



IBM Software Group

Quickr Configuration/Administration

Managing Quickr

An IBM Proof of Technology



Presentation objectives

- Define configuration and administration of IBM® Lotus® Quickr™
- Describe the tools available for configuring and administering a Quickr installation

Agenda

- Definitions
- Tools
- Server/site configuration
- Server administration
- Place administration
- User administration
- Customization
- Troubleshooting

Definitions

- Configuration = setting up the server to behave in a certain way
 - ▶ Security
 - ▶ Integration with other products
 - ▶ Referred to as Site Administration
- Administration = day to day operations
 - ▶ Managing users
 - ▶ Managing places
 - ▶ Referred to as Place Administration
- Customization = making changes to the system to meet your specific business needs
 - ▶ Look and feel
 - ▶ Place templates
 - ▶ Covered in a later topic

User Types

- External – from a directory (LDAP or Domino)
- Local – Quickr only (defined within a single place)
- Quickr administrator
 - ▶ Created at install
 - ▶ First is always local
 - ▶ Can add more
- Quickr Superuser
 - ▶ Always external
 - ▶ Has access to all places, rooms and documents
 - ▶ Browser access via qpconfig.xml, notes access via QuickPlaceAdministratorsSUGroup

User Types within a Place

- Owner
 - ▶ Place creator gets this role
 - ▶ Others can be added
 - ▶ Owner has access to all rooms, folders, and pages in the place + Manager capabilities
- Manager
 - ▶ Can create and edit content, manage membership, and customize the place
- Editor
 - ▶ Can create content, and edit other people's content
- Author
 - ▶ Can create content, and edit his own
- Reader
 - ▶ Can read content

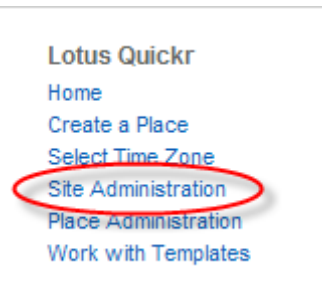
Configuration

Configuration Tools

- Site Administration
- qpconfig.xml
- Notes.ini

Quickr Site Administration

- The first stop for a Quickr server Admin is the Site Administration area accessed from the main Quickr page.
- You can choose several server wide preferences here



Create a Place

Instructions

- Security
- User Directory
- Other Options

Tips

Click User directory to connect to your LDAP or Domino directory to manage users.

Click Other options to limit file attachment size, specify instant messaging servers, and more.

Instructions

Only server administrators can enter. In the sidebar are links to the following areas:

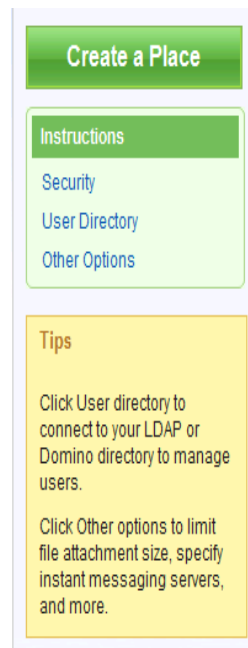
- › Security: Control who can create places and who can administer the server
- › User Directory: Enable place managers to invite members from a central directory
- › Other Options: Choose many other server settings

Next Steps

- › Click any link in the sidebar
- › For information about administering IBM Lotus Quickr, visit <http://www.ibm.com/developerworks/lotus/documentation/quickr>

Site Administration

- Site Administration choices
 - Instructions
 - Security
 - User Directory
 - Other Options



Instructions

Only server administrators can enter. In the sidebar are links to the following areas:

- › Security: Control who can create places and who can administer the server
- › User Directory: Enable place managers to invite members from a central directory
- › Other Options: Choose many other server settings

Next Steps

- › Click any link in the sidebar
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Quickr's qpconfig.xml File

- qpconfig.xml is a configuration file that allows for some additional settings that are not exposed in the UI
- a sample file qpconfig_sample.xml is shipped, must be copied to qpconfig.xml and edited to take affect
- All options are commented by default
 - ▶ Authentication
 - ▶ My Places
 - ▶ Offline
 - ▶ Server Messages
 - ▶ Super User
 - ▶ User Directory
 - ▶ Expanded Membership Model
 - ▶ Search Places
 - ▶ Place Catalog
 - ▶ Cluster
 - ▶ Sametime
 - ▶ Notifications
 - ▶ ...
 - ▶ UI Features

Notes.ini

- notes.ini parameters may affect aspects of how Quickr runs
- Generally for special cases (e.g. Tech Preview)
- Documented in Technotes, or from Support
- Example for 8.0.0.2: h_VersionType

Quickr Server Configuration

- Configure security
 - ▶ Set user access
- Configure directory
 - ▶ Domino Directory (managed by IBM Lotus Domino®)
 - ▶ LDAP (managed by Quickr)
- Configure offline use
- Configure clustering
- Enable IBM Lotus Sametime® integration
- Configure search
- Connectors
- Upgrade places

Site Administration - Security

- Who is allowed to create new places?
 - ▶ Anyone who has access
 - ▶ A specified list or users and/or groups
- Who is an Administrator
 - ▶ A list of users and/or groups

Security

Who can create new places on this server?

- Anyone who can connect to the server.
- Only specific users (or groups) who provide a name and password.

Add...	(click Add... to grant create access.)
Remove...	
Modify...	

Who can administer this server? Users and groups in this list can:

- Create new places.
- Decide who *else* can create new places.
- Change server settings, delete places, and create/delete PlaceTypes.

Add...	(click Add... to grant admin access.)
Remove...	sadmin
Modify...	

Site Administration - User Directory

- What directory will be used for authentication and user selection
- Will this server allow new (local) users to be created?

User Directory

[Change Directory](#)

You can specify a user directory from which place members can be selected.
Directory.

Type: LDAP Server
Name: collab.demoibm.com

New Users.

Disallowed

User Directory - None

All Users are local (defined per place)
This is how the system is set immediately after install

Change User Directory

You can specify a user directory from which place members can be selected.

Directory. You can specify a directory from which place managers can select members. Select the directory type and name below:

Type:

(No Directory) ▼

Back


Next

User Directory - LDAP

Change User Directory

You can specify a user directory from which place members can be selected.

Directory. You can specify a directory from which place managers can select members. Select the directory type and name below:

Type: 
Name:

Advanced Settings. You can enter specific settings for your directory or leave them blank to make use of the default settings.

Port number:

Check for SSL connection with LDAP User Directory.

Search base:

Narrow searches to the place name.

Note: Specify the search base using the Distinguished Name format.

Check to use credentials specified below when searching the directory.

Username:

Password:

Note: If your LDAP directory allows anonymous access, leave these fields blank. Otherwise, if your LDAP directory requires credentials to access information, please enter the username and password for the Quickr server to use when making requests.

Authentication Timeout (seconds):

Search Timeout (seconds):

New Users. Do you want to allow place managers to create new users in each place, or require managers to select existing users only from the available directory?

Allow managers to create new users in each place.

Disallow new users - Require managers to select *existing* users from the available directory.

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User Directory - Domino

Change User Directory

You can specify a user directory from which place members can be selected.

Directory. You can specify a directory from which place managers can select members. Select the directory type and name below:

Type:

Domino Server ▼

Note: Quickr will let the local Domino server authenticate any external place member when Domino Server is selected as the User Directory. If you are using more than one directory for place membership, you must configure the local Domino server to use Directory Assistance. Please see the Quickr installation or administration documentation for more information.

New Users. Do you want to allow place managers to create new users in each place, or require managers to select existing users only from the available directory?

- Allow managers to create new users in each place.
- Disallow new users - Require managers to select *existing* users from the available directory.

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Next

Directory Configuration Summary

- Log on as Administrator
- Choose Site Administration
- Choose Security User Directory
- Choose Change Directory
- Set type as appropriate
 - Domino
 - LDAP Server

Other Configuration Options

Other Options

Edit Options

You can choose several server-wide preferences here. Note: users must refresh their browser caches in order for the new settings to take effect. Click the **Edit Options** link to change the following settings, which affect all places on this server:

- > **Enable/Disable ActiveX and Java** - Choose whether to allow the use of ActiveX controls and/or Java Applets.
- > **Enable/Disable Form PlaceBots** - Choose whether to allow place managers to import and run PlaceBots when forms are submitted.
- > **File Attachment Size Limit** - Set the maximum size of files that can be attached to place pages.
- > **Specify Sametime Servers** - Specify the servers to use for instant messaging and online meeting services.
- > **Domino Offline Passthru Server** - Specify a passthru server for use when accessing Quickr Offline.
- > **Alternate Offline Download URL** - Specify an alternate URL for downloading the Quickr Offline installer.
- > **Email Link Format** - Specify an alternative root URL for place links displayed in outgoing email messages.
- > **Calendar Subscriptions** - Choose whether members can subscribe to receive calendar events on their personal calendars.
- > **Calendar Type** - Choose which calendar type to use.

Please click the **Edit Options** link to access these settings:

Enable/Disable ActiveX and Java

Enable/Disable ActiveX and Java. Check to allow the use of ActiveX controls and/or Java Applets. If your organization has a policy against using ActiveX controls or Java Applets, you can disable them here. (Note: doing so will disable some advanced authoring and customization features.)

- Enable ActiveX
- Enable Java Applets

Enable/Disable Form PlaceBots

Enable/Disable Form PlaceBots. Check to allow place managers to import and run PlaceBots on submission of forms.

Enable Form PlaceBots

Set Maximum Attachment Size

Maximum Attachment Size. Enter the maximum file size allowed for any attachment.

File size in KB:

Sametime Integration

Sametime Servers. To enable real-time collaboration features in Quickr, you need to specify the Community Server that will provide awareness and instant messaging services, and the Meeting Server that will provide meeting services. The same Sametime server can be used for both functions if required. Leave blank if you want to disable the features.

Sametime Community Server: [protocol://hostname[:port], Example: http://myserver.mycompany.com]

Sametime Meeting Server: [protocol://hostname[:port], Example: http://myserver.mycompany.com]

Offline Configuration

Domino Offline Passthru Server. You can specify a passthru server for use when accessing Quickr Offline.

Server canonical name: Example: Tollbooth/MyCompany

Server hostname: Example: tollbooth.mycompany.com

Alternate Offline Download URL. You can enter the URL of an alternative source for downloading the Quickr Offline installer.

Offline download URL: Example: http://myserver.mycompany.com

Offline Configuration

Quickr allows a user to take a place offline, make changes, and synchronize changes with the server

- Enable Domino Off-line Services (DOLS)
- Create certifier
 - ▶ An offline user must have a notes id
 - ▶ Types of users
 - External users
 - Same OU
 - Different OU
 - Local users
- Create offline security policy document
- Configure download server for DOLS
- Hide offline link
- Details in Chapter 13

Email URL Prefix. If this server will be accessed through a gateway server, you can specify an alternative root URL to use in place links displayed in outgoing email messages.

URL prefix:

Example: <http://myserver.mycompany.com:8080>

Calendar Integration

Calendar Subscriptions. Choose whether members can subscribe to receive calendar events on their personal calendars.

Enable calendar subscriptions

Calendar Type. Select Calendar Type for Display.

Select Calendar Type

	▼
Gregorian	
Hijri	
Hebrew	

Clustering

- Create a Domino cluster
- Implement load balancing and/or failover
 - ▶ External IP Sprayer
 - Hardware
 - Software
- Setup catalog server
 - ▶ Each server should have a replica of the place catalog
- Modify scheduled qptool commands
- Details in InfoCenter

Sametime Integration

- Allows awareness, chat, and meeting scheduling
- Requires Sametime 7.5 or greater
- Servers must be in same Lotus and DNS domains
- Set up Single Sign On
- Servers should use same LDAP
- Copy files to Sametime and Quickr servers
- Specify Sametime servers in Site Administration
- Details in InfoCenter and developWorks®

Create:

What would you like to create?



Post

Post a new topic for discussion that can include formatted text, images, and file attachments.



Imported Page

Import an existing Microsoft Office, HTML, JPEG or GIF file from your computer.



Event

Create a new event on the calendar.



Online Meeting

Work with others in real time using screen sharing, chat, and other tools.

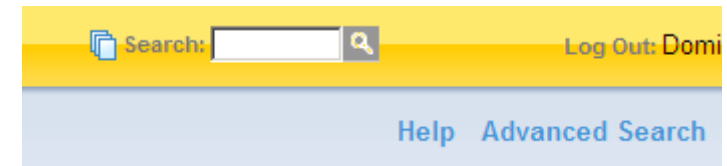


mygif

Lucille Suarez on 09/25/2007 at 10:02:56 AM | Updated by Lucille Suarez on 09/25/2007 at 10:03:32 AM

Search

- Out-of-the-box Search and Advanced Search within Quickr Places
 - Includes full text search
 - Cross-place search can be enabled
 - Enable Domain Catalog
 - Set `search_places enabled=true` in `qpconfig.xml`
 - External searching also supported



Find pages in:

All places

This place

Folder:

Search for:

Text. Only include pages that contain these words or phrases:

Author. Name contains:

Date. Only include pages created or modified:

After

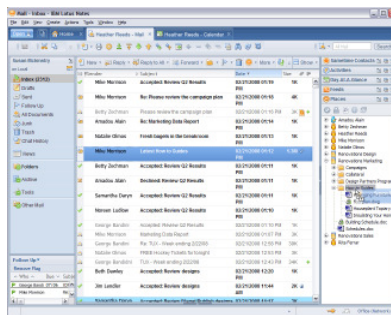
Sort results by:

Most matches. Pages that contain the most matches with the above word/phrase will be listed first.

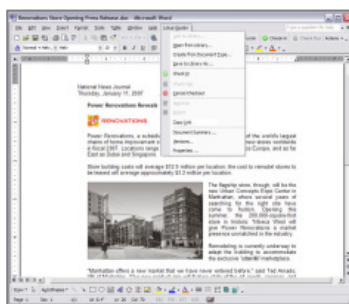
Newest first. Most recently edited pages that contain the above word/phrase will be listed first.

Connectors

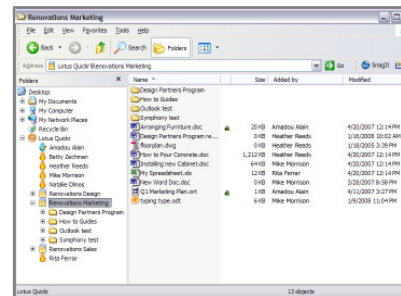
- Enable or disable Web Services support
- Configure separate download site
- Manage silent install



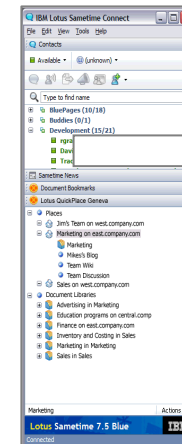
Lotus Notes client



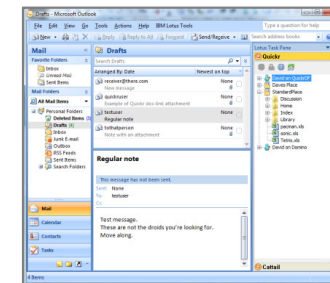
Microsoft Office / IBM Lotus Symphony™



Windows Explorer / "My Documents"



Lotus Sametime



Microsoft Outlook

Administration



Server Administration

- Normal Domino admin
- Backup/archive
- Space monitoring
- Connectivity
- Cluster administration

The Quickr Admin's view of the world

- Wants to make his user population happy
- Doesn't want to spend a lot of time hand-holding to do it!
- Users can do a lot without my involvement:
 - ▶ Self-provision places
 - ▶ Customize places
 - ▶ Control membership of places
- Many places created without my knowledge
 - ▶ How do I find offending places and easily take action?
 - Dead places – inactive for long period of time
 - Large places – growing out of control

Administration Tools

- Place Administration
- Usage Statistics
- Place Catalog
- qptool
- My Places
- Java® api

The Quickr 8.1 Admin Console

Place Administration

Places Templates Policies

All Places
Locked Places
Policy Alerts

Key

- Place is locked
- Place has a policy alert


Tips

Use Shift + Click to select multiple places, then choose an action to perform on the selected places.

All Places on quickr.demoibm.com
33 Places on this server's Places Catalog

Actions

1 - 10 of 33 Select: All None Unlocked Locked

Select	Locked	Alert	Title	Policy Name
<input type="checkbox"/>	<input type="checkbox"/>		Adams Connectors	!Default Policy
<input type="checkbox"/>	<input type="checkbox"/>		Amado Connectors	!Default Policy
<input type="checkbox"/>	<input type="checkbox"/>		Betty Share	EntryPolicy
<input type="checkbox"/>	<input type="checkbox"/>		Betty1000	SmallPolicy
<input type="checkbox"/>	<input type="checkbox"/>		BettyBlog330	!Default Policy
<input type="checkbox"/>	<input type="checkbox"/>		BeWiki	!Default Policy
<input type="checkbox"/>	<input type="checkbox"/>		Blog Design	!Default Policy
<input type="checkbox"/>	<input type="checkbox"/>		Daryn Connectors	!Default Policy
<input type="checkbox"/>	<input type="checkbox"/>		Dray Connectors	!Default Policy
<input type="checkbox"/>	<input type="checkbox"/>		Dumond Connectors	!Default Policy

One place to go

Place Administration

Places | Templates | Policies

All Places on quickr.demoibm.com
33 Places on this server's Places Catalog

Actions

1 - 10 of 33 Select: All None Unlocked Locked

Select	Locked	Alert	Title	Policy Name
<input type="checkbox"/>			Adams Connectors	!Default Policy
<input type="checkbox"/>			Amado Connectors	!Default Policy
<input type="checkbox"/>			Betty Share	EntryPolicy
<input type="checkbox"/>		!	Betty1000	SmallPolicy
<input type="checkbox"/>			BettyBlog330	!Default Policy
<input type="checkbox"/>			BeWiki	!Default Policy
<input type="checkbox"/>			Blog Design	!Default Policy
<input type="checkbox"/>			Daryn Connectors	!Default Policy
<input type="checkbox"/>			Dray Connectors	!Default Policy
<input type="checkbox"/>			Dumond Connectors	!Default Policy

Callouts:

- Select subsets (points to sidebar)
- View and Manage Places, Templates and Policies (points to navigation tabs)
- Sort on any column (points to table headers)


Easily See Place Detail

Click on a place name to see more detail

Usage Statistics

Logins	71
Docs	16
Drafts	2
Attachments	7
Custom Forms	0
Offline Installs	0
Managers	2
Editors	3
Authors	0
Readers	0

[All Places](#) > Place Summary for Betty1000



Place Summary for Betty1000

4/15/08 9:32:43 PM

Actions ▼

Place Title (Display) [Betty1000](#)

Place Name (URL) <http://quickr.demoibm.com/betty1000>

Policy [SmallPolicy](#)

Server quickr.demoibm.com

Locked? **No**

Policy Status	Place Attribute	Current	Alert Limit
⚠	Size (MB)	22	20
✔	Last Accessed	4/11/08 8:38:58 AM	0


Usage Statistics

- Selecting the Usage Statistics tab from the Quickr main page allows access to statistics for places you are a member of
- Statistics available in the 'My Places' view include:
 - Title
 - Size
 - Last Accessed
 - Last Modified
 - Logins
 - Docs
 - Reads
 - Postings
 - Readers
 - Authors
 - Managers

Name	Title	Size (MB)	Last Accessed	Last Modified	Logins	Doc Reads	Postings	Readers	Authors	Managers	Editors	Docs	Drafts	Attachments
betty1000	Betty1000	22	04/25/2008	03/19/2008	68	426	28	0	0	2	3	15	2	6
bettyblog330	BettyBlog330	6	02/18/2008	04/24/2008	1	8	0	0	0	1	0	3	0	3
chimeraplace	Chimera Place	6	04/24/2008	04/24/2008	20	126	22	0	0	1	1	7	0	3

Using Usage Statistics to Perform Administration Tasks

- Administrators and place owners can take several actions for each place including:
 - Lock or unlock a place
 - Update place statistics
 - Reset place data statistics
 - Remove place



The screenshot shows a web interface titled "My Places" with a table of places. A context menu is open over the first row, listing actions: "Go To Place", "Lock Place", "Update Place Data Statistics", "Reset Place Data Statistics", and "Remove Place".

Name	Title	Size (MB)	Last Accessed	Last Modified
betty1000	Betty1000	22	04/25/2008	03/19/2008
bettyblog330			/2008	04/24/2008
chimeraplac			/2008	04/24/2008

Place Catalog

- Contains data on servers, places, rooms, and members
- Enables qptool command, statistics, My Places, and cross-place search
- Must be in superusers group to see all entries
- Some info updated realtime, some by server task (3 AM)

Place

PlaceName	f place1
PlaceTitle	f Place One
PlaceDescription	f
PlaceServerName	f server1.acme.com
PlaceServerIsMaster	f 1
PlaceServerIsVirtual	f 0
PlaceSize (K)	f 14255
PlaceLastAccessed	f 04/29/2007 11:17 AM EDT
PlaceLastModified	f 04/29/2007 11:16 AM EDT
PlaceIsLocked	f
PlaceReaders	f
PlaceAuthors	f CN=Domino Administrator,O=acme
PlaceEditors	f
PlaceManagers	f CN=Domino Administrator,O=acme
LoginCounts	f 1
DocReadCounts	f 7
PostingCounts	f 1
NumberOfReaders	f 0
NumberOfAuthors	f 0
NumberOfManagers	f 1
NumberOfEditors	f 0
NumberOfDocs	f 15
NumberOfDrafts	f 1
NumberOfAttachments	f 6
NumberOfCustomForms	f 0
NumberOfOfflineInstalls	f 0
LargestDocSize	f 3087415
LastDayUses	f 29
LastDayReads	f 69
LastDayWrites	f 10
LastWeekUses	f 143
LastWeekReads	f 258
LastWeekWrites	f 67
LastMonthUses	f 506
LastMonthReads	f 787
LastMonthWrites	f 297
h_Readers	LocalDomainServers, QuickPlaceAdministratorsSUGroup, Domino Administrator/acme
h_SaveReaders	



qptool

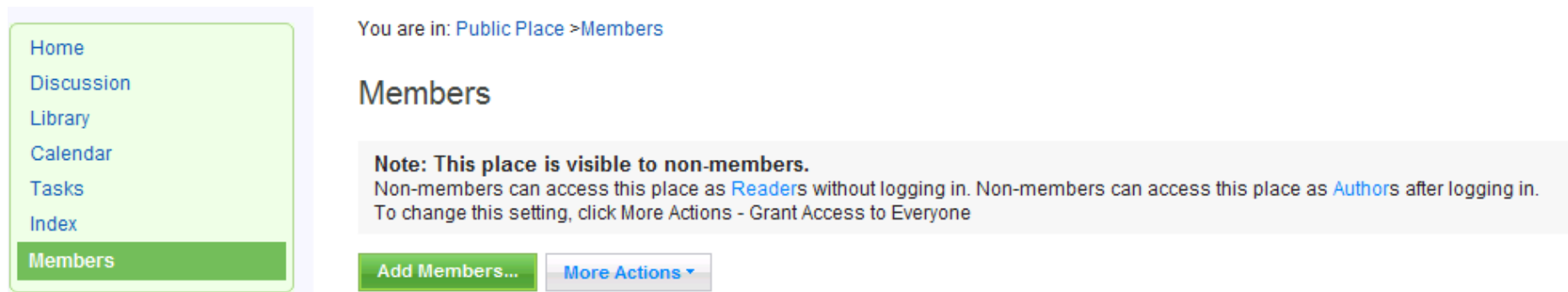
- Server task that runs commands – output goes to xml file (and console)
 - ▶ addmember, changemember, removemember, updatemember
 - ▶ archive
 - ▶ changehierarchy
 - ▶ membershipmodel
 - ▶ deadmail
 - ▶ execute
 - ▶ lock, unlock
 - ▶ newsletter, sendmail
 - ▶ password
 - ▶ placecatalog
 - ▶ addgraphicfont, removegraphicfont
 - ▶ refresh
 - ▶ register, unregister
 - ▶ remove
 - ▶ repair
 - ▶ replicamaker
 - ▶ report
 - ▶ Upgrade
 - ▶ createentryplace

User Administration

- Administer users in directory
- User name changes require qptool rename (adminp under consideration)
- User search can be configured

Place Administration

- There are several administration tasks an administrator or place manager can perform:
 - Manage members
 - Adjust folder options
 - Customize the place in several ways



Home
Discussion
Library
Calendar
Tasks
Index
Members

You are in: [Public Place](#) > [Members](#)

Members

Note: This place is visible to non-members.
Non-members can access this place as [Readers](#) without logging in. Non-members can access this place as [Authors](#) after logging in.
To change this setting, click [More Actions](#) - Grant Access to Everyone

[Add Members...](#) [More Actions ▾](#)

Administering Quickr Users

- Quickr users can be added to a place with the following access levels:
 - Reader
 - Author
 - Editor
 - Manager
 - Owner
- Added through user interface, or using qptool addmember

The screenshot shows a user administration dialog box with five tabs: Reader, Author, Editor, Manager, and Owner. The 'Author' tab is selected. Below the tabs, a text box contains the text: "Authors can read and edit pages. Click OK to add the following users as Author". Below this text box is a large empty input field. Underneath the input field are three radio button options: "Person (enter last name or first name)" (which is selected), "Group", and "Send an invitation to any new users who have email." (which is unchecked). At the bottom of the dialog are two buttons: "OK" and "Cancel".

Customized Administration using Quickr Java API/XML

- By using the XML (qpconfig.xml) to access Lotus Quickr you will be able to perform a variety of tasks, such as:
 - ▶ Searching all places in the service
 - ▶ Getting a list of all places on a particular server
 - ▶ Creating a new place
 - ▶ Adding a new person or group to a place
- To access the Lotus Quickr Java API, you must:
 - ▶ Set up the Lotus Quickr server to access the XML toolkit
 - ▶ Create well-formed XML that specifies the Lotus Quickr objects and the actions you want performed on them
 - ▶ Run your XML against the Lotus Quickr processor on the server
 1. On the command line, navigate to the /Lotus/Domino directory and enter the following command to execute the XML: `java com.lotus.quickplace.api.QPAPI -i inputfile.xml`
 2. **Note:** If you run the command from the Domino server console you must preface it with "load." For example: `load java com.lotus.quickplace.api.QPAPI -i inputfile.xml`

Quickr's XML API

- You can specify actions for the following XML IBM Lotus Quickr objects when using XML to access the Lotus Quickr Java API, such as
 - ▶ Service: actions: query, search
 - ▶ Server: action: getPlaceTypes
 - ▶ Place: actions: create, remove, forceRemove, update
 - ▶ Placetype: attribute Id; elements: name, description, addition information URL,
 - ▶ Person: attribute id, local, subscribed_to_newsletter, subscribed_to_calendar_events, using_accessible_ui, email_client; elements: <dn>, <username>, <first_name>, <last_name>, <password>, <phone_number>, <offline_password>, <description>, <email>, <theme>; actions: add, remove, update
 - ▶ Group: elements: <dn>, <description>; actions: add, remove, update
 - ▶ Member: elements: link; actions: add, remove

An XML Example

- In this example, a place named MyPlace is marked to deletion using the following XML file:

```
<?xml version="1.0"?>
  <service>
    <servers>
      <server local="true">
        <places>
          <place action="remove">
            <name>MyPlace</name>
          </place>
        </places>
      </server>
    </servers>
  </service>
```

An XML Example (Contd.)

- The output file from the previous example will look like the following:

```
<service>
  <servers>
    <server local="true">
      <places>
        <place>
          <name>MyPlace</name>
          <action_result action="remove">
            <status>0</status>
          </action_result>
        </place>
      </places>
    </server>
  </servers>
</service>
```

Customization

- Placebots
- XML API
- Javascript
- PlaceTypes
- Themes
- Forms
- Folders

Summary

- User Types
- Tools
- Server/site configuration
- Server administration
- Place administration
- User administration
- Customization

Questions





IBM Software Group

Demo

Quickr Administration

An IBM Proof of Technology

