



# **IQM V4 Lotus Notes Databases**

## Installation Guide

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# 1. Setting up the Database

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## 1. Setting up the Database

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### a. Move the Templates to Lotus Domino Data Directory

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Unzip the downloaded database files

ITQConnect\_[version].zip → ITQConnect\_[version].ntf  
ITQMeasure\_[version].zip → ITQMeasure\_[version].ntf  
ITQLogs\_[version].zip → ITQLogs\_[version].ntf

Move or copy the unzipped files (\*.ntf) to the Lotus Domino directory of Lotus Domino server on which these databases will be hosted.

The standard path to the data directory on Lotus Domino server might be

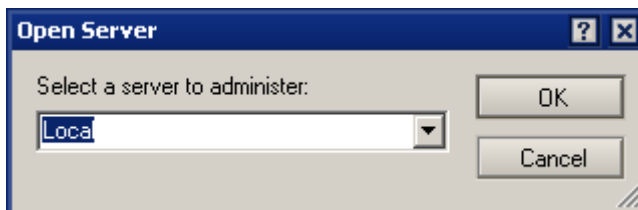
<drive>:\Lotus\Domino\Data

### b. Sign the Templates

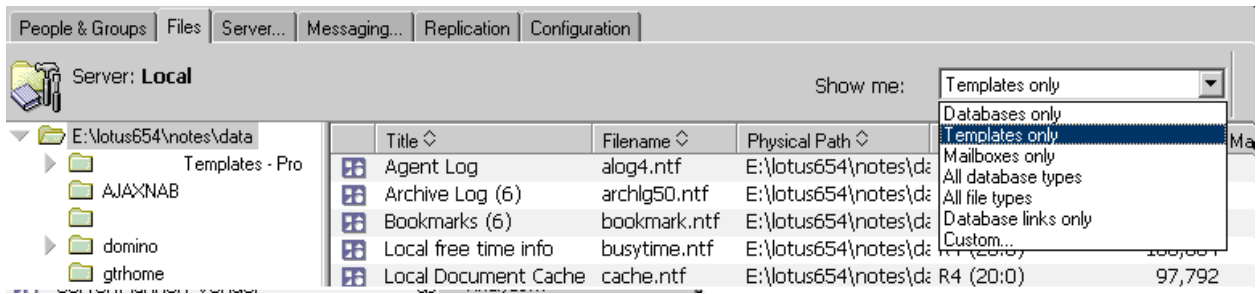
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Login to Lotus Domino Administrator with the Administrator's ID or an ID that has proper rights on the server on which the template has been copied.

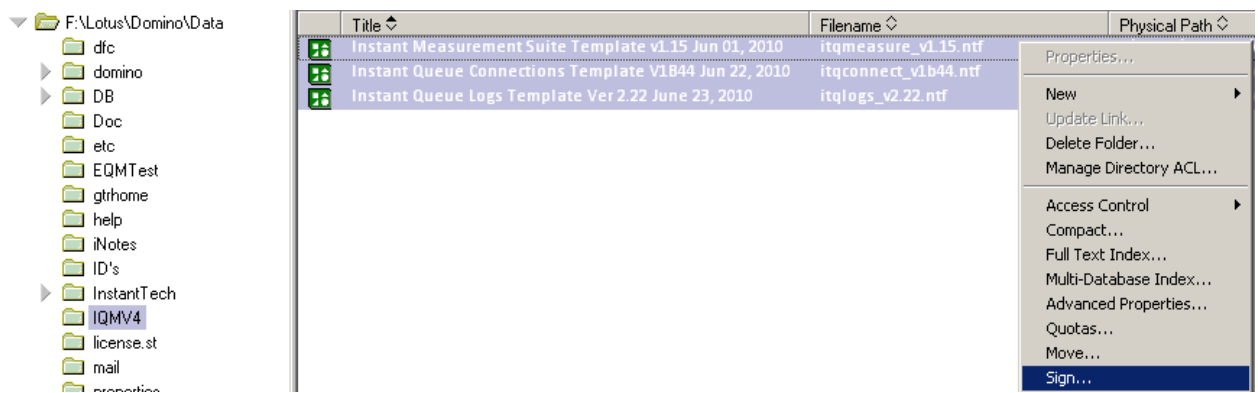
Select the server on which the template has been copied by clicking on 'File → Open Server' from the menu



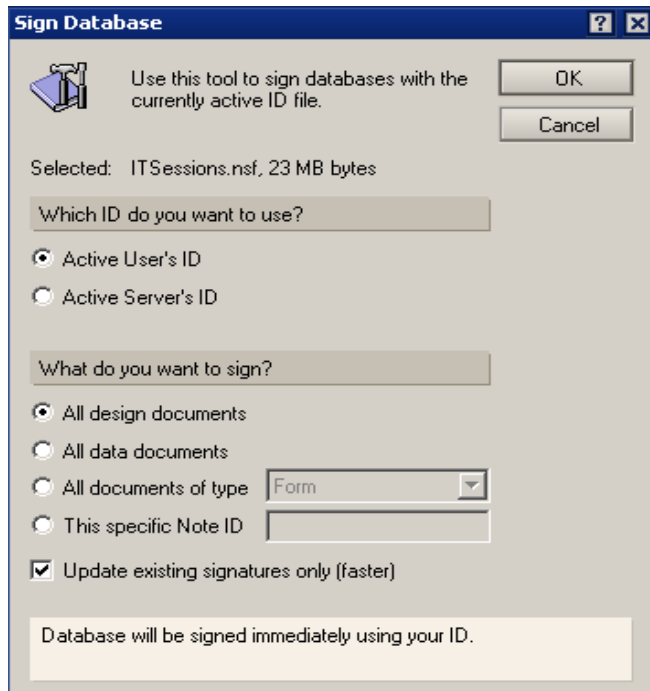
After the selected server has been loaded click on tab 'Files' and select 'Templates Only' from the list 'Show me' as shown in the below figure



Select all the three templates Instant Queue Connections, Instant Queue Logs and Instant Measurement Suite from the list, Right-click and click 'Sign'



Click Ok on the dialog shown below to sign the templates.



## c. Create the Databases

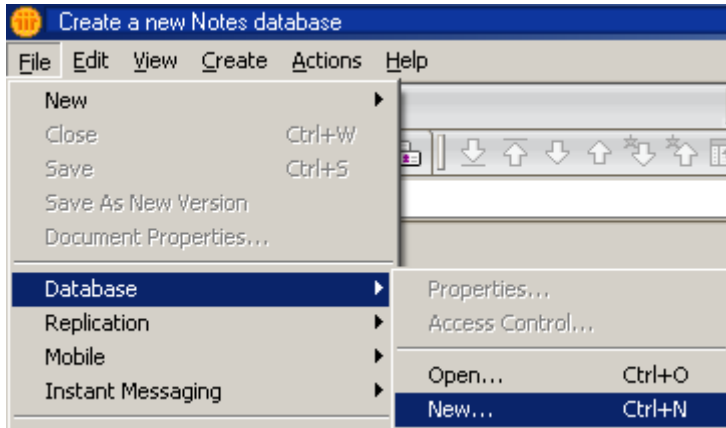
---

### Instant Queue Connections

Create a new Database 'ITQConnect.NSF' on the server using the signed Queue Connections Template.

ITQConnect\_[version].ntf → ITQConnect.NSF

Click on File → Database → New to get the dialog for creating new database



Select the Server on which the database needs to be created.

Specify a title for the database.

The title is not important – although we recommend:

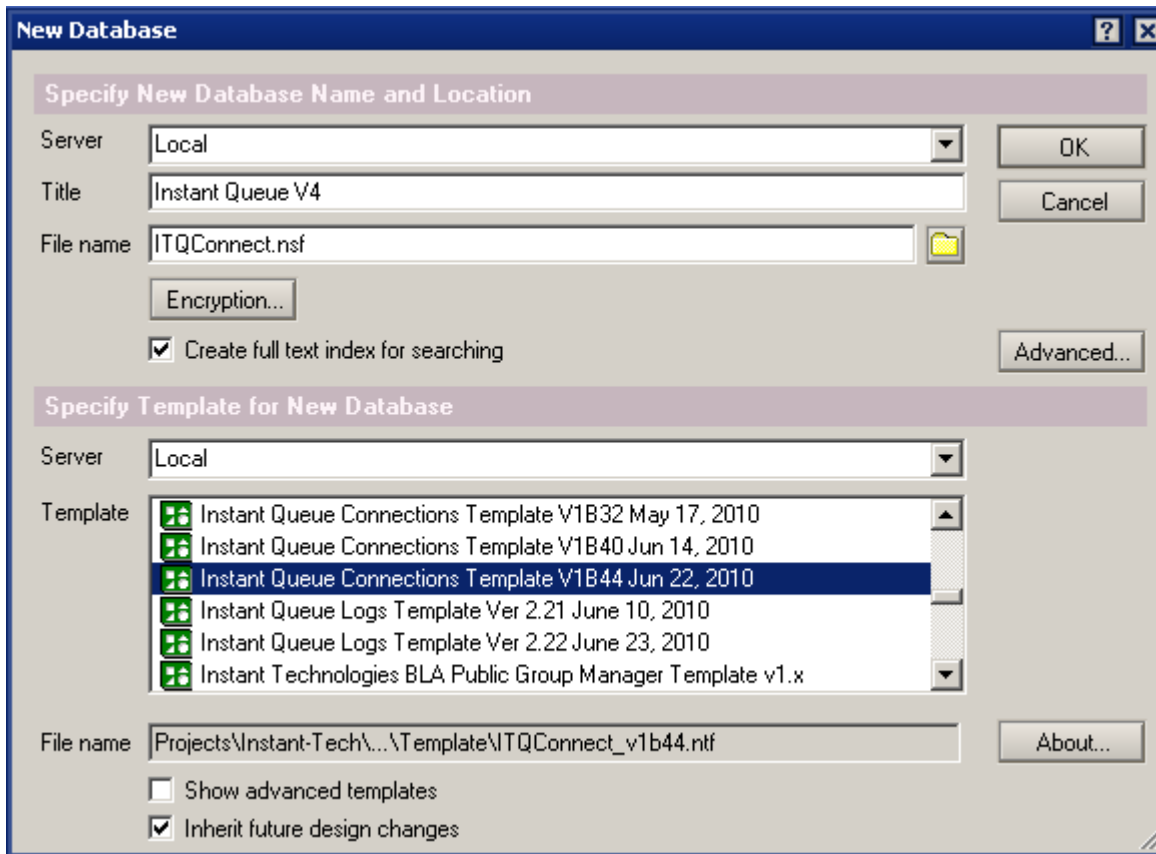
Instant Queue V4

The file name should be: ITQConnect.nsf

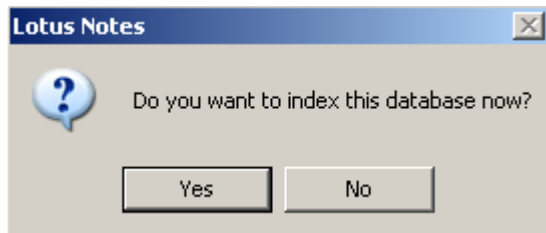
Select the option 'Create full text index for searching'

Select the Server on which the Queue Connections template is installed

Select the Queue Connections template from the templates list and click ok



Select 'Yes' for the dialog prompted to index the database

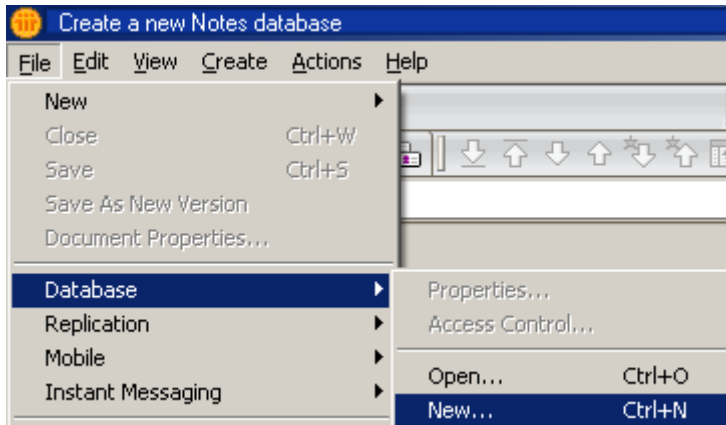


## Instant Queue Logs

Create a new Database 'ITQLogs.NSF' on the server using the signed Queue Logs Template.

ITQLogs\_[version].ntf → ITQLogs.NSF

Click on File → Database → New to get the dialog for creating new database



Select the Server on which the database needs to be created.

Specify a title for the database.

The title is not important – although we recommend:

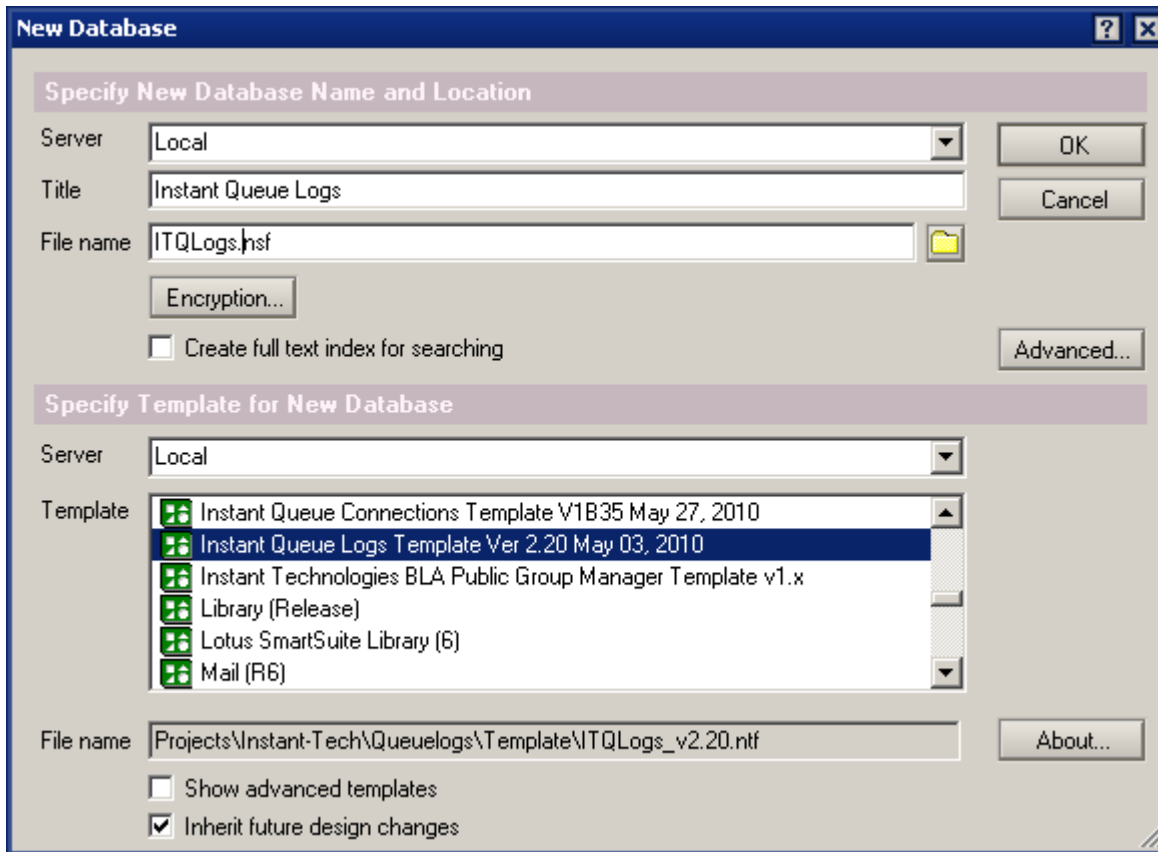
Instant Queue Logs

The file name should be: ITQLogs.nsf

Select the Server on which the Queue Connections template is installed

Select the Queue Logs template from the templates list and click ok

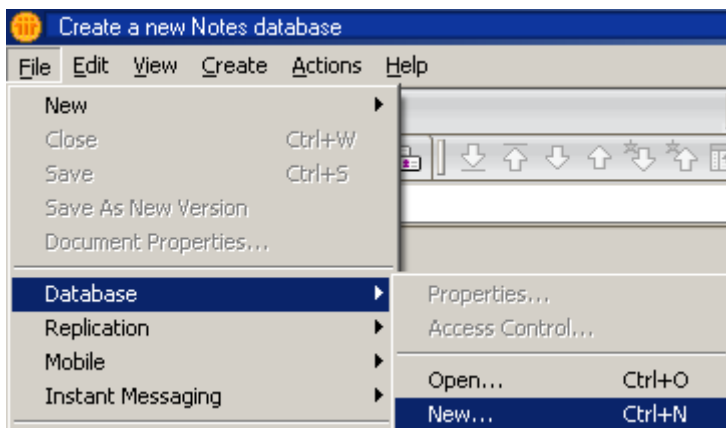




## Instant Measurement and Reporting Suite

Create a new Database 'ITQMeasure.NSF' on the server using the signed Measurement Suite Template.

Click on File → Database → New to get the dialog for creating new database



Select the Server on which the database needs to be created.

Specify a title for the database.

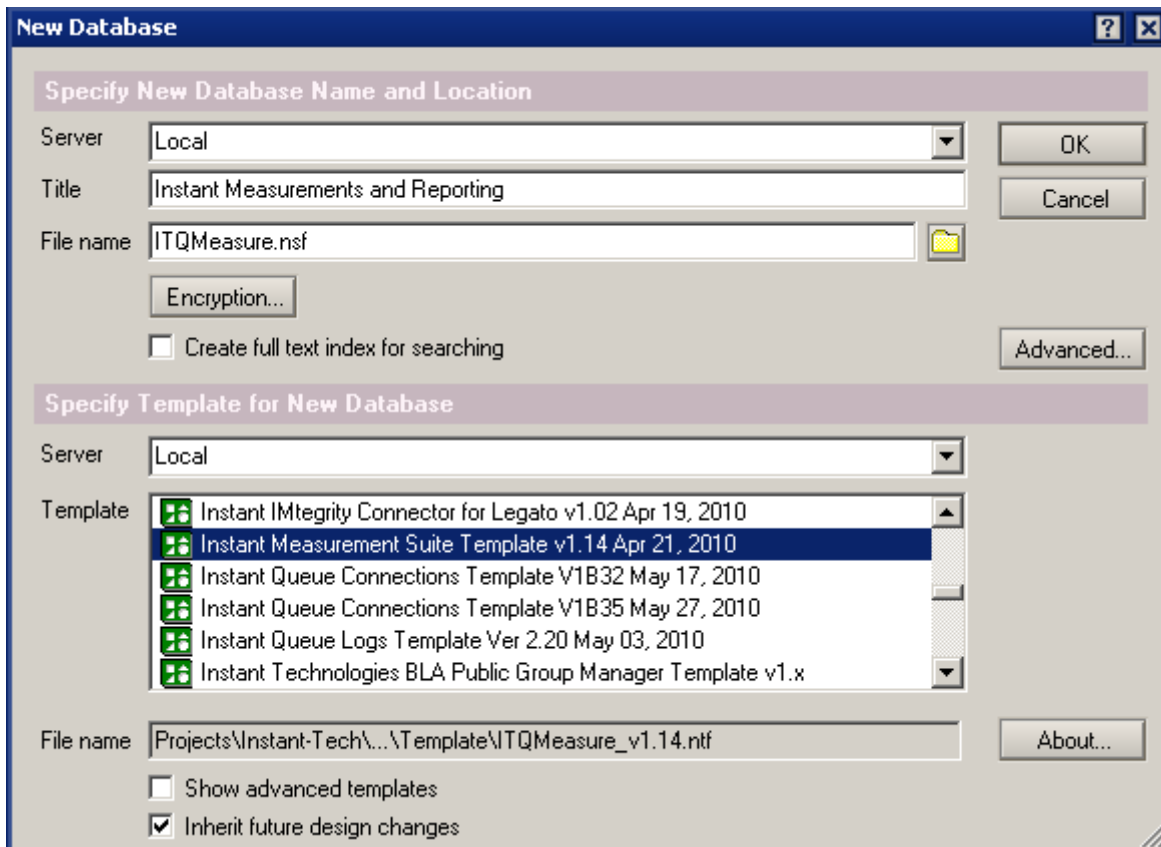
The title is not important – although we recommend:

Instant Measurements and Reporting

The file name should be: ITQMeasure.nsf

Select the Server on which the Measurements Suite template is installed

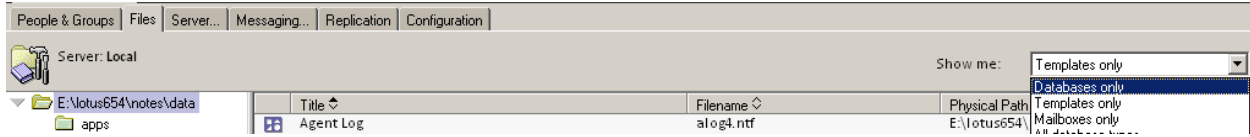
Select the Measurements Suite template from the templates list and click ok



## d. Set up the ACL

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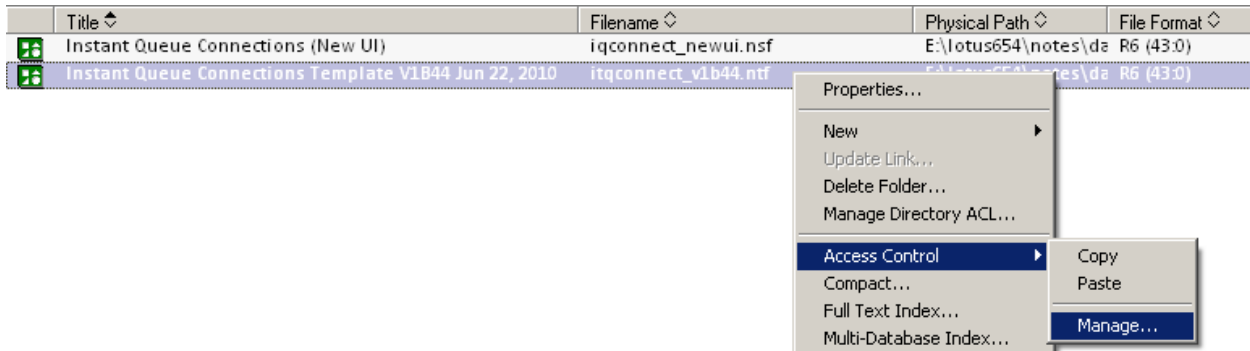
Within Lotus Administrator client, click on tab 'Files' and select 'Databases Only' from the list 'Show me' as shown in the below figure



Browse and locate the databases created in the previous steps and configure the ACL for each of them.

### Instant Queue Connections

Right-Click on Instant Queue V4 database which you might have created with name ITQConnect.nsf, click Access Control → Manage...



Click on 'ADD' to enter the new entries to the list

The server entry must have an access level of 'Manager' and 'Admin' role needs to be enabled

The default entry must have an access level of 'No Access'

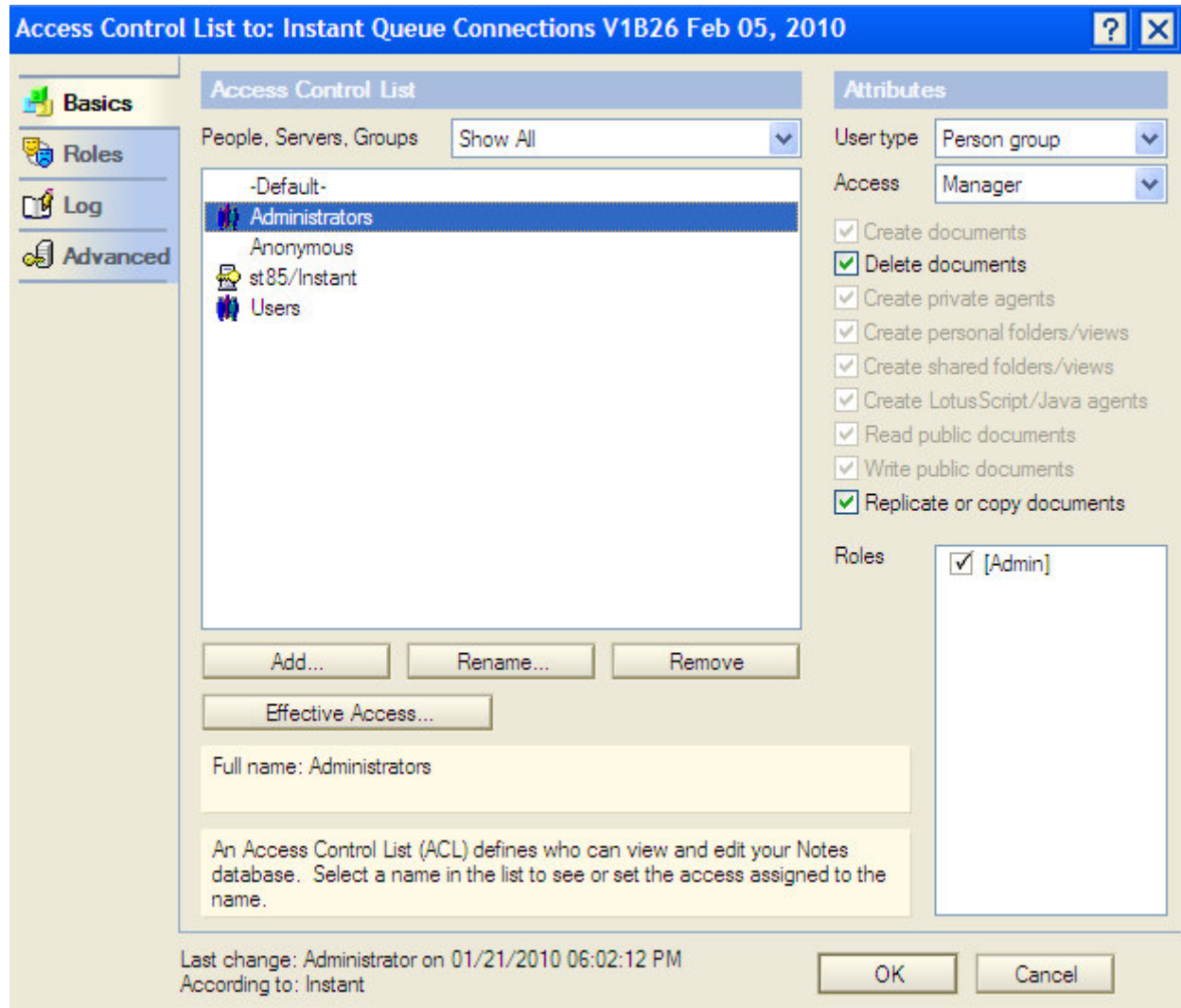
A entry called 'Anonymous' must be added which will have an access level of 'No Access' and of user type 'unspecified'

There must be an entry of a user or a group with access level of 'Manager' and of user type 'Person' or 'Person group' who will responsible for administrating the database. 'Admin' role should also be enabled for this entry

There must be an entry of a user or a group with access level of 'Author' and of user type 'Person' or 'Person group' who will be users of the application.

If you wish to restrict access to the database you can set it in the ACL. You can also restrict access to specific Queues when you create them.

The ID with which the database is signed should also be added to the ACL with access level of 'Manager' and 'Admin' role



## Instant Queue Logs

Right-Click on Instant Queue Logs database which you might have created with name ITQLogs.nsf, click Access Control → Manage...

Click on 'ADD' to enter the new entries to the list

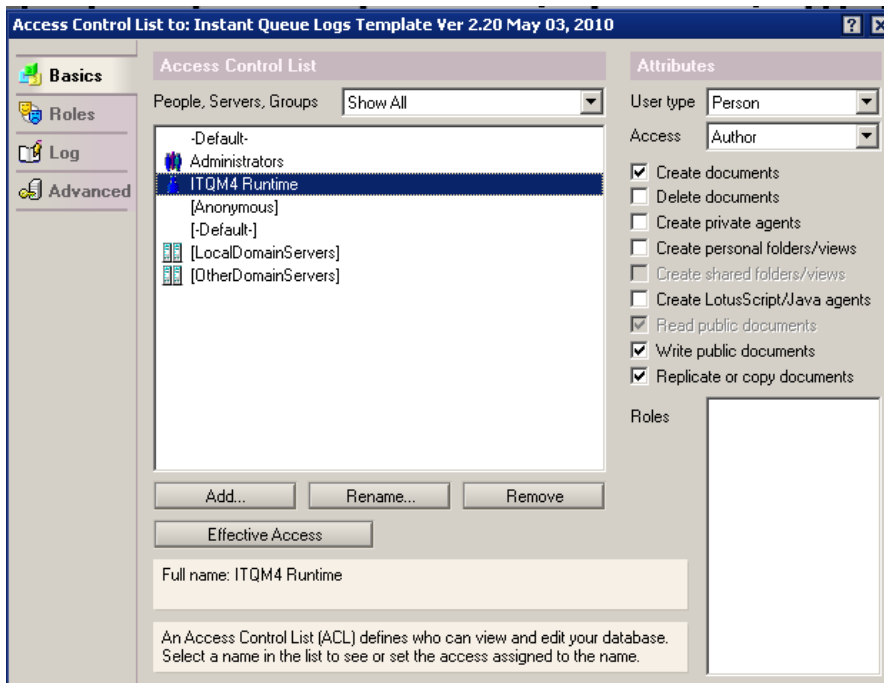
The server entry must have an access level of 'Manager'

The default entry must have an access level of 'Reader'

An entry called 'Anonymous' must be added which will have an access level of 'Reader' and of user type 'unspecified'

There must be an entry of a user or a group with access level of 'Manager' and of user type 'Person' or 'Person group' who will be responsible for administering the database.

There must be an entry of a user with minimum access level of 'Author' and of user type 'Person' who will be used to create logs in the database. This is the same user which will be specified in the Instant Queue Connections database under 'Admin → Settings → Logging'.



## Instant Measurements Suite

Right-Click on Instant Measurements and Reporting database which you might have created with name ITQMeasure.nsf, click Access Control → Manage...

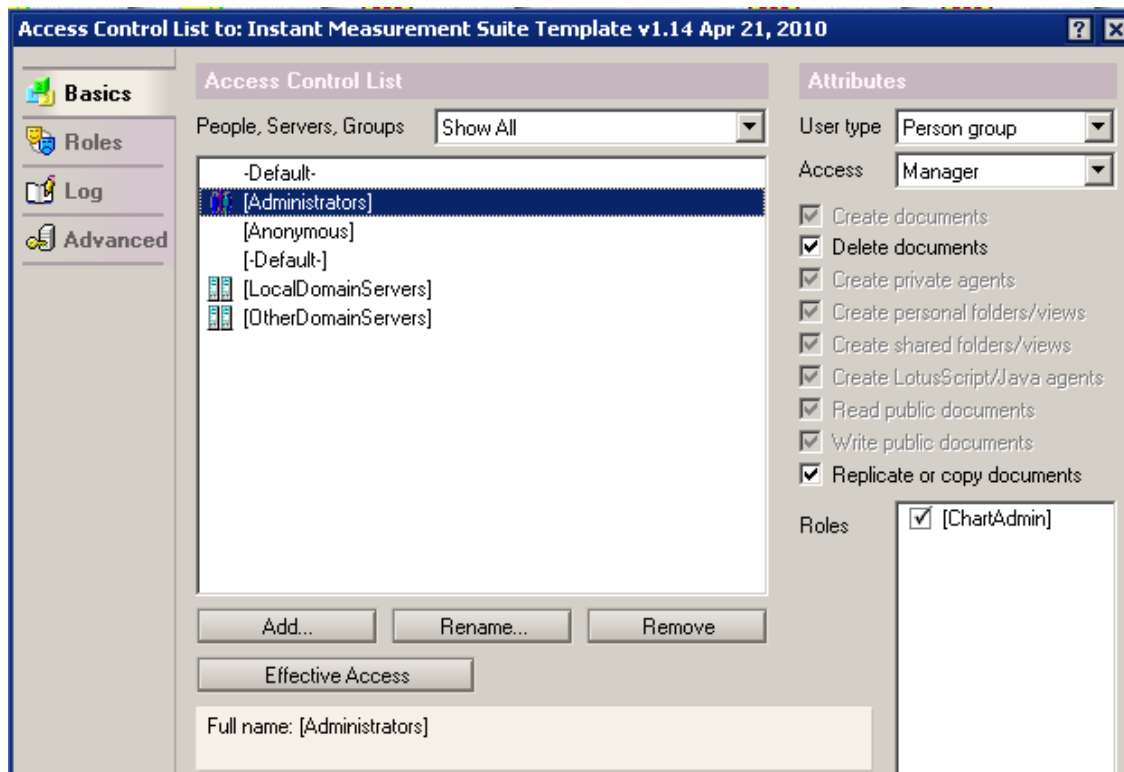
Click on 'ADD' to enter the new entries to the list

The server entry must have an access level of 'Manager'

The default entry must have an access level of 'Reader'

An entry called 'Anonymous' must be added which will have an access level of 'Reader' and of user type 'unspecified'

There must be an entry of a user or a group with access level of ‘Manager’ and of user type ‘Person’ or ‘Person group’ with role ‘Chart Admin’ who will responsible for administrating the database.



### **e. Enable the Public Group support Scheduled agent in Queue Logs Database**

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Login to Lotus Notes Designer client and Click on File → Database → Open to open the Instant Queue Logs database which you might have created with name ITQLogs.nsf

After the database has been loaded, expand ‘Code’ and double click on ‘Agents’

Select the agent ‘agUpdateGroupMembersCountOnQandGroupDocs’ from the list and click ‘Enable’

## f. Set up the config documents in Instant Measurements Suite

Within Lotus Notes Administrator client, browse, locate and double click on the Instant Measurements and Reporting database which you might have created with name 'ITQMeasure.nsf'

The main purpose of this step is to link the Measurements database with the Queue Logs database.



### Welcome!

Thank you for choosing to use Instant Technologies' products. This application does not have a Notes-based user interface, except for some administrative setup details. To use this application, please navigate to this location in your favorite web browser and enjoy!

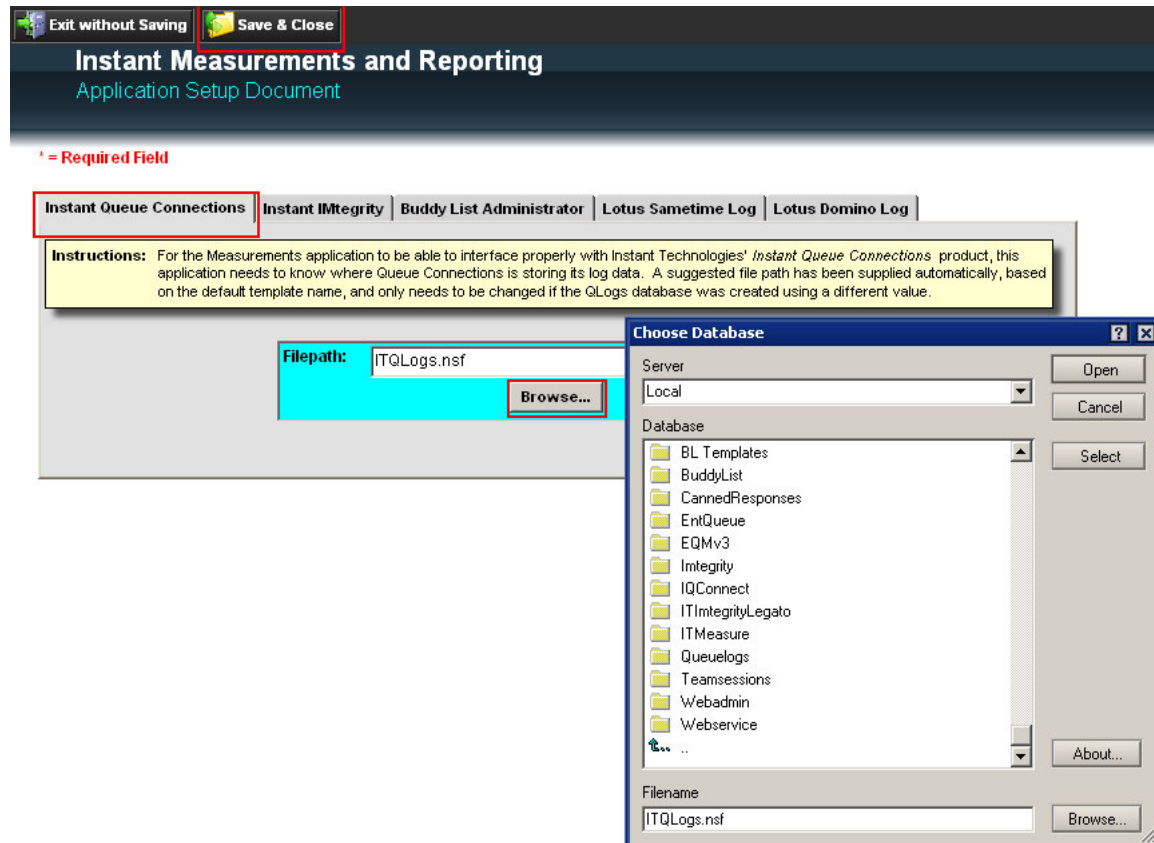
Administrators: To edit the setup document, [click here](#).

Thank you,  
Instant Development

Click on 'Click here' to open the setup document in the screen as shown above.

Select 'Instant Queue Connections' tab, click on 'Browse' to open up the database dialog and select the Instant Queue Logs (ITQLogs.nsf) created in the previous step.

Click 'Save & Close' to save the setup document



## g. Refresh the Database Design

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This step is required if IQM V4 databases already exist and need to update the design of any or all the databases.

Download the latest templates, delete the copy of templates (ITQConnect\_[version].ntf, ITQMeasure\_[version].ntf, ITQLogs\_[version].ntf) on Domino data directory if exists and perform the setps

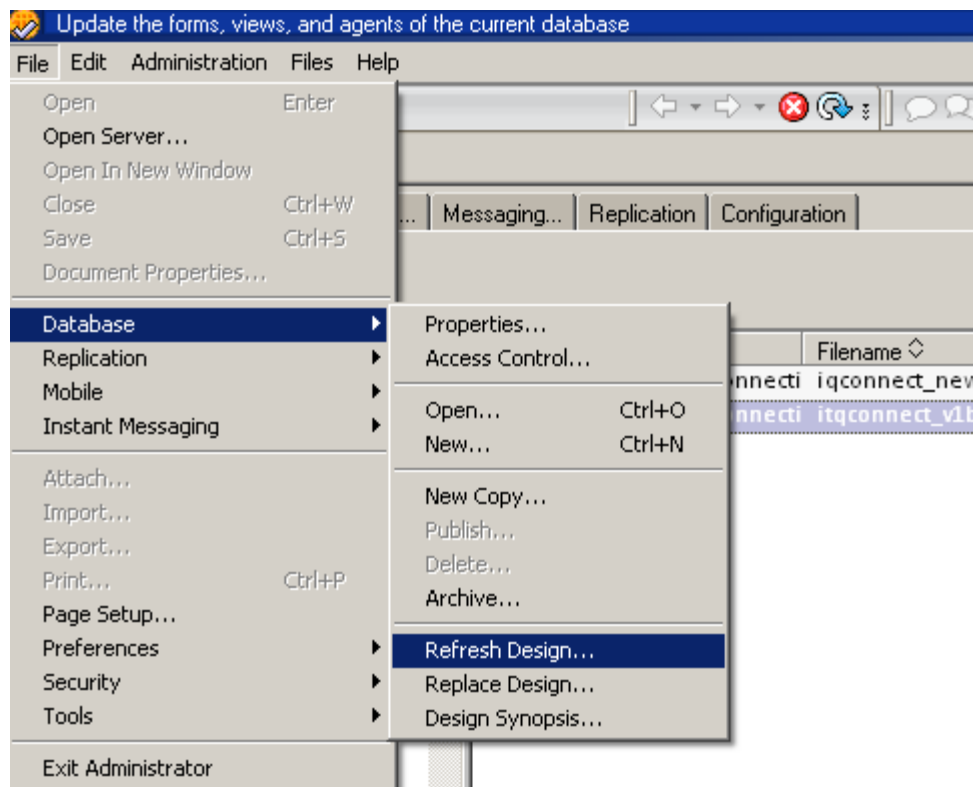
- a. Move the Templates to Lotus Domino Data Directory
- b. Sign the Templates

before proceed further.

Login to Lotus Notes Administrator client, browse and locate the IQM V4 databases which you might have created with names 'ITQConnect.nsf', 'ITQLogs.nsf' & 'ITQMeasure.nsf'

Perform the following step on each of the database if all the 3 databases needs to be updated.

Select the database you required to update the design from the list, then click File → Database → Refresh Design...

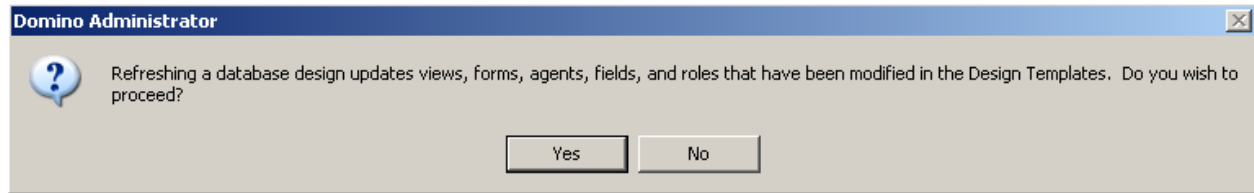




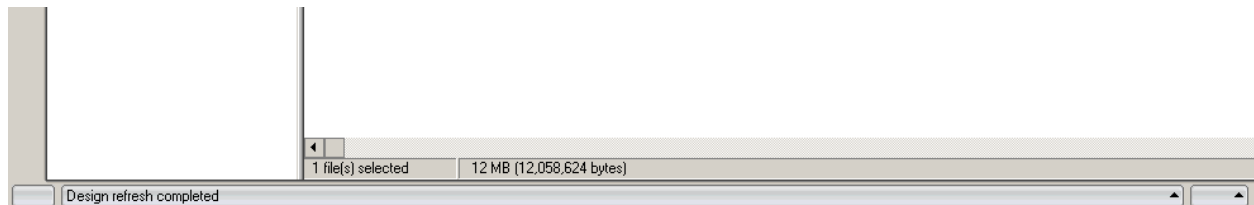
Select the server on which the template exists and click ok.



Click Yes to the next prompt shown as below



The design refresh of the database will be completed when 'Design refresh completed' will appear on the taskbar of the Lotus Notes Administrator client.



## 2. Configure the Instant Queue V4 Database

### a. Set up the Global Settings

1. Before users start creating Queues/Interviews or access other functionalities set the global settings, by logging in with a browser to : <http://stserverFQHN/itqconnect.nsf>
2. Browse to 'Admin' section and then 'Settings'. Click 'Update' for the database to create the default settings and then refer to the points below for in-detail of editing of the global settings

**Note: Clicking of 'Update' button is mandatory for the application to work properly. DO NOT MISS THIS STEP.**

The screenshot shows the 'ADMIN' section of the Instant Queue V4 interface. The 'Settings' link in the breadcrumb is highlighted. The 'GENERAL' tab is selected in the sub-navigation bar. The settings form includes the following fields:

GENERAL	LOGGING	KEYWORDS	TEXT	STANDARD REPLIES	SECURITY
Base IM Platform:	Sametime				
Directory Service	Domino				
Install site for SameTime plugin	<a href="http://174.129.5.6/cm/site.xml">http://174.129.5.6/cm/site.xml</a>				
Url to the Reporting Database:	<a href="http://st802.instant-tech.com/ITMeasure.nsf?OpenDatabase&amp;Source=Queue&amp;Hosted=True">http://st802.instant-tech.com/ITMeasure.nsf?OpenDatabase&amp;Source=Queue&amp;Hosted=True</a>				
Monitoring Queue Groovy File Path on Server:	<a href="http://[Apache Server]/ITFramework/groovy">http://[Apache Server]/ITFramework/groovy</a>				
URL to the Web Service Wrapper:	<a href="http://174.129.5.6:80/ITFramework/ITApplicationManagerPort?wsdl">http://174.129.5.6:80/ITFramework/ITApplicationManagerPort?wsdl</a> <a href="#">Test</a>				
AJAX Web Client Location:	<a href="http://chatui.instant-tech.com/ITFramework/itclient">http://chatui.instant-tech.com/ITFramework/itclient</a> <a href="#">Test</a>				
URL Service load list:	<a href="http://st85.instant-tech.com/itqconnect.nsf/agGenerateInterviewServiceLoad?OpenAgent&amp;Key=All">http://st85.instant-tech.com/itqconnect.nsf/agGenerateInterviewServiceLoad?OpenAgent&amp;Key=All</a>				
<b>Note:</b> In the above url all interviews will be retrieved, if you want to retrieve a subset of interviews then replace "All" with the group keyword specified in the interview.					
Default URL for Survey:	<a href="http://chatui.instant-tech.com/ITFramework/webclient/survey.html">http://chatui.instant-tech.com/ITFramework/webclient/survey.html</a>				
Replace '/' with ',' for Expert	<input type="checkbox"/> Yes				
URLs to the Queue service List:	<a href="http://st85.instant-tech.com/itqconnect.nsf/agGenerateQueueServiceLoad?OpenAgent&amp;Key=All">http://st85.instant-tech.com/itqconnect.nsf/agGenerateQueueServiceLoad?OpenAgent&amp;Key=All</a> <a href="http://st85.instant-tech.com/itqconnect.nsf/agGenerateQueueServiceLoad?OpenAgent&amp;Key=Broadcast">http://st85.instant-tech.com/itqconnect.nsf/agGenerateQueueServiceLoad?OpenAgent&amp;Key=Broadcast</a> <a href="http://st85.instant-tech.com/itqconnect.nsf/agGenerateQueueServiceLoad?OpenAgent&amp;Key=Watched">http://st85.instant-tech.com/itqconnect.nsf/agGenerateQueueServiceLoad?OpenAgent&amp;Key=Watched</a> <a href="http://st85.instant-tech.com/itqconnect.nsf/agGenerateJavaQueueServiceList?OpenAgent&amp;Key=Watched">http://st85.instant-tech.com/itqconnect.nsf/agGenerateJavaQueueServiceList?OpenAgent&amp;Key=Watched</a>				
URL to the Expert Panel Plugin:	<a href="http://st85.instant-tech.com/itqconnect.nsf/MiniMonitoringPanel?Open&amp;?">http://st85.instant-tech.com/itqconnect.nsf/MiniMonitoringPanel?Open&amp;?</a>				
URL to the Monitoring Panel (Integrated):	<a href="http://st85.instant-tech.com/itqconnect.nsf/LandingMain?Open&amp;MPanel=True">http://st85.instant-tech.com/itqconnect.nsf/LandingMain?Open&amp;MPanel=True</a>				
URL to the Monitoring Panel:	<a href="http://st85.instant-tech.com/itqconnect.nsf/MonitoringPanel?OpenPage">http://st85.instant-tech.com/itqconnect.nsf/MonitoringPanel?OpenPage</a>				
URL to manually run the agent to sync the Groups:	<a href="http://st85.instant-tech.com/itqconnect.nsf/agRunScheduleAgentManually?OpenAgent">http://st85.instant-tech.com/itqconnect.nsf/agRunScheduleAgentManually?OpenAgent</a>				
URL to Standard Replies :	<a href="http://st85.instant-tech.com/itqconnect.nsf/LookupStandardReply?ReadViewEntries">http://st85.instant-tech.com/itqconnect.nsf/LookupStandardReply?ReadViewEntries</a>				
<a href="#">Update</a>					

## **General**

**Base Platform** – Select the base IM platform from the list

**Directory Service** – Select the directory(Domino, Sametime or LDAP) you like use in the application. For eg. Creating Experts, IM Entry Points...etc.

**Url to the reporting database** – Specify the url of the measurements and reporting database

http://<server>/ITMeasure.nsf?OpenDatabase&Source=Queue&Hosted=True

**Monitoring Queue Groovy File Path on server** – Specify the path of the monitoring queue groovy

http://[Apache Server]/ITFramework/groovy

**URL to the Web Service wrapper** – Specify the url of the web service server

http://[Apache Server]/ITFramework/ITApplicationManagerPort?wsdl

**AJAX Web Client Location** – Specify the server and the location of the STLinks

http://[Apache Server]/ITFramework/itclient

**Default URL for Survey** –

http://[Apache Server]/ITFramework/webclient/survey.html

## **Logging**

**Source for Logging** – Specify the source platform for logging i.e 'Lotus Domino' in this case

**Logging database** – Specify the lotus notes database used for logging i.e Queue Logs (ITQLogs.nsf)

**Server** - Specify the server on which the logging database exists

**User Name** - Specify the username used to access the logging database

**Password** - Specify the password used to access the logging database

**Include conversation text** – Specify 'Yes' if you want to include the conversation text when logging

GENERAL	LOGGING	KEYWORDS	TEXT	SECURITY
Source for Logging	<input type="text" value="Lotus Domino"/>			
Logging database (The name of the domino database where transactions are to be logged)	<input type="text" value="QLog2008.nsf"/>			
Server (Server name or IP address where the logging database is located)	<input type="text" value="st802.instant-tech.com"/>			
User Name	<input type="text" value="VGTest User44"/>			
Password	<input type="password" value="*****"/>			
IP Address	<input type="text"/>			
Port	<input type="text"/>			
Include conversation text (When logging entries are posted, should the text of the conversation be included.)	<input type="text" value="Yes"/>			

## Text Resources

Use this section to create text resources used in the application

By default text resources of English, Spanish and French will be created by the system.

**Note: All the text resources which are created automatically by the system should be edited and saved before using them. DO NOT MISS THIS STEP.**

GENERAL	LOGGING	KEYWORDS	TEXT	SECURITY
<b>Text Resources</b>				
<input type="checkbox"/>	Name	Type	Description	Language
<input type="checkbox"/>	English	UTF 16	English	English
<input type="checkbox"/>	Chinese	UTF 8		Chinese
<input type="checkbox"/>	Spanish	UTF 16		Spanish
<input type="checkbox"/>	Russian	UTF 8	Russian	Russian
<input type="checkbox"/>	Japanesse	UTF 8	Japanesse	Japanesse
<input type="checkbox"/>	German	UTF 8	German	German
<input type="checkbox"/>	French	UTF 8	French	French

Total Text Resources: 7      Page : 1 of 1

[New Text Resource](#) [Edit Text Resource](#) [Delete Text Resource](#)

Use the actions 'New Text Resource', 'Edit Text Resource' and 'Delete Text Resource' to create/edit/delete a text resource

Text Resources

Name  \*

Description

Type  UTF 8  UTF 16

Language

XML Text Data 

```
<?xml version="1.0" encoding="utf-8" ?>
<IAFBasicTextResources> <Resource> <textItemName> WELCOME_MESSAGE </textItemName> <textValue>
Bienvenido a las ventas de Instant Technologies y el apoyo, por favor indique su solicitud
mientras localizar expertos para que usted</textValue> <textComment> This message is sent when
customer enters the Queue </textComment> </Resource> <Resource> <textItemName> OPERATOR_LOCATED
</textItemName> <textValue>Operador ha sido localizado</textValue> <textComment> This message
is sent to the customer if operator has been located </textComment> </Resource> <Resource>
<textItemName> NO_OPERATORS_AVAILABLE </textItemName> <textValue>Lo sentimos, ningún operador
está disponible para ayudarle en este momento. Por favor, e-mail sales@instant-tech.com
Gracias.</textValue> <textComment> This message is sent to the customer if no operator is
available </textComment> </Resource> <Resource> <textItemName> NOTIFY_OPERATOR
</textItemName><textValue>Operador ha sido notificado</textValue> <textComment> This message is
sent to the customer if operator has been notified </textComment> </Resource> <Resource>
<textItemName> NO_OPERATOR_ONLINE </textItemName> <textValue>Ausencia de un operador en línea
en el momento en</textValue> <textComment> This message is sent to the customer if no operators
is online </textComment> </Resource> <Resource> <textItemName> BROKEN_CONNECTION
</textItemName> <textValue>Conexión se ha roto</textValue> <textComment> This message is sent
to the customer if connection has been broken </textComment> </Resource> <Resource>
```

**Name** – Specify the name of the text resource

**Description** – Specify a short description for the text resource

**Type** – Specify the type 'UTF 8/UTF 16'

**Language** – Specify the language of the text resource

**XML Text Data** – Paste the XML text of the text resource

## Standard Replies

Use this section to define the standard replies (previously called canned messages).

Standard Replies are basically available to an expert when he has a canned messages plugin installed in his Sametime client.

The screenshot displays the Sametime interface. At the top, a navigation bar includes links for >Directory, >Control Panel, >Settings, >Testing, and >Help. A red box highlights three buttons: 'New Standard Reply', 'Edit Standard Reply', and 'Delete Standard Reply(s)'. Below this is a tabbed interface with tabs for GENERAL, LOGGING, KEYWORDS, TEXT, STANDARD REPLIES (selected), and SECURITY.

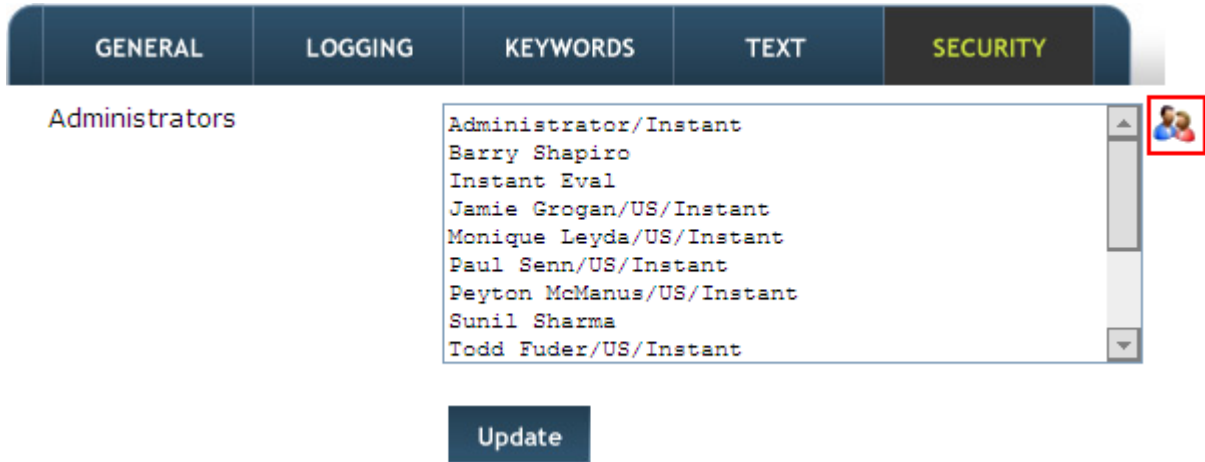
The 'Standard Reply' configuration table is shown below:

Title	Text
<input type="checkbox"/> Epiphany	1
<input type="checkbox"/> Hello	2
<input type="checkbox"/> Jamie's Welcome Message	Hello, welcome to Instant, my name is Jamie and I can help answer your questions. What can I help you with today?
<input type="checkbox"/> Mark's Hi	
<input type="checkbox"/> Mark's standard greeting	Hi. This is Mark. Thanks for contacting me. I work in the Testing department, and am getting to know my way around here pretty well. How can I help you?
<input type="checkbox"/> Pega	2
<input type="checkbox"/> Prashanth's Standard Reply	Hello Welcome to IQM V4

Below the configuration page is a chat window for 'Mark Kleinschmidt' with the status 'I am at work'. The chat toolbar at the bottom includes various icons for text formatting, insertion, and a 'Standard Reply' icon (highlighted with a red box). A dropdown menu is open from this icon, showing options: GM, Hi, How?, and Add/Modify Canned Messages...

## Security

Use this section to define the administrators of the database. Users specified in the section have access to all sections of the database and also can define the managers for a Queue



Administrators

Administrator/Instant
Barry Shapiro
Instant Eval
Jamie Grogan/US/Instant
Monique Leyda/US/Instant
Paul Senn/US/Instant
Peyton McManus/US/Instant
Sunil Sharma
Todd Fuder/US/Instant

Update

Click on the action as shown in the above screenshot to add new users

Click on 'Update' to save your changes