



integra
for notes

Installation & Configuration Manual

Integra for Notes 4.6 and Integra Quick Reports 4.6

Integra for Notes 4.6
Integra Quick Reports 4.6
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Lotus Notes Integration for MS Office

www.integra4notes.com

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Preface

Thank you for purchasing Integra for Notes 4.6, the solution designed to enable the highest degree of bi-directional integration between Lotus Notes™ and Microsoft Word™ and Microsoft Excel™ and output to XML and Adobe's PDF format™ or Integra Quick Reports, the solution which allows end-users of Lotus Notes to create and generate ad-hoc reports to Microsoft Excel and mail merges and labels to Microsoft Word.

This Installation Manual is designed to allow people who are installing, deploying and configuring Integra for Notes and/or Integra Quick Reports to understand the steps necessary for a successful installation and deployment and the optimization of these products within their organization. The installation manual should be read in conjunction with the following manuals:

- » *Integra for Notes End-User Manual.*
- » *Integra Upgrade Manual (for existing users)*
- » *Integra for Notes Designer's Manual*
- » *Integra Quick Reports user Manual*

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Every reasonable attempt has been made to ensure the accuracy of this Installation Manual and that it reflects the operations of the product, however users of Integra for Notes are responsible for ensuring that the product and its documentation are suitable for the needs of that organization. No warranties explicate or otherwise in respect of this Installation Manual are being made or can be assumed.

The product Integra for Notes may at times be referred to within this documentation by its shortened name of Integra. This is not to be confused with any trademarked product of a similar name, whose rights are hereby recognized and this abbreviation is used only for ease of reference.



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1 Introduction to this Manual

This **Integra Installation & Configuration manual** is designed to assist you in installing, configuring and deploying Integra for Notes for Notes 4.6 and Integra Quick Reports 4.6 within your organization. The manual provides a step-by-step explanation of all that is required to successfully deploy these products. Following these instructions correctly will ensure a smooth implementation of Integra for Notes.

All the functionality required to run Integra for Notes and/or Integra Quick Reports is available within the Integra database itself. No EXE or DLL files are required to be installed on any servers or workstations. The only change required on user workstations is the deployment of the Integra SmartIcon, which process is itself also automated.

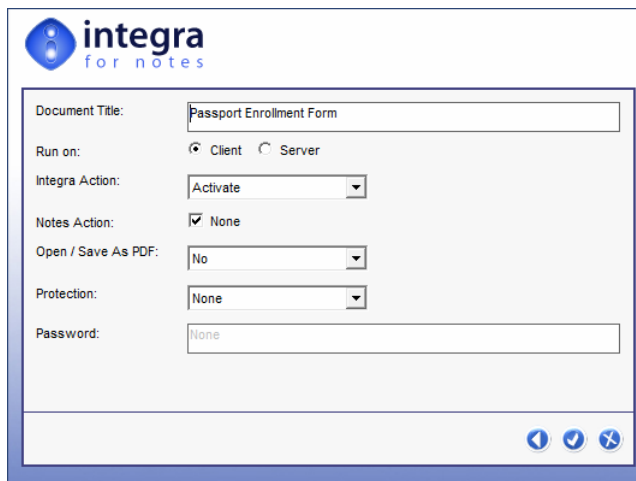
Integra does not require any changes to be made to existing Lotus Notes databases that are to act as the source of data for Integra reports, exports or imports except where web browser access is required. This means that no design changes or inheritance is required and therefore no regression testing or updating of documentation is required and the security of your applications is not effected.

1.1 Conventions used in this Manual

This Installation Manual is designed to be a guide to the installation and deployment of Integra for Notes. The keys required to be selected by a user are explained within this manual by the use of angled brackets. Therefore, an instruction to select the key called **Enter** will appear as follows: select **<Enter>**

Prompts given to the user to allow selection of one or more options are shown in a dialog box as follows:

Hot tips of particular interest to readers are displayed as follows:



If your profile has had its confidentiality restricted, only those users mentioned in the profile's confidentiality field will be able to see the profile.

Bright ideas are shown within the following type of display:



To create a profile document linking to a particular database, the user does not require *Designer* rights in the Access Control List of the database to which the link is being implemented but rather just *Reader* level rights.

2 Introduction to Installing Integra

Integra is shipped to you as an installation executable (Integra.exe) which, when run, will allow a controlled deployment of an Integra template and the user documentation to your local workstation. There are no executables or DLL's contained within this installer. From this template you can create your own Integra database which can then be configured in accordance with the instructions in this manual.

The step-by-step installation and configuration process is summarized below and then further defined in detail within the subsequent sections of this document. This procedure assumes that you have downloaded the Integra.EXE file containing the installation & set up routine. The installation process for Integra involves the following steps:

1. Run the Integra Setup Program (Integra.exe) to extract the Integra.ntf template to your local workstation.
2. Create a new Integra Lotus Notes database from the locally stored Integra template. We assume within this manual that this database will be called Integra.NSF however it can be called whatever valid name is suitable for you.
3. Sign the template with an ID file which has rights within your domain to execute 3rd party software products (thus avoiding ECL warnings being given to users unnecessarily) and, if you intend using Integra for Notes' scheduled execution facilities, this ID must have the rights to execute restricted LotusScript agents on the server(s) that Integra is deployed on.
4. Set the Access Control List of the Integra database according to the instructions detailed herein.
5. Enter your license key(s) into the Integra database
6. Optionally pre-allocate user licenses to the intended users of the software
7. Configure PDF Output (optional – only required if generating PDF based reports on a scheduled basis)
8. Enable scheduled running through the *Configuration* document (optional & only for Windows servers)
9. Enable the Integra database for web browser access (optional – only required if deploying Integra to web users)
10. Install Word, Excel and PDF capability on Domino Server (optional only for Scheduled/ profiles)
11. Deploy the Integra database (.NSF) to your server(s)
12. Deploy the Integra SmartIcon to licensed users
13. Create an Integra Log Database (optional)

3 Step-by-Step Installation

This section of the Integra Installation & Configuration Manual will provide a step-by-step explanation of installing Integra for Notes 4.6 in your environment.

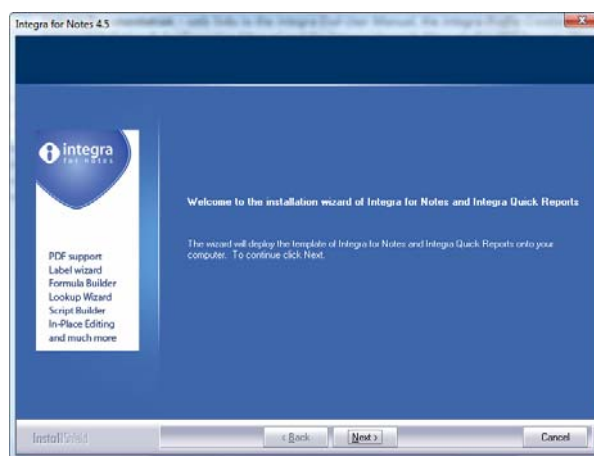
3.1 Installing Integra Set-Up

You would have received the Integra for Notes software as a set up program (Integra.exe) either via e-mail, a download or on CD. Save this file to a working directory of your choice from which the installation will be executed. This is a working directory from which you will then be able to remove Integra.exe after its successful install. The Integra.exe file contains

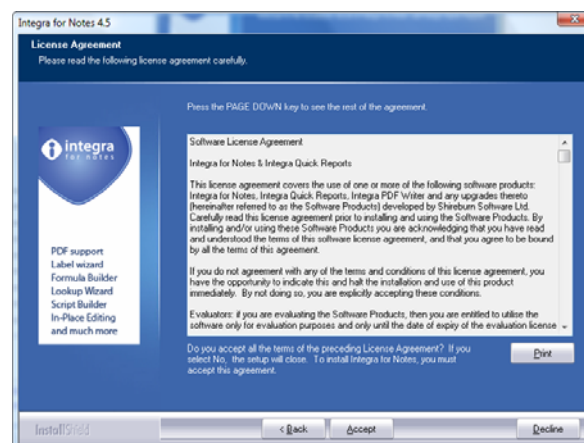
- » **Integra template** (Integra.NTF) – from which you will be able to create your own Integra database.
- » **Links to Documentation** – web links to the *Integra End-User Manual*, the *Integra Profile Creator's Manual*, the *Integra Installation & Configuration Manual* and the *Integra Upgrade Manual* all in PDF format. These files are available at www.integra4notes.com/manuals.

Run the Integra.exe file either through the Windows *Start->Run* option or alternatively by double clicking on it through Windows Explorer™.

On running Integra.exe, you will see a small splash screen following which the Integra Installer Wizard commences with the following screen:



On selecting the *Next* option, you will be shown the software license agreement and given the opportunity to agree or disagree with the terms of the agreement. Disagreeing with the terms will result in you exiting from the install process while agreeing will proceed to the next stage.



Assuming that you proceed, the dialog box to select the directories will be presented to you.

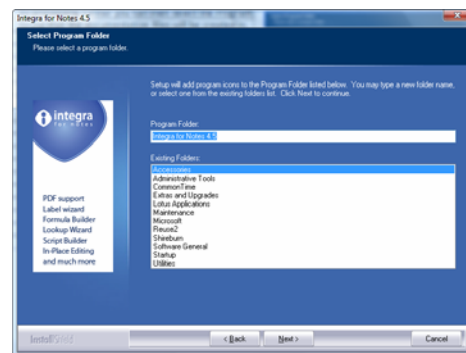
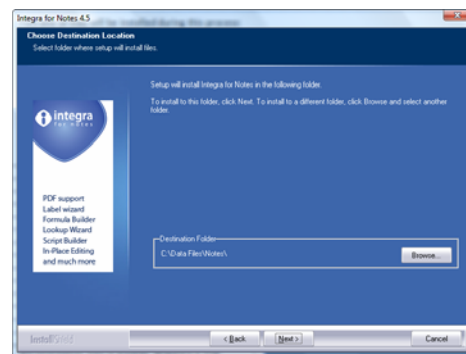
Two sets of files will be installed during this process:

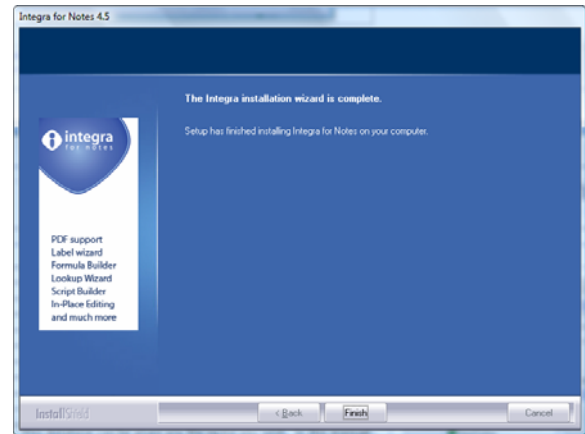
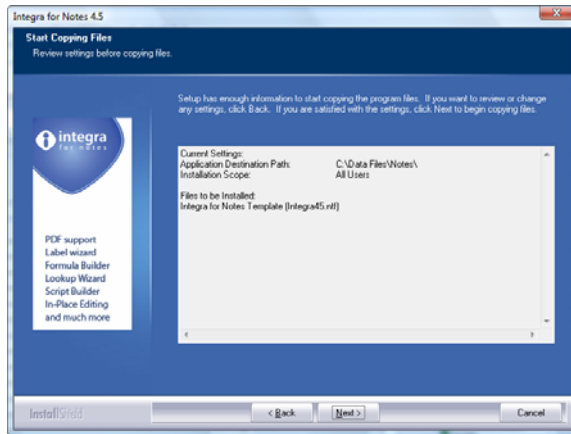
- » **The *Integra.ntf* template** - as with all Notes templates, this file is required to be stored in the Notes default data directory. The Installer reads your registry settings to determine the default Notes data directory of your installation and this is displayed in the dialog box. The option to change this exists using *Browse* although this is not recommended. If you have multiple versions of Lotus Notes installed on your machine, Integra may not be able to select the correct default data directory.
- » **Links to the documentation files** – links to the *End-User Manual*, the *Installation & Configuration Manual* and the *Upgrading to Integra* Manual. These files are available at:
www.integra4notes.com/manuals

The Integra Installer will provide you with a choice of locations where to deploy the Integra template file contained in the installer. The default for the template is the Notes default data directory of your local workstation. The installation process will be read the path from your system unless you have multiple versions of Lotus Notes installed). Please ensure that you select the default data directory of your local machine as the place to deploy the template. The documentation links defaults to c:\Program Files\Integra for Notes 4. While both directories for these files can be modified by the user selecting the *Browse* button, this is not recommended for the template. Deciding to install the links to documentation files in another directory is fine.

By proceeding further you 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*. 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 you will see a number of progress bars while the files are copied to the chosen directories following which a conclusion screen is presented.



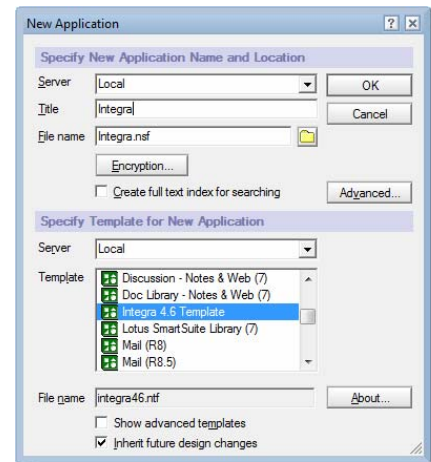


3.2 Create the Integra Database

Use Lotus Notes' standard *File*→*Database*→*New* menu option to create a new database. Select the Integra4Notes template from the Local machine as the source of the design for the new database. The Integra template is called Integra 4.6 Template.

The newly created database can be created either on your local machine or directly on the server assuming that you have the rights to create new databases on the server.

This database can be given any file name you wish. In this manual, we have assumed that the file is called Integra.nsf



As described above, the Integra installer unwraps a Notes template file i.e. a .NTF file. It is essential that a .NSF file is created from this template and used to create Integra profiles and run reports.

Using a template file as the main database to create and run reports will result in incorrect operation of Integra.

3.3 Sign the Integra Database

So as to ensure the smooth operation of Integra for Notes within your environment, and particularly to avoid end-users being presented with Execution Control List (ECL) warnings, it is important that the Integra database is correctly signed using an ID file authorized for operation in your environment, and for which end-users are already certified for access. This will avoid end-users being presented with ECL warnings when running Integra.

Check with your Domino administrator to confirm this step in the process if you are not familiar with this.

Should you intend using the scheduled facilities of Integra, or to deploy Integra to web browser access, then the ID should also be authorized to execute restricted agents on the server(s) on which Integra is deployed.

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

3.4 Set Security Options

The security settings required to run Integra include both ACL settings of the Integra database itself and execution control settings on the server document.

Administrators who will be able to configure the Integra database need access to the [Admin] role to enable configuration. We would recommend that administrators are granted a minimum of *Editor* rights and allocated the [Admin] role. This should be implemented as a first step as configuration of certain other options are not possible without this role.

End-Users who need to run Integra for Notes profiles need to be granted *Author* rights to the Integra database and both the *Create Documents* and the *Create Personal Folders/Views* options must be enabled (ticked).

An insufficient level of rights will result in a warning being displayed to the user. Despite having *Author* rights, users will still not be able to create Integra profiles as an [Import] role and an [Export] role govern the capability to create Import and Export profiles respectively.

Users who are to be able to create profiles should be given access to the [Import] and/or [Export] role. See more details below providing a full explanation of the available roles.

Summary of ACL Roles in Integra database	
Role	Description
Admin	<p>As described above, the Integra database contains an [Admin] role. Certain functionality in Integra is restricted only to users and/or groups who have been granted this role. The functions restricted to members of the [Admin] role are:</p> <ul style="list-style-type: none"> » The ability to access the <i>Configuration</i> document through the Integra navigator and through this feature most of the configuration options for Integra including: » the ability to access the SmartIcons view (see next section) and therefore the ability to deploy or retract the SmartIcons from users. » The ability to access the <i>Buttons</i> view and therefore the ability to create and maintain Button sets. » The setting of the Integra log database » Enablement of scheduled profiles
Import	Users to be granted the ability to create Integra profiles to be used for the importation of data into Notes databases need to be granted the <i>Import</i> role.
Export	Users to be granted the ability to create Integra profiles to be used for the exporting of data from Notes databases need to be granted the <i>Export</i> role.
Advanced	Users requiring to see and amend the contents of the <i>Advanced</i> tab in an Integra profile are to be granted access to the <i>Advanced</i> role.
Scheduled	Users requiring to see and amend the contents of the <i>Scheduled</i> tab in an Integra profile are to be granted access to the <i>Scheduled</i> role.
HiddenDesign	<p>A creator of an Integra profile is able to set a profile to operate directly from a specific view. By selecting the <i>All Documents in View</i> option in the Notes tab, the profile creator is presented with a set of the available views in the database.</p> <p>This list will not display hidden views unless the profile creator has been granted access to the [HiddenDesign] role in the Integra database's ACL. Users with this role will see design elements which are hidden in the source Notes database.</p> <p>Reader and Editor Access to individual profiles can be set at the level of</p>

Summary of ACL Roles in Integra database	
Role	Description
	individual profiles. Utilize Notes' standard ACL tools to set the correct ACL rights to the Integra database.
QRsave	This role governs the ability of an end-user to use the Save option in the Quick Reports to save their reports in the Integra database.
RuntimeEdit	This role governs the ability of an end-user to edit an Integra profile or a Quick Report from the Profile dialog box. If allocated, this role will result in the presentation of the Edit button to the user in the dialog box.
NoQuickReports	When allocated to a user, group or other entity in the ACL of the Integra database, the effected users are unable to utilize the Integra Quick Reports product. This would ensure that users are contained in their ability to report from Notes applications only to the predefined reports.
Mappings	Users allocated this role will be able to create field maps in the Integra database.



Remember that user roles only function on Notes databases which are stored locally (i.e. not on a Domino server) when the "*Enforce a consistent Access Control List across all replicas of this database*" property is set on the database's ACL.

If you intend to run either Scheduled Profiles or provide access to running Integra profiles through a web browser you must ensure that the Domino server on which the Integra database will run has the correct execution control settings. The server must have the rights to execute restricted agents. Set this security feature within the *Security* tab of the *Server* document in the Domino directory where there are a set of options related to *Agent Restrictions* as shown alongside.

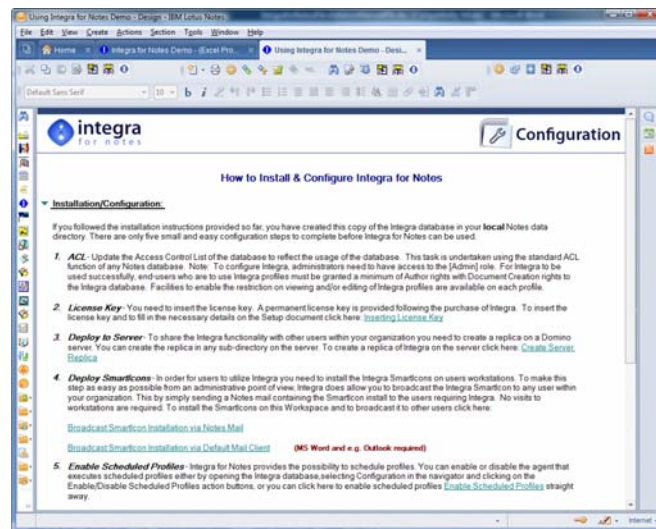
Agent Restrictions	Who can -
Run personal agents:	
Run restricted LotusScript/Java agents:	
Run unrestricted LotusScript/Java agents:	

3.5 Open the Integra Database

At this point you can open the Integra database. This will result in you being presented with the *About this Database* document.



At the bottom of this document is a link to the *Using this Database* document. Selecting this link will open the *Using this Database* document which provides you with a link to each of the install tasks.



3.6 Enter the License Key

Having allocated the [Admin] role, you are now able to access the *Configuration* document of the Integra database by clicking on the *Configuration* button in the navigator. If the *Configuration* button in the

Configuration

navigator is not accessible then please ensure the [Admin] role has been allocated and if necessary exit the Integra database, press the <F5> function key to disconnect from the security system (or <CTRL-F5> in Lotus Notes 8) and re-enter the Integra database.

The Integra *Configuration* document will then be displayed.


The *Configuration* document is divided into various tabs, the first of which is the *License* Tab. This tab requires entry into two fields as follows:

» **Licensee's Name** – this is the name of your organization. This is not validated and is used purely for reference purposes.

» **License Key(s)** – this field requires entry of a valid Integra license key or keys. A license key is required per Integra product/module and per Notes domain in which the Integra database is to be run.

This license key(s) would have been provided to you in a separate email from Shireburn Software Ltd or your chosen Integra partner and would be contained in your Proof of Entitlement document. We recommend that you copy this license key from the email and paste it into the *Configuration* document of the Integra database. Shireburn Software issues *Temporary License Keys* to customers on receipt of orders which are valid for 45 days. Following receipt of payment a permanent key is then issued.

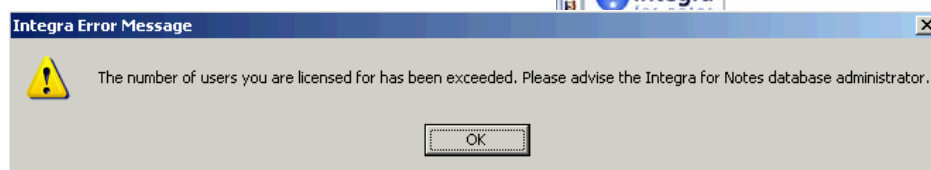


Confirm the details in the license by clicking on the confirm tick icon. This will allow you to confirm acceptance of the license agreement. 

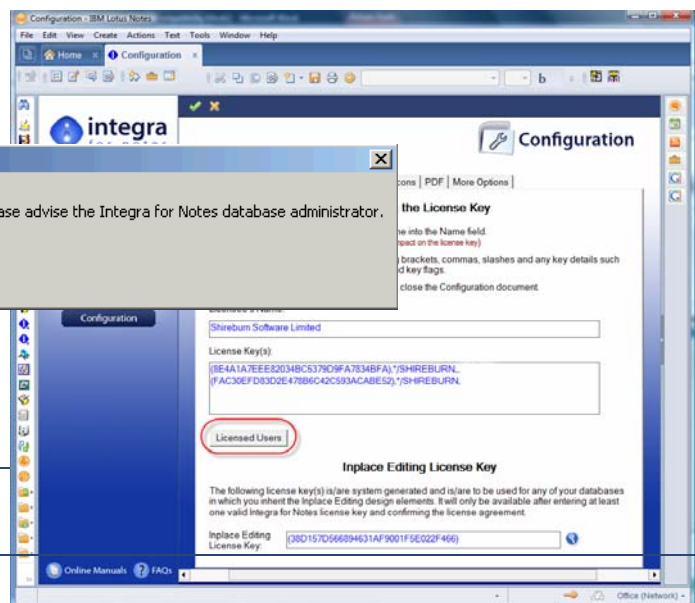
3.7 Pre-allocate User Licenses

Integra for Notes and Integra Quick Reports are licensed on a per user basis. The details of the number of licensed users is contained as a part of the license key for the respective products and Integra keeps track of the licensed users of both products.

In the event that a user attempts to use either product without a user license being available, the user will be displayed an appropriate message box.



Integra supports a method of self-allocation of licenses. On first usage of

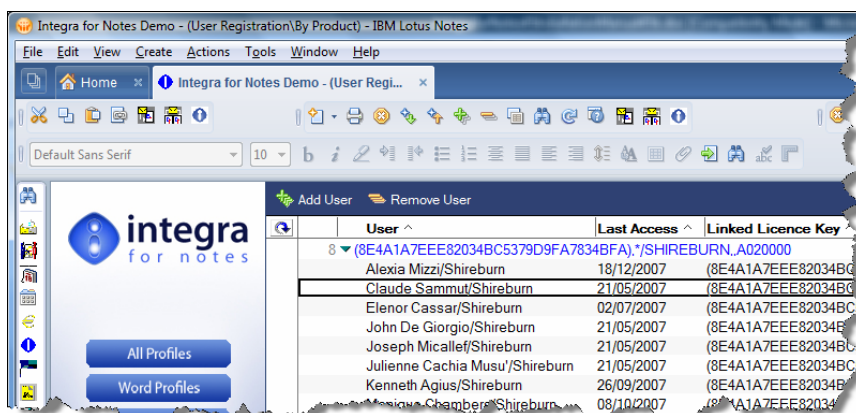


either product by a user, Integra will add that user's name to the list of authorized users, thus "consuming" a user license. This method ensures the lowest level of administrator intervention by fully automating this process.

However, Integra also allows reservations of some or all of the available user licenses to be made to selected users. An authorized user can pre-allocate some or all of the available licenses. To pre-allocate the licenses, a user who has been allocated the Admin role can open up the *Configuration* document where he will be presented with the *Licenses* tab.

By clicking on the *Licensed Users* button, the user is presented with a view of the licensed users categorized by product. Of course, on installation this view would initially be blank.

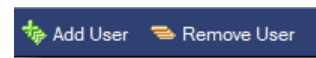
Licensed Users



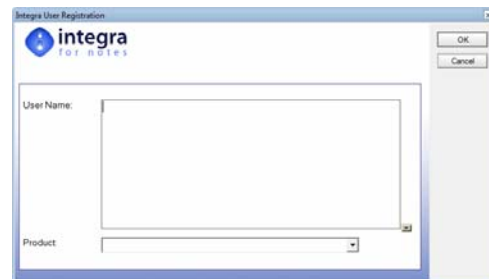
The screenshot shows the 'Integra for Notes Demo - (User Registration) By Product' window. It features a menu bar (File, Edit, View, Create, Actions, Tools, Window, Help), a toolbar, and a text area with 'Default Sans Serif' font. On the left, there's a sidebar with the Integra logo and buttons for 'All Profiles' and 'Word Profiles'. The main area displays a table of licensed users with columns for 'User', 'Last Access', and 'Linked Licence Key'. The table includes a search bar and 'Add User'/'Remove User' buttons.

User	Last Access	Linked Licence Key
(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000		
Alexia Mizzi/Shireburn	18/12/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000
Claude Sammut/Shireburn	21/05/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000
Elenor Cassar/Shireburn	02/07/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000
John De Giorgio/Shireburn	21/05/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000
Joseph Micallef/Shireburn	21/05/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000
Julienne Cachia Musu/Shireburn	21/05/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000
Kenneth Agius/Shireburn	26/09/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000
Monique Chambers/Shireburn	08/10/2007	(8E4A1A7EEE82034BC5379D9FA7834BFA).7/SHIREBURN_A020000

The *Add User* and *Remove User* action buttons allow the user to allocate the licenses of the product or products that are licensed on a per-user basis. On clicking on the *Add User* button, the user is presented with a dialog box:



This allows either the manual entry of a user's name (in the format John Doe/Acme) or the selection of the user from a directory using the drop down menu arrow. Since some organizations may have more than one product licensed on a per-user basis, the *Product* field allows identification of the product for which this user is to be licensed.

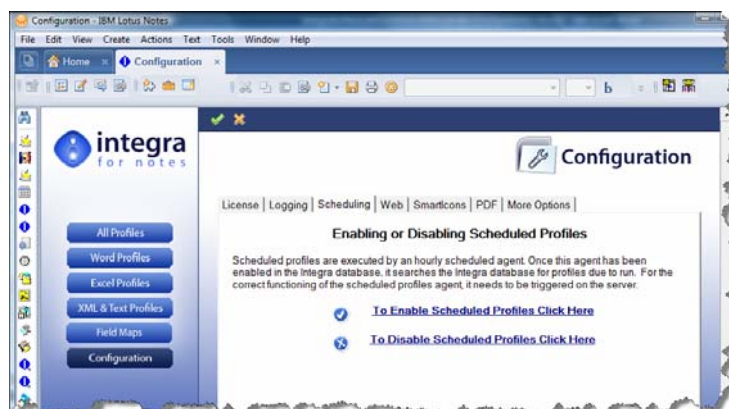


In the event that Integra for Notes is licensed for the server (which is the usual method) and Quick Reports is licensed per-user, then the *Product* field will only list the Integra Quick Reports product from the list of available products to be licensed.

3.8 Enable Scheduled Profiles

If you intend to utilize the facility available in Integra for Notes for profiles to be executed on a schedule, you will need to enable Scheduled Profiles for the Integra database. This is done through the *Schedule* tab of the *Configuration* document.

To enable scheduled profiles, click on the *Scheduling* tab and then click on the *Enable Scheduled Profiles* hot spot. This will trigger the enablement of the single schedule profiles agent in the Integra database.



Scheduled profiles do not require an agent to be run per scheduled profile but rather just the one *Scheduled Profiles* agent.



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.



Due to the security settings of the Domino environment, it is important that when this agent is enabled, it is enabled using the Notes ID of a user or server with sufficient access rights to run agents on the Domino server on which Integra is running and the appropriate ECL settings for accessing the file system and that the ID has access to running restricted agents on the Domino server.

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.

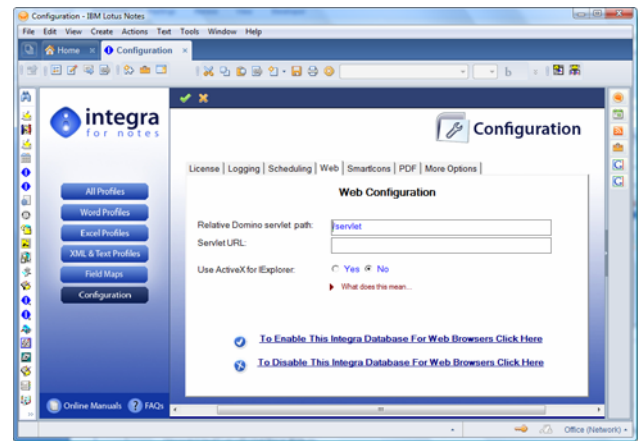
3.9 Enable Database for Web (optional)

If your Integra database is deployed on a Windows based Domino server for usage by web browser users, then you will need to enable the Integra database for Web usage.

Enabling the Integra database for web usage is undertaken through the *Web* tab of the *Configuration* document (see screenshot).

To set this configuration option you require:

- » To have appropriate access rights to run Unrestricted Agents for that server
- » To ensure that the servlet fields are set correctly.



3.9.1 Web Access Control

The process to enable the Integra database for web access requires the user who is enabling this facility to have rights to run unrestricted agents on the server to which Integra is deployed. These rights are set in the Server Document of the appropriate server found in the Domino Directory under the *Security* tab. The field is named *Run Unrestricted LotusScript/Java Agents*.

3.9.2 Servlet Path

Integra's web functionality utilizes a servlet which is deployed automatically through this web configuration tab. It is important that the servlet is deployed to the correct directory on your server. While by default, Domino servers utilize the */servlet* directory below the default Domino path of the server, it is possible that your organization may have modified this path from the default.

The correct path used on your server needs to be set in the Configuration document. To check which directory is used on your Domino server for the storage of your servlets, open the *Domino Directory* and find the *Server Document* for the server on which Integra is to be deployed for usage by web browsers.

Within the tab structure of the *Server Document* under *Internet Protocols* → *Domino Web Engine* you will find a field called *Servlet URL path*. Ensure that the setting in the Integra Configuration document's web tab for the field called *Relative Domino Servlet Path* is set to the same value as that in the *Servlet URL path* field on the *Server Document*.

In addition, the *Servlet URL* field in the web configuration tab of the Integra Configuration Document needs to identify the web server's host name or IP address followed by this path. For instance, if the host name of the server (available across the network to users of Integra) is *everest.acme.com* and the default */servlet* directory is used, then the *Servlet URL* field should be set to: *everest.acme.com/servlet*

As a result, the two fields on this configuration page need 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**.

3.9.3 Enabling web usage

Once the servlet fields are set correctly and the security is ensured, enable web configuration by clicking on the following text "To Enable This Integra Database for Web Browsers Click Here."



Due to the security settings of the Domino environment, it is important that when this agent is enabled, it is enabled using the Notes ID of a user or server with sufficient access rights to run agents on the Domino server on which Integra is running and the appropriate ECL settings for accessing the file system and that the ID has access to running restricted agents on the Domino server.

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.

3.10 Configure PDF Output

Integra profiles include a facility for exporting output to PDF file format. This option can be set within the profile found within the Word or Excel tabs as well as at runtime. See the *Integra Profile Creator's Manual* for more details.

Integra supports various PDF output method including its own freely licensed Integra PDF Writer. The available PDF options consist of the following:

- » Integra PDF Writer
- » PDF Suite 995
- » Adobe's Acrobat Distiller™ client,
- » Acrobat PDF Writer™ client
- » Ommniwatch Shared Watch Folder



You are licensed to use the free of charge Integra PDF Writer only in conjunction with Integra for Notes and for the number of users licensed for the usage of Integra for Notes.

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.

Multiple PDF options can be selected and, when Integra executes the PDF creation capability on the workstation, Integra will check which of the configured options are available on that particular machine.

The Integra PDF Writer, PDF 995 and Acrobat PDF Writer are all printer based PDF solutions and require the deployment and installation of the



writer to the desktop.

3.10.1 Configuring Integra PDF Writer

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. or the 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.

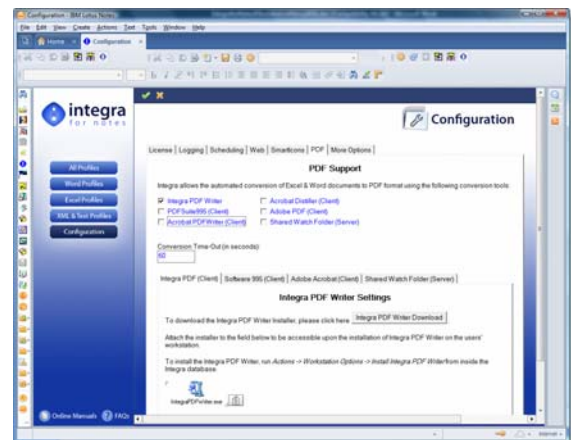
This installation will require a reboot of the PC.

To ease the configuration and installation task for administrators and users of the Integra PDF Writer, Integra allows an administrator to deploy the latest executable of the Integra PDF Writer to the desktop via the Integra configuration option of the Integra database. This facility ensures that no separate distribution of the Integra PDF Writer software needs to be made to end users. This can be achieved by attaching the Integra PDF Writer installer exe into the attachment field at the bottom of the PDF configuration form.

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

1. point your browser at www.integra4notes.com/integrappdf
2. 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

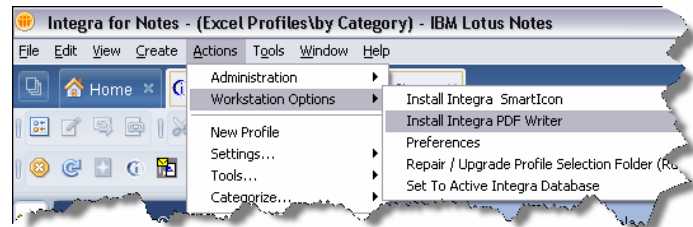


your Integra database, open the *PDF* tab and attach the IntegraPDWriterF.exe file into the Rich Text field in the *Integra PDF (Client)* tab.

Once this is done, the installation on workstations can proceed.

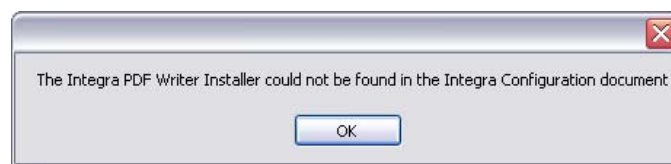
3.10.1.1 Installing the Integra PDF Writer on the Workstation

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.

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.

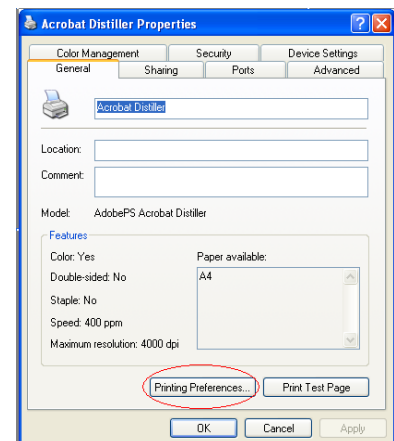


3.10.2 Configuring other PDF Writers

In addition to the free for use Integra PDF Writer, you will notice additional options PDF writing options related to PDF995, Acrobat PDF Writer and Acrobat Distiller. Click on the appropriate check box related to the option or options available on your user's workstations and your Domino server is scheduled generation of PDF files will be used.

In the event that some users use for instance Acrobat Distiller and others use PDF995, select both these options. At runtime, in the event that one of these drivers is not available on the particular workstation, then the other will be used.

In the event that a user attempts to run a profile with the PDF option set and they have no PDF driver installed, an error message indicating this will appear to the user and the profile will generate a Word or Excel document instead.

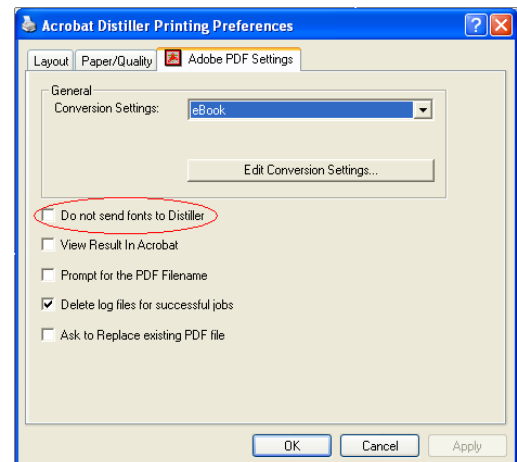


3.10.3 Special Configuration of Acrobat Distiller

Integra is particularly sensitive to a specific property of the Acrobat Distiller driver which must be de-selected for the correct operation of the PDF options in Integra. This option is the *Do Not Send Fonts to Distiller* option which can be found in the Distiller printer driver's properties.

To ensure that this property is set correctly following these steps:

- » Click on the Windows *Start* Button
- » Select the *Printers & Faxes* option. This will present you with the list of currently installed printers and faxes on the workstation.
- » Right click on the Acrobat Distiller icon and select the *Properties* option. This will present you with a dialog (see alongside) displaying the properties of the Acrobat Distiller printer driver.
- » Select the *Printing Preferences* button and click on the Adobe PDF Settings tab within this dialog box. You will be presented with the options shown in the screenshot alongside. Ensure that the *Do not send fonts to Distiller* option is deselected



In the event that this property is set on a workstation or server that is running an Integra profile with PDF generation facilities, a specific error message will be provided to the user indicating that this option should be disabled.

3.11 Install Word & Excel on Domino server (optional)

If you intend utilizing the *Scheduled Profile* facilities of Integra, a Windows platform of Domino **must be used and Microsoft Word, Excel and a supported PDF writing capability need to be installed on the Domino server.**

This installation should be undertaken while logged in as an Administrator or a Local Administrator on the server so as to provide the correct execution rights.



If your Lotus Domino server is running on operating systems which are not Windows based you will not be able to run *Scheduled* Integra profiles as Word, Excel and PDF Writer will not be able to be run.

A workaround to this limitation is to install a Lotus Notes client on a Windows workstation and set the execution of *Scheduled Profiles* on this machine. This machine will then be acting as an Integra Schedule Profiles Server.

Users of Domino running on a Windows operating system are unaffected by this.

If you intend utilizing the facility for Integra Profiles to print out on the server from a *Scheduled Profile*, there is a known Microsoft bug that prohibits such printing without fixing the Windows server. Please refer to the Microsoft report on this issue found at :

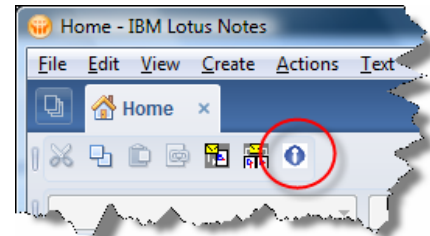
<http://support.microsoft.com/default.aspx?scid=kb;EN-US;184291>

3.12 Deploy the Integra Database

Deploy the Integra database onto the licensed server(s) within your organization that is/are to host Integra. This is done by creating replicas of the Integra database onto the various servers. Remember that a license for Integra for Notes is required per server.

3.13 Deploy SmartIcons to Users

End-users utilizing profiles created in Integra, do not need to launch the Integra database itself, although they require *Author* access rights to the database. End-users do however require access to the Integra for Notes SmartIcon. SmartIcons are the set of icons available in the icon bar of the Notes client (see the circled Integra icon alongside) and are not to be confused with the Action Button bar contained in the views and forms of Notes databases which are specific to each application. Lotus Notes uses Toolbars as the container for the SmartIcons.



To minimize the touch-costs associated with the deployment of these icons to users of Integra, the product contains a facility to automatically distribute these icons out to required users as defined by the person responsible for deploying the application.

This process is fully automated for users of. There are three ways to install the SmartIcons for users:

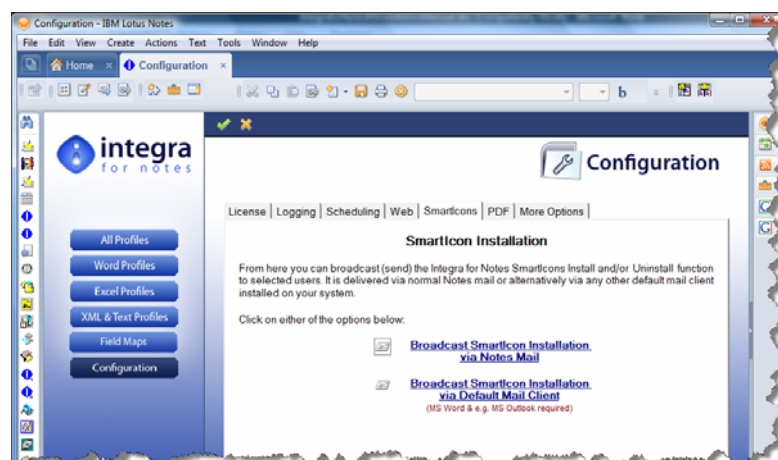
- » Through the *SmartIcons* tab contained on the *Configuration* document which is accessible through the *Configuration* button in the main navigator.
- » Through the highlighted link in the *Using This Database* document (*Broadcast SmartIcons*).
- » Through the *Actions* -> *Workstation Options* -> *Install Integra SmartIcon* option.



The Configuration button is only available to users allocated the [Admin] role within the Integra database's *Access Control List*.

On selection of the *Configuration* button and selection of the *SmartIcons* tab, the user is presented with a form with two buttons as shown in the screenshot below which allow the generation of an e-mail to broadcast the SmartIcon installer to users.

One of these buttons launches the installer when the person broadcasting the install is using

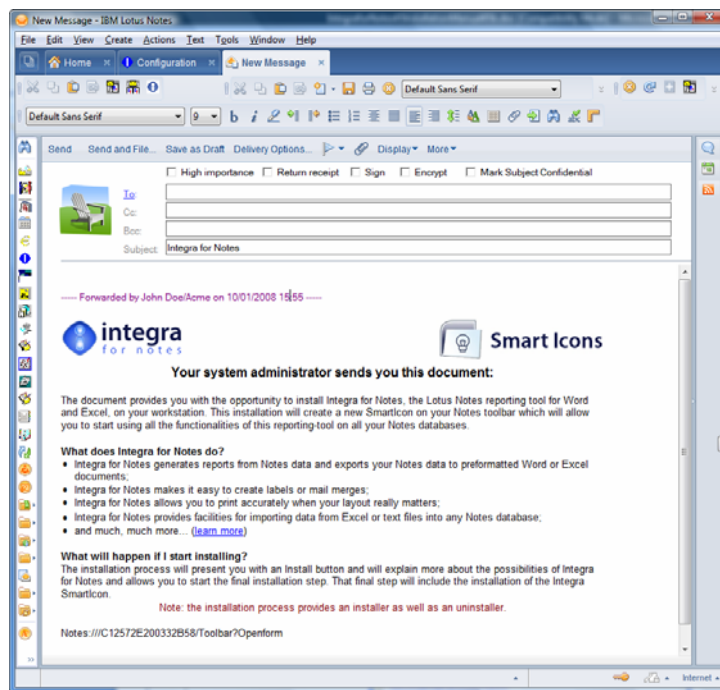


Lotus Notes e-mail while the other launches the installer when using an alternative mail client such as Microsoft Outlook.

These are explained in the following section.

3.13.1 Broadcast SmartIcon Installation via Notes Mail

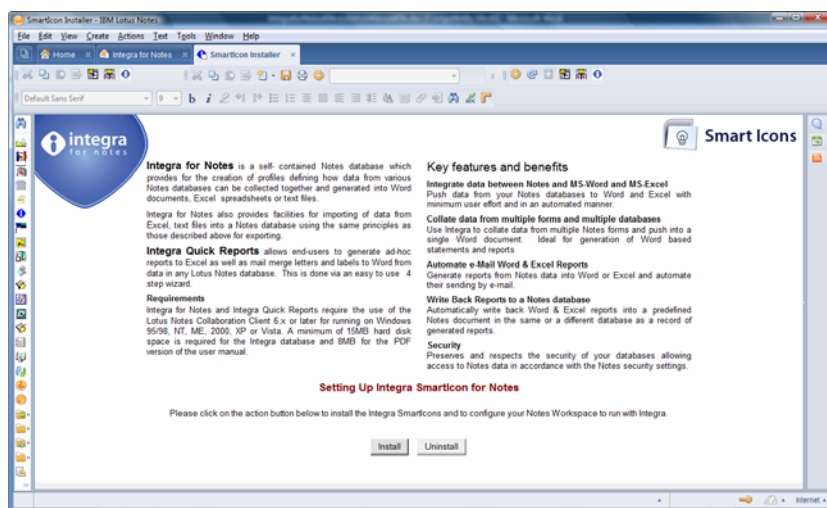
The *Broadcast SmartIcon Installation via Notes Mail* action button results in the generation of a Notes email, which can be sent to those users to whom you wish to deploy and install Integra for Notes' capabilities at the desktop. This email automatically contains all the necessary initial explanations to the user about Integra for Notes, to which the administrator can add their own comments, as well as two url's, one to be used by users Lotus Notes 5 clients and the other for users of Lotus Notes 6 and 7. The users to whom Integra is to be deployed would be identified as the recipients of this email in the *To* field.



On receipt of this email by an intended user, clicking on the url within the email appropriate to their client version will open the installer page appropriate to the Notes client version,

This document will contain both an Install and an Uninstall button

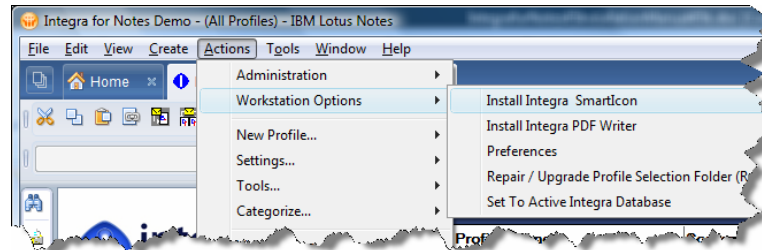
Clicking on the *Install* button automatically installs the Integra SmartIcon onto that user's SmartIcon Toolbar. If the user's preferences do not anticipate SmartIcons being *On*, the user will need to enable Icon toolbars.



The user may also need to exit and reload the Lotus Notes client for the icon to be deployed.



If installation cannot be undertaken by a user utilizing this method, an alternative installation method is available via the *Actions* → *Workstation Options* → *Install Integra SmartIcon* menu option.



This feature will not work in the event that the e-mail is sent with the Notes encryption facility turned on. Please ensure that Encryption is turned off when sending this SmartIcon install mail.

In the event that these SmartIcons are being deployed out to users within an external Notes domain, the appropriate cross-certifications must be in place to enable native Notes mail delivery.

This install procedure can be run multiple times sending the Integra icon install procedure to different users and/or groups or even repeating an installation to an existing user in the event of some feature change in the icon's coding.

The Integra icon has simple coding associated with it and most of the functionality is within the centralized Integra database. As a result, modification to available features, upgrades to new versions etc. should rarely result in any need for reinstalling the icon on the user desktop.

This approach has been taken specifically to reduce the touch-costs associated with any modifications at the user workstation level, even though this process is automated.

3.13.2 Integra SmartIcon Install via Microsoft Outlook

This method of installation is used when an organization utilizes Microsoft Outlook as its mail client rather than Lotus Notes. When the administrator clicks on the Microsoft Outlook version of the *Broadcast SmartIcon Installation* button, the standard e-mail will be created within Microsoft Outlook and can be addressed to the intended recipients as per the Lotus Notes mail based deployment.



Broadcast SmartIcon Installation via Default Mail Client

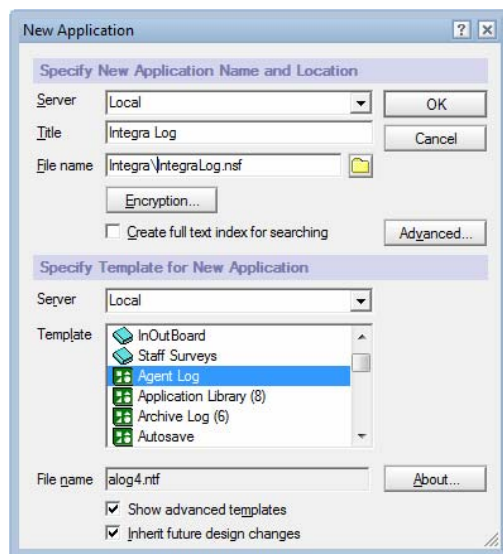
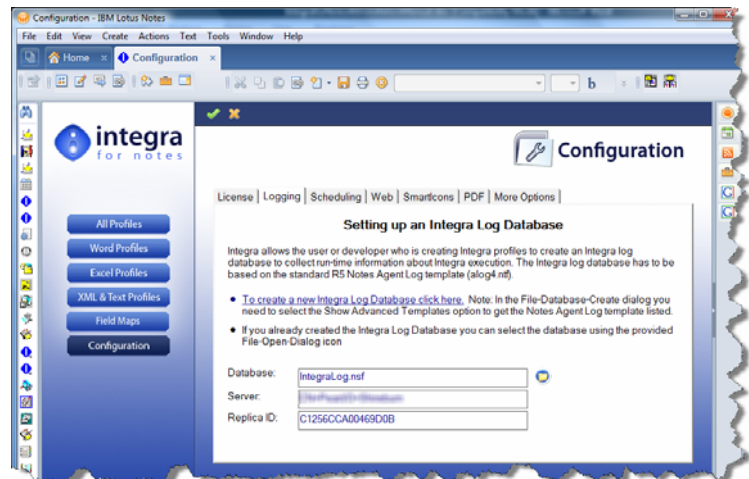
(MS Word & e.g. MS Outlook required)

3.14 Creating an Integra Log Database (optional)

Integra allows the user or developer who is creating Integra profiles to create an Integra log database to collect runtime information about Integra execution. The Integra log database has to be based on the standard Notes agent log template (alog4.ntf). It can be created by the user or developer himself or by the system administrator.

Access to the configuration of the Integra Log database is found in the *Integra Log database* tab on the *Configuration* document as shown in the screen shot alongside.

The *Integra Log Database* document contains an option to create the Integra log database directly by selection of a hot spot. On selection of the hot spot, the user will be presented with the standard Lotus Notes *Create Database* or *New Application* (in Notes 8) dialog box. Within the dialog, tick-mark the *Show advanced templates* option, as otherwise the Agent Log template will not be listed.



The Integra log database must be :

- » based on the Agent Log template (alog4.ntf) which is the standard Notes agent log template.
- » For each location of an eventual replica of the Integra database, a replica or new copy of the Integra log database has to be created, following the above rules.

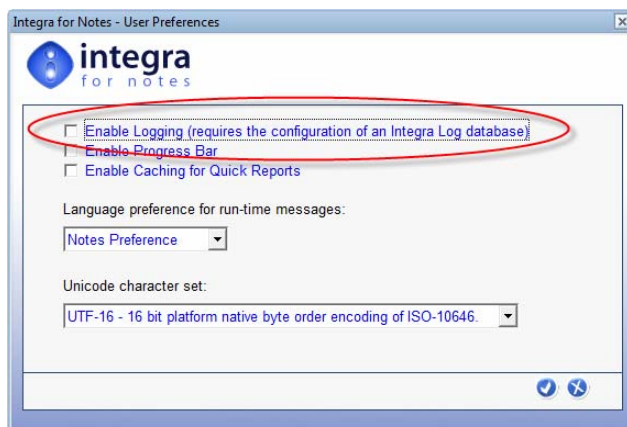
On creation of the Integra log through this process, Integra will record the file name and location of the Integra Log database for recording events.

In the event that the Integra log has been created independently of Integra, i.e. directly through the *File->Database->New* menu option, then it is essential for

the database to be configured to be used by Integra through the selection of the database using the file dialog icon.

3.14.1 Enabling and Disabling the Integra Logging

To enable or disable the Integra Logging mode, select the Integra database on the workspace or open it from the bookmarks. From the menu, select *Actions -> Workstation Options-> Preferences*.



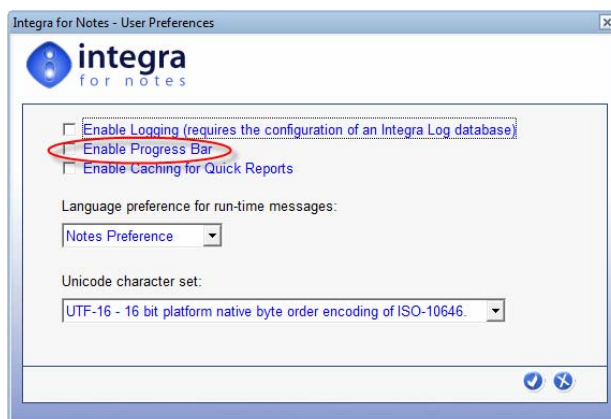
To enable and disable logging select or deselect the *Enable Logging* option in the preferences dialog box.



As logging mode creates a message for every function executed at runtime, it has a considerable impact on Integra's performance and should only be used for debugging and disabled after the debugging process is complete.

3.14.2 Enabling and Disabling the progress Bar

When using Integra on an on-line meeting, disabling the Progress Bar reduces the amount of traffic over the connection. To enable or disable the Progress Bar, select the Integra database on the workspace or open it from the bookmarks. From the menu, select *Actions -> Workstation Options-> Preferences*.



To enable and disable the Progress Bar select or deselect the *Enable Progress Bar* option in the preferences dialog box.

Support

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

- » Your version of Integra for Notes
- » 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
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Useful web links:

www.integra4notes.com

www.integra4notes.com//faq

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