



eLink
Collaborative Business



eLink Client Configuration

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Overview

Welcome

This guide provides all the information you need to use eLink properly.

How to use this guide?

We suppose you use this guide before following the basic lessons of the guide "Using eLink".

Content

In order for eLink's features to work properly on the client, there are a few settings to be checked on the Browser, in Word (for document merging) and in Outlook (for the integration features).



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I. Browser configuration

Overview

Because the new eLink's web2.0 versions need evolves browser supporting CSS1 & 2, we not support under versions of **MS-Internet Explorer 6** anymore.

Except Opera which provide lot of displays bugs, the majority of the other main browsers (Firefox, Safari), have been validated for the main web2.0 features, but do not support ActiveX, which means that some eLink features do not work correctly on thus.

We don't support any browser except **MS-Internet Explorer 6** and higher so the following explanations are bases on **MS-Internet Explorer** configurations.

▶ Internet Explorer Configuration

Trusted web site

Add the eLink Web server as trusted site. This tells Internet Explorer that you trust all contents and scripts coming from the eLink Web Server:

Go to (menu) **Tools** → (item) **Internet Options** → (tab) **Security** → (icon) **Trusted Sites**

Click (button) **Sites...**

In the new window, untick (checkbox) **Require Server verification (https:) for all sites in this zone** then add the following line: '**http://[IP address of eLink web server]**'

Bypass the Proxy Server

If your company uses a proxy server to access the Internet, then you will need to carry out the following steps to bypass the proxy server for local addresses. This is done to prevent the caching on the proxy server interfere with the operation of eLink. This also assumes that you know the IP address/host name of the server.

Go to (menu) **Tools** → (item) **Internet Options** → (tab) **Connections** → (button) **Lan Settings**.

Ensure that the checkbox labelled **Bypass proxy server for local addresses** is **ticked**.

Click the button labelled **Advanced**. Enter the IP address/host name of eLink into the textbox within the "**Exceptions**" section, labelled "**Do not use proxy server for addresses beginning with:**" If there is already something in here, put a semicolon (" ; ") before the IP address/host name of the eLink server.

ActiveX

Some modules of eLink use ActiveX (the Query and Template wizards e.g.). Those ActiveX are installed automatically the first time you access one of those modules. However, if the computer is running Windows NT or Windows 2000, the **user** must have **the right to install an ActiveX** on his workstation. Users who only belong to group "Local Users" do not have that right.

- Make the user a member of the local group "**Power Users**" OR
- Give the user the installation right by using the NT or Windows 2000 **Policies** OR
- Register all ActiveX while logged as Administrator (ocx files extracted from the cab files from the eLink web server – see Appendix 1, page 14).

The ActiveX-related security settings must be configured as follows:

From Internet Explorer: (menu) **Tools** → (item) **Internet Options** → (tab) **Security** → (icon) **Trusted Sites**.

Then click (button) **Custom Level** in section **Security level for this zone**. Set all options concerning **ActiveX** to "**Enable**".

Cookies

eLink uses cookies to store information about your session and user identification. Thus, your browser must allow cookies. Please note that the **default settings** of Internet Explorer **work fine**.

From Internet Explorer: (menu) **Tools** → (item) **Internet Options** → (tab) **Privacy** → (button) **Advanced** → tick (checkbox) **Override automatic cookie handling** → (section) **First-party Cookies** → tick (radio button) **Accept** and tick (checkbox) **Always allow session cookies**

Caching

To prevent the browser from opening other sites in eLink windows:

Go to (menu) **Tools** → (item) **Internet Options** → (tab) **Advanced** → (section) **Browsing**

Clear the checkbox **Reuse windows for launching shortcuts**.

To prevent the interface flashing:

Go to (menu) **Tools** → (item) **Internet Options** → (tab) **General** → (section) **temporary internet files**

Click on settings

Check Automatically

Pop-up windows

eLink needs to use pop-ups as it is a multi-window application, with hyperlinks on one card opening another window. Even the eLink Navigator pops up after login.

If you are using Internet Explorer 7 the first Time you will connect you to eLink you should accept Pop-Up. You can change the option into (menu) **Tools** → (item) **Internet Options** → (tab) **General** → (section) **tabs**

Click on settings

Changing the options to Always open pop-up into a new window

II. POP-up killers

Overview

Some applications offer to prevent pop-ups from appearing on web sites. However, eLink needs to use pop-ups as it is a multi-window application, with hyperlinks on one card opening another window. Even the eLink Navigator pops up after login.

So, you need to configure your pop-up killer to make sure that all windows will be activated in eLink. Generally, there is an option in the pop-up blocker to add a site as "trusted" or "allowed". Do this for the entire eLink web site.

▶▶ Example: the Google Toolbar

The Google Toolbar blocks pop-ups. To allow pop-ups for eLink, click the button from the Google toolbar when logging in to eLink.



▶▶ Example: Norton Internet Security

If you have Norton Internet Security and the eLink navigator does not appear after login, check the following:

(start menu) **Settings** (menu item) **Control panel** (item) **Administrative tools** (item)
Services:

Find the service called **Symantec network proxy**, right click and select **Properties**.

Click the button **Stop** and set the dropdown field **Startup type** to **Manual**.

Note: this program modifies a part of eLink's code, thus preventing the eLink Navigator from displaying. Changing the setting above will not stop Norton's main Internet Security features.

▶▶ Personal Firewalls

If you have a Personal Firewall installed, you may experience trouble accessing the Internet (thus eLink). Please refer to the application's documentation.

III. MS-Word and MS-Excel configuration

Overview

The document merging using an eLink Template uses macros. That's why the macro security options in Word and Excel should not be set to "high", which will not execute the macros and cause errors in the merge.

▶▶ Editing macros Securities

Macro security in Word and Excel

In MS-Word, go to menu **Tools – Macros – Security**.

On the first tab (**Security Level**), tick the radio button **Medium** or **Low**.

Note: if you choose a Medium security level, warn the user that he/she should click the button **Enable macros** when prompted while launching an eLink Template.

In Word 2003 or XP, also go to the second tab (**Trusted Publishers**) and tick the checkbox **Trust access to Visual Basic Project** at the bottom of the window.

Note: this option has been added to Word through a Windows Update. If you do not see this option, do not worry.

Repeat the same configuration in

MS-Excel.

Troubleshooting

If you experience trouble launching an eLink Template, please refer to the Appendix (page 15) for a few troubleshooting topics.

IV. MS-Outlook configuration

Overview

The Outlook add-in is necessary for the integration between eLink and Outlook. The eLink Command Center groups a series of nice-to-have features like direct login, favorites, recent cards etc...

▶▶ Outlook add-in

Install the Outlook add-in and the eLink Command Center

Before starting, close all applications of the MS-Office suite (Outlook, Word, etc.)

From the eLink Navigator, click (button) **Tools**, (hyperlink) **Options**, (hyperlink) **Install Add-in Components**

After installation, please check that the URL to eLink has been taken correctly:

In **Outlook**: (menu) **Tools** – (menu item) **Options** – (tab) **Link**

The icon for the **eLink Command Center** is a butterfly. If it does not appear in your system tray, go to *Start – Programs – eLink Add-In Components 2005 – eLink Command Center*.

Right-click the butterfly in your system tray and choose **Properties**. Check the URL on tab **Options**.

Do not use Word to edit e-mail messages

If Word is set as the editor for your e-mails, this may cause errors. If you experience trouble, do the following:

In MS-Outlook 2000, go to menu **Tools** – **Options**. On tab **Mail Format**, clear the checkbox **Use Microsoft Word to edit e-mail messages**.

In MS-Outlook 2003, go to menu **Tools** – **Options**. On tab **Mail Format**, clear the checkboxes **Use Microsoft Office Word 2003 to edit e-mail messages** and **Use Microsoft Office Word 2003 to read Rich Text e-mail messages**.

Move notification e-mails to a separate Outlook folder

Users often ask to keep the LINK internal mails and system notifications apart from external e-mails.

A rule based on the presence of the text **<!LINK\$** in the message body will accomplish the job.

V. Userfriendliness

Opening eLink

Make sure eLink can be accessed easily:

- Place a shortcut to the eLink login page on the desktop OR
- Add the eLink login page to the Favorites OR
- Log in through the eLink Command Center

Specify language in login

When logging in to eLink, you need to specify each time in which language you choose to work. This can be automated by specifying the language in the URL, as follows:

<http://xx.xx.xx.xx/elink/elink.dll/home?rootdir=elink&language=NL>

Note: NL = Dutch; F = French, E = Spanish, GB = English, D = German

Specify region in login

eLink has two sets of layouts for addresses: the continental one (by default), and the UK/US layout. You can force the region in the URL as follows:

<http://xx.xx.xx.xx/elink/elink.dll/home?rootdir=elink®ion=UK>

Specify theme in login

eLink comes with some colour themes: You can force the theme to be used in the URL as follows:

http://xx.xx.xx.xx/elink/elink.dll/home?rootdir=elink&theme=Link_BlackWhite_st

<http://xx.xx.xx.xx/elink/elink.dll/home?rootdir=elinktrinity&theme=LinkColors>



Appendices

Appendix 1: installing activex

If you do not want to put the user into the group Power Users, register all ActiveX (ocx files extracted from the cab files from the eLink web server) while logged as Administrator.

In the **Run** window, type **Regsvr32 <ActiveX File Name>**

where <ActiveX File Name> can be:

```
eLink\activex\eLinkDocLoader.cab
eLink\activex\DocModelWizardPanelXControl1.cab
eLink\activex\DocModelMergerXControl1.cab
eLink\activex\QueryFileXControl1.cab
eLink\activex\QueryWizardPanelXControl1.cab
eLink\activex\RemoteInstallerActiveX.cab
eLink\activex\ScriptClientXControl1.cab
```

Please note:

The ActiveX components are installed in the language that was specified during the installation of eLink. For example, if eLink has been installed in English and a user logs in in Dutch, the Template Wizard en Query Wizard will still appear in English.

Appendix 2: eLink features that need ActiveX

Some eLink features only work with ActiveX. This is a list of impacted features if your browser does not support ActiveX:

There is no **Outlook integration** (but the POP3 mailbox is fully operational).

Queries: the user can execute queries and print the answer tables. Not available: exporting the results to a file and creating new queries.

Documents: the user can upload files into eLink Documents (though not as smoothly as with ActiveX). Not available: launching Templates (for merging) and creating Templates.

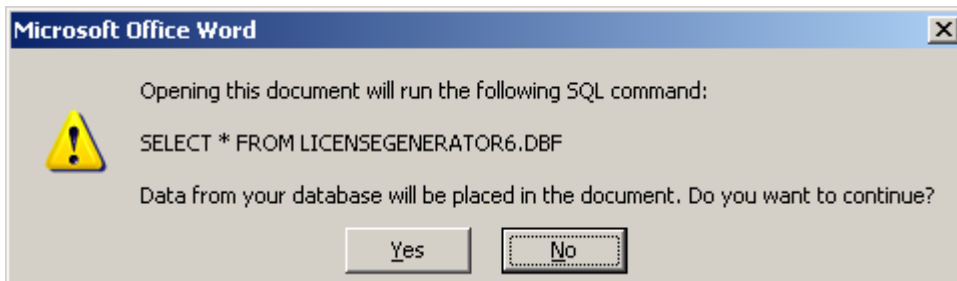
Document Templates: not available.

APPENDIX 3: troubleshooting templates

I get a weird message when using a Template or making a Mailing

Explanation:

With Windows XP, you might get the following message when opening a DBF file (e.g. when making a Mailing and sometimes when using an eLink Template).



Click **Yes** to proceed.

Solution:

See Microsoft's support site if you wish to skip this message:

<http://support.microsoft.com/?scid=kb;fr;825765>

The (first page of my) merged document is empty

Explanation:

Sometimes, the ODBC data source for dBase files (usually "Microsoft dBase Driver") is configured to show deleted records. As a result, when merging a document template you obtain an empty result, or the first page of the document is empty.

Solution:

Open Control Panel, Administrative Tools, Data Sources (ODBC).

Select the data source you're using (dBase Files). Click the button Configure. Click the button Options at the bottom of the window. Clear the checkbox Show Deleted Rows.

Accented characters do not appear correctly

Explanation:

dBase files are generated with the "old" DOS character set for extended or accented characters.

Windows applications usually expect to find ANSI character sets.

In order to solve this problem, the character set should be translated by the Microsoft Jet Engine.

Solution:

Windows proposes different drivers for dBase files via ODBC.

The only driver that correctly translates the characters set from "OEM" to "ANSI" is the driver "dBase Files" or "dBase Files via ODBC".

Drivers of the kind "dBase Files - Word", "dBase VFP" or "dBase FoxPro" do NOT translate the character sets. Please do not use drivers containing the words "Word", "FoxPro" or "VFP".

On Windows NT/ 95/98, in order for the Microsoft Jet Engine to work correctly, it may be required to install Service Pack 6 of Jet 4.0. This update (Jet 4.0 SP6) is freely available on the Microsoft web site.

Memo fields are always empty in the merged document**Explanation:**

This problem only occurs when dBase files are used to perform the document template merge.

The contents of the memo fields are not written in the main .dbf file, but are contained in a separate .dbt file.

When eLink does not have the appropriate access rights to the temporary directory in which the .dbt file is created, the file will not be transferred to the client.

Solution:

Give all users full access to the server's "temp" directory.

Using Templates with Products

If the user is supposed to use eLink Templates containing a table of products, you should check his rights on folder "temp".



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This is the end of this Manual. Now you have configured your desktop.
For all comments about this manual, contact by e-mail support@nextapplication.com

Are you registered on the eLink Community?
Go there: <http://forum.nextapplication.fr>