



IBM Software Group

Installation and Configuration

IBM Lotus Quickr

An IBM Proof of Technology



Agenda

- Supported platforms
- Optional software
- Installation
- Definitions
- Configuration
- Deployment scenarios

Lotus Quickr Supported Platforms

IBM® Lotus® Quickr services for Lotus Domino

- Microsoft® Windows® 2003
- IBM AIX®
- IBM i5/OS®

Optional Software

Lotus Quickr services for IBM Lotus Domino®

- LDAP Directory
 - Microsoft Active Directory®
 - Sun One Directory Server
 - Lotus Domino 7.x & 8.0.1
 - IBM Directory Server 5.2 & 6.0
- Sametime 7.5, 7.5.1, 8.0
 - For Sametime features in places

Installation Lotus Quickr

- Lotus Quickr Services for Lotus Domino installs on top of an installed Lotus Domino 8.01 server
- First install Lotus Domino 8.0.1 Enterprise Server
 - Select HTTP services
 - Certifier should be no more that two Organizational Units (OU) deep
- Install Quickr
 - Choose Entry or Standard
 - Install takes less than 30 minutes
 - Select an administrator that is NOT in the directory you will use
- Configure Quickr
 - Select Directory (LDAP recommended)

Definitions

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

Definitions - 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

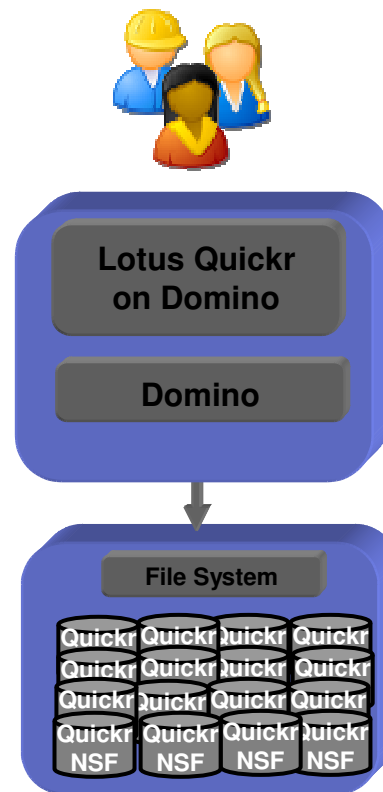
Definitions - User Types within a Place

- 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

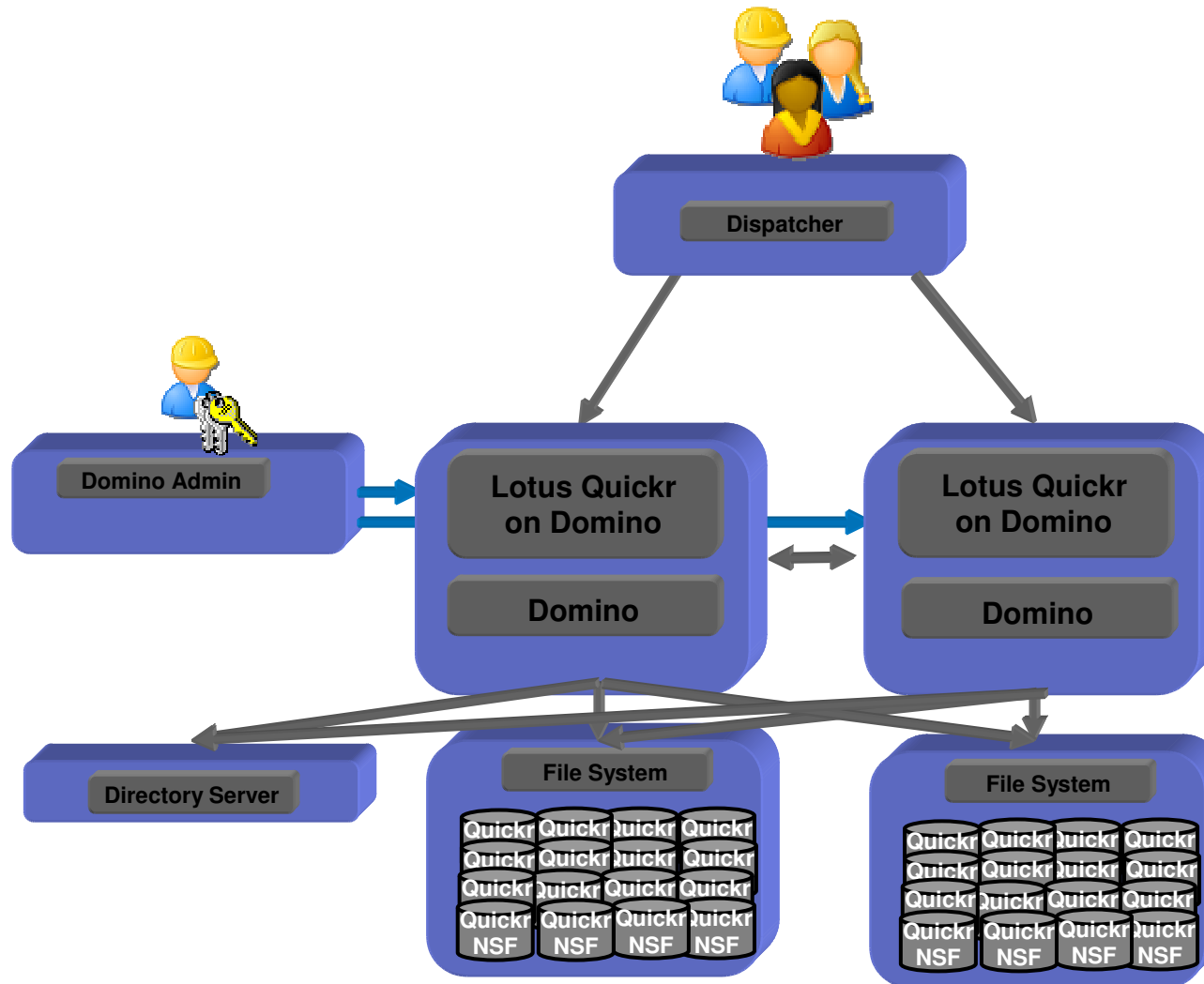
Configuration

- Select Time Zone
- Site Administration
 - ▶ Security
 - ▶ User Directory
 - ▶ Other Options
 - Enable/Disable ActiveX and Java and Form PlaceBots
 - File Attachment Size Limit
 - Specify Sametime Servers
 - Offline settings : Domino Offline Passthru Servers and Alternate Offline Download URL
 - Email Link Format
 - Calendar Subscription & Type
- Clustering
- Search
- Connectors
- Quicr's qpconfig.xml File
- Notes.ini parameters
- Enable SSO (part of Domino SSO)

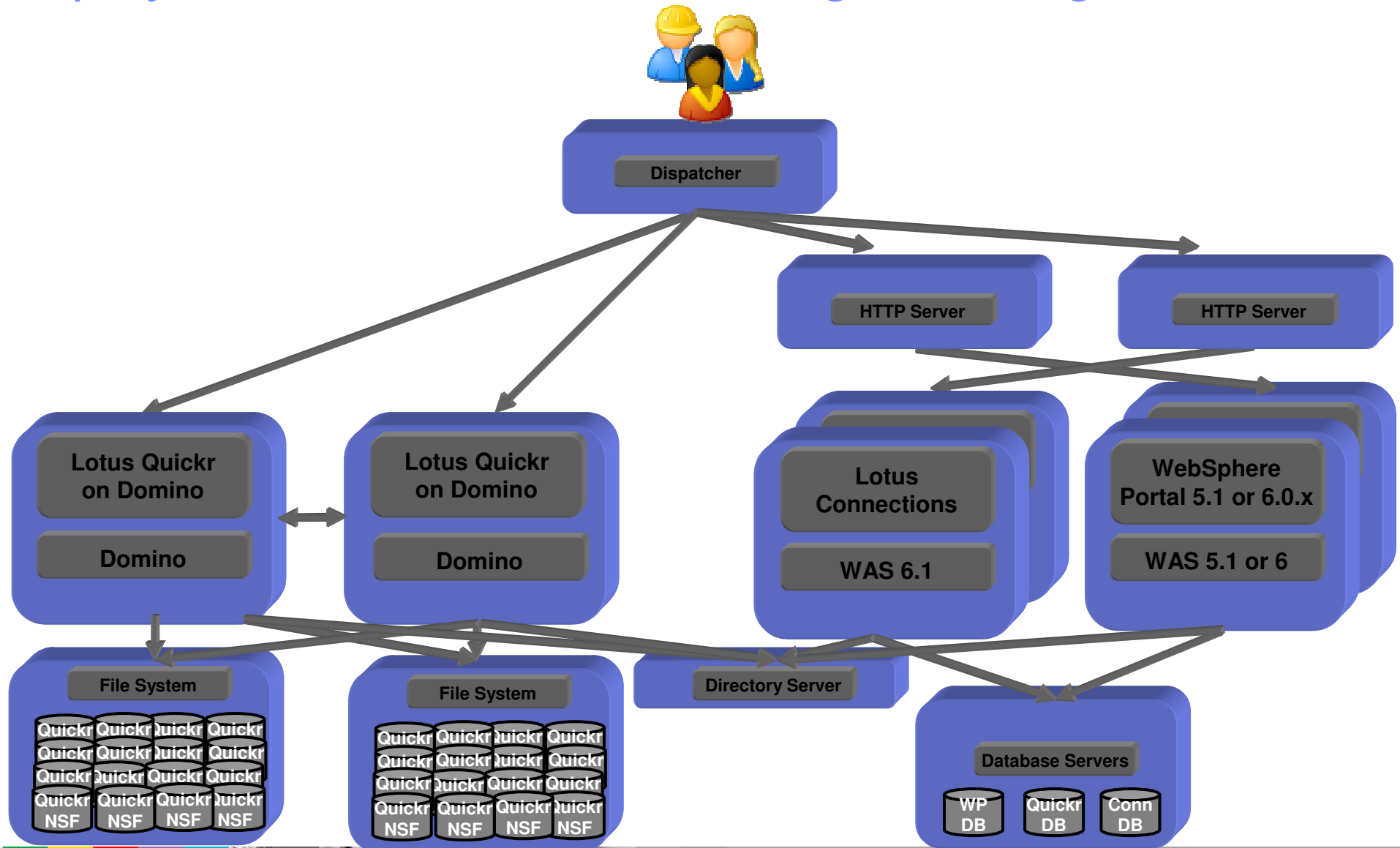
Deployment scenarios – Single Server



Deployment scenarios – Clustering



Deployment scenarios – Clustering and Integration



Upgrade Paths

- Upgrade to Quickr 8.1 is supported from Quickr 8.0/8.0.0.2 only
- Upgrade to Quickr 8.0 is supported from QuickPlace 6.5.1 and IBM Lotus QuickPlace® 7
- Upgrade can be done in place, or by installing a new server, and moving places

Upgrade Paths

- The process of upgrading a server and places is separated into independent stages. This separation minimizes the downtime required to upgrade.
- After you upgrade a server, you can choose to upgrade places and PlaceTypes to enable new features in them when it is convenient.
- Users can continue to work in their existing places before you upgrade places and PlaceTypes, and can continue to create new places and PlaceTypes, as long as they do not use existing places or PlaceTypes to create them.
- The existing places remain available except when they are locked for the relatively short time when they are being upgraded.
- In a non-cluster environment, Lotus Quickr Version 8.0 servers can coexist in the same IBM Lotus Domino domain as Lotus QuickPlace Version 6.5.1 or 7.0 servers. However, this coexistence is supported only during the limited process of upgrading. Servers in a cluster should all run Lotus Quickr Version 8.0

Summary

- Supported platforms
- Optional software
- Installation
- Definitions
- Configuration
- Upgrade
- Deployment scenarios

Questions



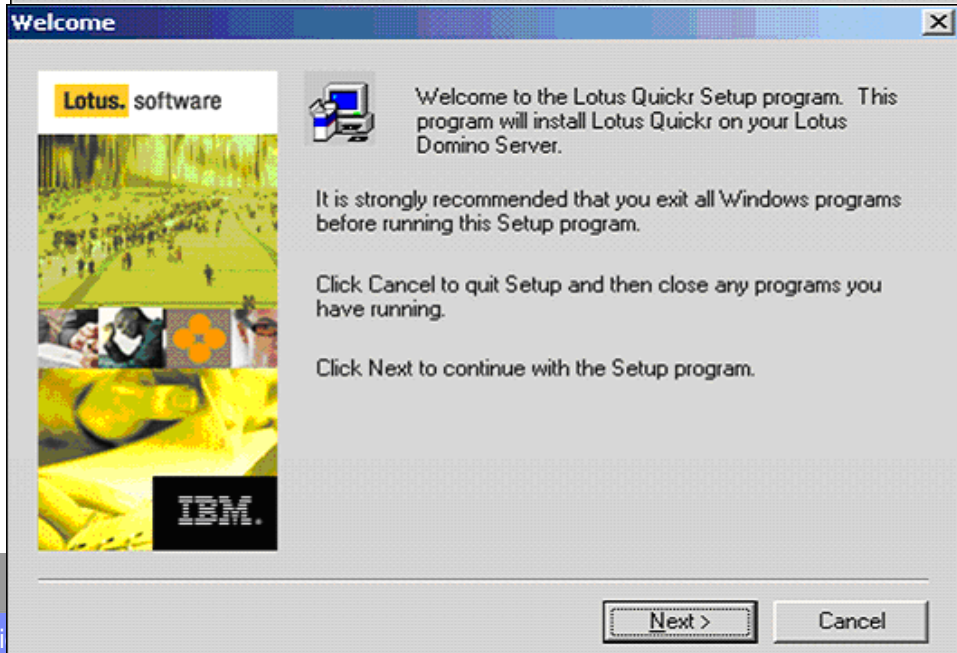
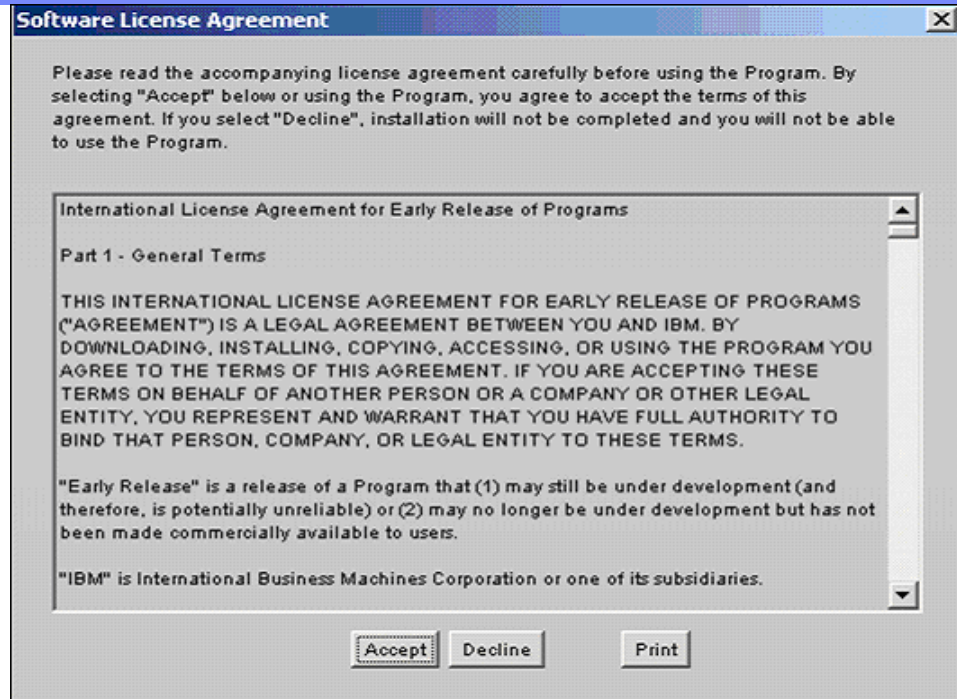
Backup Material



Installation (2/6)

- Run server\setup.exe (Windows)
 - Accept License Agreement

- Click Next at Welcome



Installation (3/6) Choose Entry or Standard

- Server can be set up as Entry only, or Standard (includes Entry capability)



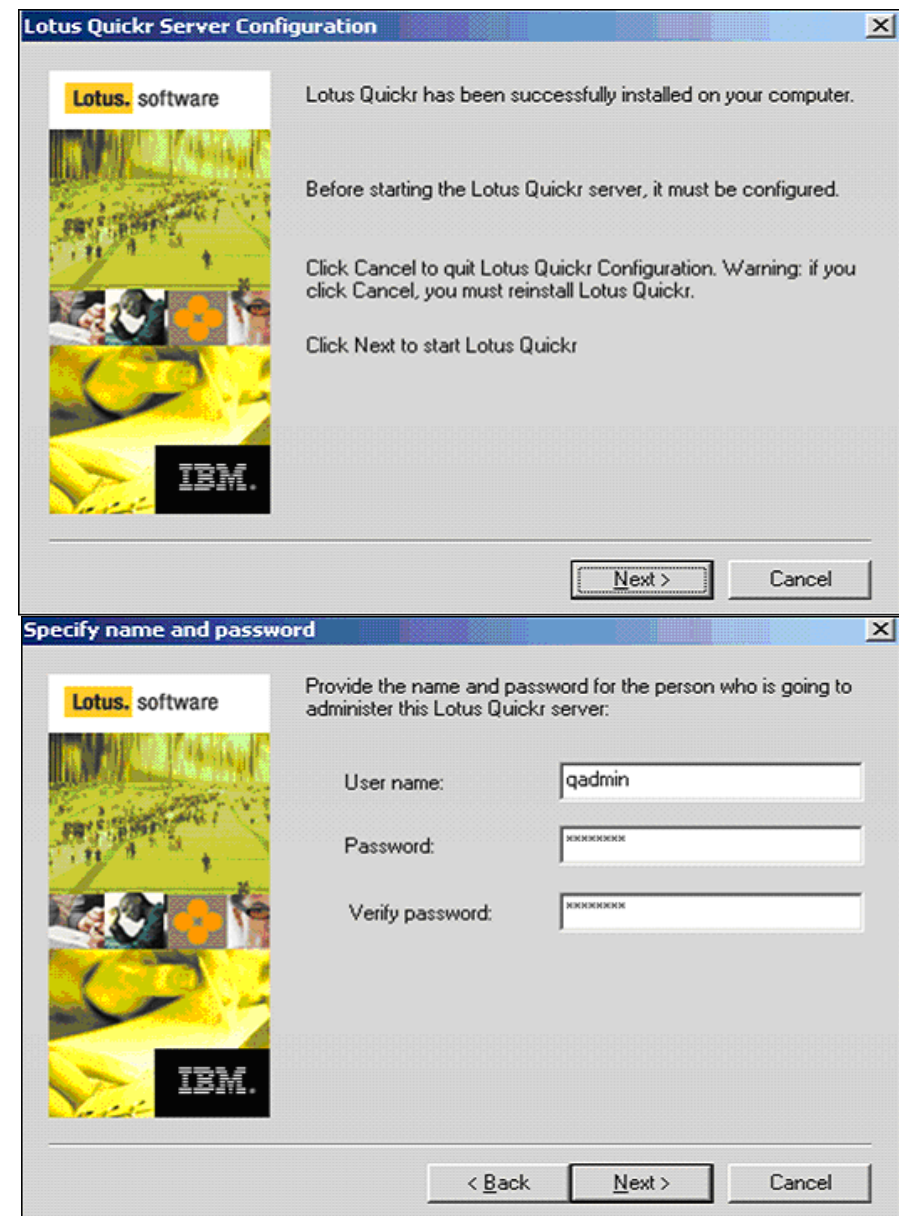
Installation (4/6)

- Specify/accept Lotus Domino program and data directory location



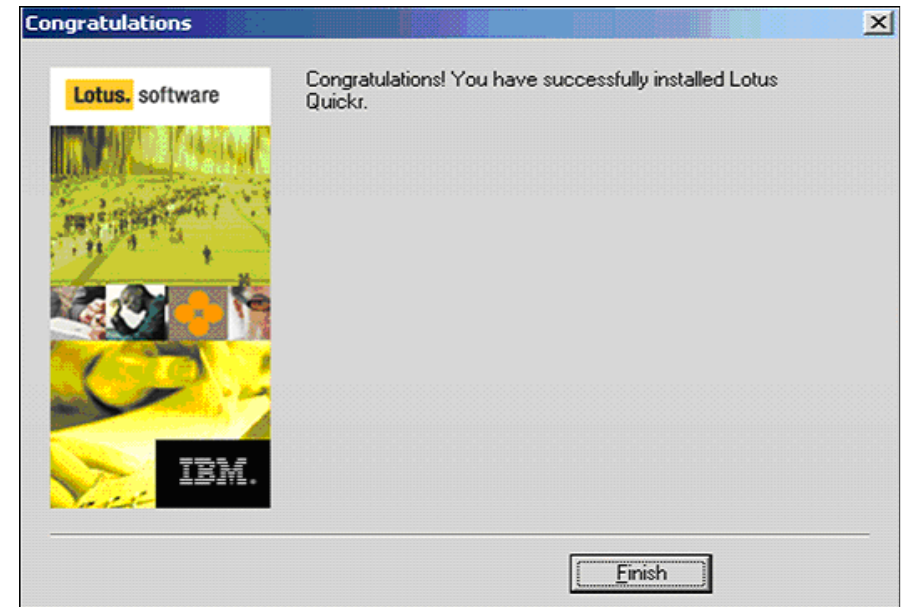
Installation (5/6)

- After installation completion
 - Click Next to start configuration
 - Specify a name and password for the Lotus Quickr Administrator
 - Do NOT use a name that is contained in a directory you plan to use for Quickr Services for Domino



Installation (6/6)

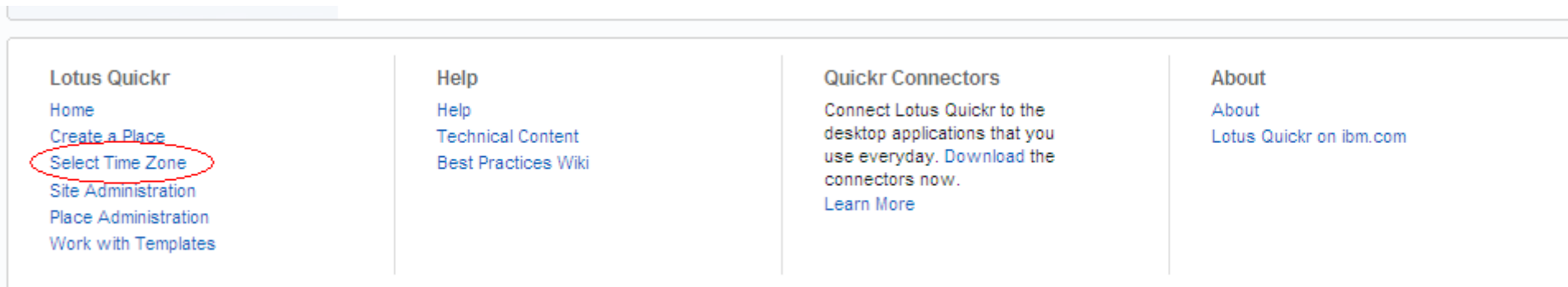
- Click Finish
- Start the Domino server
- Watch for Lotus Quickr messages



```
05/19/2007 11:58:17 AM HTTP Server: Java Virtual Machine loaded
05/19/2007 11:58:18 AM HTTP Server: DSAPI Domino Off-Line Services HTTP extens
on Loaded successfully
05/19/2007 11:58:20 AM Start IConfig::ReadLtpaConfig( )
05/19/2007 11:58:20 AM QuickPlace: Successfully loaded Web SSO Configuration.
05/19/2007 11:58:20 AM End IConfig::ReadLtpaConfig( )
05/19/2007 11:58:21 AM Quickr Web Services are enabled on this server.
05/19/2007 11:58:26 AM Lotus Quickr Server started. Build U80_04262007, 800000
000
05/19/2007 11:58:27 AM HTTP Server: No Web SSO Configuration specified, using
efault ('LtpaToken').
05/19/2007 11:58:37 AM HTTP Server: Started
>
```

Select Time Zone

- Select the time zone to apply from bottom left toolbar



The screenshot shows the bottom toolbar of Lotus Quickr, divided into four sections:

- Lotus Quickr**: Home, Create a Place, **Select Time Zone** (circled in red), Site Administration, Place Administration, Work with Templates
- Help**: Help, Technical Content, Best Practices Wiki
- Quickr Connectors**: Connect Lotus Quickr to the desktop applications that you use everyday. Download the connectors now. [Learn More](#)
- About**: About, [Lotus Quickr on ibm.com](#)

- Options
 - ▶ Use server time zone
 - ▶ Or customize with time zone and daylight saving time



The screenshot shows the 'Time Zone Preferences' dialog box. On the left, there is a sidebar with 'Time Zone' (selected) and 'Regional'. The main area has two radio buttons: 'Use server time zone' (unselected) and 'Customize' (selected). Below 'Customize', there is a 'Time zone:' dropdown menu showing '(GMT-06:00) Central Time (US & Canada)'. Below that is a 'Daylight saving time:' dropdown menu showing 'Observed'. At the bottom, there are 'Reset' and 'Save' buttons.

Configuration – Site Administration

- The Site Administration is the principal place to setup further Quickr configuration

| | | | |
|---|---|--|--|
| Lotus Quickr Home Create a Place Select Time Zone Site Administration Place Administration Work with Templates | Help Help Technical Content Best Practices Wiki | Quickr Connectors Connect Lotus Quickr to the desktop applications that you use everyday. Download the connectors now. Learn More | About About Lotus Quickr on ibm.com |
|---|---|--|--|

- You can choose several server wide preferences here

Configuration – Site Administration

- Site Administration choices

- Instructions
- Security
- User Directory
- Other Options

The screenshot displays the 'My Places' configuration page. The sidebar on the left includes a 'Create a Place' button, a menu with 'Instructions', 'Security', 'User Directory', and 'Other Options', and a 'Tips' section. The main content area contains the following text:

Instructions

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

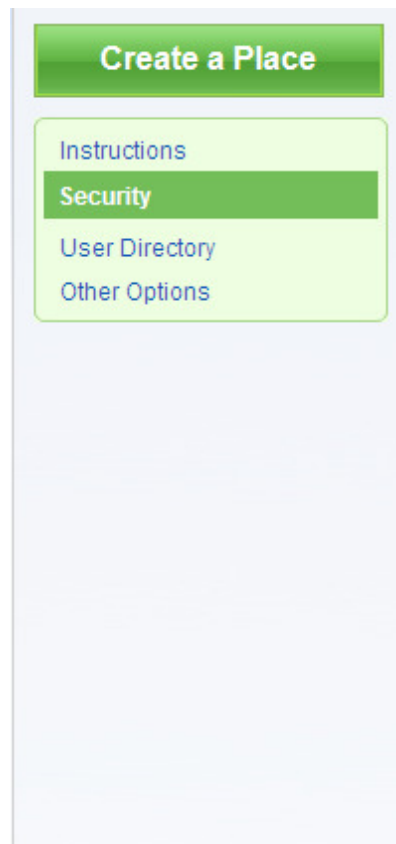
- › Security: Control who can create places and who can administer the server
- › User Directory: Enable place managers to invite members from a central directory
- › Other Options: Choose many other server settings

Next Steps

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

Configuration - Site Administration - Security

- Who is allowed to create new places?
 - ▶ Anyone who has access
 - ▶ A specified list of 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.

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

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

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

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

Configuration - Site Administration - User Directory

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

The screenshot shows the 'Places' configuration page. On the left, there is a sidebar with a 'Create a Place' button and a list of options: 'Instructions', 'Security', 'User Directory' (which is highlighted), and 'Other Options'. The main content area is titled 'User Directory' and features a 'Change Directory' button. Below the button, there is a text prompt: 'You can specify a user directory from which place members can be selected. **Directory.**' This is followed by two fields: 'Type:' with the value 'LDAP Server' and 'Name:' with the value '(No name)'. At the bottom, there is a section for 'New Users.' with the status 'Disallowed'.

Configuration – Site Administration - 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

Configuration – Site Administration - 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.

Configuration – Site Administration - User Directory - Domino

[Instructions](#)[Security](#)[User Directory](#)[Other Options](#)

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:

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.

[Back](#)[Next](#)

Configuration - Directory Configuration Summary

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

Configuration - Other Options

Create a Place

Instructions
Security
User Directory
Other 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:

Configuration – Other Options - Enable/Disable ActiveX and Java

Other 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.

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

Configuration – Other Options - 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

Configuration – Other Options - Set Maximum Attachment Size

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

File size in KB:

Configuration – Other Options - 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

- Allows awareness, chat, and meeting scheduling
- Requires IBM Lotus 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 developerWorks®

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



Configuration – Other Options - Offline

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

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

- Further steps to take to enable:
 - ▶ Enable Domino OffLine Services (DOLS)
 - ▶ Create certifier
 - An offline user must have a Notes ID
 - Types of users: External users (Same or Different OU) or Local Users
 - ▶ Create offline security policy document
 - ▶ Configure download server for DOLS
 - ▶ Hide offline link

Configuration - Email URL Prefix

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>

Configuration - 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 | ▼ |
| Gregorian | |
| Hijri | |
| Hebrew | |

Back

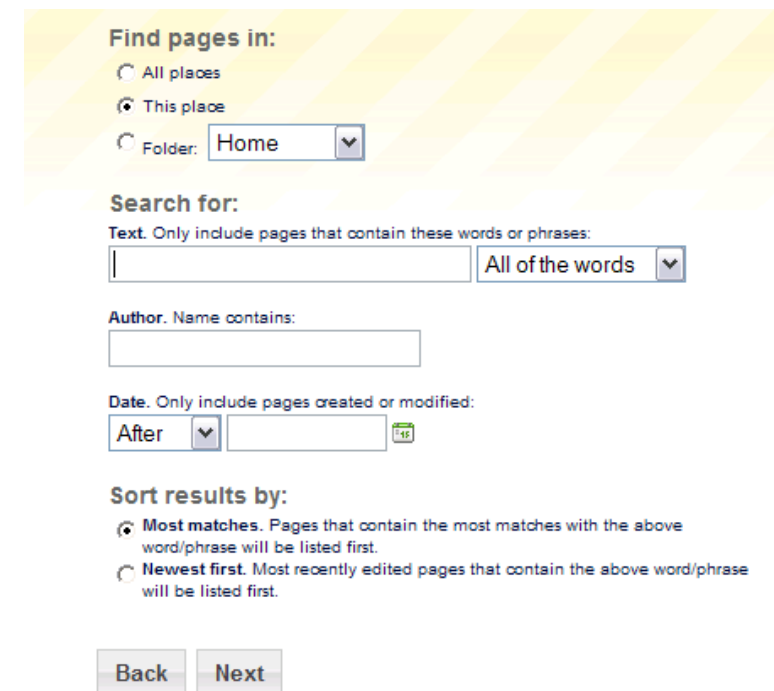
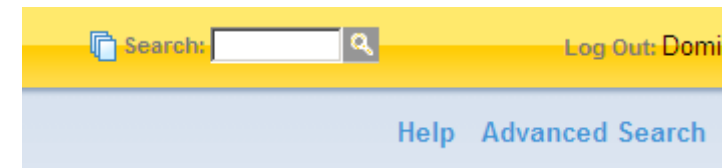
Next

Configuration - 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

Configuration - 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: Home

Search for:

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

All of the words

Author. Name contains:

Date. Only include pages created or modified:

After

Sort results by:

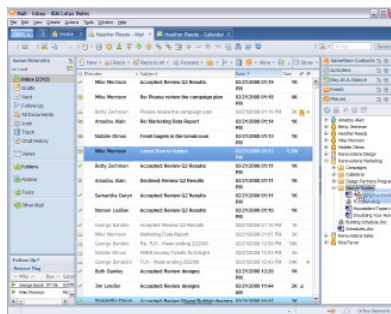
Most matches. Pages that contain the most matches with the above word/phrase will be listed first.

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

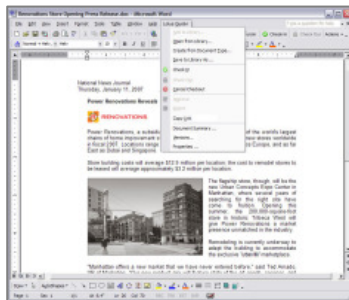
Back Next

Configuration - Connectors

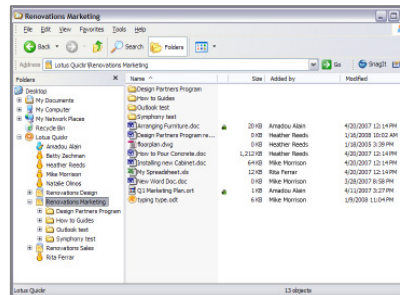
- Enable or disable Web Services support
- Configure separate download site
- Manage silent install



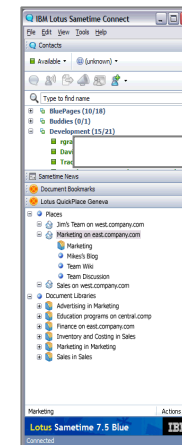
Lotus Notes client



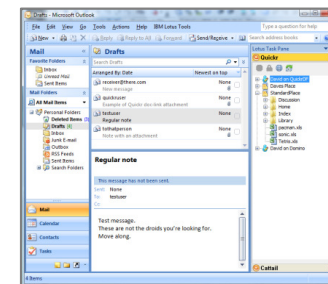
Microsoft Office / IBM Lotus Symphony



Windows Explorer / "My Documents"



Lotus Sametime



Microsoft Outlook

Configuration – Quickr's qpconfig.xml File

- qpconfig.xml is a configuration file that allows for some additional settings that are not exposed in the User Interface (UI)
- Is 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

Configuration – Notes.ini parameters

- Notes.ini parameters may affect aspects of how Quickr runs
- Generally for special cases (e.g. to choose for Entry and/or Basic installation)
- Documented in Info Center, Technotes, or from Support
- Example to determine what version (Entry or Basic) to install : QRD_Install_Type