

3 Click the user's name in the Available box and then click the right-arrow to move the name to the Selected box.

4 Click Save List.

Removing a User from an Administrator List

1 Click Administrations Roles > Edit (for the desired administrator list).

2 Click the user's name in the Selected box and then click the left-arrow to move the name to the Available box.

3 Click Save List.

Setting Restrictions

1 Click Restrictions.

2 Make the desired changes and then click Save.

The following table gives details on each setting.

Table 4   Restrictions Settings

Setting	Purpose
Allow Save Credentials	Select if you want users to see a Remember Login Information checkbox on the login page. If a user selects this option, the user's validated credentials are encrypted and stored in a cookie on the user's workstation. The user can then load Novell eGuide multiple times without having to log in each time. The cookie is removed when the user clicks the Logout icon or after the cookie expiration time passes.
Cookie Expiration	Enter the number of seconds (86,400 seconds = one day) you want to elapse between login attempts before the login information cookie expires.

Setting	Purpose
Force Users to Authenticate	Select if you want all users to be forced to log in to use eGuide. If not selected, eGuide will load in anonymous mode. A user then has the option of logging in by clicking the eGuide Login icon. **NOTE:** If Allow Save Credentials is on and a login information cookie is available, the user will not be forced to reauthenticate.
Show Password Change Link	Select to make the Change Password link available in the Edit panel in the eGuide client. This also allows user administrators to change user passwords. **IMPORTANT:** Allow Self Administration must be selected before users can access the Edit panel.
Allow Self Administration	Select if you want to grant users access to change their editable attributes (those designated as Editable in the Attributes page). When you select Allow Self Administration, the View Personal Information icon in the eGuide client changes to Edit Personal Information.
Show Organizational Chart	Select if you want the Organizational Chart tab activated in the details panel for all users. The org chart shows the currently selected user's manager and all of that manager's direct reports. For details, see "Organizational Chart Tab Display" on page 37.

eGuide Interface and Usage

The following customization tasks are covered in this section:

General Appearance and Behavior

Changing General Customization Settings

To change Novell eGuide's general customization settings, click General, make the desired changes, and then click Save. See the following table for details on each setting.

Table 5   **General Settings**

Setting	Purpose
Current Theme	A theme consists of certain display settings that determine the layout and look-and-feel of the eGuide client. eGuide includes only the Default theme; however, you can use this theme as a template for creating your own. For details, see Appendix 5, "Adding a Skin or Theme," on page 45.
	Themes you create are added to the Current Theme drop-down list where you can select them.
	NOTE: You can change just the colors used within the current theme by using the Colors feature. For details, see "Changing Color Scheme" on page 34.
User Authentication Key	By default, the CN attribute is used as the user authentication key for the default User category in the first directory you configure. Change this selection if you want to use some other attribute (such as e-mail address) for logging in.
Home Page Link	Enter the URL of the page you want displayed when users click the Custom Home Link icon in the eGuide client.
Enable Auto-Edit	Select to allow authenticated users and user administrators to directly access the Modify form when clicking a username in a search results list (instead of displaying the normal Details panel).

Changing Color Scheme

To change the colors used for various Novell eGuide display elements, click Colors, select a color scheme, and click Save.

HINT: For details on downloading and installing additional color schemes and for instructions on how to create your own color scheme, see Appendix 5, "Adding a Skin or Theme," on page 45.

Searches

Users perform searches in the Novell eGuide client by selecting three search filters, entering the text they want to search for, then clicking Search. The three search filters, in the form of drop-down lists, are Category, Attribute, and Search Constraint. The sections that follow explain how to customize certain aspects of each of these filters. You will also learn how to customize Advanced Search settings and the Search Results panel.

Category Filter Labels

The Category filter lists all defined categories. By default, the Find People label is displayed for the mandatory User category in the Category filter list. For categories you add to Novell eGuide, the category name you specify becomes the default label displayed in the Category filter list.

You can change Category filter labels using the Display Labels feature. For details, see "Editing Label Text" on page 38.

Attributes Filter List

With the Attribute search filter, users select what attribute (such as Last Name or Department) they want to search on. The Attribute filter contains an alphabetized list of searchable attributes with one of the attributes selected by default. All attributes designated as Searchable in the Attributes page appear in the Attribute filter list.

To change what attributes appear in the list, simply change the attribute Searchable designations. For details, see "Editing LDAP Attributes" on page 27.

To change the default search attribute:

1 Click Display Layout > Edit (for the desired category) > Search Form.

> **HINT:** If you receive an access error instead of the Search Form page, check to make sure that at least one attribute has been designated as Searchable in the category you are editing.

2 Click the desired attribute and then click the up-arrow until the attribute is at the top of the list.

> **IMPORTANT:** An attribute must be designated as both Enabled and Searchable in the Attributes page for it to be displayed in the Ordered Search Attributes box.

3 Click Save.

> **NOTE:** The order of the attributes does not affect the order they appear in the Attributes filter drop-down list; they are always listed alphabetically. However, the order does affect Advanced Search, as explained in "Advanced Search Settings" on page 36.

Search Constraints

By default, all search constraints (Starts With, Contains, Equals, etc.) are available for searches.

To remove a search constraint from the list or add one back on:

1 Click Search Properties.

2 Click a search constraint and then click the appropriate arrow to move it to the other box.

Search constraints in the Selected box appear in the Search Constraint filter and those in the Available box do not.

Number of Search Rows

By default, a normal search contains one row of search criteria (Category, Attribute, and Search Constraint filters). You can add one or more rows so users have the option of doing an advanced search without having to select Advanced Search (the plus icon). In an advanced search, each successive search criteria row is connected to the previous row with a boolean (AND, OR) operator.

To add rows to a normal search:

1 Click Search Properties and then adjust the number for Default Search Rows.

2 Click Save.

Advanced Search Settings

By default, Advanced Search (accessed by clicking the plus icon) displays three search criteria rows.

To modify the number of Advanced Search rows:

1 Click Search Properties and then modify the number for Advanced Search Rows.

2 Click Save.

To change the default Attribute filter in each row:

1 Click Display Layout > Edit (for the desired category) > Search Form.

2 Reorder the list by selecting attributes and moving them with the arrows.

The first attribute in the list is the default search attribute in the first Advanced Search row, the second in the list appears in the second row, etc.

3 Click Save.

Search Results Panel Display

1 Click Display Layout > Edit (for the desired category) > List Form.

2 Select up to four attributes you want displayed in each column of the Search Results panel.

IMPORTANT: An attribute must be designated as Enabled in the Attributes page before you can select it as a column heading.

Details Panel

The Details panel in the Novell eGuide client consists of the Information tab and the Organizational Chart tab. You can customize the information displayed in both of these tabs.

Information Tab Display

The Information tab of the Details panel displays an ordered list of attributes (First Name, Last Name, Department, Phone Number, etc.) whenever a user clicks a search result.

All attributes designated as Enabled in the Attributes page are displayed in the Information tab. To change what attributes are displayed, simply change the Enabled settings for those attributes. For details, see "Editing LDAP Attributes" on page 27.

To change the order of attributes displayed in the Information tab:

1 Click Display Layout > Edit (for the desired category) > Details Form.

2 Click an attribute and then click the up-arrow or down-arrow to move it to the desired location in the list.

3 After making all the desired changes, click Save.

Organizational Chart Tab Display

Organizational (org) chart structure is controlled by the Manager and IsManager attributes. The distinguished name in a user's Manager attribute indicates who that user reports to. A True value in a user's IsManager attribute indicates that the user is a manager and activates the Reports To link (left-arrow icon) for traversing upward in the org chart from manager to manager.

By default, only a user's full name (created by combining the FirstName, MI, and SN attributes) and title (if available) is displayed in the org chart. In addition to the full name, you can display up to four additional attributes (only Title is selected by default) by doing the following:

1 Click Display Attributes > Edit (for the desired category) > Org Chart Form.

2 Select the attributes you want displayed along with the user's full name.

Only attributes designated as enabled in the Attributes page can be selected.

3 Click Save.

Labels

You can customize the labels (text strings) associated with LDAP objects and attributes as well as the labels associated with general Novell eGuide client presentation (field labels, buttons, messages, etc.). You can have a full set of labels—called a resource bundle—for each language you need to support in the eGuide client.

Adding a Language Resource Bundle

1 Click Display Labels > New.

2 Enter the standard two-character language code (required).

3 Enter the standard two-character country code (optional).

IMPORTANT: Do not enter a country code unless you know for sure that a user's browser will pass in that country code. The language and country codes you set here must match exactly the codes in the browsers of users for this particular language.

4 Click Save.

When the Novell eGuide client is launched, it checks the browser's language and country codes and uses the resource bundle with the matching codes, if available. Otherwise, it uses the U.S. English resource bundle.

Editing Label Text

1 Click Display Labels > Edit (for the desired resource bundle).

2 Click Attribute Labels or General Labels.

3 Make the desired changes.

4 Click Save (at the bottom of the page).

Debug Reports

♦ To have all diagnostic information for the current session of the Novell eGuide servlet written to a log file in the EGUIDE\WEB-INF\LOGS directory, click Debug, select Debug, and then click Save.

♦ To have the dynamic XML documents returning from the directory displayed on the server console and written to the active log file, click Debug, select XML, and then click Save.

Selecting XML also forces XSL style sheets to be reloaded from disk upon each client request. This can be especially helpful when developing and testing customized style sheets.

IMPORTANT: Turning Debug on affects Novell eGuide performance. For best performance, make sure debug is turned off.

4 Accessing the eGuide Client

If you just completed the Quick Setup Wizard and the Administration Utility is currently displayed in your browser, click the Launch Novell eGuide Client icon to access the eGuide client.

To access the eGuide client at any other time, point your browser to the following URL:

`http://`*`web_server`*`/eGuide`

Replace *web_server* with the host name or IP address of the Web server where you installed eGuide.

IMPORTANT: The "eGuide" portion of the URL shown above is case sensitive. You must type it exactly as shown (with a capital "G" and all other letters in lowercase).

5 Adding a Skin or Theme

You can further customize the user interface appearance of the Novell®
eGuide client by adding skins or themes.

Adding a Skin

Additional skin files might be available for download on the Novell eGuide
Web site. To install a downloaded skin file, place it in the currently selected
theme templates folder. By default, this is the EGUIDE\WEB-
INF\TEMPLATES\XSL\DEFAULT\BROWSER folder.

You can create your own skin file by copying and modifying an existing one
using any text editor. The file contains the XML definitions described in the
following table:

Table 6   Color Scheme XML Definitions

Setting	Defines
ImgTheme	A string that can be associated with image files.
	By default, ImgTheme is used to define the Logo_*theme_name* image file, but can be used for dynamically changing to other files based on the selected skin.
Dominant	The dominant color used for many display elements, including the Search Results pane.
Subordinate	The header background color.
Accent	The color of a selected tab.
DominantHighlight	The highlight color for many displays, including the Search Results pane.

Setting	Defines
Link	The text links color in the Details pane
ReverseText	The mouse-over text color for header icons

Adding a Theme

By adding a theme, you can completely customize the look and layout of the Novell eGuide client. You can, for example, create a theme with no frames, a theme with a different layout (placement of display elements), or one that is customized to search on a specific category other than Find People.

HINT: If you only need to change the color set, simply add a skin file. For details, see "Adding a Skin" on page 45.

IMPORTANT: Customizing the theme requires advanced knowledge of XSLT, HTML, JavaScript*, CSS, and other HTML-related technologies. In addition, Novell cannot support problems related to customized themes (unless the problem is unrelated to the style sheet). Therefore, in order to maintain support you must create a new theme instead of modifying the existing Default theme. This gives you a way to go back to the Default theme if you experience problems with the one you created.

A theme consists of several files in a theme directory in two separate locations: \EGUIDE\WEB-INF\TEMPLATES\XSL and \EGUIDE\LOOK. Each path is relative to the directory where you installed eGuide.

To create a new theme:

1 Copy and rename the DEFAULT directory in the XSL directory.

2 Copy and rename the DEFAULT directory in the LOOK directory.

IMPORTANT: The new theme directories must have exactly the same name in both the XSL and LOOK directories.

After creating the new directories, the directory name appears in the Current Theme drop-down list in the Administration Utility. For details on selecting a theme, see "Changing General Customization Settings" on page 33.

WARNING: Never directly modify the contents of the DEFAULT or ADMINUTIL theme directories.

3 Modify the template files in the new theme directory in the XSL directory as desired.

HINT: While modifying the templates, it is often necessary to view the XML output of the eGuide server. You can turn on XSL Debug to view the XML output in both

the eGuide server console and in a log file in the \EGUIDE\WEB-INF\LOGS folder. For details, see "Debug Reports" on page 39.

4 Modify the image, HTML, CSS, and JavaScript files in the new theme directory in the LOOK directory as desired.

6 Using Role-Based Services

Role-based Services (RBS) will allow users to adminster their own personal information in Novell® eDirectory™ using the Novell iManager utility.

RBS will be available in eDirectory 8.7. For more information, refer to the iManager documentation (http://www.novell.com/documentation) after eDirectory 8.7 is available for purchase.

A Using Web Services

Novell® eGuide runs on a web server. On NetWare® 6, Apache and Tomcat are installed by default. Microsoft Windows NT/2000 can run Apache and Tomcat or Microsoft Internet Information Services (IIS).

For information about Apache and Tomcat, visit the Apache Software Foundation Web site (http://www.apache.org).

For information about Microsoft Internet Information Services, visit the Microsoft Web site (http://www.microsoft.com).

B Settings in EGUIDE.CFG File

The following table describes the settings contained in the Novell® eGuide configuration (EGUIDE.CFG) file.

IMPORTANT: Both load balancing settings must be in the file and active (not commented) for either one to work.

Table 7   EGUIDE.CFG Settings

Setting	Specifies
Load Balancing	
Load.Max.Users=*n*	Maximum number (*n*) of concurrent eGuide sessions allowed.
Load.Redirect.URL=*URL*	URL to the next eGuide server
Logging	
Log.Console.Enable= *true/false*	Whether console logging is enabled (true = enabled).
Log.Enable=*true/false*	Whether file logging is enabled (true = enabled).
Log.Language=*language_code*	Language (two-character ISO language code) of the log file.
Log.Level=*level_name*	Logging level. Valid level names are normal, verbose, and diagnostic.
Log.Max.Age=*n*	Number of days (*n*) that log files should be kept.

Setting	Specifies
Log.Max.Size=*n*	Maximum combined size (*n* in kilobytes) of all files in the log directory.
	The oldest file is deleted when the maximum size is exceeded.
Log.Path=*path*	Path to the directory where log files are written.
Log.TimeStamp=*date/time format*	Time format for stamping log file entries.
	Refer to SimpleDateFormat in your Java documentation for details on defining a date/time format.
Security	
Security.Timeout=*n*	Number of minutes of inactivity before a user session is dropped
Security.UseClientIP.Enabled=*true/false*	Whether user client's IP address is used in constructing how the servlet identifies the user's browser session.
	The default setting is true. Set to false only if experiencing "invalid hash" errors.
	IMPORTANT: You must set to false if you are using Novell iChain™ with eGuide.
Other	
CharSet.Default=*character_set*	Default character set
	This setting overrides character sets detected by the browser. User only for the UTF-8 character set. All other settings are auto-detected.
Config.Update.Check=*n*	Time in minutes between eGuide checks of the EGUIDE.CFG file for changes
	This prevents the administrator from having to bring down the eGuide servlet to make configuration changes.
WebApp.Home.Path	Full pathname from the root to the Web application's context.

C Configuring and Using SSL for LDAP Connections

Follow these instructions if you want to use SSL connections between Novell® Web-based applications (e.g., iManager, eGuide) and an LDAP data source rather than plain- or clear-text connections.

WARNING: SSL connections are slower than plain- or clear-text connections. Using SSL may result in a noticeable degradation in performance.

This procedure varies depending on the server platform you are using (NetWare, Windows, UNIX). The specific platform is indicated under each step.

Step One: Download and Set Up the JSSE Package from Sun Microsystems

On NetWare

If you have NetWare® 6, JDK version 1.4, or iManager 1.5, you should already have the necessary software.

On Windows and UNIX

1 Verify if you have Java* Secure Socket Extension (JSSE) package on your server.

2 To download the JSSE, access the java.sun.com Web site (http://java.sun.com/products/jsse).

3 Add the following files to Java's jre\lib\ext folder:

- ◆ JSSE.JAR
- ◆ JNET.JAR

◆   JCERT.JAR

Step Two: Set the Provider in the Security Object

On All Platforms

Setting the provider in the security object can be done statically in the security properties file (jre\lib\security\java.security).

To set this provider statically, find the following line in the security properties file:

`security.provider.1=sun.security.provider.Sun`

Add the following line immediately after:

`security.provider.x=com.sun.net.ssl.internal.ssl.Provider`

where *x* is equal to the next sequential number (for example, `security.provider.2=com.sun.net.sll.internal.ssl.Provider`).

IMPORTANT: Both of these lines are required in order for SSL to work correctly.

Step Three: Configure the LDAP Server to Support SSL

On All Platforms

1 In ConsoleOne™, access the properties for the LDAP server object.

2 Click the SSL/TLS Configuration tab.

3 Select an SSL Certificate object in the Server Certificate field.

   NOTE: These objects were created at the time eDirectory™ was installed.

4 Make note of the SSL port (typically 636).

5 Make sure the Disable SSL Port option is *not* selected.

6 Save your changes.

7 Access the LDAP server's properties again and click Refresh NLDAP Server Now on the General tab.

Step Four: Export the Trusted Root Certificate

On All Platforms

1 In ConsoleOne, access the properties for the SSL Certificate object you just configured.

2 Click Certificates > Trusted Root Certificate.

3 Click Export and save the file in binary DER format (filename is typically trustedrootcert.der).

Step Five: Import the Trusted Root Certificate

On All Platforms

For this step, you will need a JDK to use keytool. If a JRE was installed with iManager, you will need to download a JDK to use the keytool.

You now need to import the Trusted Root Certificate into your cacerts or jssecacerts trust store file.

1 Find the cacerts or jssecacerts file in the lib\security folder (relative to your Java home folder).

2 Find keytool in the \bin folder (relative to your Java home folder).

IMPORTANT: You must use keytool that comes with JVM 1.3 or later. The keytool that comes with JVM 1.2.2 or earlier will not work.

3 Execute the following keytool command:

```
keytool -import -alias [alias_name] -file
[full_path]\trustedrootcert.der -keystore
keystore="\usr\java\jre\lib\security"
```

Replace *[alias_name]* with a unique name for this certificate and make sure you include the full path to trustedrootcert.dir and cacerts.

IMPORTANT: You will be prompted for a keystore password. If you haven't changed it, the default is "changeit".

Step Six: Configure eGuide to Use SSL

On All Platforms

1 From a web broweser, open the Novell eGuide Administration Utility.

2 Click LDAP Data Sources > Edit (for the appropriate directory) > LDAP Settings.

3 Select Enable SSL.

4 For Secure Port, type the LDAP server port number you made note of when configuring the LDAP server.

5 Click Save.

If you receive an error message or hang when you click Save, go through all of the SSL configuration steps again to make sure the configuration is completely correct. The following are two examples of bad settings that will cause eGuide to hang:

◆ Trying to communicate with an SSL port using a plain-text connection

◆ Trying to communicate with a plain-text port using an SSL connection

D Accelerating eGuide with iChain

Novell® eGuide has the capability of being secured and accelerated via Novell iChain®. By using iChain, you can

- Enable silent authentication so that users are automatically logged in when they access eGuide.

- Use Web acceleration technologies to accelerate access to eGuide.

- Load balance multiple instances of eGuide.

Following these high-level steps will help you set up iChain to work with eGuide.

1. (Optional) Create an LDAP Authentication Profile

If you want iChain to pass user credentials to eGuide, you must create an LDAP authetication profile.

Before authentication will work with the proxy services, you need to create an authentication profile that will point the authentication requests to the LDAP data source.

To create an LDAP authentication profile:

1 Open the iChain browser-based administration tool and click Configure > Authentication > Insert.

2 Name the authentication profile ldap.

3 Select LDAP Authentication and LDAP Options.

4 Enter the IP address of your internal eDirectory™ server for the LDAP Server Address.

5 Enter the LDAP username and password.

6 Select Use Distinguished Name for the LDAP Login Name Format.

7 Click Insert to add an LDAP context that contains all authenticating users and click OK.

8 Click OK > Apply.

2. Configure eGuide as a Web Accelerator

1 From the iChain browser-based administration tool, click Web Server Accelerator.

2 Add a web server accelerator by clicking New and specifying the Name, DNS Name, and Web Server Address.

3. (Optional) Enable iChain to Pass the Authentication Credentials to eGuide

1 From the iChain browser-based administration tool, click Web Server Accelerator.

2 In the Add Authentication Profiles dialog box, check the Enable Authentication check box.

3 Specify the Authentication Options and LDAP profile created in Step "1. (Optional) Create an LDAP Authentication Profile" on page 59.

4. (Optional) Enable the SSLizer in iChain

To transmit content over HTTPS, you need to enable the SSLizer in iChain.

1 From the iChain browser-based administration tool, click Web Server Accelerator.

2 Check the Enable Secure Exchange check box.

3 Specify the certificate.

If Auto is selected, iChain will automatically generate a certificate; however, the users will be presented with an unknown certificate each time they enter eGuide until a certified certificate is assigned.

HINT: Turning on Secure Exchange will force users to be prompted to display non-secure items from their browser. The AOL Instant Message and Yahoo Instant Message data handlers use a nonsecure request when checking if other users are

online. These handlers (and other that have been obtained) can be changed so the Show Non-Secure Items prompt will not appear.

5. Configure iChain to Not Cache Dynamic eGuide Content

1 From the iChain browser-based administration tool, click Configure > Management.

2 Check the Enable Pin List check box.

3 Add the hostname.domain/eGuide*/URL Mask and select Bypass from the Pin Type drop-down list.

4 From ConsoleOne®, find your iChain Service object and add a new protected resource. Specify the Name, URL Prefix, and Access Type.

Secure verifies username, password, and ACL rights. Restricted verifies username and password. Public allows requests access.

IMPORTANT: You will need to refresh you iChain server to reflect these changes.

6. Configure eGuide

1 From the eGuide Administration Utility, ensure that your LDAP data source is configured to the same directory as the iChain LDAP authentication profile (see "1. (Optional) Create an LDAP Authentication Profile" on page 59).

2 Click Restrictions.

3 Disable Allow Save Credentials.

7. (Optional) Configure iChain to Load Balance eGuide

1 After configuring multiple instances of eGuide, add each instance to the Web Server Addresses.

2 Check the Load Balance at Session Level Only check box.

E UI Handlers

This UIHandlerss appendix describes the User Interface (UI) Handlers used in Novell® eGuide. UI Handlers display information from the LDAP data source in a specific or customized fashion.

UI Handlers can also be created and customized to meet individual needs. For example, one company might want to display a user's e-mail address as a clickable link while another company might want to display the information as static text.

eGuide comes with a base set of UI Handlers. UI Handlers can be associated with either the Attribute Name itself or the LDAP Directory Syntax.

UI Handlers Associated by Attribute Name

NOTE: An asterisk (*) indicates the default handler for the attribute.

Name	Description	Association by Attribute Name
URL Project Link	Can be used to edit and display project links. A project link consists of a Label and a URL, and is stored in LDAP using Labeled URI format. The View mode on this handler displays the label as a clickable link to the URL. Editing attributes associated with this handler will prompt for the Label and the URL in separate textboxes.	LABELEDURI

Name	Description	Association by Attribute Name
Email Link	Displays attributes as clickable links using the HTML mailto: tag which launches the default eMail client.	EMAIL* CELLPHONEEMAIL*
Text Area Entry	Can be used to place a description or summary of the object. The attribute information is displayed in the header of the objects details, and it edits as an HTML TextArea.	DESCRIPTION*
Textbox (Single-Value, Edit Only)	Hides attributes unless in edit mode. If in edit mode, allows only single-value strings to be entered via HTML TextBox.	GIVENNAME* INITIALS* LASTNAME* TITLE*
Yahoo IM Launcher (via Browser)	Displays Instant Messaging Link to launch Yahoo's Internet Client (via browser).	YAHOOIMID
AOL AIM Launcher (via Application)	Displays Instant Messaging link to launch the AOL Instatant Messaging (AIM) Application. This handler assumes the AIM client is installed.	INSTANTMESSAGINGID
Combined US Address and Map Link	Displays address attributes in the standard U.S. envelope mail format. If POSTALCODE is populated, this handler creates a map link to the address. This handler is sorted by the STREET attribute (edit mode only). Related attributes CITY, ST, POSTALCODE, and CO should use this handler if displaying them is desired.	STREET ST CITY POSTALCODE CO

Name	Description	Association by Attribute Name
Hidden Attribute	When selected, associated attributes are hidden. This is useful when desiring to used the attribute in the detail.xsl document, but not wanting to display the attribute in the list. If you don't need the attribute at all, we recommend that you completely disable the attribute instead of using this handler.	USERPASSWORD* CN* PHOTOAGREE*
Combined Name	Combines the editing of a person's full name, which is broken into GIVENNAME, INITIALS, and LASTNAME. These attributes should all be enabled and editable. Ordering is controlled by the LASTNAME Template Key. Hides attributes when not being edited, so they can be displayed only in the detail header.	GIVENNAME INITIALS LASTNAME
Binary Photo File	Displays PHOTO in header of object details. When being edited, allows for browsing of the file. This handler also allows specifying file store location (i.e. LDAP or FILE), maximum file size, and file store path when applicable. These changes can be made in UIHandlers.XML.	PHOTO*
Binary Video File	Displays VIDEO in header of object details. When being edited, allows for browsing of the file. This handler also allows specifying file store location (i.e. LDAP or FILE), maximum file size, and file store path when applicable. These changes can be made in UIHandlers.XML.	VIDEO*

Name	Description	Association by Attribute Name
Binary Audio File	Plays AUDIO attribute in object details. When being edited, allows for browsing the file. This handler also allows specifying file store location (LDAP or FILE), maximum file size, and file store path when applicable. These changes can be made in UIHandlers.XML.	AUDIO*

UI Handlers Associated by LDAP Directory Syntax

NOTE: An asterisk (*) indicates the default handler for the attribute.

Name	Description	Association by LDAP Directory Syntax
Expanding Textbox	Uses the Expanding Textbox control when possible. This control is available only on Internet Explorer 5.5 and later. When this browser is not available, eGuide uses the standard controls.	Directory String*
True/False Selector	Displays a True/False selector. If attribute is not currently True or False, this handler creates an additional option which is the current value.	Boolean
Distinguished Name Selector	Displays Distinguished Names (DNs) abstractly using the Display-Attributes, defined in the UIHandlers.XML file. By default these attributes are GIVENNAME, INITIALS, and LASTNAME. When in edit mode, eGuide allows users to be specified using List Attributes, defined in the eGuide Administration Utility - Display Settings.	DN*

Name	Description	Association by LDAP Directory Syntax
Single-Value Distinguished Name Selector	Displays and edits a single-value Distinguished Names (DN) abstractly using the Display-Attributes" defined in the UIHandlers.XML file. By default these attributes are GIVENNAME, INITIALS, and LASTNAME. When in edit mode, eGuide allows users to be specified using the List Attributes, defined in the eGuide Administration Utility - Display Settings.	DN
Multi-Value US Phone Number	Ensures that telephone numbers are entered in a specific format. By default this format is "(012) 345-6789", but can be easily changed in the UIHandlers.XML file.	Telephone Number
Single-Value US Phone Number	Ensures that a single-value telephone number is entered in a specific format. By default this format is (012) 345-6789, but can be easily changed in the UIHandlers.XML file.	Telephone Number*
Single-Value International Phone Number	This handler will ensure that a single-value telephone number is entered in a specific format. By default this format is +0123456789 (optionally followed by additional digits), but can be easily changed in the UIHandlers.XML file.	Telephone Number
Single-Value Australia Phone Number	This handler will ensure that a single-value telephone number is entered in a specific format. By default this format is (01) 2345 6789, but can be easily changed in the UIHandlers.XML file.	Telephone Number

Name	Description	Association by LDAP Directory Syntax
True/False Selector (Edit Only)	Displays a True/False selector. If attribute is not currently True or False, this handler creates an additional option which is the current value. Attribute is hidden unless in edit mode.	Boolean*
Textbox	Shows basic Display Format and Edit Format controls.	Directory String
Textbox (Single-Value)	In edit mode, allows only a single string to be entered.	Directory String
Binary File	Creates link to launch specified file from object details. When being edited, allows for browsing of file. This handler also allows specifying file store location (i.e. LDAP or FILE), maximum file size, and file store path when applicable. These changes can be made in UIHandlers.XML.	Octet String*
Generic Control	Is available for all attributes regardless of syntax or attribute key name. It treats the attribute as a string and shows multi-value controls as appropriate.	All other syntaxes

Using a UI Handler

IMPORTANT: Before you can use a UI Handler, you must have Novell® eGuide configured and running.

To use a pre-existing UI Handler:

1 In the eGuide Administration Utility, click LDAP Data Sources.

2 Select Edit for the desired LDAP Data Source.

3 On the Attributes tab, find the attribute you want to modify and click More Options.

4 Select the desired UI Handler.

5 Select the UI Handler and click OK.

Changing Advanced Properties of an Existing UI Handler

To see or modify working examples of these properties, you should explore the UIHandlers.XML file located in the \eGuide\WEB-INF\plugins\eGuide directory.

Although most UI Handlers only need to be selected from the eGuide Aministration Utility, there are some additional settings that might be useful for advanced configuration.

These settings are specific to each UI Handler's Data Handler. Data Handlers are beyond the scope of this document, but you don't necessarily need to understand Data Handlers to use their features. The basic idea is that each UI Handler has a corresponding Data Handler. The Data Handler knows how to store and retrieve information to the LDAP data source. The advanced properties allow the administrator to change some of the behaviors in the storing and retrieving process.

For example, you might choose to display your LDAP DN attribute using a set of different attributes. These Abstracted attributes are stored on the object that the DN specifies (not on the object where the DN attribute is located); therefore, you must specify which attributes for which eGuide should do an additional read, in order to display the attributes.

Creating a New UI Handler

There are two basic steps to creating your own UI Handler:

Step 1. Register the UI Handler Information Using an XML File in the \plugins\eGuide Directory

When the eGuide server is started, it searches the \plugins\eGuide directory for XML files. The files located in this directory define what UIHandlers are available in the eGuide Administration Utility. Therefore, you can create or modify existing UI Handlers by adding or editing the files in this directory. Note that the file can have any name but must have the .XML extention.

Basically, you need to define the UI Handler, an ID, name, and description. You also need to specify the association to the Temple Key or attribute syntax. This is done using the attribute-name or syntax-name tags.

You can also specify which clients can use this handler. By using the eGuide Administration Utility you can easily tell if the handler is capable of running various devices. You can also specify multi-valued-enabled, single-valued-enabled, read-write-enabled, and read-only-enabled if desired.

You will also need to define the class-name for the Data Handler. Data Handlers give you the capability of changing the way the information is retrieved and stored using Java classes. You could, for example, query a completely separate database to retrieve some information. However, most of the time you will be specifying the Default Data Handler as shown in the example below.

Use the following handler definition as an sample data to create the User Type handler. Note that these examples can be found in the Customuihandler.XML document located in the \eGuide\WEB-INF\plugins\eGuide folder. You need only to un-comment the lines and restart eGuide to make them work:

```
<!-- ATTRIBUTE : User Type Selector -->
<ui-attribute-handler>
    <id>SVUserType</id>
    <attribute-name>USERTYPE</attribute-name>
    <class-name>com.novell.eguide.handler.LabeledURIDataHandler</class-name>

    <client>browser</client>
    <client>pocket</client>

    <multi-valued-enabled/>
    <single-valued-enabled/>
    <read-write-enabled/>
    <read-only-enabled/>

    <display-name-key>User Type Selector</display-name-key>
    <resource-properties-file>eguideresources</resource-properties-file>
</ui-attribute-handler>
```

After you have defined the same information in the XML file, you will need to restart the eGuide server. At this point you can go and select the custom UI Handler. However, when viewing the handler in the client, you will get a warning message for the associated attribute. You need to complete step 2 to finish the process.

Step 2. Define Behavior of UI Handler in UIHandlers.XSL File

Using HTML, JavaScript, CSS, and other browser languages, you define the way your information is displayed and/or edited.

For this example, uncomment the following xsl from the UIHandlers.xsl file located in the eGuide\WEB-INF\templates\xsl\default\browser directory:

```
<!-- SV Employee Type -->
<xsl:when test="@uihandler='SVEmployeeType'">
    <tr>
        <xsl:call-template name="LabelTD"/>
        <xsl:choose>
            <xsl:when test="edit='true'">
                <td class="ValueText">
                    <input type="hidden" name="{name}" id="{name}">
                    <xsl:attribute name="value"><![CDATA[<undefined><nochange></
nochange></undefined>]]></xsl:attribute>
                    </input>
                <select size="1" class="inputTextBox" name="_SV_CTRL_{name}"
value="{value}" onchange="updateSvXml('document.forms[0]._SV_CTRL_{name}')">
                        <option value="Contract"><xsl:if test="value =
'Contract'"><xsl:attribute name="selected">true</xsl:attribute></
xsl:if>Contract</option>
                        <option value="Full Time"><xsl:if test="value = 'Full
Time'"><xsl:attribute name="selected">true</xsl:attribute></xsl:if>Full Time</
option>
                        <option value="Internship"><xsl:if test="value =
'Internship'"><xsl:attribute name="selected">true</xsl:attribute></
xsl:if>Internship</option>
                        <option value="Part Time"><xsl:if test="value = 'Part
Time'"><xsl:attribute name="selected">true</xsl:attribute></xsl:if>Part Time</
option>
                    <option value=""><xsl:if test="value = ''"><xsl:attribute
name="selected">true</xsl:attribute></xsl:if>(None)</option>
                    </select>
                </td>
            </xsl:when>
            <xsl:otherwise>
                <xsl:call-template name="MSV_GenericTextShowTD"/>
            </xsl:otherwise>
        </xsl:choose>
    </tr>
</xsl:when>
```

NOTE: In order for these changes to reflect in a currently running system, you must either restart the server or enable XML Debug from the eGuide Administration Utility under the Reporting - Debug settings. XML Debug is used for two reasons: To disable

caching of the templates and to cause the XML output of eGuide to be written to the console screen as well as the log files. It will, on the other hand, slow down the server in order to accomidate for these two features.

At this point you can select the UI Handler for the EMPLOYEETYPE attribute, or any attribute with the Template Key mapped to EMPLOYEETYPE.

F eGuide Action Commands

This appendix describes the parameters that supply actions to the Novell® eGuide servlet. These commands can also be used by other applications to communicate with the eGuide servlet.

How to View Action Commands

1 In the eGuide Administration Utility, click Debug.

2 On the Debug page, check the Debug check box.

3 In the eGuide log file and/or the application server console, look for the term "Key:" For every action the values passed in from the URL or through a Post form will be displayed with the Key: Name=value.

Command Parameters and Examples

No Action

When no action is submitted on the command line and in Anonymous mode, the eGuideForm action will be initiated. If in Forced Authentication mode, AuthForm is loaded.

Parameter

Parameter	Description
None	

Example

```
http://www.domainname.com/eGuide/servlet/eGuide
```

AuthForm

This is the default action when in Forced Authenticated mode. It sets up the initial frames for the login pages and uses Authform.XSL which initiates the action to AuthHeader and AuthBody.

Parameters

Parameters	Description
Action=AuthForm	
User.context=rypxSbuoirAi	A blank User.context that creates a new session

Examples

Forced Authentication mode:

```
http://www.domainname.com/eGuide/servlet/eGuide
```

Only Forced Authentication Mode:

```
http://www.domainname.com/eGuide/servlet/
eGuide?Action=AuthForm
```

NOTE: When creating a theme without frames, remove the links in Authform.XSL to AuthHeader and AuthBody. Because the authentication process loads the Authbody.XSL by default, Authform.XSL and Authbody.XSL should contain the same information.

AuthHeader

This action is called after AuthForm to finish setting up the frames. The Authheader.XSL file is loaded by default.

Parameters

Parameter	Description
Action=AuthHeader	
User.context=rypxSbuoirAi	A blank User.context that creates a new session

Example

Only Forced Authentication mode:

```
eGuide?Action=AuthHeader&User.context=rgyadiof
```

AuthBody

This action is called to set up the main authentication HTML page. It can be accessed when in Anonymous mode using the Login action. The Authbody.XSL file is loaded by default.

Parameters

Parameter	Description
Action=AuthBody	
User.context=rypxSbuoirAi	A blank User.context that creates a new session

Examples

Only Forced Authentication mode:

```
eGuide?Action=AuthBody&User.context=rgyadiof
```

Anonymous mode:

```
eGuide?Action=Login&User.context=rgyadiof
```

Detail.get

These actions display the details of the LDAP entry from a specified directory.

Parameters

Parameter	Description
Action=Detail.get	Action
User.dn=cn=name,ou=name2,o=novell	Distinguished Name of entry
Directory.uid=*DirectoryName*	Ask your eGuide system administrator for this name
Object.uid=USER	The category in which the entry is defined

Optional Parameter	Description
User.context=	Session control
stsh=other.xsl	Specify style sheet other than default
RecurseDN=false	Read DN and return info defined in DN

Example

```
eGuide?User.context=rytuUjkhhkAi&Action=Detail.get&User.dn=c
n=userid,ou=org,o=Novell&Directory.uid=Extensive&amp;Object.
uid=USER'
```

DetailEdit

See "Detail.get" on page 75 and replace the action with the desired actions. The only difference is the XML document has additional information for these actions.

DetailModify

See "Detail.get" on page 75 and replace the action with the desired actions. The only difference is the XML document has additional information for these actions.

DetailUpdate

This action updates the LDAP entry in the directory and returns the results.

NOTE: The attributes being modified are returned to eGuide with the Key Name of the Attribute and the value. The value is to be created in XML format and should be wrapped with the CDATA tag. If the key word "nochange" is found for the value, then the attribute is ignored and not updated.

Parameters

Parameter	Description
Action=DetailUpdate	Action
User.dn=cn=name,ou=name2,o=novell	Distinguished Name of the entry
Directory.uid=*DirectoryName*	Ask your eGuide system administrator for this name
Object.uid=USER	The category in which the entry is defined
AttributeKeyName=<undefined><value><![CDATA[new value]]></value></undefined>	

Optional Parameter	Description
User.context=	Session control
stsh=other.xsl	Specify style sheet other than default
RecurseDN=false	Replaces DN with user info. Default is True.

Example

```
<form action="eGuide?&Action=DetailUpdate method="post" >
     <input name=Directory.uid type=hidden value="novell">
     <input name="User.context" type="hidden" value="eiadyda">
     <input name="Object.uid" type="hidden" value="USER">
    <input name="User.dn" type="hidden" value="cn=name,ou=organUnit,o=novell">
    <input name="TITLE" type="text" value="<undefined><value> <![CDATA[new
```

```
value]]>
</value> </undefined>" >
</form>
```

eGuideForm

The default action when in Anonymous mode or after the authentication process in Forced Authention mode.

Parameters

Parameter	Description
Action= eGuideForm	Action
User.context=rypxSbuoirAi	A blank User.context that creates a new session

Optional Parameter	Description
stsh=otherform.xsl	Used to specify style sheet other than default

Example

Anonymous mode:

```
eGuide
```

or

```
eGuide?Action=eGuideForm&User.context=rgyadiof&stsh=otherfor
m.xsl
```

eGuideHeader

This is called from the Eguideform.XSL and sets up the eGuide search categories and attributes.

Parameters

Parameter	Description
Action=eGuideHeader	Action
User.context=rypxSbuoirAi	A blank User.context that creates a new session
Search.rows=1	The number of Search rows to display by default

Optional Parameter	Description
stsh=otherform.xsl	Used to specify style sheet other than default

Example

```
eGuide
```

or

```
eGuide?Action=eGuideForm&User.context=rgyadiof&stsh=otherfor
m.xsl
```

eGuide.verifyCredentials

This is used in the authentication process to make an authenticated connection to the directory and verify the users credentials.

Parameters

Parameter	Description
Action=eGuide.verifyCredentials	Action
User.context=rypxSbuoirAi	A blank User.context that creates a new session
Value1=	The user's DN to authenticate
Value2=	The password

Optional Parameter	Description
RememberUserInfo=true	When true, stores credentials as a cookie in the browser

Example

```
eGuide?eGuide.verifyCredentials&User.context=rypxSbuoirAi&DN
=cn=Admin,o=novell
```

eGuide.verifyNewPassword

This is used when the password has been determined to be expired and needs
to be reset.

Parameters

Parameter	Description
Action=eGuide.verifyNewPassword	Action
User.context=rypxSbuoirAi	A blank User.context that creates a new session
OldPassword=	The old password
Value1=	The password
Value2=	The password

Example

```
eGuide?Action=eGuide.verifyNewPassword&User.context=rypxSbuo
irAi&OldPassword=old &Value1=new psswrd&Value2=new psswrd
```

eGuide.selectContext

This is used in the authentication process when multiple users are found with
the same login ID.

Parameters

Parameter	Description
Action=eGuide.selectContext	Action
User.context=rypxSbuoirAi	A blank User.context that creates a new session
DN=cn=name,o=container	The selected DN to authenticate

Example

```
eGuide?eGuide.selectContext&User.context=rypxSbuoirAi&DN=cn=
Admin,o=novell
```

List.get

This is a search request with a specified filter, and the resultant set is a list. The search filter is searched against any or all directories configured in the eGuide Administration Utility. Use the max key to cache list results larger than the value set, then see the next List.get action for cached lists.

Parameters

Parameter	Description
Action=list.get	Action
val1=*value*	Value searching for
attr1=*attribute*	Attribute key name
crit1=sw	The criteria used to evaluate the value
Object.uid=USER	The search category
Search.attributes=attr1,attr2,attr3,...	The attributes returned from a search

Optional Parameter	Description
User.context=rypxSbuoirAi	A blank User.context that creates a new session
Primary.sortkey=attr1	The first attribute used to determine the sort order of the list
Secondary.sortkey=attr2	The second attribute used to determine the sort order of the list
max=20	The number to display on the browser at any one time; this speeds up the request to the end user
stsh=otherform.xsl	Specifies style sheet other than default

Example

```
<form action="eGuide?&Action=List.get&Object.uid=USER&User.context="
method="post" >
 <input name="Search.attributes" type="hidden"
value="GIVENNAME,LASTNAME,DEPARTMENT">
  <input name="Primary.sortkey" type="hidden" value="LASTNAME">
  <input name="Secondary.sortkey" type="hidden" value="GIVENNAME">
 <select name="crit1">
  <option value="co">contains</option>
  <option value="eq">equals</option>
  <option selected="true" value="sw">starts with</option>
 </select>
 <select name="attr1">
  <option value="GIVENNAME">First Name</option>
  <option selected="true" value="LASTNAME">Last Name</option>
 </select>
 <input size="20" type="text" name="val1">
 <input type="Submit">
</form>
```

List.get (Cached list)

The list action when using max and start parameters will retrieve information from a previously cached list. The end user will see a significant increase in performance by using a cached list. The original list.get request must use the max parameter to cache the results in the users session. Then the start value

tells eGuide where to start in the cached list. Use the prev and next values in the XML file to determine what value to start with.

Parameters

Parameter	Description
Action=list.get	Action
start=100	The next starting point on the list
max=20	The number to display on the browser at any one time; this speeds up the request to the end user

Optional Parameter	Description
stsh=otherform.xsl	Specifies style sheet other than default
User.context=rypxSbuoirAi	A blank User.context that creates a new session

Example

```
eGuide?Action=list.get&max=20&start=20&User.context=rypxSbuo
irAi
```

List.get (Advanced)

This is a search request with a specified filter, and the resultant set is a list. The difference between the list and advanced list action is that there can be any given number of values and attributes sent in the query to define the search filter. For any given number of values (parameter val1,val2,val3…) submitted there must be the same number of attributes (attr1,attr2,attr3…) and supporting criteria (crit1,crit2,crit3…) submitted. Each set of attributes, criteria and values (attr1,crit1,val1), (attr2,crit2,val2) must be separated by a Boolean value (aoval1).

Parameters

Parameter	Description
Action=list.get	Action
val1=valu1&val2=val2&val3=value3	
attr1=attribute&attr2=attribute&attr3=attribute3	
crit1=sw&crit2=cq&crit3=sw	
Object.uid=USER	The search category
Search.attributes=attr1,attr2,attr3,...	The attributes returned from the search

Optional Parameter	Description
User.context=rypxSbuoirAi	A blank User.context that creates a new session
Primary.sortkey=attr1	The first attribute used to determine the sort order of the list
Secondary.sortkey=attr2	The second attribute used to determine the sort order of the list
aoval1=and	For advanced searches when defining more than one value to search on
max=20	Specifies the number to display on the browser at any one time; this speeds up the request to the end user
stsh=otherform.xsl	Specifies style sheet other than default

Login

This is usually called to authenticate when eGuide is in anonymous mode. It starts the authentication process and the Authbody.XSLstylesheet is loaded.

Parameters

Parameter	Description
Action=Login	Action

Optional Parameter	Description
User.context=rypxSbuoirAi	A blank User.context that creates a new session

Example

```
eGuide?Action=Login&User.context=rypxSbuoirAi
```

OrgChart

This is a combination between the list and details actions. It retrieves the manager information from a specified directory but the subordinates can be retrieved from multiple directories.

Parameters

Parameter	Description
Action=Org.Chart	Action
Directory.uid=*DirectoryName*	
Manager.dn=cn=userid,o=org,o=novell	
attr1=Manager	
crit1=eq	
val1=cn=userid,o=org,o=novell	
Search.attributes=GIVENNAME,LASTNAME,ORGCHARTPARENTDN,ORGCHARTISPARENT	
Object.uid=USER	

Parameter	Description
User.dn=cn=userid,ou=org,o=novell	

Optional Parameter	Description
User.context=rypxSbuoirAi	A blank User.context that creates a new session
stsh=other.xsl	Specifies tyle sheet other than default
RecurseDN=false	Returns User info. Default is true.

Example

```
eGuide?User.context=rytuUjkhhkAi&Action=Org.Chart&Directory.
uid=Extensive&User.dn=cn=nbjensen,ou=eGuide,ou=Demo,o=Novell
&Object.uid=USER&Search.attributes=GIVENNAME,INITIALS,LASTNA
ME,EMAIL,TITLE,ORGCHARTPARENTDN,ORGCHARTISPARENT,&attr1=MANA
GER&crit1=eq&Manager.dn=cn=Bgarrett,ou=eGuide,ou=Demo,o=Nove
ll&val1=cn=Bgarrett,ou=eGuide,ou=Demo,o=Novell
```

OrgChartUpdate

This is used to update the attribute mapped to the key ORCHARTPARENT.

Parameters

Parameter	Description
Action=Org.Chart	Action
Directory.uid=*DirectoryName*	
Manager.dn=cn=userid,o=org,o=novell	
attr1=Manager	
crit1=eq	
val1=cn=userid,o=org,o=novell	

Parameter	Description
Search.attributes=GIVENNAME,LAST NAME,ORGCHARTPARENTDN,ORG CHARTISPARENT	
Object.uid=USER	
TargetDN=cn=userid,ou=org,o=novell	User modifying
AttrTargetValue=cn=admin,o=novell	The value we want to change
AttrTargetName=ORGCHARTPAREN TDN	The attribute key name to update

Optional Parameter	Description
User.context=rypxSbuoirAi	A blank User.context that creates a new session
stsh=other.xsl	Specifies style sheet other than default
RecurseDN=false	Returns User info. Default is true

Example

See "OrgChart" on page 85, but add TargetDN, AttrTargetValue, and AttrTargetName as parameters.

PasswordModify

This is used to setup the page view to modify the password. The end user will receive a view based on his role. An user administrator (setup in the eGuide Administration Utility) or a user with the role to modify other's passwords are given two input fields. A normal end user is given three.

Parameters

Parameter	Description
Action=PasswordModify	Action

Parameter	Description
User.dn=cn=name,ou=name2,o=novell	Distinguished Name of the entry
Directory.uid=*DirectoryName*	Ask your eGuide system administrator for this name
Object.uid=USER	The category in which the entry is defined

Optional Parameter	Description
User.context=rypxSbuoirAi	A blank User.context that creates a new session

PasswordUpdate

Parameters

Parameter	Description
Action=PasswordUpdate	Action
User.dn=cn=name,ou=name2,o=novell	Distinguished Name of the entry
Directory.uid=*DirectoryName*	Ask your eGuide system administrator for this name
Object.uid=USER	The category in which the entry is defined
Value1=	The new password
Value2=	The new password
OldPassword=	The old password

Optional Parameter	Description
User.context=rypxSbuoirAi	A blank User.context that creates a new session

PhotoModify

This creates the page view to allow the end user to add or remove a photo as well as accept a photo agreement.

Parameters

Parameter	Description
Action=PhotoModify	Action
User.dn=cn=name,ou=name2,o=novell	Distinguished Name of the entry
Directory.uid=*DirectroyName*	Ask your eGuide system administrator for this name
Object.uid=USER	The category in which the entry is defined

Optional Parameter	Description
User.context=	Session control
RecurseDN=false	Returns User info. Default is true.

NOTE: The User.context is used to keep track of the current user's session. When making an initial request, the User.context can be omitted, but any pages to follow must contain the User.context parameter.