integra
for notes

Upgrading to Integra for Notes 4.6

Documentation Version 4.6/1.0

© Shireburn Software Ltd 2008
16th June 2008

Lotus Notes Integration for MS Office

www.integra4notes.com

Contents

1 OBTAIN THE LATEST INTEGRA TEMPLATE 1

1.1 SELECT NEW LICENSING METHOD – ONLY REQUIRED BY USERS OF INTEGRA 4.2 OR OLDER 3

2 TAKE A BACKUP 5

3 RUN THE INTEGRA SETUP PROGRAM 5

4 SIGN THE TEMPLATE 8

5 REFRESH DESIGN 8

6 UPGRADE DOCUMENTS & PROFILES 9

7 RE-ENABLE SCHEDULED PROFILES 10

8 REPLACE LICENSE KEY – ONLY FOR UPGRADERS FROM VERSION 4.2 OR OLDER 10

9 ENABLE DATABASE FOR WEB 10

10 ENABLE INTEGRA PDF WRITER 11

10.1 CONFIGURE PDF OUTPUT 11

10.2 INSTALLING THE INTEGRA PDF WRITER ON THE WORKSTATION 14

Summary Upgrade Instructions for Integra for Notes 4.6

This document is designed to assist users currently utilizing older versions of Integra for Notes to upgrade their systems to Integra for Notes 4.6. A summary of the main new features available in Integra for Notes 4.6 are available at www.integra4notes.com/whatsnewin/46.

Following these instructions correctly will ensure a smooth transition from one version of Integra for Notes to the next. The step-by-step upgrade process is summarized below and then further defined in detail within the subsequent sections of this document.

If you are upgrading from version 4.2 or older of Integra to Integra 4.6, you will require a new license key.

Please read and follow the special instructions for users of Integra 4.2 or older found in the next section.

The Upgrade Process

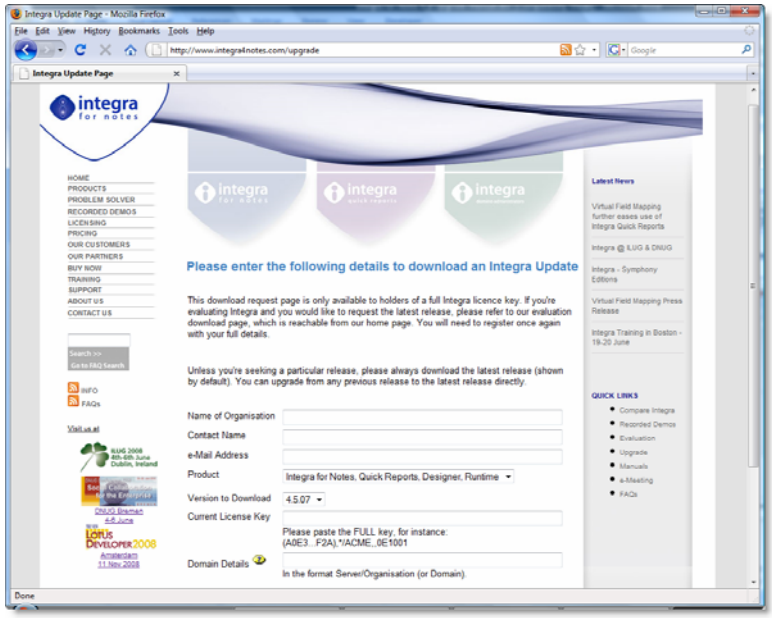
In summary the process of updating your Integra for Notes environment involves the following steps which are described in greater detail in the sections below:

1. Request an upgrade to Integra for Notes 4.6 from www.integra4notes.com/upgrade.
2. Download the Integra.exe installer file which contains the Integra.ntf template file and store this in a folder on your PC.
3. Users of Integra 4.2 or older should wait until they receive the new Integra for Notes 4.6 license key. Upgrading their Integra environment to 4.6 from 4.2 without deploying the new key will result in a failure of the system to operate.
4. Take a backup copy of your existing Integra database(s) and of your current Integra template (Integra.ntf).
5. After obtaining the new license key (only required by users Integra 4.2 or older), run the Integra.exe file from the previously chosen folder. This will allow extraction of the new Integra.ntf template to the **default Notes data directory** of your **local workstation**.
6. Sign the template with an ID file authorized to run on the server on which Integra will be deployed and which will avoid ECL warnings for your users at runtime.
7. Modify the *Inherit from Design Template* property of your existing Integra database(s) to read Integra4NotesR45 and refresh the Design of your Integra database from the **locally stored** template
8. Replace the current license key found in the *License* tab found in the *Configuration* page with the new Integra 4.6 license key.
9. Run the *Upgrade Documents & Profiles* agent. **This is very important.**
10. If you are using scheduling on a Windows based Domino server, re-enable scheduled running through the *Configuration* document using a Notes ID authorized to run restricted agents.
11. Enable the Integra database for web browser access (optional)
12. Enable Integra PDF Writer (optional)

The subsequent sections of this document address each of these steps in detail.

1 Obtain the latest Integra template

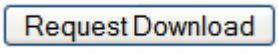
Integra.exe, containing the Integra.NTF template and documentation are available to all clients with an up to date maintenance agreement. To access this template, point your web browser to www.integra4notes.com/upgrade and you will then be presented with a screen similar to that shown alongside:



You will be required to provide certain the details in this form consisting of:

- ***Name of Organization*** – this is the name of your organization and is used just for logging purposes. It is not the Notes organization name or domain name but just the standard name.
- ***Contact Name*** – this is the name of the person responsible for downloading the upgrade.
- ***E-mail address*** – the e-mail address of the person responsible for downloading the upgrade and who is to receive the e-mail containing the login details.
- ***Version to Download*** – this allows you to define the version number that you would like to download. While typically you would choose the default option which would be the current shipping version, if you specifically wish to download an older version, this option will allow that flexibility.
- ***Current License Key*** – this field requires you to enter the license key of your current version of Integra. This can be found from the *Configuration* document where the key is shown in the License tab.
- ***Domain Details*** – this field contains the Notes name of the certificate used by your server and users within your organization. This field is automatically updated based on the key entered in the *Current License Key* field above as soon as you tab out of the *Current License Key* field.

Following entry of this requested information click on the *request Download* button.



After filling in the Request Form and submitting it, the user will receive an automated email containing a link to a temporary page to allow the manual downloading of the same **Integra.exe** installer. The temporary page is available only for a **limited time period** and the URL provided should be used as soon as possible to download even if the upgrade will occur later.

If after receiving the e-mail containing your login details you do not download within 48 hours, you may find that the login is no longer available. This would require you to register once more for the upgrade,

a process which will send another e-mail with new login details.

1.1 Select New Licensing Method – only required by users of Integra 4.2 or older

If you are upgrading from Integra 4.2 or older to 4.6, since new licensing options have been available since Integra 4.3, you will require a new license key.

Since Integra for Notes version 4.3, Integra software products have been licensed on a per user basis instead of the per server basis previously available and is now available in two versions:

- **Integra for Notes Designer Edition** - allows a user equipped with this license to create and edit Integra for Notes profiles.
- **Integra for Notes End-User edition** - allows a user equipped with this license to run Integra profiles but not modify the design of these profiles.

Unlike previous versions of Integra which were licensed per server, these licenses run across an unlimited number of servers within the same Lotus Notes Domain. This new method brings a number of benefits to Integra, it's partner network, new potential customers and the existing client base, namely:

- we will be able to offer a lower entry point for Integra for Notes
- we will be more competitive for customers who have a large number of servers but not necessarily a large number of users
- launching Integra reports will no longer be limited by the server, but will be available throughout the entire Notes domain
- the model will enable easier deployment on clustered servers, development and test environments
- no longer separate (higher) pricing for iSeries and Sun Solaris deployments

Existing licensees of Integra for Notes who have purchased Integra under the server based licensing model and are now upgrading to Integra for Notes 4.6 are therefore able to:

- switch their licensing method to a user-based method.
  OR
- retain that method of license moving forward onto Integra for Notes 4.6

Clients opting to switch their current server-based Integra for Notes license to an end-user based license can convert each server license to one of the following:

Option 1
100 x Integra for Notes End-user Edition
1 x Integra for Notes Designer Edition

Option 2
50 x Integra for Notes End-user Edition
3 x Integra for Notes Designer Edition

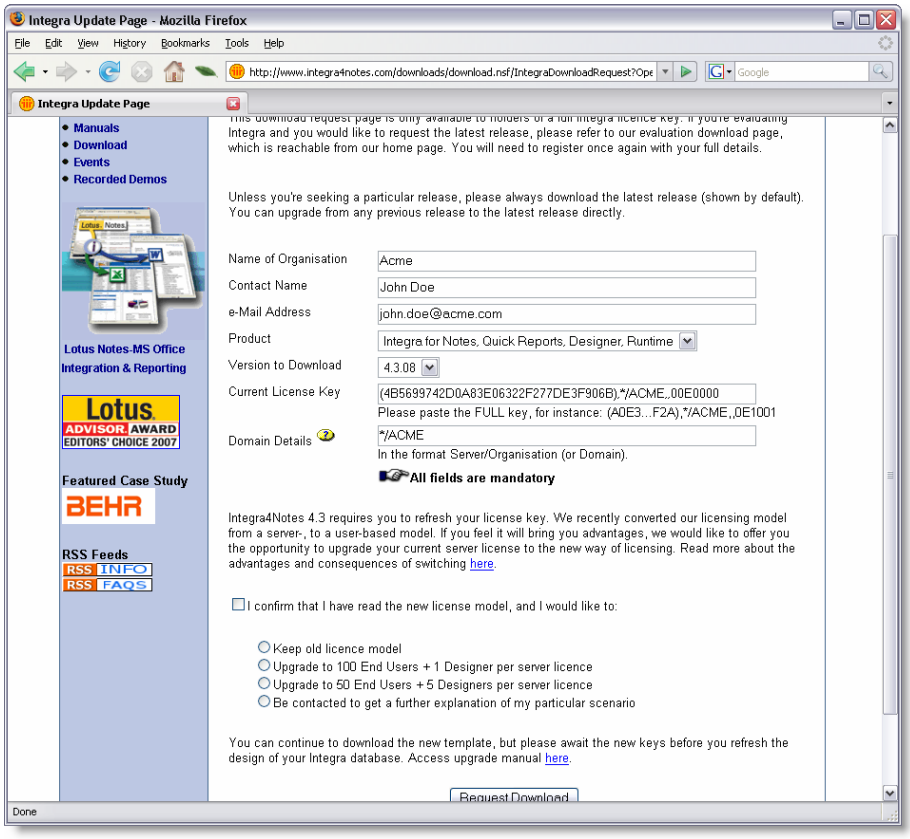
Clients will need to make their choice on requesting an upgrade to Integra for Notes 4.6 when going to www.integra4notes.com/upgrade. For more details about the new licensing model please refer to www.integra4notes.com/licensing/43.

When upgrading to Integra for Notes 4.6 you will require a new license key. Following your request for an upgrade you will also receive a separate e-mail with your new key.

It is important to wait for the new license key to be received prior to actually undertaking subsequent steps to refresh the design of your existing database as you will otherwise be locked out of the Integra application.

The Integra upgrade site will recognize that your site is using Integra 4.2 or older and, in this case you will be presented with a number of additional options in the upgrade form to allow selection of the choice of licensing method to be implemented for your site. These are shown in the screenshot below:

	Once a choice of licensing method has been selected, this is irreversible. To ensure you are able to make an informed decision please refer to the description of the new licensing found at www.integra4notes.com/licensing/43.



Having made your licensing choice you should receive a new license key by e-mail which needs to be updated into Integra for Notes at the appropriate point in the cycle (see section 8).

It is important to wait for the new license key to be received prior to actually undertaking subsequent steps to refresh the design of your existing database as you will otherwise be locked out of the Integra application. In the event that you do not receive this e-mail within 24 hours, please contact support@integra4notes.com.

2 Take a backup

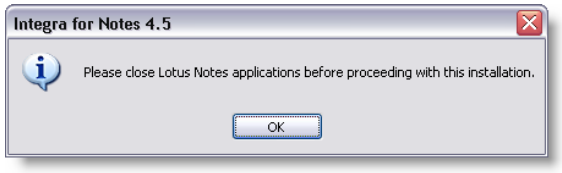
Good practice dictates that you should take a backup of your current Integra for Notes database as well as the current Integra.NTF template to allow you to recover from any failed upgrade and to roll back to your previous version.

	The taking of a backup is strongly recommended by Shireburn Software Ltd. Since the file name of the template for Integra 4.6 is Integra.ntf as was the case with earlier versions of Integra, please ensure that you **take a backup of your current Integra.ntf file** before downloading, possibly renaming it to distinguish it from previous versions.

3 Run the Integra SetUp Program

The Integra.exe file is an installer which contains the Integra.ntf template file as well as the user documentation. There are no other executables or DLL's in this installer.

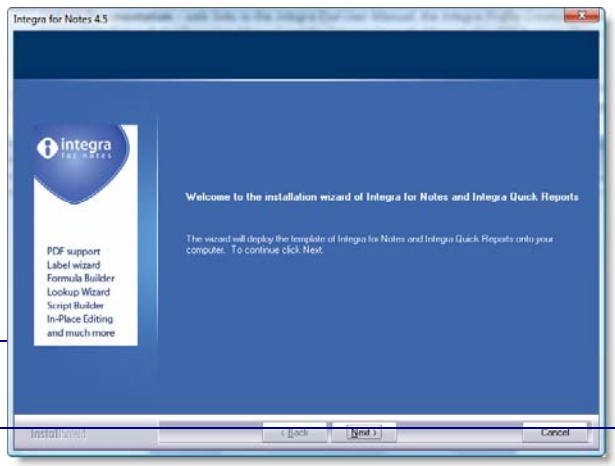
Having received Integra.exe in your e-mail or downloaded it from the download page provided, you should have detached the file to a directory of your choice. This is a working directory from which you will then be able to remove Integra.exe after its successful install.



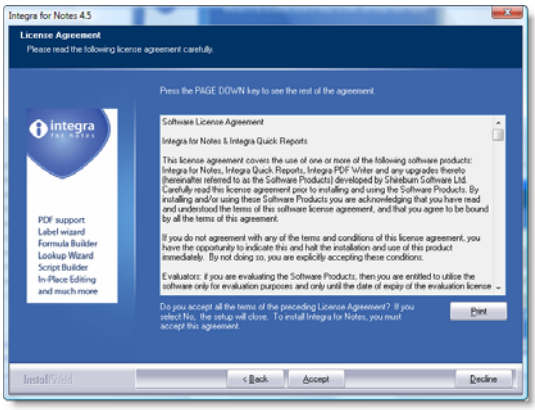
Exit Lotus Notes before running the Integra set up. Run the Integra.exe file by double clicking on the file in Windows Explorer having identified the folder in which you stored it.

On running Integra.exe, you will see a small splash screen. In the event that Lotus Notes was still running, you will be warned to exit through a dialog box.

The Integra Installer Wizard will then be presented to the user as shown alongside:



On selecting the *Next* option, the user will be shown the software license agreement and given the opportunity to agree or disagree with the terms of the agreement. The *Accept* option can only be used once you have scrolled through the license agreement.

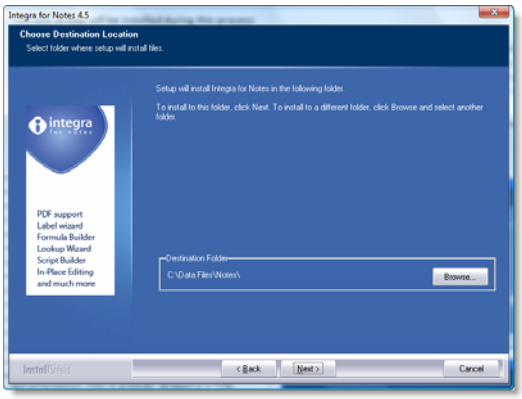


Disagreeing with the terms will result in the exiting from the install process while agreeing will proceed to the next stage.

Assuming the user proceeds, the dialog to select the directories will be presented to the user.

Remember to backup your previous Integra template before proceeding

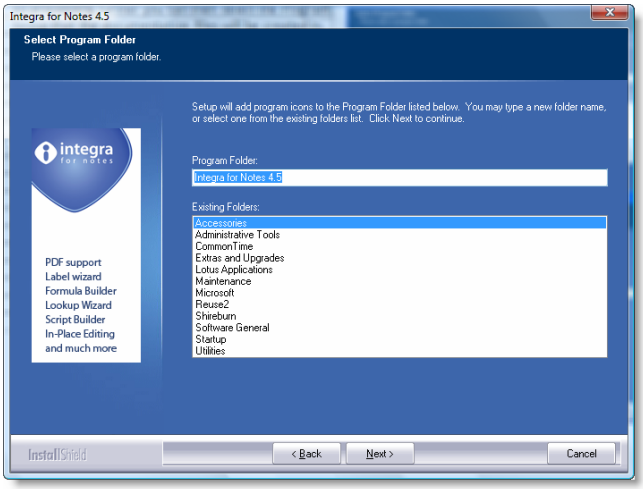
Two sets of files or links will be installed during this process:



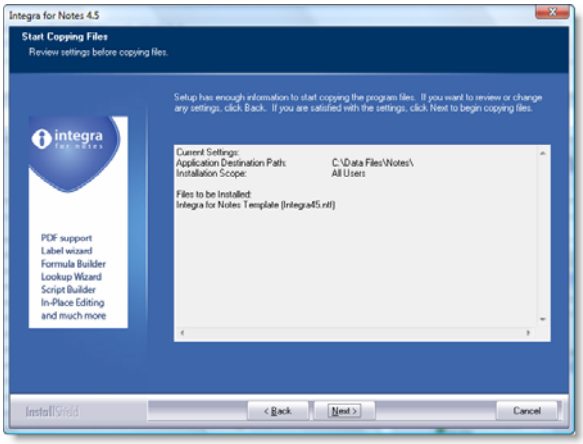
- ***The Integra.ntf template* -** as with all Notes templates, this file is required to be stored in the Notes default data directory. The Installer reads your registry settings to determine the default Notes data directory of your local installation and this is displayed in the dialog box. The option to change this exists using the *Browse*. **IT IS IMPORTANT THAT THE INTEGRA TEMPLATE IS STORED LOCALLY AND NOT ON THE SERVER.**
- ***The documentation files*** – links to the user manuals available on the Integra web site.

The Integra Installer will provide the user with a choice of locations where to deploy the files contained in the installer. The default for the template is the Notes default data directory while the links to the documentation defaults to c:\Program Files\Integra for Notes 4. The directory for the documentation links can be modified by the user selecting the *Browse* button.

By proceeding further the user can then select the Program Group that the documentation files will be created in. This allows selection of the files from the Windows Start->Program Files menu. The default Group name is Integra for Notes 4.6. The current list of the user's groups are displayed.



Having selected the group the user is given one final opportunity to confirm:



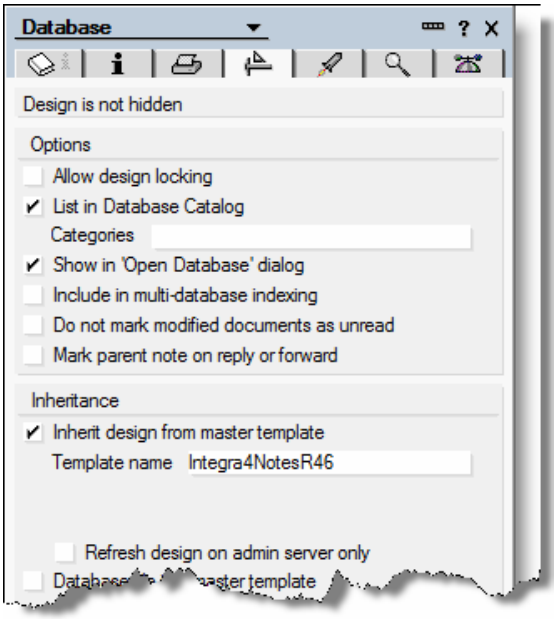
On confirmation the user will see a number of progress bars while the files are copied to the chosen directories following which a conclusion screen is presented.

4 Sign the Template

So as to ensure the smooth operation of Integra for Notes within your environment, we strongly recommend that you sign the Integra template using an appropriate ID used within your organization for signing 3rd party applications and which is granted rights in users' ECL's. Should you intend using the scheduled facilities of Integra, then the ID should also be authorized to execute restricted agents on the server on which Integra is deployed.

5 Refresh Design

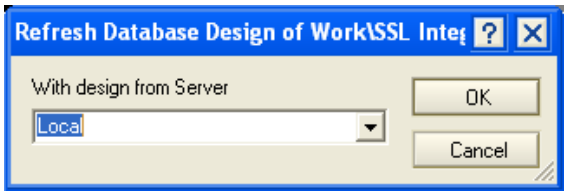
As with any Notes database, a user with a minimum of *Design* level access to a database is able to refresh or replace the design of a Notes database from the template that it is connected to. The relationship between a database and its template is defined within the *Design* tab of the Database's properties box.



To upgrade your current version of Integra to the 4.6 version, set the *Design Template* on which your existing Integra database is to inherit its design from within the *Design* tab of the database properties of the Integra database (see screenshot). The design template for Integra for Notes 4.6 should be set to:

Integra4NotesR46

Once this is done, the Integra database is able to be updated through the usual manual process of refreshing the design of a database from its parent template. This is undertaken using the Notes feature in the file menu: *File→Database→Refresh Design.* This option will allow the user to select the current Integra database (either on the server or local) and then run the refresh from the user's local workstation to which the Integra template had been deployed.



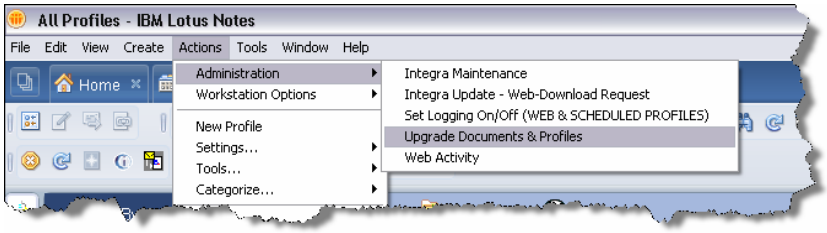
It is important that the Integra for Notes 4.6 template is placed on the local workstation of the user undertaking the upgrade.

For a database's design to be refreshed, the current user must have a minimum of Designer level of access to the access control list of the database.

6 Upgrade Documents & Profiles

The new Integra template contains updates to messages and the on-line help. In addition Integra for Notes ships with a number of sample profiles which can be used immediately to provide value to your organization as well as the allow you to dissect the profiles as a means of better understanding Integra for Notes. New versions of Integra may contain improvements to standard profiles shipped with the product. The *Upgrade Documents & Profiles* agent automatically upgrades the existing profiles as well as adding any new profiles and updating messages and help.

The *Upgrade Documents & Profiles* agent is run through the *Action* menu.



Only run the *Upgrade Documents &* Profiles agent after having undertaken the *Refresh Design* process.

On running this option, the user will be given the opportunity to choose the parameters to be updated:

In the event that the standard profiles that shipped with Integra had been modified by a user, the modified standard profiles will not be updated by this agent. Should you wish to update a modified standard profile, delete the modified profile manually and re-run the *Upgrade Documents & Profiles* agent.

7 Re-enable Scheduled Profiles

In some situations, Lotus Notes may disable any scheduled agents running on a database when that database's design is refreshed. Although such an occurrence is rare, if you utilize scheduled profiles on a Windows based Domino server, it is prudent to re-enable the agent set in Integra which controls the running of profiles which are scheduled.

Scheduled profiles in Integra can only be executed on a Domino server running on a Microsoft Windows™ environment or a Lotus Notes client also running on Windows. If the operating system you use is not Windows, **DO NOT ENABLE** Scheduled profiles.

To re-enable scheduled profiles, select the *Configuration* view in the Integra navigator. This view is only accessible to users that have been granted access to the [Admin] role. On selecting this view, the user will be presented with the *Configuration* document which contains the *Scheduling* tab. Select this tab.

Select the *Enable Scheduled* Profiles hot spot in this document to trigger the enablement of this agent.

8 Replace License Key – only for upgraders from version 4.2 or older

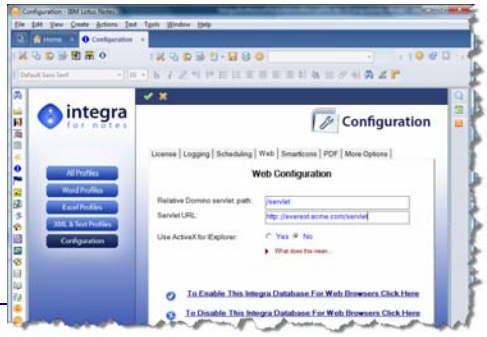
User of Integra for Notes version 4.2 or older will at this point have to replace the current license key found in the *License* tab found in the *Configuration* page with the new Integra for Notes 4.6 license key.

9 Enable Database for Web

If your Integra database is deployed for usage by web browser users, then you will need to enable the Integra database for Web usage. This is done through the *Web* tab of the *Configuration* document. In addition, the actual profiles run via a web browser also need to be enabled for the web (see the Integra for Notes Designer's Manual.

The two fields on this configuration page store configuration settings used by the web aspect. The field contents are to be as follows:

- ***Relative Domino Servlet path*** – this field identifies the directory under your default Domino data directory which contains servlets. It is by default called /servlet but in case your organization uses a different folder to contain servlets, this should be reflected here.



- ***Servlet url*** – this field defines the complete url that points to the servlet directory. This is likely to be something like **http://everst.acme.com/servlet** or **http://www.acme.com/servlet.**
- ***Use Active-X in Explorer*** – this option, new to Integra 4.6, allows Integra to be set to allow Active-X to be used by users of Microsoft Internet Explorer.

Due to the security settings of the Domino environment, it is important that when these agents are enabled, they are enabled using a Notes ID with sufficient access rights to run agents on the server and the appropriate ECL settings for accessing the file system.

In addition, since one of the agents deletes documents in the Integra database, the ID must also have deletion rights in the ACL of the Integra database.

10 Enable Integra PDF Writer

While previous versions of Integra have supported various 3rd party solutions for the generation of PDF files, Integra for Notes 4.5 onwards now supports its own Integra PDF Writer which is licensed for your use across all Integra licensed users. The Integra PDF Writer is a printer-driver based PDF writer and requires the deployment and installation of the writer to the desktop. This can be effected directly through Integra (see section

The installation of the Integra PDF Writer requires three steps:

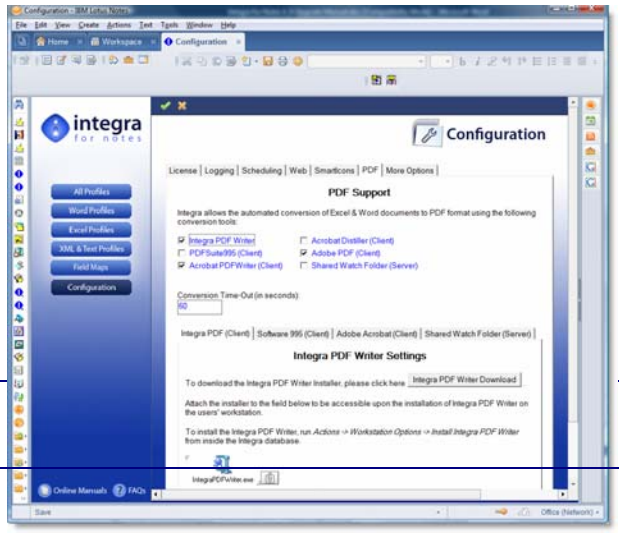
1. selection of the Integra PDF Writer as one of the required PDF options in the Configuration page.
2. attachment of the Integra PDF Writer executable software into the Configuration page. This enables easier distribution of the executable to end-users, particularly ones that might be on remote networks or laptop users.
3. running of the Integra PDF Writer installation routine by end users on their workstations.

This installation will require a reboot of the PC.

10.1 Configure PDF Output

The PDF writing capability needs to be configured by the administrator inside the Integra database itself before it can be used. This is done through the *Configuration* page where a tab is specifically dedicated to the PDF configuration.

The configuration requires that you first select the *Integra PDF Writer* as one of the PDF options in the Configuration page.



Following this, the installation requires that the Integra PDF Writer installer is executed on each workstation that is to use this capability.

This can be achieved in one of 2 ways:

- Distributing the Integra PDF Writer installer to all users by means of deploying it to a file server and pointing people to it and allowing them to install the installer
- Attaching the installer EXE into the *PDF* tab of the *Configuration* document found in the Integra database as a means of distributing the installer and using the installation command in-built into Integra (see section 10.2). This facility ensures that no separate distribution of the Integra PDF Writer software needs to be made to end users.

You can obtain the Integra PDF Writer software in either of 2 ways:

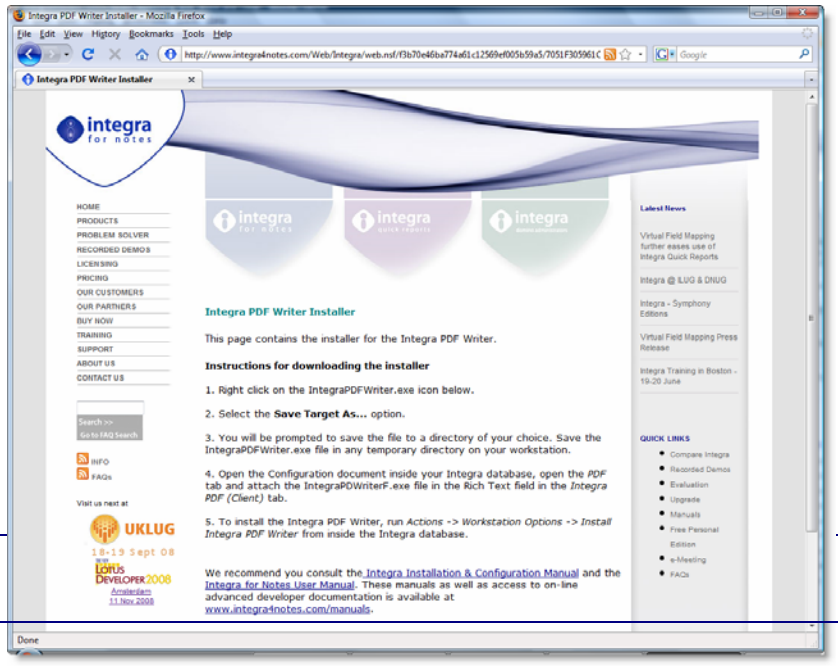
- point your browser at www.integra4notes.com/integrapdf
- or open the *Configuration* page of the Integra database (you will require access to the *Admin* role in the database's ACL, and move into the *PDF* tab. Then click on the *Integra PDF Writer Download* button.

Integra PDF Writer Download

Either of these options will take you to the appropriate page on the Integra web site which contains this executable and allows you to download it to a temporary folder of your choice.

To download the Integra PDF software:

1. Right click on the IntegraPDFWriter.exe icon at the bottom of the page.
2. Select the Save Target As... option. You will be prompted to save the file to a directory of your choice. Save the IntegraPDFWriter.exe file in any temporary directory on your workstation.



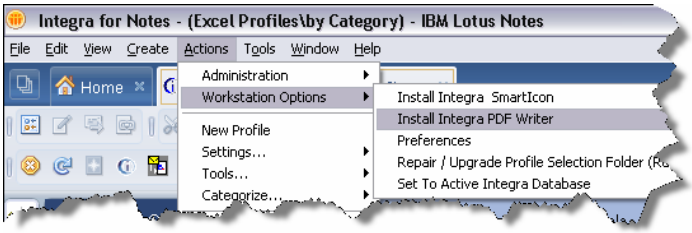
Once the download has been effected, open the

Configuration document inside your Integra database, open the *PDF* tab and attach the IntegraPDWriterF.exe file into the Rich Text field in the *Integra PDF (Client)* tab.

Once this is done, the installation on workstations can proceed (see section 10.2 below).

10.2 Installing the Integra PDF Writer on the Workstation

Once the Integra PDF Writer software has been attached into the *Configuration* page, end-users will be able to install the software on their workstations. To install the Integra PDF Writer on the workstation, open the Integra database and then run *Actions -> Workstation Options -> Install Integra PDF Writer* from the main Lotus Notes menu.



You will be presented with a page with an *Install* and an *Uninstall* button. Select *Install* and follow the installation wizard. This installation will require a reboot of the PC.

In the event that the user attempts to install the Integra PDF Writer without the administrator first having attached the Integra PDF Writer installation EXE in the Integra database, the user will be provided with a warning message.

Support

Should you have any difficulties effecting the upgrade to Integra for Notes 4.2, please send an e-mail to **support@integra4notes.com** providing as many details about your configuration and setup as possible including:

- Your current version of Integra for Notes and the version you are upgrading to
- Your operating system version of your workstation and client
- Your version of Word, Excel
- In the case of a PDF related support issue, the PDF generation product you are utilizing and the version number.

Contact Details:

Shireburn Software Ltd Carolina Court Guze Cali Street Ta' Xbiex MSD 14 MALTA	Tel USA: (508) 915 4805 (650) 276 0506 Tel UK: (020) 7193 1296 Tel Europe: (+356) 2131 9977 Fax: (+356) 2131 9528 Skype: integra4notes	support@integra4notes.com www.integra4notes.com www.integrareports.com

Useful web links:

www.integra4notes.com
www.integra4notes.com/demo
www.integra4notes.com/faq
www.integra4notes.com//manuals
www.integra4notes.com/support

support@integra4notes.com
www.integra4notes.com

Tel USA: (508) 915 4805 or (650) 276 0506
Tel UK: (020) 7193 1296
Tel Europe: +356 2131 9977
Fax +356 2131 9528

Time Zone CET (Paris, Berlin, Rome)