



BEA AquaLogic® Interaction Content Service - Lotus Notes

Installation and Upgrade Guide

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Welcome

AquaLogic Interaction Content Service - Lotus Notes (Lotus Notes CS) enables you to include Lotus Notes content in your portal from repositories inside or outside your network. Portal administrators can then create remote content sources and remote content crawlers that access Lotus Notes.

How to Use This Book

This book describes how to install and deploy AquaLogic Interaction Content Service - Lotus Notes 6.1. It also provides instructions for upgrading to Lotus Notes CS 6.1 from earlier versions.

Audience

This guide is written for the user responsible for installing or upgrading Lotus Notes CS. This user must have an understanding of the existing portal deployment, knowledge of how to administer objects in the portal, and knowledge of the security required for your Lotus Notes system.

Organization

This guide includes the following chapters:

- This chapter provides information on how to use this guide and describes other resources available to help install, deploy, upgrade, and administer Lotus Notes CS.
- [Chapter 2, “Completing Pre-Installation Steps,”](#) provides hardware and software requirements, as well as environmental and third-party software prerequisites. You must read this chapter and meet the prerequisites prior to proceeding to the installation or upgrade.
- [Chapter 3, “Installing or Upgrading Lotus Notes CS,”](#) provides detailed instructions for installing and configuring Lotus Notes CS.
- [Chapter 4, “Configuring Lotus Notes CS,”](#) provides detailed instructions for importing, configuring, and creating Lotus Notes CS objects in the portal.
- [Chapter 5, “Uninstalling AquaLogic Interaction Content Service - Lotus Notes,”](#) provides instructions for uninstalling Lotus Notes CS.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
<ul style="list-style-type: none"> • File names • Folder names • Screen elements 	bold	<ul style="list-style-type: none"> • Upload Procedures.doc to the portal. • The log files are stored in the logs folder. • To save your changes, click Apply Changes.
<ul style="list-style-type: none"> • Text you enter 	computer	Type Marketing as the name of your community.
<ul style="list-style-type: none"> • Variables you enter 	computer with angle brackets (<>)	Enter the base URL for the Remote Server. For example, http://<my_computer>/.
<ul style="list-style-type: none"> • New terms • Emphasis • Object example names 	<i>italic</i>	<ul style="list-style-type: none"> • <i>Portlets</i> are Web tools embedded in your portal. • The URI <i>must</i> be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.

BEA Documentation and Resources

This section describes other documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Release Notes	<p>These files are written for AquaLogic Interaction Content Service - Lotus Notes administrators. They include information about new features and known issues in the release.</p> <p>They are available on edocs.bea.com and on the application CD.</p>
Online Help	<p>The online help is written for all levels of Lotus Notes CS users. It describes the user interface for Lotus Notes CS and gives detailed instructions for completing tasks in Lotus Notes CS.</p> <p>To access online help, click the help icon.</p>
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	<p>These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.</p>
Deployment Guide	<p>This document is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment.</p> <p>It is available in electronic form (PDF) on edocs.bea.com.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction Support Center	<p>The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities:</p> <p>Technical Support Center</p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p>User Group</p> <p>Visit the User Group section to collaborate with peers and view upcoming meetings.</p> <p>Product Center</p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p>Developer Center</p> <p>Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.</p> <p>Education Services</p> <p>Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p>If you do not see the Support Center when you log in to http://support.plumtree.com, contact ALUISupport@bea.com for the appropriate access privileges.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
Technical Support	<p>If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.</p> <p>E-mail: ALUISupport@bea.com</p> <p>Phone Numbers:</p> <p>U.S.A. +1 866.262.PLUM (7586) or +1 415.263.1696</p> <p>Europe +44 1494 559127</p> <p>Australia/NZ +61 2.9923.4030</p> <p>Asia Pacific +61 2.9931.7822</p> <p>Singapore +1 800.1811.202</p>

Welcome

Completing Pre-Installation Steps

This chapter describes the following pre-installation steps to ensure successful installation:

1. Download the most up-to-date documentation from edocs.bea.com.
2. Read the release notes for additional information on compatibility issues, known problems, and workarounds that might affect how you proceed with your deployment. Release notes are located at the top-level directory of the product package.
3. Provision host computers for your deployment and install prerequisite software. For details, see “[Hardware and Software Requirements](#)” on page 2-2.
4. Install the Lotus Notes client on the Remote Server host computer.
5. Give the ASPNET user full access to the folder with the Lotus Notes ID file in it.

Hardware and Software Requirements

Note: For the most up-to-date list of supported software for your deployment, refer to the Interoperability page in the AquaLogic User Interaction Support Center.

Component	Requirement
Lotus Notes CS Host Computer	Hardware <ul style="list-style-type: none">• 512 MB memory• 128 MB disk space Operating System <ul style="list-style-type: none">• Microsoft Windows 2000 Professional, Microsoft Windows 2000 Server SP4, Microsoft Windows 2003 Server SP1 Note: Windows 2003 SP1 is only supported for the Remote Host when using Lotus Notes Client 7.0.1
Lotus Domino Server	Domino Server 6.5, 7.0
Lotus Notes Client	Lotus Notes Client 6.5.1, 7.0.1
Portal Software	AquaLogic Interaction 6.1
Client Browser	<ul style="list-style-type: none">• Firefox 1.0, 1.5, 2.0• Microsoft Internet Explorer 6.0, 7.0• Netscape 7.2, 8.0• Safari 1.3, 2.0

Installing or Upgrading Lotus Notes CS

This chapter describes how to install or upgrade Lotus Notes CS. Before you begin, ensure that you have met the prerequisites for installation and performed the necessary pre-installation procedures described in [Chapter 2, “Completing Pre-Installation Steps.”](#)

1. Install the Lotus Notes CS application on the remote server host. For details, see [“Installing or Upgrading Product Files” on page 3-2.](#)
2. Install the image files and help files for Lotus Notes CS on the Image Service host. For details, see [“Installing Image Files” on page 3-4.](#)
3. Verify deployment of Lotus Notes CS. For details, see [“Verifying Installation” on page 3-5.](#)

Installing or Upgrading Product Files

Lotus Notes CS is implemented as a remote server in the context of your portal deployment. It must be installed on a remote server host computer that can communicate with AquaLogic Interaction. For best performance, the remote server host computer should not host other AquaLogic User Interaction components. For host specifications, see [“Hardware and Software Requirements” on page 2-2](#).

Note: Lotus Notes CS is not supported when installed on the same computer that is running the Lotus Domino Server.

Note: If you have previously installed Lotus Notes CS, we recommend uninstalling the earlier files before installing the current version.

To install product files:

1. Log in to the host computer as the local host administrator.
2. Close all applications.
3. Copy the Lotus Notes CS installation package to a location on the remote server host.
4. Double-click **ALIContentServiceLotusNotes_v6-1.exe** to launch the installer.
5. Complete installation wizard pages as described in the following table.

Note: To facilitate any troubleshooting that might be required, as well as communication among IT staff and customer support, we recommend you keep the default settings.

Wizard Page	Description
Introduction	Click Next .
Choose Components	Choose Content Service for Lotus Notes and click Install .
Choose Install Folder	The default installation folder is C:\bea\alui . This is the location is where the component will be installed.
Fully Qualified Domain Name	Enter the domain name for your host computer, for example: mycomputer.mycompany.com.
Web Protocol	The installer asks you to choose whether to use a secure HTTP protocol for the Web service (https) or a standard Web protocol (http).

Wizard Page	Description
Select IIS Web Site	<p>Specify if you want to use the default Web site:</p> <ul style="list-style-type: none"> • Use Default Web Site - Choose this option to create a virtual directory called notescws in the Web directory http://<RemoteServer>/notescws. The default Web site listens on port 80. • Use another Web site - You will specify the Web site particulars on the next page.
Specify IIS Web Site Information	<p>If you selected to use another Web site, specify the information for that site:</p> <ul style="list-style-type: none"> • IIS Web Site Name - Enter the name of the site on which you want to deploy the Lotus Notes CS. • IIS Web Site Port - If necessary, change the port for this site. The default port is 8082. • IIS Web Site Secure Port - If necessary, change the secure port for this site. The default port is 9092.
Path to Temporary Directory	<p>Type the complete path name for the directory in which temporary files are downloaded during crawls before they are served to the indexing servlet.</p> <p>The default is C:\bea\alui\ptnotescws\6.1\tmp.</p>
User Credential Key	<p>If you are using Groupware Notes and want the Lotus Notes CS to pick up the Groupware Notes user credentials, this key must be the same as the Groupware Encryption key.</p> <p>If you are not using Groupware, set this key to any value other than blank.</p>

6. On the Pre-Installation Summary page, review the installation settings and click **Install** to begin installation.
7. You must restart your computer before you can use the Lotus Notes CS. Select **Yes, restart my system**, and click **Done**.

Installing Image Files

The image files used by the Lotus Notes CS are hosted on the Image Service used by the portal. You must install these files on the Image Service host so they are available to the remote server. This section contains information on the following procedures:

- [“Installing Image Files on a Windows Host” on page 3-4.](#)
- [“Installing Image Files on a Unix Host” on page 3-5.](#)

Installing Image Files on a Windows Host

To install image files on a Windows host:

1. Log in to the host computer as the local host administrator.
2. Close all applications.
3. Copy the Lotus Notes CS installation package to a location on the remote server host.
4. Double-click **ALIContentServiceLotusNotes_v6-1.exe** to launch the installer.
5. Complete installation wizard pages as described in the following table.

Note: To facilitate any troubleshooting that might be required, as well as communication among IT staff and customer support, we recommend you keep the default settings.

Wizard Page	Description
Introduction	Click Next .
Choose Components	Choose Image Server Files for Windows Image Service and click Install .
Specify Image Service Folder	Specify the location of your Image Service folder. Note: We recommend using: \\ptimages .

6. On the Pre-Installation Summary page, review the installation settings and click **Install** to begin installation.
7. You must restart your computer before you can use the Lotus Notes CS. Select **Yes, restart my system**, and click **Done**.

Installing Image Files on a Unix Host

To install image files on a Unix host:

1. Navigate to the images directory on the computer where you installed the Lotus Notes CS. The default installation location is **/bea/alui/ptnotescws/6.1/images**
2. Move the **imageserver.tgz** file to the server on which the Image Service is installed.
3. Decompress the **.tgz** file.
4. Navigate to the directory in which the Image Service is installed and confirm a **Webservices** folder exists underneath it.
5. Decompress the .tar file into the directory in which the Image Service is installed. Do not overwrite existing files. This step results in files being put into the **ptimages/imageserver/Webservices** folder.

Verifying Installation

To verify a successful installation:

1. Ensure the ASPNET user has full control privileges to the Lotus Notes data directory.
2. Open the installation test page in the following location:

http://<server_name>:<port>/NotesCWS/Servlets/InstallTest.aspx

Run the procedures using a valid Lotus Notes ID and password.

Configuring Lotus Notes CS

After you have run the installation wizard and verified correct installation, the next step is to import, configure, and create Lotus Notes CS objects in the portal. This chapter includes the following topics:

- [“Importing, Configuring, and Creating Lotus Notes Objects”](#) on page 4-1
- [“Configuring User Preferences for Click-Through”](#) on page 4-5
- [“Configuring Remote Server Logging”](#) on page 4-5

Importing, Configuring, and Creating Lotus Notes Objects

Complete the following steps to import, configure, and create Lotus Notes CS objects in the portal:

- Import the remote server and content Web service. For details, see [“Importing the Remote Server and Content Web Service”](#) on page 4-2.
- Map Lotus Notes file types. For details, see [“Mapping File Types”](#) on page 4-2.
- Configure Lotus Notes CS security. For details, see [“Configuring Security”](#) on page 4-3.
- Create a content source. For details, see [“Creating a Content Source”](#) on page 4-4.
- Create a content crawler. For details, see [“Creating a Content Crawler”](#) on page 4-4.
- Create a job. For details, see [“Creating a Job”](#) on page 4-4.

Importing the Remote Server and Content Web Service

Import the Lotus Notes CS remote server and content Web service into the portal using the Object Migration utility:

1. On the computer that hosts the portal application, map or mount a network drive connection to the Lotus Notes CS host computer or copy files to an accessible directory.
2. Log into your portal as an administrator.
3. Click **Administration**.
4. From the Select Utility menu, select **Migration - Import**.
5. Browse to the migration package. If you accepted installation defaults, the location is:
`\\<RemoteServer>\bea\alui\ptnotescws\6.1\serverpackages\LotusNotesCS_WS_RemoteServer.ptc`
6. Click **Load Package**.
7. Select **Overwrite Remote Servers**.
8. Click **Finish**.

Stay logged in to the portal for the next procedure.

Mapping File Types



To map Lotus Notes file types to portal file types, import the Lotus Notes content types into the portal using the Object Migration utility:

1. From the Select Utility menu, select **Migration - Import**.
2. Browse to the migration package. If you accepted installation defaults, the location is:
`\\<RemoteServer>\bea\alui\ptnotescws\6.1\serverpackages\LotusNotesCS_DocumentType.ptc`
3. Click **Load Package**.
4. Click **Finish**.

Stay logged in to the portal for the next procedure.

Configuring Security

To configure security settings for the Lotus Notes CS:

1. Deploy an authentication source (for example, LDAP) to manage Lotus Notes users. For details, refer to Lotus Notes documentation.
2. Create a remote authentication source in the portal to import the Lotus Notes users. For details, refer to the portal's online help or the *Administrator Guide for AquaLogic Interaction*.
3. Configure the Global ACL Sync Map to associate the Lotus Notes domain name with the authentication source:
 - a. Log in to the portal as an administrator.
 - b. Click **Administration**.
 - c. From the Select Utility menu, select **Global ACL Sync Map**.
 - d. Click  **Add Mapping** and choose the authentication source you created in step 2.
 - e. In the **Domain Name** column, click  and enter the domain name of the Lotus Notes users, usually the Lotus Domino Server name.
 - f. Click **Finish**.

Note: Lotus Notes CS only maps group level security rights from Lotus Notes groups to portal groups. It does not map user level security rights.

You will configure additional security settings in the Content Crawler Editor as described in [“Creating a Content Crawler” on page 4-4](#).

Stay logged in to the portal for the next procedure.

Creating a Content Source

Create a content source to define the area of Lotus Notes from which you want to import content. To create a content source, perform the following steps in the portal:

1. Open the **Lotus Notes CS** folder.
 2. From the Create Object menu, select **Content Source - Remote**.
 3. In the Choose Web Service dialog box, choose the **Lotus Notes CS** Web service.
 4. Configure the content source as described in the online help.
- Stay logged in to the portal with the Lotus Notes CS folder open for the next procedure.

Creating a Content Crawler


Create a content crawler to import content from the content source. To create a content crawler, perform the following steps in the Lotus Notes CS folder of the portal:

1. From the Create Object menu, select **Content Crawler - Remote**.
2. In the Choose Content Source dialog box, choose the content source you created in the previous procedure.
3. On the Main Settings page of the Content Crawler Editor, select **Import security with each document**. Configure the rest of the content crawler as described in the online help.

Stay logged in to the portal with the Lotus Notes CS folder open for the next procedure.

Creating a Job

To import content, you must associate the content crawler with a job and run the job. To create and run a job, perform the following steps in the Lotus Notes CS folder of the portal:

1. From the Create Object menu, select **Job**.
2. Click  **Add Operation** and choose the content crawler created in the previous procedure.
3. Configure the rest of the job as described in the online help.
4. When you are finished creating the job, make sure the Lotus Notes CS folder is associated with an Automation Service. For assistance, see the online help under **Select Utilities | Automation Service**.

Configuring User Preferences for Click-Through

The portal can be configured to automatically pass the Lotus Notes user credential information to the remote server when a user clicks a Lotus Notes document. If the user preference is not configured, the user will have to log in to Lotus Notes on every document click-through.

Each user should perform the following steps to set user preferences for click-through:

1. Log in to the portal.
2. Click **My Account**.
3. Click **Lotus Notes CS**.
4. Enter the client you would like to use on click-through and your Lotus Notes user name and password.
5. Click **Submit**.

Configuring Remote Server Logging

Lotus Notes CS keeps a log of errors and other information on the remote server. If you need to troubleshoot the Lotus Notes CS remote server or you are curious how your crawls are progressing, you might want to change the logging level to record more information.

To change the logging level and view the current log:

1. Log in to the portal as an administrator.
2. Click **Administration**.
3. From the Select Utility menu, select **Lotus Notes CS**.
4. Select the appropriate logging level or view the most recent log.

Note: If you want to view the log files directly, the default location on the remote server is:
`<PT_HOME>\ptnotescws\6.1\Webapp\NotesCWS\log`

Configuring Lotus Notes CS

Uninstalling AquaLogic Interaction Content Service - Lotus Notes

To remove Lotus Notes CS from your remote server, use the Windows Add/Remove Programs utility. The uninstaller removes the application files that were installed.

After the installation process has completed, it is safe to delete the installation directory and any directories created for the Lotus Notes CS in IIS.

Uninstalling AquaLogic Interaction Content Service - Lotus Notes

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