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Title: Configuring FileCM Extensions for Excel

The information in this article applies to:

- FileCM 2.6, 3.0, 3.5, 3.5.1,3.5.2,4.0,4.2
 - Microsoft Windows 2000 Professional, Windows XP
 - Microsoft Windows 2000 Server and 2003 Server
 - Office 2000, Office XP, Office 2003,Office 2007
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SUMMARY

Moderate-High: Requires Visual Basic For Applications (VBA) skills, network file services skills and interoperability skills.

This article explains how to configure FileCM Extensions for Excel. This will enable any spreadsheet in Excel to be registered in FileCM.

This article assumes that you are familiar with administering and configuring applications. For more information about Microsoft Excel, or SBS FileCM, please refer to your product documentation.

This article assumes you are familiar with administering FileCM.

MORE INFORMATION

FileCM Extensions for Excel allows users of FileCM to register spreadsheets directly from Microsoft Excel to FileCM via a preconfigured add-in. There are a number of ways of deploying this add-in. This procedure will be focusing on configuring a FileCMLink.XLA file with reference to the FileCMAPI.XLA add-in. This method allows you to make modifications to the one FileCMAPI.XLA add-in.

PREREQUISITES

To complete this procedure, you must have configured your systems as per the application note Installing and Configuring FileCM Remote PC Client (S/PRD/FCM/DDS/0053.04).

This procedure will refer to path names, shares and files from the above application note.

ASSUMPTIONS

It is assumed that you have configured FileCM with an ID Key structure, fields and forms.

Install Required Files

1. Copy the FileCMAPI.XLT file from the Extensions folder on the FileCM Installation CD to the FCMInst\Templates folder.
2. Change the properties of the FileCMAPI.XLT file so that it is NOT read only.

Configure FileCMAPI.XLT

1. Open the FileCMAPI.XLT file.
2. Open the Visual Basic Editor.
3. Locate and open the Module named FileCMCode.
4. In the declarations area, change the following details:
 - Public Const FileCMServer = " " SET TO: IP address or your FileCM Server
 - Public Const FileCMUpdateLocation = " " SET TO: "\\MyServer\FCMInst\Updates\"
(Where MyServer is the server hosting the FCMInst share)
 - Public Const FileCMTemp = " " SET TO: "\\MyServer\FCMInst\Temp\"
(Where MyServer is the server hosting the FCMInst share)
 - Public Const FileCMLocation = " " SET TO: "C:\Program Files\FileCM Remote\"
 - Public Const FileCMEField = " " SET TO: The name of your OS store or DB store that the attached file will be attached to.
5. SBS recommends that VBA projects be digitally signed to work efficiently with Microsoft Excel security. Please complete the steps in "Digitally Signing VBA Projects" below before continuing.
6. Save As Excel Add-in to FCMInst\Templates folder and close the file.

Configure FileCMLink.XLA

The FileCMLink add-in is used to reference the FileCMAPI add-in configured above.

1. Create a new Excel Add-in named FileCMLink.XLA.
2. Open the Visual Basic Editor.
3. Select Tools|References.
4. Browse for the FileCMAPI.XLA file located in \\MyServer\FCMInst\Templates\ and add the reference to it.
5. If you are prompt with a security dialogue due to a digital signature, ensure certificate details are correct, then tick "Always trust macros from this source" and Enable Macros.
6. SBS recommends that VBA projects be digitally signed to work efficiently with Microsoft Excel security. Please complete the steps in "Digitally Signing VBA Projects" below before continuing.
7. Save to FCMInst\Templates folder and close the file.

Digitally Signing VBA Projects

All VBA projects should be digitally signed to enable them to work efficiently with Microsoft security. Please read Microsoft's documentation for recommendations on when to use SelfCert to sign VBA projects. Follow the steps bellow to digitally sign your project.

1. On the Windows Start menu, point to Programs, and then click Windows Explorer.
2. In Windows Explorer, navigate to the Program Files\Microsoft Office\Office folder, where Program Files is the drive and folder where you installed Microsoft Office.
3. Find the SelfCert.exe program, and double-click it.

NOTE: The SelfCert.exe program is not part of the standard installation of Microsoft Office. If you need to install the SelfCert.exe program, rerun Setup for Office CD1 and click Add or Remove Features. Click the plus sign (+) next to Office Tools; click Digital Signature for VBA Projects and then click Run from My Computer. Click Update Now.

4. After SelfCert starts, type your name in the Your name box, and click OK.
5. In the VBA project, on the Tools menu, click Digital Signature. This displays the Digital Signature dialog box.
6. Click Choose to select a digital certificate. This displays the Select Certificate dialog.
7. Select the Certificate you just created in step 4 above.
8. Click OK twice.

Distribution of FileCMLink.XLA

There are a number of ways to distribute the FileCMLink add-in to give users access to the FileCM Excel extension. The method chosen will depend on a number of factors, including network setup and use of other add-ins in users Excel.

Method 1

Set users Excel Alternate Start-Up location to a shared network location.

Advantages

- Easy roll out by network administrators via policies.
- No distribution required for future updates.
- Easy upgrade due to only one copy of FileCMLink file existing.
- Can be used by laptops or PC that get disconnected from the network.

Disadvantages

- Users must share a startup directory that may affect other Excel Add-ins.

Method 2

Copy to Excel Start-Up (XLStart) location on each machine.

Advantages

- Easy roll out by network administrators using login script.
- Does not effect other Excel add-ins.

Disadvantages

- Complex upgrade due to multiple copies of FileCMLink file.
- Distribution required for future updates.
- Can cause problems when used by laptops or PC that get disconnected from the network.

Distribution Method 1

1. Create a new folder in your FCMInst directory called StartUpExcel
2. Copy the FileCMLink.XLA file from FCMInst\Templates folder to the FCMInst\StartUpExcel folder.
3. From Tools|Options in Excel select the General tab and set the Alternate StartUp location to be "\\MyServer\FCMInst\StartUpExcel". This can be done manually for each user or using a policy.

Distribution Method 2

1. Copy the FileCMLink.XLA file from FCMInst\Templates folder to each machines "C:\Program Files\Microsoft Office\Office\XLStart".

First Time Use with Digital Signing

If you have opted to digitally sign your project a security warning dialog box may appear when a user starts Microsoft Excel the first time after distribution.

1. If the "Always trust macros from this source" is unavailable you will have to install the certificate. To do this
 - a. Click Details
 - b. Click View certificate
 - c. Click Install Certificate
 - d. Follow wizard instructions.
 - e. After restarting Excel the "Always trust macros from this source" will be enabled.
2. Click View details of the certificate and verify it is correct.
3. Click Ok
4. Tick always trust macros from this source
5. Enable macros

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