

# Novell exteNd™ Director™ Standard Edition

4.1

USER GUIDE

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# Contents

- About This Guide** **3**
- Additional Documentation . . . . . 3
- Documentation Updates . . . . . 3
- Documentation Conventions . . . . . 3
- 1 Overview** **5**
- Novell exteNd Director . . . . . 5
- Novell exteNd Director Components . . . . . 6
  - Gadgets . . . . . 6
  - Pages . . . . . 6
  - Communities . . . . . 6
- 2 Using Novell exteNd Director Gadgets** **7**
- Alta Vista Search Gadget. . . . . 8
- Authentication Gadget . . . . . 8
- Bookmark Gadget . . . . . 9
- Change Password Gadget . . . . . 9
- Citrix Gadget . . . . . 10
- Community Access Gadget. . . . . 11
- Community Calendar Gadget. . . . . 11
- Community Chat Gadget . . . . . 12
- Community Discussion Gadget. . . . . 14
- Community File Sharing Gadget . . . . . 15
- Community Management Gadget . . . . . 16
- Community Message Gadget. . . . . 16
- Exchange Gadget . . . . . 18
- GroupWise Calendar Gadget. . . . . 18
- GroupWise Mail Gadget . . . . . 19
- HTML Gadget. . . . . 19
- MoreOverNews Gadget . . . . . 20
- NetWork File Gadget . . . . . 20
  - Creating Directories. . . . . 21
  - Uploading Files . . . . . 21
  - Creating Shortcuts to Directories . . . . . 21
  - Deleting Directories and Files. . . . . 22
- Phone Book Gadget . . . . . 22
- Preferences Gadget . . . . . 22
  - Content . . . . . 23
  - Layout. . . . . 23
  - Theme. . . . . 25
  - Pages . . . . . 25
  - Password . . . . . 25
- Registration Gadget . . . . . 26
- RSS Gadget . . . . . 26
- Self Administration Gadget . . . . . 28
  - Editing Self Admin Object Attributes . . . . . 28
- Shortcut Gadget . . . . . 29
- Stock Ticker Gadget . . . . . 31
- Survey Gadget . . . . . 32
- Topics Gadget . . . . . 32

User Admin Gadget . . . . .	32
Editing User Admin Object Attributes . . . . .	34
Web Mail Gadget . . . . .	35
<b>3 Creating and Configuring Communities</b>	<b>37</b>
Community Types . . . . .	37
Creating Communities . . . . .	37
Configuring Communities . . . . .	38
Adding a Community Owner . . . . .	38
Viewing a List of Community Members . . . . .	38
Inviting Users to a Community . . . . .	38
Accepting Community Invitations . . . . .	39
Blocking Users from a Community . . . . .	39
Editing Community Properties . . . . .	39
Requesting Members . . . . .	39
Notifying Members of Community Events . . . . .	40

## About This Guide

This guide introduces Novell® exteNd™ Director™ and explains the different components available to set up and use your portal workstation. This documentation is intended for both end users and network administrators and is divided into the following sections:

- ♦ Chapter 1, “Overview,” on page 5
- ♦ Chapter 2, “Using Novell exteNd Director Gadgets,” on page 7
- ♦ Chapter 3, “Creating and Configuring Communities,” on page 37

## Additional Documentation

In addition to the *Novell exteNd Director End User Guide*, Novell exteNd Director includes the following manuals:

- ♦ *Novell exteNd Director Configuration Guide*
- ♦ *NPSDump Utility Administration Guide*

## Documentation Updates

For the most recent documentation on using Novell exteNd Director, see the *Novell exteNd Director Standard Edition Users Guide* (<http://www.novell.com/documentation/lg/nedse41/index.html>) on the Novell documentation Web site.

## Documentation Conventions

A trademark symbol (®, ™, etc.) denotes a Novell trademark. An asterisk (\*) denotes a third-party trademark.

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

When a single pathname can be written with a backslash for some platforms or a forward slash for other platforms, the pathname is presented with a backslash. Users of platforms that require a forward slash, such as UNIX\*, should use forward slashes as required by your software.



# 1

## Overview

You rely on having immediate access to the various tools you use each day to complete your work. Searching in different locations for the tools and resources you need can slow your productivity. Having all your tools and resources available right on your desktop is an efficient method of organizing your daily workload.

### Novell exteNd Director

Novell<sup>®</sup> exteNd<sup>™</sup> Director<sup>™</sup> is a personal browser-based Webtop that you set up to immediately access needed tools and resources anywhere at anytime. This reduces time spent searching through a surplus of irrelevant data and Web content. Novell exteNd Director is a portal integration toolkit for creating secure, custom portals. This gives you access to knowledge that helps you make better decisions and take action more quickly.

The following examples illustrate some possible uses of Novell exteNd Director:

#### Example 1: Staff Management

You manage a staff of employees who reside in different geographical locations. You could set up your portal with the following tools:

- ♦ **Daily calendar** to schedule and track meetings and appointments.
- ♦ **Message board** to post daily messages that automatically appear on each of your staff's desktops.
- ♦ **File sharing** to allow your staff to upload and share relevant files.

#### Example 2: Financial Management

You manage the financial interests of a company or group of clients. You need access to the most current stock quotes, business news, and major news headlines. You can set up your portal to provide instant access to the following tools:

- ♦ **Stock quotes** so you can obtain the most current quotes and information on only the symbols you choose to display on your desktop.
- ♦ **Business news** so you can post a specific Web site that automatically appears on your portal and provides the most recent business news.
- ♦ **Major news headlines** so you can carve out a specific section from a news Web site and display only that section on your portal. For example, you can display just the news headlines, weather, or sports sections of a site without having to search the entire site for the information you want.

# Novell exteNd Director Components

To use Novell exteNd Director, you configure your desktop to become a portal. A portal is a centralized resource that lets you immediately access tools and specific information sources, manage your daily schedules and tasks, and retrieve and share files with staff members are either local or at different geographical locations.

**NOTE:** This document refers to your Novell exteNd Director desktop as a portal.

There are three components that make up the Novell exteNd Director portal architecture:

- ◆ Gadgets
- ◆ Pages
- ◆ Communities

This architecture provides easy access to the tools you need right on your portal.

## Gadgets

A *gadget* is an individual tool you use to access a variety of tasks or information sources. For example, to manage your daily schedule, you might use a calendar gadget to track deadlines or events you need to attend. Another type of gadget is a bookmark tool that lets you instantly access Web sites you visit frequently. Novell exteNd Director has several gadgets that you can use with your portal desktop.

The purpose of some gadgets is for Novell exteNd Director configuration tasks; these gadgets have no end user functionality.

When you set up your portal, you choose the gadgets you want to use and then place them into a single portal framework called a *page*.

## Pages

A page is a Novell exteNd Director component that stores the gadgets you use. For example, you might routinely use gadgets that let you access daily calendars, common Web sites, stock information, and news services. You would set up all these gadgets on a single page that will be your portal desktop. Pages are created by the system administrators who install and configure Novell exteNd Director.

You might want to let other users have access to the gadgets you set up on a page. To do this, you can set up a central component called a *community*.

## Communities

A community is a central location in your portal where users can exchange information, share files, and access the same gadgets. For example, you might need other users in your department to have access to your calendar of events. In addition, you might need to allow easy access to some of your files. To set up this type of interaction, you can create a community and let other users have access to it.

# 2

## Using Novell exteNd Director Gadgets

A gadget is a tool that you use to do a specific task in your portal. This chapter explains how to use the Novell® exteNd™ Director™ gadgets. Some gadgets can be used only in a community environment and some gadgets cannot be used in communities

The following gadgets are available to users:

- ◆ Alta Vista Search Gadget (page 8)
- ◆ Authentication Gadget (page 8)
- ◆ Bookmark Gadget (page 9)
- ◆ Change Password Gadget (page 9)
- ◆ Citrix Gadget (page 10)
- ◆ Community Access Gadget (page 11)
- ◆ Community Calendar Gadget (page 11)
- ◆ Community Chat Gadget (page 12)
- ◆ Community Discussion Gadget (page 14)
- ◆ Community File Sharing Gadget (page 15)
- ◆ Community Management Gadget (page 16)
- ◆ Community Message Gadget (page 16)
- ◆ Exchange Gadget (page 18)
- ◆ GroupWise Calendar Gadget (page 18)
- ◆ GroupWise Mail Gadget (page 19)
- ◆ HTML Gadget (page 19)
- ◆ MoreOverNews Gadget (page 20)
- ◆ NetWork File Gadget (page 20)
- ◆ Phone Book Gadget (page 22)
- ◆ Preferences Gadget (page 22)
- ◆ Registration Gadget (page 26)
- ◆ RSS Gadget (page 26)
- ◆ Self Administration Gadget (page 28)
- ◆ Shortcut Gadget (page 29)
- ◆ Stock Ticker Gadget (page 31)
- ◆ Survey Gadget (page 32)

- ◆ Topics Gadget (page 32)
- ◆ User Admin Gadget (page 32)
- ◆ Web Mail Gadget (page 35)

## Alta Vista Search Gadget

This gadget lets you search the internet for information that you need. Novell exteNd Director provides content according to user identity. This gadget cannot be used in a community.



The screenshot shows a search interface with a grey header bar labeled "Search". Below the header are two tabs: "Simple" (selected) and "Advanced". The main area contains a "Look For:" text input field, an "In Index:" dropdown menu with "ThisSite" selected, and a "Search" button. A "Help" link is located in the bottom right corner.

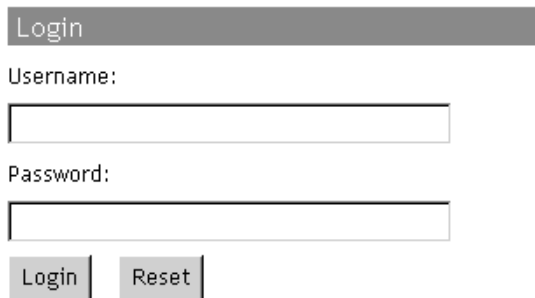
To use the Alta Vista Search gadget:

- 1** Type a search term in the Look For field.
- 2** Select an index from the list.
- 3** Click Search.

Novell exteNd Director shows the results for the index you selected.

## Authentication Gadget

This gadget is necessary for logging in to Novell exteNd Director. This gadget appears only after you install the product.



The screenshot shows a login form with a grey header bar labeled "Login". Below the header are two input fields: "Username:" and "Password:". At the bottom are two buttons: "Login" and "Reset".

To log in to Novell exteNd Director:

- 1** Type your username.
- 2** Type your password, then click Login.

# Bookmark Gadget

This gadget lets you display links to relevant Web sites. Each link consists of a display name and the address of the Web site. You can add links to this gadget only if the administrator configures the gadget to allow users to overwrite and configure bookmarks.

If you do not have rights to configure the Bookmark gadget, you can click the links to the available sites. The following graphic shows the Bookmark gadget with links to Web sites.



If you have configuration rights to the Bookmark gadget, you can change the settings on the Bookmarks gadget.

To use the Bookmarks gadget:

- 1** In the Bookmark gadget, click the edit icon (pencil) on the Bookmarks gadget, then click Add.
- 2** Specify a name for the link and then type the URL for the Web site.
- 3** Click OK > Save.

The link displays with the name you assigned. Click the link to open the Web site.

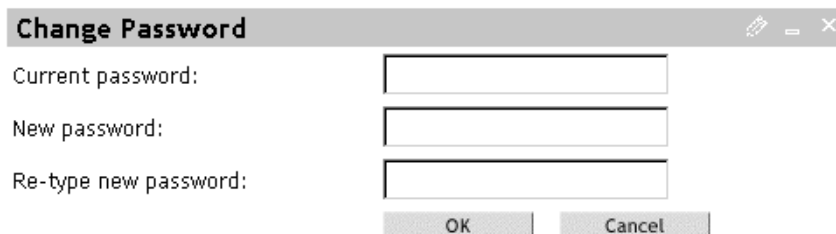
To edit or delete the links, click the edit icon to access those options.

For more information about configuring this gadget, see *Bookmark Gadget in the Novell exteNd Director Configuration Guide*.

# Change Password Gadget

This gadget lets you change the password you use to log in to Novell exteNd Director. This gadget displays as either an icon or the Change Password fields depending on how the gadget is configured. You can change the display only if the administrator sets up the gadget to allow users to configure the gadget.

This gadget can be configured to display as an icon or the following screen.

A screenshot of a "Change Password" dialog box. The title bar is grey and contains the text "Change Password" and three icons: a pencil (edit), a minus sign (collapse), and an X (close). The main area has three text input fields labeled "Current password:", "New password:", and "Re-type new password:". Below the fields are two buttons: "OK" and "Cancel".

If your administrator configures the gadget to appear as an icon, double-click the icon to open the Change Password screen.

To change your password:

- 1 From the Change Password gadget, click the icon or type your current password.
- 2 Type the new password and then retype it.
- 3 Click OK > Save.

## Citrix Gadget

This gadget lets you access a Citrix WinFrame or MetalFrame server through an embedded applet. The applet resides on a Web server and is downloaded every time you access the page.

Your administrator determines the applet and the authentication requirements during the gadget configuration. When you open your page, it will display either the Citrix screen or the applet the administrator set up for this gadget. If the Citrix screen appears, click Click to Connect to open the applet.



# Community Access Gadget

This gadget is typically the only gadget on the Communities tab and is named community Access.



The following is a list of ways you can share information in communities:



- News
- Discussions
- Chat
- File Sharing
- Calendaring
- Links

Use the above links to find, create, and manage communities.

The Community Access gadget has four sections that you use to set up and manage communities.

- ♦ **Introduction** lists gadgets that let you share information in communities.
- ♦ **Find** lists all the existing communities and lets users join them.
- ♦ **Memberships** lists the community invitations you have received and lets you accept or reject the invitations.
- ♦ **Create** lets you create a new community. (For more information, see “Creating and Configuring Communities” on page 37.)

# Community Calendar Gadget

This gadget displays a calendar that lets you schedule events and appointments. You can allow users to add, delete, or display events.

This gadget can be used only in a community.

To create an event:

- 1** In the Calendar gadget, click Create.
- 2** Enter a subject for the event.  
A subject is required.
- 3** Select a month, date, year, and then select a time for the event.
- 4** (Optional) Include a message about the event.

The event appears as a link in the Subject column. When you click the event link, Novell exteNd Director displays all the information about the event.

- 5** Click Save > Close.

To review events:

- ◆ To display the current calendar date, click Today.

If you are looking at a different day or month, you can use this feature to immediately return to the current day.

- ◆ To see the events for a selected day, click Show Events for Selected Day.

This shows all the events that are set up for the selected day. When you click the link, it changes to Show Events for the Month.

- ◆ To see all the events for a selected month, click Show Events for the Month.

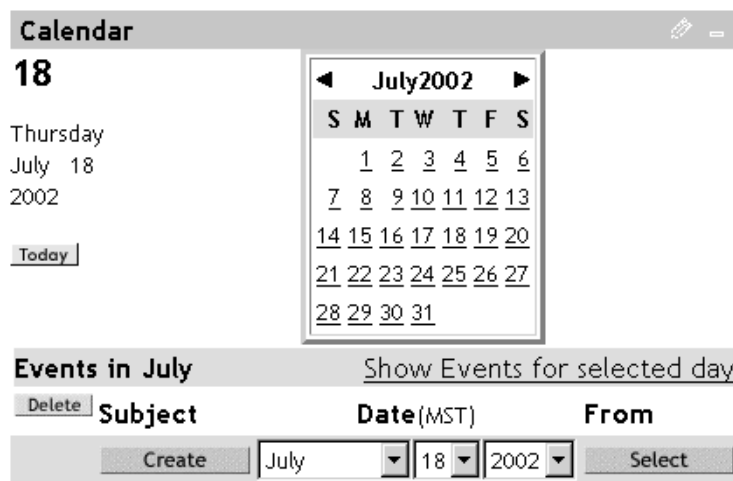
This lists all the events scheduled for the month.

- ◆ To view the details for an event, click the event link in the Subject column.

This opens a window that lets you view and edit the message.

To delete an event:

Check the check boxes for the events you want to delete, then click Delete.



## Community Chat Gadget

This gadget lets members of a community communicate through instant messaging. The following are the chat gadget features:

- ◆ Save or print a conversation
- ◆ Invite other users to join a chat session
- ◆ Accept or decline an invitation to join a chat session
- ◆ Turn sounds on or off
- ◆ Change your user status to Away
- ◆ Display your name in chat windows

When you start the Chat gadget, Novell exteNd Director displays a list of community users that are both logged in and logged out. To open a chat window, double-click on a logged-in user.

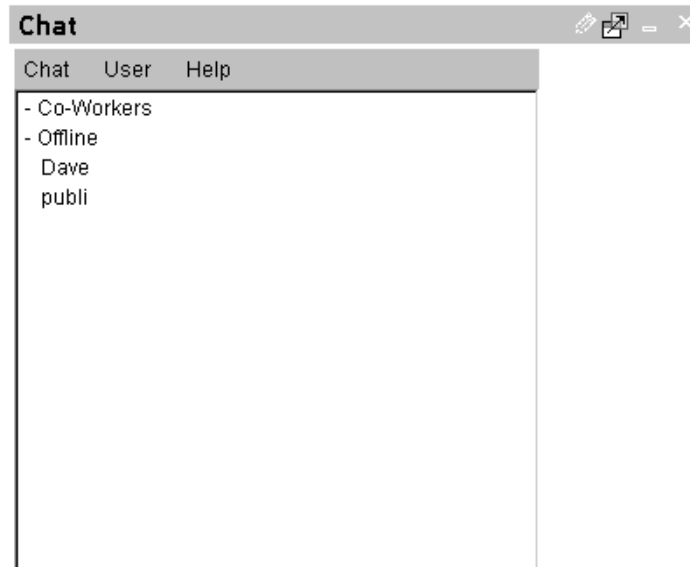
You can use the Chat gadget outside of the community. If you use this gadget outside of a community, the gadget will list all the users in all the portal containers.

When you start the gadget, it lists the community users who are logged in and logged out. Double-clicking a logged-in user brings up the Chat window. This window contains a text field, a Send button, and a Save button. You can save the history of the conversation or print it. You can also allow other users to join the conversation.

If you click Invite, a list of logged-in community users that are not currently in the conversation appears. You can select one or more users to invite to the conversation. When you invite a user, Novell exteNd Director sends an invitation message to that user, which can be accepted or declined.

The main applet window also has several menu items to turn sounds on or off, set your status to Away, send a message to a selected user, display your user name in chat windows, and display the applet version.

When you log in, the Chat gadget indicates that you are available and you can communicate with other users. Click Chat > Away to indicate that you are logged in to the community but away from your workstation.



To start a chat session:

- 1 Type a message in the space.
- 2 Click User, select the username you want, then click Send Message.

To invite other users to join a chat:

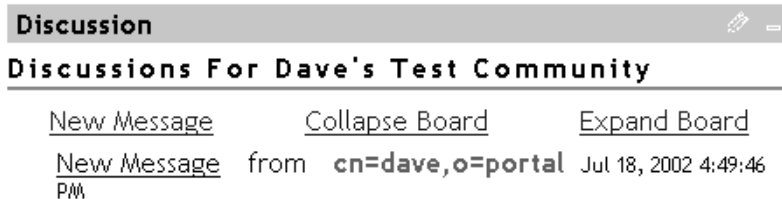
- 1 Double-click a username.
- 2 Click Invite.
- 3 Select a name to invite, then click OK.

To save a chat session:

- 1 In the Chat window, click Save.
- 2 Cut or Copy and then paste the conversation into a text file.
- 3 Close the conversation window.

## Community Discussion Gadget

This gadget lets you manage a discussion with message threads for community members. You can configure the name of the discussion. Also, the gadget can support a list of topics that are configurable by the community administrator.



This gadget can be used only in a community.

To use the Community Discussion gadget:

- 1 From the community front page, click New Message.
- 2 Specify and type a message, then click Post.

The Discussion gadget displays the message subject, the user who posted the message, and the date and time the message was posted. The subject line becomes the link to the message.

The screenshot shows the "Enter New Message" form. It has a title bar "Discussions For Dave's Test Community" and a subtitle "Enter New Message". The form contains a "Subject" field with the text "New Message". Below it is a large text area for the message content, with the placeholder text "Enter message here.". To the left of the text area is the label "Message :". Below the text area is a "Name" field with the text "cn=dave,o=portal" and an "Email" field which is currently empty. At the bottom of the form are two buttons: "Post" and "Cancel".

The message is available to all members of the community.

**3** To open the message, click the message link.

The message opens. You can close the message, send a reply to the user, or erase the message.

### Discussions For Dave's Test Community

Close

Reply

Erase

**From :** cn=dave,o=portal

**Date :** Jul 18, 2002 4:49:46 PM

**Subject :** New Message

Enter message here.

### Replies

## Community File Sharing Gadget

This is a file sharing tool that can be used only in a community. It lets community members do the following tasks:


- ◆ Browse directories
- ◆ Create directories in the current path or directory
- ◆ Upload files
- ◆ Remove files
- ◆ Share files with other users in a community

You can upload files to a directory you create or to the root directory in the gadget. When you create and upload directories, the gadget displays them for easy access.

You can upload files to a directory only if you are a community owner. Community members cannot upload files, but they can download files.



The screenshot shows a window titled "Files" with a toolbar containing "Delete", "Upload", and "Create" buttons. Below the toolbar is a table with columns for "Name in: /", "Size(KB)", and "Last Modified". The table lists two directories: "myfiles" and "My other files", both created on 7/19/02.

Name in: /	Size(KB)	Last Modified
<input type="checkbox"/>  myfiles		7/19/02 11:15:11 AM MDT
<input type="checkbox"/>  My other files		7/19/02 11:14:30 AM MDT

To create directories:

- 1** In the File gadget, click Create.
- 2** Specify a name for the directory, then click Create.

To upload files:

- 1** From the Community front page, click Upload.
- 2** Browse for the file you want to upload, then click Upload.

The files load to your parent directory where you can easily access them.

You must have rights to delete directories. These rights are granted by your administrator.

To delete directories:

- 1 Check the check boxes for the directories you want to delete.
- 2 Click Delete.

## Community Management Gadget

This gadget automatically appears at the top of a community page. It shows the name of the community and lets you edit various community settings.

If you are the owner of a community, you can configure that community's properties and memberships.

## Community Management

Community: **Dave's Test Community**

Introduction Members Invitations Requests Owners Blocked Users Properties Delete



This is the place where you can edit the community settings.

Press Close to close the community management window.

This gadget is configured by Novell exteNd Director administrators, but you can use this gadget to do the following tasks:

- ◆ Adding a Community Owner (page 38)
- ◆ Viewing a List of Community Members (page 38)
- ◆ Inviting Users to a Community (page 38)
- ◆ Accepting Community Invitations (page 39)
- ◆ Blocking Users from a Community (page 39)
- ◆ Editing Community Properties (page 39)
- ◆ Requesting Members (page 39)

## Community Message Gadget

This gadget lets community owners and administrators post messages for community members. The messages can be any block of text and can include HTML formatting codes. By default, the text of the message will be the description of the community.

News



Enter the message to display here.

To set up a message:

- 1 From the community front page, click the Edit icon (pencil) in the Message gadget.
- 2 Type a message, then click OK.

## Personalizations for: News

Configure the settings to personalize the gadget. Press Descriptions for more information on each setting.

Setting Name	Setting Value
Message to display	Enter the message to display here.

OK Cancel All Settings Descriptions

To edit or delete the message, click the Edit icon to access those options.

# Exchange Gadget

This gadget lets you access the Microsoft Exchange calendar and messaging functions through your portal.

# GroupWise Calendar Gadget

This gadget provides access to your GroupWise® calendar functions through your portal.

To access your GroupWise calendar information, type your username and password, then click Login.

**GroupWise Calendar** ◀ August2002 ▶

**2**

Friday  
August 2  
2002

Today

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Appointments

Subject	Time	From
---------	------	------

Notes

Subject	Date	From
---------	------	------

Tasks

Subject	Due Date	From
---------	----------	------

[New Appointment](#)      [New Note](#)      [New Task](#)

[GroupWise Webaccess](#)

Your administrator might give you rights to personalize the GroupWise Calendar gadget. A Personalize icon (pencil) displays on the gadget title bar if these rights are available.

To personalize the GroupWise Calendar gadget:

- 1 On the gadget main page, click the Edit icon.
- 2 Modify any of the following options:

Setting	Description
Show Monthly Calendar	Shows or hides the calendar.
Show Appointments	Shows or hides your list of appointments.
Show Tasks	Shows or hides your list of tasks.
Show Notes	Shows or hides notes.
Show Buttons	Shows or hides the buttons to create new items and the link to WebAccess.

## GroupWise Mail Gadget

This gadget lets you access your e-mail account through your portal.

To access your e-mail, type your username and password, then click Login.



Your administrator might provide rights for you to personalize this gadget. A Personalize icon (pencil) displays on the gadget title bar if these rights are available. The Personalize option for this gadget lets you select the number of e-mail messages to display.

To personalize this gadget, click the Personalize icon and then select the number of messages from the list.

## HTML Gadget

This gadget obtains HTML content from Web pages. It provides links to specific HTML pages that you can use within your portal. You can also subdivide HTML pages and display only sections of the page.

For example, you can subdivide the page to display only the sports section of a news site.

To subdivide a Page:

- 1 From the HTML gadget configuration screen, click Edit on the Record Steps for Getting to and Subdividing a URL field.

- 2 Type the URL of the page you want, then click OK > OK > Subdivide Page.
- 3 Check the check boxes for the sections of the page you want the HTML gadget to display.
- 4 Click Finish > Finish.
- 5 Click Continue > Save > OK.

## MoreOverNews Gadget

This gadget provides links to a variety of news resources. The number and type of links is configured by your administrator.



The screenshot shows the MoreOverNews gadget interface. It features three sections of news stories, each with a bolded title and two links below it. The first section is titled "Moreover - Top stories" and contains links for "Israel looks to exile militants" and "U.S. quells firefight between Afghans". The second section is titled "Moreover - Top business stories" and contains links for "Global stock markets spiral lower" and "Johnson & Johnson admits investigation". The third section is titled "Moreover - Top finance stories" and contains links for "U.S. Stocks Sink At Open" and "Dollar falls on record trade gap".

To access news information, click a headline link.

## NetWork File Gadget

This gadget is a Web storage and retrieval system that lets you access and upload your files from any location. You can use this gadget as a file management system.

You can use this gadget to do the following tasks:

- ◆ Creating Directories (page 21)
- ◆ Uploading Files (page 21)
- ◆ Creating Shortcuts to Directories (page 21)
- ◆ Deleting Directories and Files (page 22)

## Network files



Current Location:

Shortcuts:

<input type="button" value="Delete"/> <input type="button" value="Upload"/> <input type="button" value="Create"/>		
Name	Size	Last Modified
<input type="checkbox"/> <u>Euro €</u>		3/25/02 9:49 AM
<input type="checkbox"/> <u>jim &amp; Norman</u>		3/25/02 9:49 AM
<input type="checkbox"/> <u>music</u>		6/12/02 2:09 PM
<input type="checkbox"/> <u>test</u>		6/12/02 3:38 PM

The Current Location field displays the file path of the directory you access. If you know the path of a specific file, you can specify that path in the field and immediately access the file you want.

You can create your own directories to store your files.

## Creating Directories

- 1 In the Network File gadget, click Create.
- 2 Type a directory name, then click Create > Close.  
Novell exteNd Director adds your new directory to the list in alphabetical order.

## Uploading Files

You can use your portal to access and upload files from any location.

- 1 In the Network File gadget, click the directory you want to upload the file to.
- 2 Click Upload.  
Novell exteNd Director opens the Upload Files dialog box. This box has four available fields so you can upload up to four files simultaneously.
- 3 Specify or browse for the file you want to upload, then click Upload.
- 4 After the file uploads, click Close.

## Creating Shortcuts to Directories

You can create shortcuts to specific directories to prevent having to search for them.

- 1 In the Network File gadget, access the directory you want to create a shortcut to, then click Add in the Shortcut field.
- 2 Specify any name for the shortcut, then click Add.  
This creates a shortcut to your directory. Novell exteNd Director adds that name to a drop-down list the shows the shortcuts you create.
- 3 To access the directory, select the file from the shortcut list and click Go.

## Deleting Directories and Files

You can delete either directories or individual files.

- 1 In the Network file gadget, open the directory or file you want to delete.
- 2 Check the check boxes for that file or directory, then click Delete > Delete > Close.

## Phone Book Gadget

This gadget lets you search for other users to obtain their phone numbers, e-mail addresses, and office locations. It lets you specify the users first name, last name, or both. Novell exteNd Director searches the entire tree for the name information you specify.

Name	Phone	Email
Portal Public User		
Jensen Dave		
Portal Public User		
Jensen		

To search for a user:

- 1 Specify the person's first or last name, then click Search.
- 2 Click the Display icon for the name you want.

The results screen displays.

**Portal Public User** (cn=public,ou=old,o=novell)

Email:

Phone:

Fax:

Department:

## Preferences Gadget

This gadget lets you make the following customizations to your page:

- ◆ **Content:** Add or remove a copy of one of your favorite content regions that you have rights to.
- ◆ **Layout:** Change the placement of any page content that you have rights to.
- ◆ **Theme:** Select the overall look or theme of your portal from a list of options.
- ◆ **Pages:** Create, delete, or rename personal pages.
- ◆ **Password:** Change your password.

## Content

The Preferences gadget lets you add or remove content regions on pages if you have been granted rights for this option. The primary content you add to pages is the gadgets you use frequently. For more information about gadgets, see “Gadgets” on page 6.

You can add content to a page that the administrator has made available. The Content screen displays the gadgets that you can add to a page.

- 1 Click the Preferences icon and then Content.
- 2 Select the page you want to add content to.
- 3 Check the check boxes for the gadgets you want to add to your page.
- 4 Click Save > Close.

## Layout

The Preferences gadget lets you change the layout settings of a page or restore the original settings. You can make these changes only if you have access rights to the Change Page Layout options.

### Change Page Layout

---

Select the content and press the appropriate button to personalize the order and location of the content. Pages marked with an \* are your personal user pages.

#### Drag and Drop Layout

Select Page:

<b>Header</b>
Edit Page
<b>Column 1</b>
DefaultCommunityPage
<input type="checkbox"/> preferences
<b>Footer</b>

Controls to move content to a different location:

<input type="button" value="To Header"/>	<input type="button" value="Move Up"/>
<input type="button" value="To Column 1"/>	<input type="button" value="Move Down"/>
<input type="button" value="To Footer"/>	

---

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
-------------------------------------	---------------------------------------

To change the page layout settings using the Change Page Layout buttons:

- 1 In the Preferences gadget, click Layout.
- 2 Select the Page you want to edit, then click Edit > Layout Gadget Assignments.
- 3 Select a gadget to reposition.
- 4 To reposition the gadget, click one of the following buttons:
  - To **Header** positions the gadget in the header.
  - To **Footer** positions the gadget in the footer.
  - To **Column 1**, To **Column 2**, To **Column 3** position the gadget in the appropriate column.
  - Move Up and Move Down** move the gadget up or down within its assigned area (header, footer, column).
- 5 Click Save > Close.

### Change Page Layout

---

Drag and drop the content to personalize the order and location of the content. Pages marked with an \* are your personal user pages.

Layout without Drag and Drop

Select Page:



To change the page layout settings using the drag and drop screen:

- 1 In the Preferences gadget, click Change Page Layout.
- 2 Select the page you want to edit and click Edit > Layout Gadget Assignments.
- 3 Click Layout without Drag and Drop.
- 4 Make the changes you want by dragging the items to their new location.
- 5 Click Save > Close.

## Theme

The Preferences gadget lets you select a theme for your portal from a list of the choices you have rights to.

- 1** In the Preferences gadget, click the Preferences icon.

- 2** Select a theme.

To see a larger image of the theme, click the thumbnail image of the theme.

- 3** Click Select > Close.

## Pages

Pages are used to define a single page of portal content. A user can inherit multiple pages from groups and containers assigned directly to the user, or from communities the user is a member of. The Pages gadget lets users create pages that only they are able to see.

Pages can be created in a hierarchy so that one page is a parent of another. For example, you can create a home page and then create child pages called *News* and *E-mail* under the home page.

To create a new page:

- 1** Click the Preferences icon and then Pages.

- 2** Click Create.

- 3** Type a page name.

- 4** Select a page to be the parent page of the new page.

If you want to create a new top-level page, select Create New Top Level Page.

- 5** Click Create > Close.

To delete a page:

- 1** Click the Preference icon and then Pages.

- 2** Select the page you want to delete, then click Delete.

To rename a page:

- 1** Click the Preferences icon and then Pages.

- 2** Select the page you want to rename, then click Rename.

- 3** Type a new name for the page, then click Rename.

## Password

The Preferences gadget lets you change your user password.

- 1** In the Preferences gadget, click the Preferences icon and then Change Your Password.

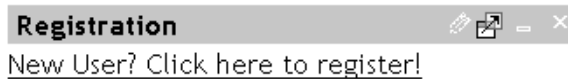
- 2** Type your current password.

- 3** Type and then re-type your new password.

- 4** Click OK > Close.

## Registration Gadget

This gadget lets you provide information to register yourself so you can obtain access to Novell exteNd Director.



To register as a Novell exteNd Director user:

- 1 In the Registration gadget, click the link to open the registration form.

**Enter your registration information below.**

First Name:	<input type="text"/>	*
Last Name:	<input type="text"/>	*
Password:	<input type="password"/>	*
Verify Password:	<input type="password"/>	*
Username:	<input type="text"/>	*
Email Address:	<input type="text"/>	*
Verify Email Address:	<input type="text"/>	*
Job Type:	<input type="text" value="Developer"/>	
<input type="button" value="Sign Up!"/> <input type="button" value="Cancel"/>		

*Fields marked with " \* " are required.*

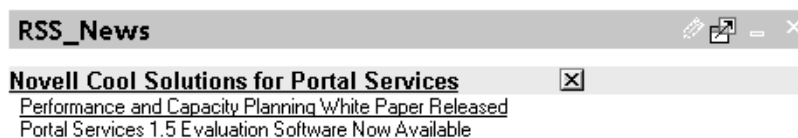
- 2 Complete the fields in the form, then click Sign Up!

When you log in, Novell exteNd Director asks for your username and password.

## RSS Gadget

Web content suppliers provide information through a resource called Resource Description Framework (RDF). Using RDF data, content providers can create an RDF site summary (RSS) and provide this data as an RSS feed. The most common RSS feeds are news resources.

This gadget is similar to the Moreovernews gadget; it provides RSS news feeds that have been set up by your administrator.



To access the news feed, click the link for the information you want.

In addition to using the RSS gadget to access the available news feeds, your administrator might allow you to configure the gadget to display other links and features.

### Hiding the RSS Gadget

You can hide the contents of the RSS gadget from a page. To do this, click the Hide icon (X). To restore the RSS contents, click the Edit icon (pencil), check the check box for the newsfeed source, then click Save Changes.

### Configuring the RSS Gadget

If your administrator grants you configuration rights, you can change some of the RSS gadget settings.

- 1 In the RSS gadget, click the Edit icon (pencil).
- 2 Click Advanced Personalize.  
The Configuration screen opens.
- 3 Edit the following fields:

Setting Name	Setting Value
User-Controlled URLs to Newsfeeds	Contains the URLs to the newsfeeds you want to access. Enter the URL of the newsfeed you want. To add multiple newsfeeds, click New Value and specify the URL information for the other newsfeed sources.
Number of Items to Show per Newsfeed	Each newsfeed could contain any number of links to information sources. Enter the number for how many sources you want to display.
Make Links Open a New Browser Window	Determines whether you want the newsfeed source to open in another browser window.
Show News Descriptions	Displays a brief description of the information contained in the newsfeed.
Table of Contents	Displays or hides the table of contents for the newsfeed source. Default = Hide

- 4 Click OK > Save Changes.

# Self Administration Gadget

This gadget lets you edit your NDS<sup>®</sup> objects according to your LDAP rights.

The screenshot shows a window titled "Self Admin" with a subtitle "Editing cn=Admin,o=novell". On the left is a vertical menu with the following items: Identity, Postal, Environment, See Also, Personal, Business, Password Restrictions, Group Membership, Security Equal To, Security Equal To Me, and Other. The "Identity" item is highlighted. To the right of the menu is a form with the following fields: Given/First (Dave), Name: (empty), Last Name: (Jensen), Full Name: (cn=dave,o=portal), Qualifier/Suffix: (empty), Middle Initial: (J), Other Name: (empty), Title: (writer), Location: (H), Department: (Doc), Telephone: (empty), E-Mail Address: (empty), and Description: (empty). Each field has an edit icon (a square with a pencil) to its right. Below the form is a warning message: "Warning: You must select Apply to save your changes before switching to a new page." At the bottom left of the window is an "Apply" button.

In this graphic, the left column contains different attribute groupings for the object. Click the attribute to edit it. When you make changes, you must click **Apply** before moving to another page; otherwise, the changes do not save.

To edit the attributes you have rights to, click the attribute and edit the fields. Many fields have an **Edit** icon; these fields allow multiple strings. If the field title is underlined, you can edit that option by clicking the title. For more information about the attributes in the left column, see “Editing Self Admin Object Attributes” on page 28.

## Editing Self Admin Object Attributes

This section explains the attributes in the blue column in the Editing Objects screen. Many of the fields have an **Edit** icon that let you specify additional information strings. Fields that do not have the **Edit** icon are single-valued string fields. Fields that have underlined titles let you change the setting by clicking the field title; when you click the field title, another attribute option appears.

- ◆ **Identity:** Specify your identifying information, such as name and business title.
- ◆ **Postal:** Specify your street address, city, and state.
- ◆ **Environment:** Specify your default language and default message server.
- ◆ **See Also:** Specify the additional information in another location.
- ◆ **Personal:** Specify your personal information, such as your spouse, children, and home contact information.
- ◆ **Business:** Specify your company information, such as your company name, manager, and office contact information.

- ◆ **Password Restrictions:** Determine if a password is required and if users can change passwords, then specify the password information.
- ◆ **Login Restrictions:** Enable or disable accounts and specify the user login restrictions.
- ◆ **Account Balance:** Specify the account balance and determine whether to allow unlimited credit.
- ◆ **Group Membership:** List the groups you are a member of.
- ◆ **Security Equal To:** List the objects that you have the same security rights to. For example, you can make an object have all admin rights by entering the distinguished name of the Admin object.
- ◆ **Security Equal to M:** List the objects that have the same security rights as you do.
- ◆ **NDS Rights:** Contains a list of the trustees assigned to the object you are editing.
- ◆ **Other:** Specify attributes that do not fit in the other categories.

## Shortcut Gadget

This gadget lets you create direct links to other gadgets or HTML pages.



To access a shortcut:

Click the link in the Shortcuts gadget.

To create a shortcut to a Web site:

- 1** In the Shortcuts gadget, click the Edit icon (pencil), then Edit > Add Web Link.

This opens the wizard to create a link.

- 2** Type the URL for the page you want, then click Next.

This opens the Web site within the wizard.

This wizard lets you set up links to Web sites and local applications, such as other gadgets. To access the wizard, click Edit in the Wizard for Setting Up Links to Gadgets or URLs field.

When you start the wizard, you have two options:

- ◆ Create a shortcut to a Web site
- ◆ Add a local application

- 3** After you confirm that the Web site is correct, click Next.

- 4** Click Add Web Link.

**5** Do one of the following:

- ◆ Enter a URL, click Next, then go to Step 6.

This accesses the Web site you entered. You can now click Next to open a window to edit the Web site options.

- ◆ Click Skip Wizard and go to Step 6.

This opens a window that lets you manually edit the Web site options.

**6** Complete the following fields to set up or edit the Web site options:

- ◆ Link Description
- ◆ URL of the Web site.
- ◆ Parameters
- ◆ Image Reference
- ◆ Post URL
- ◆ URL Uses a Basic Authentication
- ◆ Hide Link
- ◆ Window Height
- ◆ Window Width
- ◆ Additional Description
- ◆ New Window is Resizable
- ◆ New Window has Scrollbars
- ◆ Show Address Bar
- ◆ Show Menu
- ◆ Show Buttons
- ◆ Show Status
- ◆ Show Title
- ◆ Auto Launch This Link

**7** Click Save Changes.

To add a local application:

**1** Click Add Local Application.

**2** Complete the following fields to set up a link to a local application:

- ◆ Link Description
- ◆ Application Path
- ◆ Application Parameters
- ◆ Image Reference
- ◆ Additional Description

**3** Click Save Changes.

# Stock Ticker Gadget

This gadget lets you track stock information such as last price, high price, and low price. It also lets you specify portfolio information so you can track gains or losses.

Symbol	Last	Date	Time	Change	Open	High
<u>CALD</u>	1.000	07/19/2002	16:00:00	-0.10	1.100	1.110
<u>CSCO</u>	13.650	07/19/2002	16:00:00	-0.69	14.340	14.350
<u>MSFT</u>	49.560	07/19/2002	16:00:00	-1.55	51.110	50.890
<u>NOVL</u>	2.380	07/19/2002	16:00:00	-0.12	2.500	2.620
<u>ORCL</u>	9.720	07/19/2002	16:00:00	-0.33	10.050	10.060
<u>SUNW</u>	4.250	07/19/2002	16:00:00	-1.55	5.800	4.830

Symbol:

## Adding a Stock Symbol

To add a stock symbol, type the letters of the symbol in the Symbol field and click Add.

## Viewing More Detail about a Stock

To see more detail about a specific stock, click the stock symbol in the list. This opens a stock tracking Web page that provides detailed information about the stock.

## Removing a Stock Symbol

To remove a stock symbol, type the letters of the symbol in the Symbol field and click Remove.

## Editing the Display Options

You can edit the Stock Ticker gadget to specify the information you want to display.

- 1 In the Stock Ticker gadget, click the Edit icon (pencil).
- 2 Check the check boxes for the information you want to display on the stock ticker, then click Save.

## Adding Portfolio Information

You can enter your portfolio information to track the status of your stock.

- 1 In the Stock Ticker gadget, click the Edit icon (pencil).
- 2 Type the stock symbols from your portfolio.
- 3 Specify the information in the columns, then click Save.

## Survey Gadget

This gadget lets you post survey questions that users can respond to.

**NOTE:** This gadget requires Microsoft Access 97 or later.

To change the survey:

- 1 Add a new survey in the Surveys table.
- 2 Add the questions in the Questions table.
- 3 Add the options for each question in the Options table.

## Topics Gadget

This gadget is similar to the Shortcuts gadget (see “Shortcut Gadget” on page 29). It lets you create a list of links and their URLs. You can choose to show only the links you want on your page.



### Accessing Topics

To access a shortcut, click the link in the Topics gadget.

### Display or Hide links

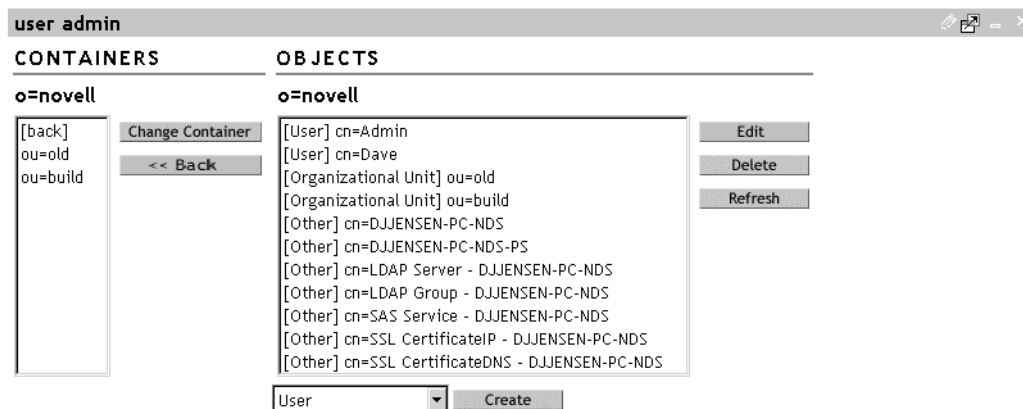
You can select which links to display or hide.

- 1 In the Topics gadget, click the Edit icon (pencil).
- 2 Click Update Settings.

## User Admin Gadget

This gadget lets you browse and edit other objects in the NDS tree according to your LDAP rights. When you log in to Novell exteNd Director, the User Admin gadget reads a configuration XML file that contains all supported objects and attributes.

This gadget is preconfigured with the necessary settings. You would edit this gadget only if you want to display a subset of attributes or objects. Many of the attributes allow multiple strings.



The User Admin main browser window lets you search the NDS tree and select which action to take.

- ◆ **Change Container:** Change to the selected context.
- ◆ **Back:** Change to the context one level up.
- ◆ **Edit:** Edit the selected object.
- ◆ **Delete:** Delete the selected object.
- ◆ **Refresh:** Refresh the contents of the current context.
- ◆ **Create:** Create an object using the selected object type.

### Creating an Object

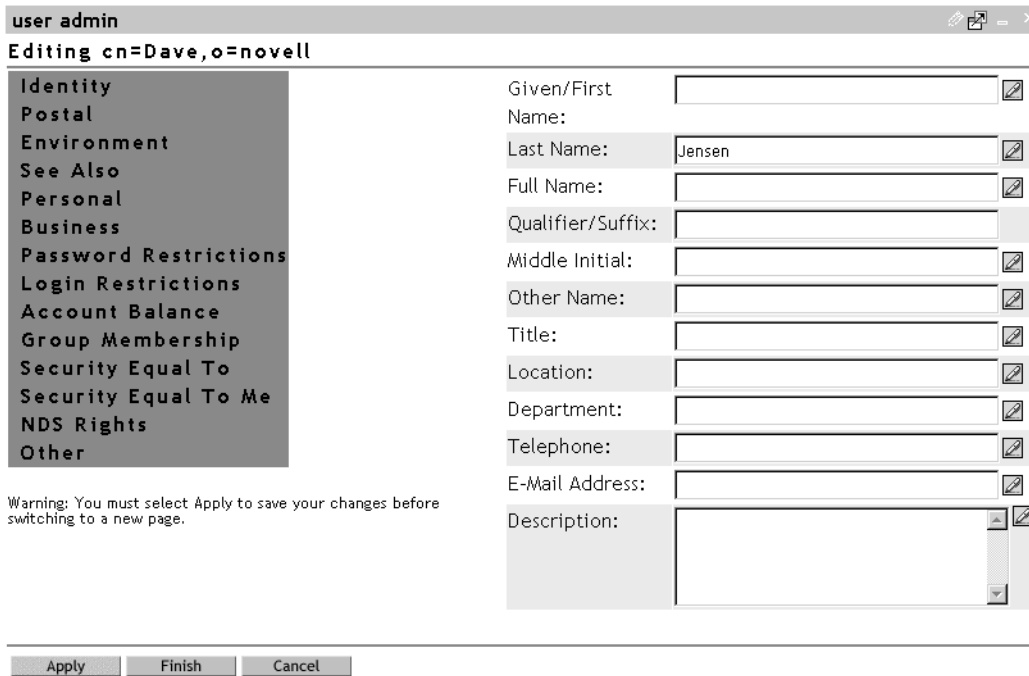
- 1 From the main browser window, click Create.
- 2 Complete the fields to create a User object.
- 3 Click Create.

### Deleting an Object

- 1 From the main browser window, select an object.
- 2 Click Delete > OK.

### Editing an Object

- 1 From the main browser window, select an object.
- 2 Click Edit.



Warning: You must select Apply to save your changes before switching to a new page.

The left column contains different attribute groupings for the object. Click the attribute to edit it. When you make changes, you must click **Apply** before moving to another page; otherwise, the changes do not save.

For more information about the attributes in the blue column, see “Editing User Admin Object Attributes” on page 34.

**3** Edit the fields you want to change, then click **Finish**.

The Edit icon (pen) in each field means the field supports a multivalued string. To add or edit these strings, click the Edit icon and click **Apply** to save your changes.

## Editing User Admin Object Attributes

This section explains the attributes in the blue column in the Editing Objects screen. Many of the fields has an Edit button that lets you specify additional information strings. Fields that do not have the Edit button are single-valued string fields. Fields that have underlined titles let you change the setting by clicking the field title; when you click the field title, another attribute option appears.

- ◆ **Identity:** Enter your identifying information, such as name and business title.
- ◆ **Postal:** Enter your street address, city, and state.
- ◆ **Environment:** Enter your default language and default message server.
- ◆ **See Also:** Specify additional information in another location.
- ◆ **Personal:** Enter your personal information, such as your spouse, children, and home contact information.
- ◆ **Business:** Enter your company information, such as your company name, manager, and office contact information.
- ◆ **Password Restrictions:** Determine if a password is required, if users can change passwords, and enter the password information.
- ◆ **Login Restrictions:** Enable or disable accounts and enter the user login restrictions.

- ♦ **Account Balance:** Enter the account balance and determine whether to allow unlimited credit.
- ♦ **Group Membership:** List the groups you are a member of.
- ♦ **Security Equal to:** List the objects that you have the same security rights to. For example, you can make an object have all admin rights by entering the distinguished name of the Admin object.
- ♦ **Security Equal To Me:** List the objects that have the same security rights as you do.
- ♦ **NDS Rights:** Contains a list of the trustees assigned to the object you are editing.
- ♦ **Other:** Enter attributes that do not fit in the other categories.

## Web Mail Gadget

This gadget lets you access your e-mail through an IMAP or POP3 Server. If your administrator includes this gadget on your page, it displays your e-mail account.



# 3

## Creating and Configuring Communities

This chapter explains how to create and set up Novell® exteNd™ Director™ communities. It contains instructions for the following tasks:

- ♦ Creating and setting up communities
- ♦ Configuring communities

### Community Types

You can create three types of communities:

- ♦ **Public** communities appear in a list of available communities that all users can join.
- ♦ **Private** communities do not appear on the public communities list. Membership for these communities is by invitation only.
- ♦ **Restricted** communities are closed. They appear on the list of all communities, but users must request membership. Owners approve or deny membership to restricted communities.

### Creating Communities

You can create communities only if the Novell exteNd Director administrator enables the creation of communities option.

When you create a community, you become both the owner and a member of that community. As the community owner, you determine who can access the community and what gadgets to make available. In the community setting, gadgets are referred to as services.

You can create your own communities and then let other users join. You can allow the other users to be either members or owners of your community. Community members who are also owners all have the same access and configuration rights that you have.

To create communities, you use the community management gadgets on the community main page. These gadgets are the tools you use to create and maintain your portal. For more information about gadgets, see Chapter 2, “Using Novell exteNd Director Gadgets,” on page 7.

- 1** In the Communities gadget, click Create.
- 2** Specify the community name.
- 3** (Optional) Type a description.
- 4** (Optional) Select a category.
- 5** Select the community type.

For information about community types, see “Community Types” on page 37.

- 6** Select the gadgets (services) you want to have in the community.
- 7** Click Create.

## Configuring Communities

After you create a community, use the instructions in the following sections to set up and configure the community according to how you want to use it.

- ◆ Adding a Community Owner (page 38)
- ◆ Viewing a List of Community Members (page 38)
- ◆ Inviting Users to a Community (page 38)
- ◆ Accepting Community Invitations (page 39)
- ◆ Blocking Users from a Community (page 39)
- ◆ Editing Community Properties (page 39)
- ◆ Requesting Members (page 39)
- ◆ Notifying Members of Community Events (page 40)

### Adding a Community Owner

You can let other users be owners of your community. For example, you might need another user to maintain or update your community in your absence.

- 1** From the front page of the owned community, click Edit Community > Owners > Add.
- 2** Type or search for the name of the user you want to make an owner, then click Add.

### Viewing a List of Community Members

- 1** From the Community main page, click Edit Community.  
This opens the Community Manager gadget.
- 2** Click Membership.

### Inviting Users to a Community

You might create a community to be a central communication tool for a specific department. For example, a Human Resource compensation department might use a community to distribute and exchange salary survey and job description information. The Human Resources staff would need to access that community as it pertains to their jobs. However, people from outside that department might also benefit from information in your community. You can invite these other users to join a community. These users

can access the information you post, participate in chat sessions, and use the gadgets available in the community.

When you invite users to join a community, they have the option to accept or reject the invitation. Users can be assigned to communities, but only administrators can do this.

- 1 From the Community main page, click Edit Community.
- 2 Click Invitations > Add.
- 3 Search for and select the users you want to invite to join the community, then click Add.

## Accepting Community Invitations

Novell exteNd Director notifies you when you are invited to join a community. Unless you are assigned to the community, you have the option to accept or reject the invitation.

- 1 From the Communities main page, click Memberships.
- 2 Select the community.
- 3 Click Join to accept the invitation or Remove to reject the invitation.

## Blocking Users from a Community

Novell exteNd Director lets you prevent users from accessing a community. For example, you might have temporary employees that do not need to have full access to all the information in a community.

- 1 From the front main page of the owned community, click Edit Community > Block Users > Add.
- 2 Search for and select the user you want to block from the community, then click Add.

## Editing Community Properties

After you set up and configure a community, you can modify your settings later to reflect any changes or updates.

- 1 From the Community main page, click Edit Communities > Properties.
- 2 Edit the name, description, type, or services available, and then click Save.

## Requesting Members

After you create a Community, you can request other users to become members of your community by sending them an invitation.

- 1 From the Community main page, click Edit Community > Invitations > Add.
- 2 Type the first and last name of the user you want to join, then click Search.  
This opens a list of users.
- 3 Select the username from the list, then click Add.

This sends an invitation to the user to join your community. The users still have the option of accepting or rejecting your invitation.

## Notifying Members of Community Events

Novell exteNd Director provides e-mail notification to members through the Community Discussion gadget. Communities have both owners and members who access and use the services available with communities. Communities also have subscribers who are not members of the community but subscribe to the community events.

When you post events as a community owner or member, you can notify both members and subscribers of that community.

To set up e-mail notification:

- 1** In the Discussion gadget, click New Message.
- 2** Type a subject and a message in their respective fields.
- 3** Click Notify Subscribers to inform them of the new event.
- 4** Click Post.