

# GEDYS INTRAWARE 8

## Quick Installation Guide

August 2019  
Version 8.10

**GEDYS IntraWare GmbH**  
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# 1. General

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This manual describes the administrative features and procedures for the 'GEDYS IntraWare 8' modules of Version 8.10 for Lotus Notes and the web module. It is intended as an introduction for the administrator and as a reference guide to be consulted during system configuration and daily routine tasks.

This user manual is designed exclusively for users of 'GEDYS IntraWare 8' **Version 8.10**. If you are using an older version of our software, please refer to the manuals that accompany it. Several of the functions described here are not available in the older versions.

Many of the features are used across the different modules, others are module-specific. This manual covers the basics for all modules of Version 8.3.

In addition to this Administrator Manual, each module comes with a separate user manual describing the procedures in a simple, intuitive way. The Administrator Manual also contains chapters describing the administration of the application-specific functionalities. There are various references to the Administrator Manual for defining or modifying settings.

The chapter structure follows the module structure of the application, with descriptions of individual functional blocks.

## Videos

You can find a range of videos covering the modules of the GEDYS IntraWare system on our YouTube Channel: <https://www.youtube.com/user/GEDYSIntraWareGmbH>

## 1.1. Requirements

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Apart from the functionalities of the modules, the Administrator Manual also provides descriptions of some of the basics of Lotus Notes where this seems appropriate. This enables less experienced Notes Administrators to read this manual without having to resort to separate Administration documentation on Lotus Notes. Nevertheless, the reader is expected to have some basic knowledge of the following topics:

- Installation and administration of a Lotus Notes server
- Using the Lotus Notes user interface
- Administration and operation of the Lotus Notes Mail system
- Lotus Notes rights

In addition, a basic understanding of the functionality of the 'GEDYS IntraWare 8' modules and related concepts is assumed, as described in detail in the user documentation for the individual modules.

## 1.2. Typographical Conventions

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Bold terms that are linked by ">" are menu items. Example: "**File > Database > Open...**".

Words emphasized in *italics* sometimes provide a link to a relevant chapter, in which case they are also underlined. Example: See "*User data*" section.

Texts shown in `Courier` are formulae. Example:

```
@Command([EditDocument]; "1")
```

### Note / Important!

You will find hints and important text passages in this format.

### Tip

Tips, Background information and *Examples* are formatted in a 'slightly less noticeable' way.

## 2. Before you start ...

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... you will find some useful information here.

### 2.1. System Requirements

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In order to be able to install 'GEDYS IntraWare 8' on a Domino server, you need the rights to save databases on the server, as well as author rights for the "admin4.nsf" database.

Local files are created during the installation. This must be permitted for the registered Windows user. For online registration, an Internet connection and web browser are required.

#### IBM Domino server

'GEDYS IntraWare 8' is based on IBM Domino, which means an IBM Domino Server is essential to operate the databases.

'GEDYS IntraWare 8.notes' in version 8.10 is approved for IBM Domino Server versions 8.5.1 up to 10.0.1 FP2. When using version 9.0.1 FP9, then IF2 must be installed.

'GEDYS IntraWare 8.web' in Version 8.10 is approved for IBM Domino Server from version 9.0.1 FP8 up to version 10.0.1 FP2 (both 64 bit).

The software is supported for all operating systems supported by IBM Domino, with the following exceptions:

- "Server Task for Schedule" and "Server Task for Analytics" which are only supported on Microsoft Windows Servers (32 bit and 64 bit);
- The conversion of Office files into PDF format using the "JOD Converters" assumes the existence of a server operating system, on which OpenOffice version 3.3 or version 4.1 or LibreOffice 3.3 - 5.3 can be installed.

#### Note

You must have at least one Windows-based PC on which Notes Client, Domino Designer and Domino Administrator are installed in order to be able to carry out the installation and various settings.

'GEDYS IntraWare 8 goMobile' version 8.10. is approved for Domino Server from version 9.0.1 FP8 up to version 10.0.1 FP2 (both 64 bit). . The JavaScript Dojo Framework must be available in at least version 1.9.9 on the IBM Domino Server. More details can be found in the corresponding chapter of the Admin manual.

#### Notes Client (GEDYS IntraWare 8.notes)

- From Lotus Notes 8.5.1 (Basic & Standard client) up to IBM Notes 10.0.1FP2.

All Microsoft Windows platforms that are also supported by Lotus Notes are supported as operating systems. The IBM Notes 9 Browser Plugin is not supported.

If the Domino **Designer client** is required, then you must use at least Domino Designer version 9.0.1FP8.

#### Web browser (GEDYS IntraWare 8.web)

The following web browsers are supported:

- Internet Explorer Version 10 or 11 for Windows (iNotes integration is not available);
  - Microsoft Edge 44 for Windows 10
  - Firefox Version 68 for Windows or Mac OS X.
  - Safari 12 for Mac OS X und iOS11 (limited functionality under iOS (no Import and Export, no client side PDF generation, no creation of Office documents)
  - Google Chrome version 64 for Windows
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The configuration of Office integration determines whether or not Java SE 8 from update 112 (JRE) must be available.

### **Mobile devices ('GEDYS IntraWare 8 goMobile')**

- iPad and iPhone with iOS 12 with integrated Safari browser
- Android 6.x up to 9.x with Google Chrome

### **Sametime**

With regard to Sametime, we recommend that the Sametime and the Notes client have the same version status, or, in the event of a different constellation, avoid using the Sametime Connect client.

To be able to create **online conversations**, you need **Sametime Server Version 7.5 or higher**.

### **Microsoft Office and OpenOffice/LibreOffice**

Microsoft Office or OpenOffice is required for various correspondence and quotation functions. 'GEDYS IntraWare 8.10' is approved for:

- MS Word individual letter with Word 2000 to Word 2019
- MS Word form letter with Word XP to Word 2019
- MS Excel document with Excel 2000 to Excel 2019
- OpenOffice individual letter or spreadsheet from OO 2.0 up to 4.1.5
- LibreOffice individual letter or spreadsheet from LO 2.0 up to 5.3
- OpenOffice mail merge from OO 3.2.1 to 4.1.5
- LibreOffice mail merge from LO 2.0 to 5.3
- Quote templates with Word 2000 to Word 2016 (OpenOffice is not supported for quotes)
- 'GEDYS IntraWare 8' supports OpenOffice versions 3.3 to 3.4.1 only
- GEDYS IntraWare 8.web supports only the Office Open XML file format in MS Office
- GEDYS IntraWare 8.web supports only MS Office for mass mailings
- GEDYS IntraWare 8.web supports OpenOffice 3.3 to 4.1
- The client-side PDF creation for GEDYS IntraWare 8.web requires MS Word.
- The client-side PDF creation for GEDYS IntraWare 8.web under MacOS X requires MS Word 2011.
- The WebDAV integration can only be used with MS Office as of version 2010 SP2. If the web interface is run using https, then for MacOS Office 2016 is needed, in order to be able to use this kind of connection.

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### **Remarks**

When using OpenOffice, Lotus Symphony must not be installed on the computer.

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### **Analytics Exporter Server Task and Analytics Reporting**

The Exporter server task requires a windows-based Domino server and supports data sources with the following database drivers. As Domino server, the respective versions as described above are supported:

- MySQL 5.1
- DB2 9.1
- Oracle 10g (ODBC driver version 10.1!), Oracle 11g (driver version 11.2) and Oracle 12c (ODBC driver version 12.02)
- MSSQL Native Client 10.0

### **IntelliPRINT Analytics and Dashboard**

Details on the system requirements of the IntelliPRINT suite can be obtained from the manufacturer.

## Businessmail 4 Outlook

Businessmail 4 Outlook is a plug-in, that can be integrated as additional component in the Outlook client. BM4Outlook is approved for MS Outlook 2007, MS Outlook 2010, 2013 and 2016.

- Windows XP SP2, Windows 7, Windows 8, Windows 10
- Microsoft Outlook 2007\*, 2010, 2013, 2016, 2019\*\*
- For installation
  - An internet connection is necessary
  - Admin rights

\* Limitations to Outlook 2007: see chapter "Synchronizing Calendar Entries & Tasks"

\*\* Because Microsoft changed its versioning with the introduction of MS-Office 2019, we are releasing Outlook 2019 with restrictions.

The following versions of Outlook 2019 have been successfully tested:

- 16.0.10346.20002 (32-bit)
- 16.0.10339.20026 (64-bit)

### Installation requirements of the Businessmail 4 Outlook Plug-in

At least version 4.5 of the .NET Framework is required for the operation of BM4Outlook. During the installation it is checked if all required components are available. Depending on the installation program, the .NET Framework is either automatically downloaded from the Internet or included in the installation package (Setup Installer).

When installing using a software distribution (MSI Installer), the following prerequisites must be fulfilled on the clients:

- Microsoft .NET Framework 4.5 Full
- VSTO (Visual Studio Tools for Office) 2010 \*
- Microsoft Office 2007 PIA (Primary Interop Assemblies) \*

\*Annotation:

Current versions of the .NET Framework (depending on version, usage, and setup of MS-Office) contain code parts of PIA and / or VSTO and may not need to be installed.

So BM4Outlook is usually able to run without PIA under .NET 4.5.1.

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### Remarks

'GEDYS IntraWare 8' may well run fully or in part on other versions of Lotus Domino, Lotus Notes, or on other web browsers, in particular more up-to-date versions. In such cases however, GEDYS IntraWare provides no guarantee or technical support.

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With regard to **hardware recommendations**, please contact the service staff responsible for you who can give you advice appropriate to your situation.

## 2.2. Demo Mode and Activation

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The product is delivered as standard in demo mode. Activation for use according to your license agreement is carried out using an activation key (activation or license key) which you will find on your license documentation, delivery documentation, or on your receipt. You can also request the activation key direct from GEDYS IntraWare by phone.

You can familiarize yourself with the system by running it in demo mode. In demo mode you can use all the functions of the module. There are however limitations depending on the module in use.

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For example, in the 'Portal' you cannot have more than six documents in the database (general configuration, entries). If you have more than six documents, you won't be able to add or edit additional documents.

The system runs in demo mode under the following conditions:

- You don't possess a license key
- You are operating the system using a demo key which is no longer valid
- You have entered an incorrect license key

## 2.3. User and developer license

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The GEDYS IntraWare standard application differentiates between the USER LICENSE (no rights to alter Lotus script source code – the so-called 'closed' version) and the DEVELOPER LICENSE (Lotus script source code may be altered – the so-called 'open' version).

In any case you begin by installing the user license for the 'closed' version. You can subsequently install the developer license – the 'open' version – and transfer the source code package to the database.

The design of the system is not hidden in the closed system, however certain elements are only available in the source code package. With a developer license, you can open the installation database, which contains the source code.

### Note

If you have a USER LICENSE, it appears that you can alter the system design. However not all design element data are visible. On saving YOU COULD DESTROY SYSTEM COMPONENTS. The application would then not be fully functional, since program code can no longer be correctly executed. YOU MUST FIRST INSTALL THE NECESSARY SOURCECODE BEFORE UNDERTAKING ANY ALTERATION OF THE DATABASE DESIGN.

GEDYS IntraWare accepts no guarantee for damage that results from failure to respect this rule.

## 2.4. Use of third party services

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Some GEDYS IntraWare functions use external data services. As described in the license conditions, you will find here a list of these data services including a description of information transferred both to and from the external data provider.

### Cleverreach

Cleverreach (<http://www.cleverreach.de/>) for the interface to Cleverreach e-mail marketing

General conditions: <http://www.cleverreach.de/tos>

Data protection guidelines: <http://www.cleverreach.de/privacy>

Transferred to the provider:

ID, name fields, address fields, telephone numbers, customer type, sales account executive, sales team, department, function, mailing list, keywords.

Received from the provider:

Name of the bulk mailing, time sent, who has opened the mail, which links have been clicked, unsubscribes, delivery errors, quality.

### Google Maps

Google Maps ([https://www.google.com/intx/en\\_uk/work/mapsearch/](https://www.google.com/intx/en_uk/work/mapsearch/)) for route planning and displaying maps.

General conditions: <http://www.google.com/policies/terms/>

Data protection guidelines: <http://www.google.com/policies/privacy/>

### Geocoding

Transferred to the provider:

Address data of the respective addresses but without names, the language of the user.

Received from the provider

Geodata for the addresses. This are not permanently stored.

Reverse Geocoding for an area search, in order to find out the address of the current location.

Transferred to the provider:

Geodata for the current location and the language of the user.

Received from the provider

Postcode and country.

### **Geonames**

Geonames (<http://www.geonames.org/>) for the area search.

Licensing: <http://creativecommons.org/licenses/by/3.0/>

Transferred to the provider:

Postcode, Country code, radius, user name, maximum amount of data to be returned.

Received from the provider

Postcodes are further processed based on the results.

### **ABBYY**

ABBYY (<http://ocrsdk.com/>) for scanning and for business cards

General conditions: [www.abbyy.com/Legal/](http://www.abbyy.com/Legal/)

Data protection guidelines: <http://www.abbyy.com/privacy/>

Developer Agreement: <https://cloud.ocrsdk.com/Account/DisplayDeveloperAgreement> Transferred to the provider:

Access data, control parameters and a photo of the business card.

Received from the provider

XML data with all recognized text from the business card.

## **2.5. Agents and Database signing**

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GEDYS IntraWare recommends using the Notes administrator client to assign the server ID to all databases and agents. This can only be carried out, if the installer has a Notes ID with sufficient privileges.

When you later wish to manually, activate or alter agents, be sure to do this using a Notes ID, which has the necessary access rights for the execution of the agents. In general, this means using the administrator ID.

If the database is on more than one replica server, the agents should initially be activated only for the home server, in order to avoid undesired side-effects. Check the administrator notes of the product documentation.

If the agents are to be activated or signed by an individual, then this person must have the **role [EditAllDocs]** activated in the access control list for the corresponding database.

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If the agents are to be signed with the Server-ID, then the **role [Servers]** must be activated in the access control list for the appropriate database. This applies particularly to the databases 'marketing' and 'mailing'.

The following background agents are included in the databases:

Database	Agent	Activation required
Contacts, Lead	SetMailingLists	Yes, for the "Automated Mailing List" functionality. <b>Run time:</b> recommended every 120 min. <b>Target:</b> all database documents.
	(BirthdayReminder)	No. Send birthday reminder to supervisor. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	(Clean up)	Yes. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	ComputeVisitRecommendation	Yes, for the feature "Visit recommendation list" <b>Run time:</b> once daily recommended. <b>Target:</b> all all database documents.
	CleverReachSync	Yes, for the automatic export of contacts to CleverReach and for the import of campaign history from CleverReach. <b>Run time:</b> recommended once daily <b>Target:</b> none
	CleanPrivOFUViewsFolders	No. Deletes all private instances of views and folders of the type "private, for first use" <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	(MailInImport)	Yes, for the feature "Lead generation per e-mail". <b>Event driven:</b> after new mail has arrived.

Database	Agent	Activation required
Contracts	CheckContractLimits	Yes, when using limited SLAs
	CheckNumberOfAssignedIncidents	Yes, when using limited SLAs
	Expiring Alarm to approver	Yes. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	Set Expired	Yes. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	(Clean up)	Yes. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	CheckRetentionPeriod	No. <b>Run time:</b> once weekly recommended. <b>Target:</b> none.

Database	Agent	Activation required
Database Settings (DBSet)	(AdminProcess)	Yes. <b>Runtime:</b> recommended every 15 minutes. <b>Target:</b> all database documents
	aaRemoveFinishedAdminRequestAndLogs	Yes. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	(CreateAdminRequestToRefreshScheduleCfg)	Yes, Checked and updated group definitions and global entries for Schedule. <b>Runtime:</b> 1x daily. <b>Target:</b> all database documents.
	(ImportAgentSettings)	No. Updates the current status in the agent settings documents. <b>Runtime:</b> every 2 hours. <b>Target:</b> all new and changed documents.
	(InformLogErrors)	No. Informs regarding errors in the log. <b>Runtime:</b> 1x daily <b>Target:</b> none.

Database	Agent	Activation required
Event	aaCEReservationsSynchronization	
	(Clean up)	Yes. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	(MoveEventsToArchive)	Only if the archiving is used. <b>Runtime:</b> recommended 1x weekly. <b>Target:</b> all documents in the database.
	InformOverdue	Yes <b>Runtime:</b> recommended 1x daily.
	(MailConvert)	No
	EventWordPressSync	Only when the GEDYS IntraWare WordPress event calendar is used and the data is to be synchronized with this. <b>Run time:</b> every 4 hours
	CheckRetentionPeriod	No. <b>Run time:</b> once weekly recommended. <b>Target:</b> none.

Database	Agent	Activation required
Followings	FollowCollector	Yes. <b>Run time</b> between 5 and 15 minutes <b>Target:</b> none
	Newsletter Agent	Yes. <b>Run time</b> recommended once daily in the mornings <b>Target:</b> All new and modified documents

Database	Agent	Activation required
Knowledge	SendTreatmentNotification	Yes. <b>Run time:</b> once daily. <b>Target:</b> all database documents.
	(Clean up)	Yes. <b>Run time:</b> once daily. <b>Target:</b> all database documents.
	CleanPrivOFUViewsFolders	No. Deletes all private instances of views and folders of the type "private on first use" <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.

Database	Agent	Activation required
Mailing	(MMMControl)	Yes. <b>Run time:</b> recommended every 30 min. <b>Target:</b> all new and changed documents.
	Mail-In	Yes. <b>Event driven:</b> after new mail has arrived.
	CheckRetentionPeriod	No. <b>Run time:</b> once weekly recommended. <b>Target:</b> none.

Database	Agent	Activation required
Marketing	Process automatic Campaign Action	Yes. <b>Run time:</b> recommended hourly. <b>Target:</b> all database documents.
	Automatic data selection	Yes. <b>Run time:</b> once daily. <b>Target:</b> all database documents.
	Reminder	Yes. <b>Run time:</b> once daily. <b>Target:</b> all database documents.
	(Clean up) aaCECleanUp	Yes. <b>Run time:</b> recommended once daily. <b>Target:</b> all database documents.
	CheckRetentionPeriod	No. <b>Run time:</b> once weekly recommended. <b>Target:</b> none.

Database	Agent	Activation required
Mobile Interface	UpdateAbstracts	Yes. <b>Run time:</b> as often as possible, ca. every 2h.
	UpdateDynViews	Yes. <b>Run time:</b> every 5 minutes.

Database	Agent	Activation required
Office	HandleMailedIn	Yes. <b>Sign with the Server ID of the server on which the "Office" is entered as Mail-in!</b>
	(Clean up)	Yes. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	MovedocsToArchive	No
	CheckRetentionPeriod	No. <b>Run time:</b> once weekly recommended. <b>Target:</b> none.

Database	Agent	Activation required
Opportunity	CheckRetentionPeriod	No. <b>Run time:</b> once weekly recommended. <b>Target:</b> none.

Database	Agent	Activation required
Organization	Create Relations	Yes, for the feature "Create relations".
	ProcessGroups	Yes, for the feature "Create groups".
	WorkGroupRequest	Yes, for the feature "Create groups".
	SetMailingLists	No.
	(BirthdayReminder)	No.
	ComputeVisitRecommendation	No.
	CleverReachSync	No.
	CreateStandIns	Yes, for using the stand-in rules.
	(Clean up)	Yes. <b>Run time:</b> recommended once daily. <b>Target:</b> all database documents.

Database	Agent	Activation required
Schedule	(RecalcCalEntries)	Yes. <b>Run time:</b> Once daily. <b>Target:</b> all database documents.
	(SyncCalEntries)	Yes. <b>Run time:</b> recommended every 15 min. <b>Target:</b> all database documents.
	FollowUpReminder	Yes. Sends the reminders for follow-ups. <b>Run time:</b> recommended every 15 min. <b>Target:</b> all database documents.
	FollowUpSummary	No. Send a summary using follow-ups. <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	SyncExternalTasks	No.
	TransferConfigtoDBSet	Yes. <b>Run time:</b> recommended every 90 min. <b>Target:</b> all new and changed documents.

Database	Agent	Activation required
Service	Mail-in	Yes. <b>Event-driven:</b> after the arrival of a new e-mail.
	(Clean up)	Yes. <b>Run time:</b> recommended once daily. <b>Target:</b> all database documents.
	CleanPrivOFUViewsFolders	No. Deletes all private instances of views and folders of the type "private, for first use" <b>Run time:</b> once daily recommended. <b>Target:</b> all database documents.
	CheckRetentionPeriod	No. <b>Run time:</b> once weekly recommended. <b>Target:</b> none.

Database	Agent	Activation required
Web interface	(aaXPageCaching)	No. Activation is however recommended. <b>Run time:</b> every 30 min. recommended.

Database	Agent	Activation required
Workflow Control	ProcessMailRequest	Yes.
	WF-Steuerung \$View(vaHighPriorityControl)	Yes.
	Workflow-Steuerung (aaProcessStatistic)	Yes, if the feature "Process statistics" will be used.
	aaSendDailySummary	Yes. <b>Run time:</b> once daily. <b>Target:</b> all database documents.
	(Clean up)	Yes. <b>Run time:</b> once daily. <b>Target:</b> all database documents.

Database	Agent	Activation required
Workflow Example	(aaRefresh)	-----
Database	Agent	Activation required
Filing Structure Inventory Items Service catalog Templates Event archive Opportunity ZIP Followings	(Clean up) aaCECleanUp	Yes. <b>Run time:</b> recommended once daily. <b>Target:</b> all database documents.

Database	Agent	Activation required
Mobile online interface Tracking Web Interface	aaCleanupTempDocs	Yes. <b>Run time:</b> recommended once daily. <b>Target:</b> all database documents.

Database	Agent	Activation required
All	RestoreProfiles	Yes.
	(DeleteUserProfiles)	Yes, for the delete user profile function <b>Run time</b> recommended once daily <b>Target:</b> none

## 2.6. Access control lists

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During the installation membership of the user groups, administrators and editors (standard users) can be defined.

The installation program automatically sets the necessary access privileges and roles for the user groups in the access lists of the application.

## 2.7. Manuals

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All user and administrator documentation for 'GEDYS IntraWare 8' can be found in the **help database** (gehlpdb.nsf) of the application.

## 3. Installation, Configuration, and Registration

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For 'GEDYS IntraWare 8' an easy and intuitive installation, configuration and registration has been implemented. An '**Installation and Configuration Wizard**' will guide you through the entire setup process of 'GEDYS IntraWare 8'.

### Scope of installation

The 'Installation and Configuration Wizard' allows you to perform a standard or a custom installation. With the standard installation, predefined 'GEDYS IntraWare 8' modules determine the scope of installation; with custom installation, you are free to choose the individual databases.

#### Note

Please note that with one or two exceptions you need **license keys** to use the 'GEDYS IntraWare 8' databases/modules. The license keys corresponding to your order number are automatically requested and entered by the 'Registration Wizard' (see "Registration" on page V).

Installed **databases for which you do not purchase license keys** can only be used in restricted **demo mode**.

### Scaled Environments

#### Important!

The 'Installation and Configuration Wizard' does not support any scaled installation of 'GEDYS IntraWare 8'.

To use 'GEDYS IntraWare 8' in a scaled environment, first perform the installation for an instance using the 'Installation and Configuration Wizard'. Then install the additional instances.

Take a look to the admin guide to find out how to set up a scaled environment.

### Mandatory fields

The 'Installation and Configuration Assistant' will need some information to run the 'GEDYS IntraWare 8' setup successfully. Mandatory fields you must complete are marked with a red asterisk (\*).

### Groups

In the course of the configuration the database access rights (cf. S) will be set up. In this context, you should consider who will use 'GEDYS IntraWare 8'

- as an **administrator** and
- as **standard user**

**before you start the installation.** This information will – among others – be used for assigning the access rights.

#### Note

For the sake of clarity GEDYS IntraWare recommends to work with **groups** at this point. Therefore you should create corresponding groups in the **Domino directory** in advance.

### 3.1. Starting the 'Installation and Configuration Assistant'

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For the installation, configuration, and registration you will need the 'Installation and Configuration Assistant' included in the delivery scope of 'GEDYS IntraWare 8'. This 'Wizard' will guide you through the entire installation process and will assist you during the configuration and registration.

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### 3.1.1. ... from CD

To start the 'Installation and Configuration Assistant', please proceed as follows:

1. Insert the installation CD into the CD-ROM drive of your computer.  
The installation program will be started automatically.  
If the installation program should not start automatically, double-click the "**Computer**" icon on your desktop. Then double-click the icon for the CD-ROM drive and then again double-click the "**install.bat**" file.

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#### Tip

The 'GEDYS IntraWare 8' installation database is now copied to the hard disk. This may take some time.

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Then, the 'Installation and Configuration Assistant' will be started. The corresponding database icon will be added to your Notes Workspace.

### 3.1.2. ... as download file

1. Unzip the download file e.g. into the "**notes\data**" directory, first.
2. Then open your Notes client and from the "**File**" menu select the "**Database > Open ...**" commands (for Notes 8: "**File > Open > Lotus Notes Application**").
3. From the "**Database**" list select the "**GEDYS IntraWare 7, Version 8.5**" database.
4. Click on the "**Open**" button.

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#### Tip

The 'GEDYS IntraWare 8' installation database is now copied to the hard disk. This may take some time.

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Then, the 'Installation and Configuration Assistant' will be started. The corresponding database icon will be added to your Notes Workspace.

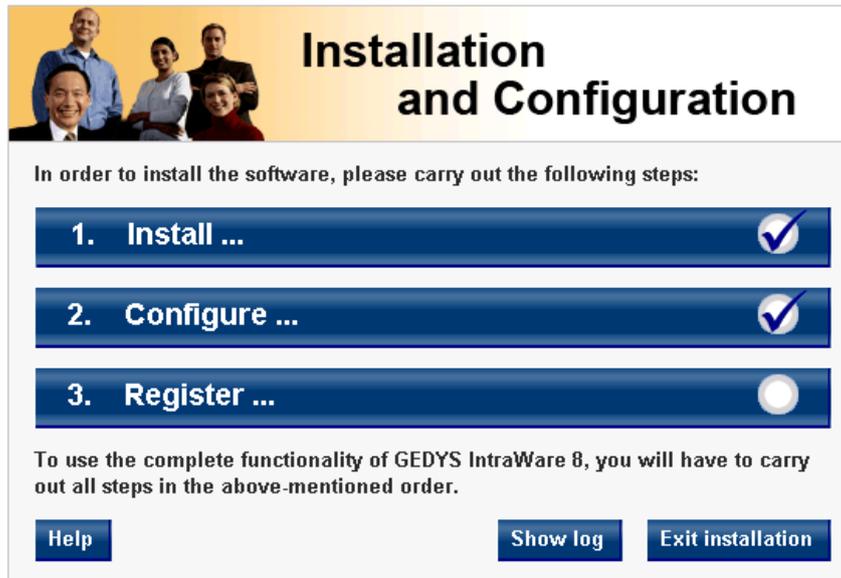
#### Note

Depending on your security settings the "**Notes Security Alert**" warning of your local Notes client may occur during the installation. If necessary, please activate the "**Start trusting the signer to execute this action**" option to proceed the installation.

### 3.1.3. The 'Installation and Configuration Wizard'

The 'Installation and Configuration Assistant' offers three buttons for the entire 'GEDYS IntraWare 8' set up:

- **Install ...**
- **Configure ...**
- **Register ...**

A screenshot of the 'Installation and Configuration' wizard. At the top left is a photo of four people. The title 'Installation and Configuration' is in large black font. Below the title, it says 'In order to install the software, please carry out the following steps:'. There are three blue buttons: '1. Install ...' with a checkmark icon, '2. Configure ...' with a checkmark icon, and '3. Register ...' with a circle icon. Below the buttons, it says 'To use the complete functionality of GEDYS IntraWare 8, you will have to carry out all steps in the above-mentioned order.' At the bottom are three buttons: 'Help', 'Show log', and 'Exit installation'.

#### Note

The settings you choose during the installation and configuration of 'GEDYS IntraWare 8' are saved. These data will be lost if the application is re-installed. Then, an already installed 'GEDYS IntraWare 8' database can no longer be configured using the 'Installation and Configuration Wizard'.

If you have previously installed 'GEDYS IntraWare 8' you will therefore be informed when you click on "Install ..." again that **all previous settings selected with the aid of the 'Installation and Configuration Wizard' will be lost in the process.**

#### Tip:

##### *How do I uninstall 'GEDYS IntraWare 8'?*

To remove 'GEDYS IntraWare 8' from your Domino server, you will need to manually delete the directory specified during the installation ("GEDYSIntraWare7" is the default) and the files it contains.

#### By the way ...

... **good to know:** You will find detailed manuals in the 'Help' database after the installation.

## 3.2. Installation ...

Click the "Install ..." button to start the installation.

The 'Installation Wizard' will welcome you. Click "Next".

#### License agreement

In the "License agreement" window, accept the license agreement and click "Next".

#### Setup type

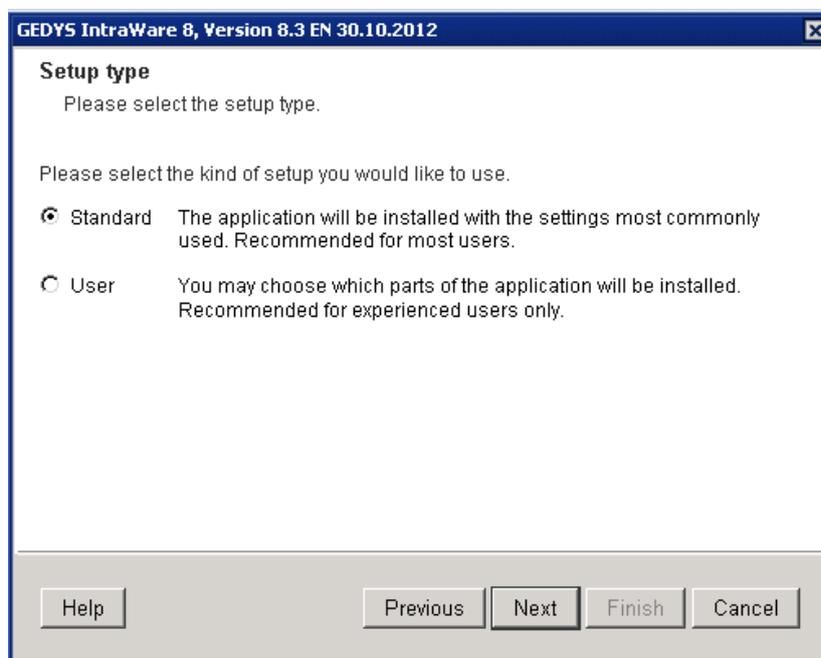
Enter here the setup type. The 'Installation and Configuration Wizard' allows you to perform a standard or custom installation.

With the standard installation, predefined 'GEDYS IntraWare 8' solutions specify the scope of installation, while with custom installation; you are free to choose the individual databases.

#### Note

Please note that with one or two exceptions you need **license keys** to use the 'GEDYS IntraWare 8' databases/modules. The license keys corresponding to your order number are automatically requested and entered by the 'Registration Wizard' (see "Registration", page V).

Installed **databases for which you do not purchase license keys** can only be used in restricted **demo mode**.



If you select "**Standard**", 'GEDYS IntraWare 8' will be installed with the standard options required by most users. This type of installation **ensures** that all the modules necessary for problem-free operation of 'GEDYS IntraWare 8' will be installed.

The "**User**" option is exclusively designed for very experienced users who know exactly which modules they would like to install **and which additional modules must be installed for problem-free operation of 'GEDYS IntraWare 8'**.

#### Important!

The 'Installation and Configuration Wizard' does not support any scaled installation of 'GEDYS IntraWare 8'.

Take a look to the admin guide to find more information.

Select the "**Setup type**" and click on "**Next**".

#### Select target directory

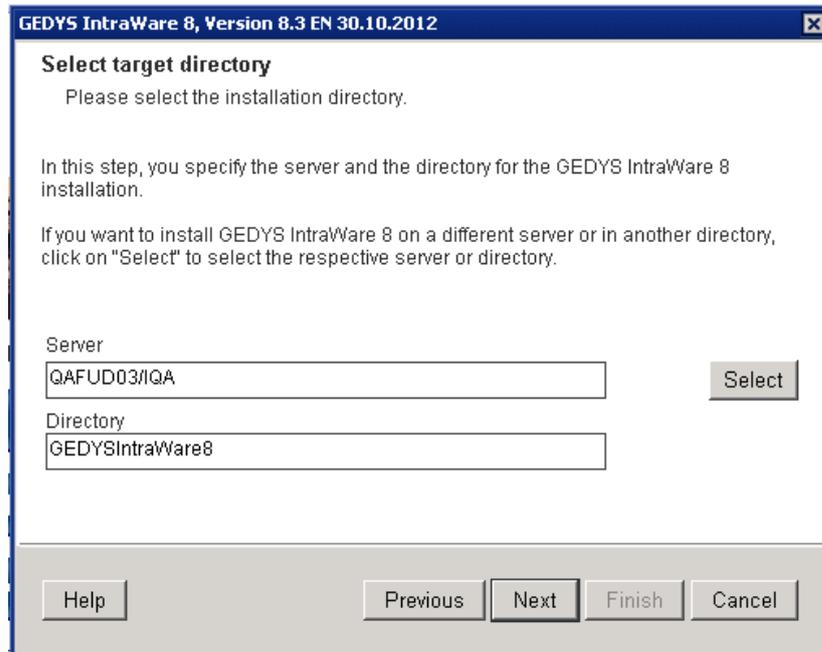
In the next step, select the server and directory for installation of 'GEDYS IntraWare 8'.

To accept the default selection, click "**Next**" to continue with the installation. If 'GEDYS IntraWare 8' is to be installed on a different server or in a different directory, click "**Select**" and then choose the preferred server or directory.

To install 'GEDYS IntraWare 8' on your local computer, choose the "**Local**" option.

A local installation of 'GEDYS IntraWare 8' can only be used by yourself. Would you like allow access for several persons, 'GEDYS IntraWare 8' has to be installed on servers that are accessible for these persons.

'GEDYS IntraWare 8' is set up by default in the selected directory under your local Notes "Data" directory.



If the details are correct, click **“Next”**.

#### Note

**If ‘GEDYS IntraWare 8’ is already installed, you will only be able to install the software on a different server or in a different directory.** In this case you can only ever **configure** the last installed version via the ‘Installation and Configuration Wizard’.

#### Application bundle selection

Specify the application bundle for installation.

- **Standard**  
Select from the application bundle provided. For each of the possible installation bundles, text will appear under **“Description”** to give you information about the selected package.
- **User**  
Select the databases that you would like to install. If you select a database, text will appear under **“Description”** to give you information about the selected database and inform you which additional databases you must install for problem-free operation of the ‘GEDYS IntraWare 8’ software.

Once you have selected the corresponding application bundle or all desired and necessary databases, click **“Next”**.

#### Workspace – database icon

Here you can add the database icon for ‘GEDYS IntraWare 8’ to your workspace.

If ‘GEDYS IntraWare 8’ is to be displayed as a database symbol in your workspace, enable the **“Add to workspace”** option. If you do this, you will find the database icon in your workspace once the installation is complete.



Then click **“Next”**.

#### Tip:

If you would prefer not to add the database icon to your workspace at this stage, you can open the

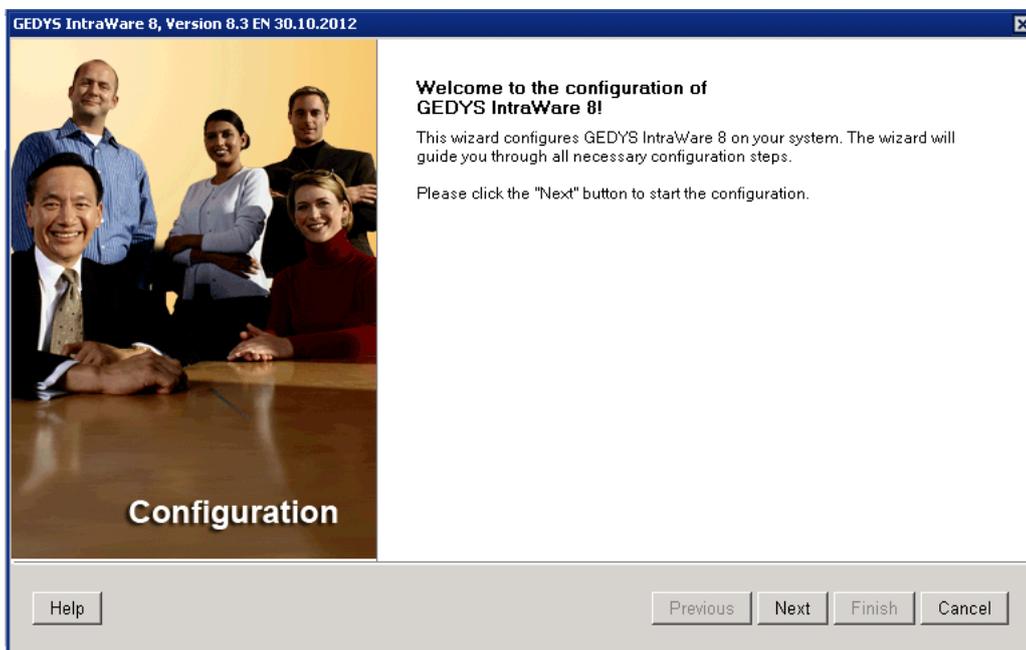
---

database via the Notes “**File**” menu and the “**Database > Open...**” command (for Notes 8: “**File > Application > Open**”).

---

### Completing the installation

If you wish to launch the wizard to take you through the configuration process as soon as you have completed the installation, enable the “**Start configuration automatically**” option.



Click the “**Finish**” button to install ‘GEDYS IntraWare 8’ to the specified directory.

According to the scope and number of databases to be installed, the installation may take a while.

---

#### Tip:

If the installation could not be completed successfully, you can open a log file containing all of the relevant information about the problems, which have occurred.

---

## 3.3. Configuration

---

If not already done so, start the ‘Configuration Wizard’. Click the “**Configure**” button in the ‘Installation and Configuration Assistant’.

The ‘Configuration Wizard’ will support you in, among other things, setting up user groups, setting up the Workspace, and installing ‘GEDYS IntraWare 8 Business Mail’.

The ‘Configuration Wizard’ will welcome you. Click on “**Next**”.

### 3.3.1. Company data

The name of your company and the specification of the country are mandatory fields and are therefore marked with an asterisk (\*).

Please make sure you enter all data correctly as 'GEDYS IntraWare 8' will use this data to create the user profiles. For information on user profiles, see the Basics and the Administrator manual. Having entered all necessary data, please click on the **"Next"** button.

### 3.3.2. User configuration

This step lets you define the ACL rights. Please select the persons and/or groups who should be given administrator rights or standard rights to the databases. In addition, specify the server(s) that should be given manager rights to 'GEDYS IntraWare 8'.

Click the **"Select"** button (  ) and select the persons/groups. If possible you should use previously defined groups here (see *"Groups"*, page M).

Then click **"Next"**.

### 3.3.3. Business Mail

In this step you can install 'Business Mail' for 'GEDYS IntraWare 8'.

'GEDYS IntraWare 7 Business Mail' conveniently displays customer details and activities in your Lotus Notes Mail database even before you have opened an e-mail. You no longer have to switch to a different database or run tedious searches. If the contact has not yet been entered in the CRM system, 'Business Mail' also supports the automatic entry of new contact details.

If you want to install this add-on, activate the "**Install Business Mail (mailbox add-on)**" option and then click on "**Next**".

#### Note

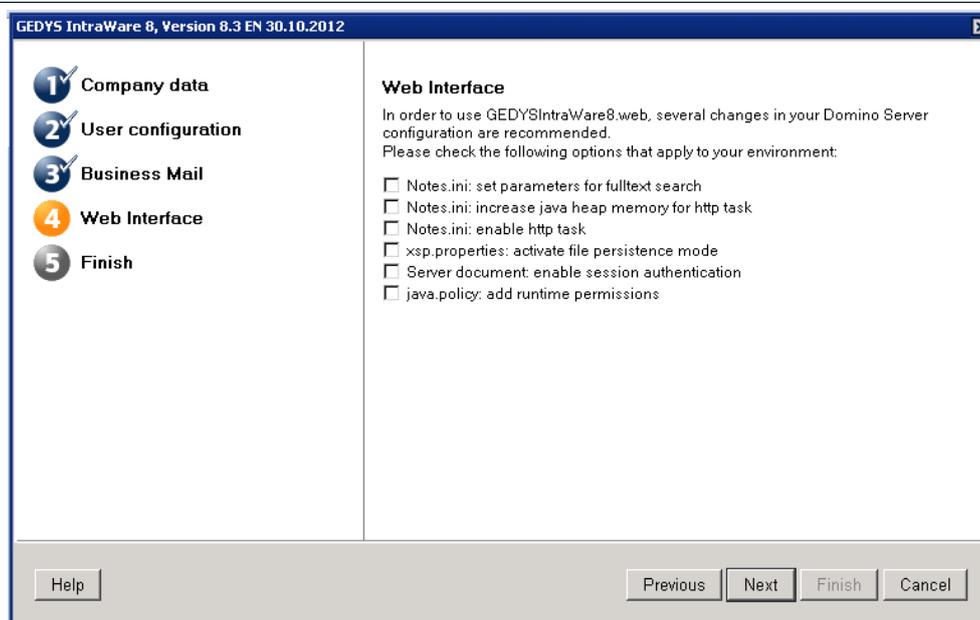
If you activate the "**Install Business Mail (mailbox add-on)**" option, 'Business Mail' will be installed for **all users** – administrators and default users!

### 3.3.4. Web Interface

In this part of the system, several settings, which are necessary to run GEDYS IntraWare 8.web, can be automatically set for you.

#### Note

Some of the settings are also needed for GEDYS IntraWare 8.mobile or for the module Ticket Tracking and will accordingly be shown during a clean installation of these modules.



- **Notes.ini: set parameters for full text search:**

For increased performance and improved memory management of the Domino Servers during a full text search, GEDYS IntraWare 8.web needs the following parameters. More information on this topic can be found via the Lotus homepage.

#### Tip

FT\_Max\_Search\_Results defines the maximum number of hits, which a full text search can return. The parameter affects all full text searches. Set the parameter to a minimal value, which fits for the volume of data you have. The automatic installation sets the value for the default from 5,000 to 300,000.

```
FTG_USE_SYS_MEMORY=1
FTG_DISABLE_PAGING=1
FTG_SET_INITIAL_BUFLen=7000
FT_Max_Search_Results=300000
```

- **Notes.ini: increase the Java-storage of the HTTP task.**

Please read the chapter “Notes on performance optimization”.

- **Notes.ini: activate HTTP Task**

If it has not already been effected, the HTTP task will automatically be activated on starting the Domino Server.

- **Serverdocument: activate session-based authentication**

GEDYS IntraWare 8.web assumes as default session-based authentication.

- **Serverdocument: increase time for HTTP requests**

To be able to run Businessmail4Outlook correctly you need a value of at least 180.

- **Serverdocument: increase HTTP POST data size**

To be able to run Businessmail4Outlook correctly you need a value of at least 50,000.

- **Serverdocument: execute agents and web services simultaneously**

To be able to run GEDYS IntraWare 8.web and Businessmail4Outlook correctly, simultaneous execution of agents and web services is necessary.

- **java.policy: establish runtime privileges**

Several operations assume certain privileges for the corresponding Javaclasses, for example when substituting placeholders in Office documents. These privileges are controlled using the file “java.policy”, which can be found in the folder “[program]\jvm\lib\security” on the Domino Server. The following entry will be added dynamically according to the installation path of the WebInt database.

```
grant codeBase "xspnsf://server:0/<install>/webint.nsf/-" {  
    permission java.security.AllPermission;  
};
```

Since changes to the java.policy are regularly overwritten by installing fixpacks, it is recommended to carry out changes using “java.pol”. A description for this can be found under:

<https://www-304.ibm.com/support/docview.wss?uid=swg21679242>

#### **Caution**

Please note that for Linux and UNIX servers, these settings cannot be automatically carried out by the installer, since the user working with the Domino server normally has no write privileges on the java.policy file in the program directory. The changes to this file must be carried out manually by an administrator.

If you carry this change out manually, please be aware that on Windows servers the codebase entry may only consist of lowercase letters. On Linux servers you must use upper and lower cases as they have been used within the system. You replace the text “<install>” with the Domino folder-relative installation path for GI 8 (for example, the installation is successfully carried out in folder c:\NotesData\GEDYSIntraWare8, which means you must replace <install> with “gedysintraware8”).

#### **Caution**

Several additional settings for operating GI8.web or GI8 go mobile cannot be automatically set (for example privileges) or are optional (for example PDF drivers). You can find more information on which specific settings you require in the chapter about 'GEDYS IntraWare 8.web'.

### 3.3.5. Finishing the configuration

If you wish to launch the wizard to take you through the registration process as soon as you have completed the configuration, enable the “**Start registration automatically**” option.

Click “**Finish**” to complete the configuration.

## 3.4. Registration

**Without a license key**, you will only be able to run 'GEDYS IntraWare 8' in a **restricted demo mode** after installation. In demo mode the word “**Demo**” is displayed in the navigation area.

To use 'GEDYS IntraWare 8' without restrictions, you need a **license key**.

'GEDYS IntraWare 8' offers different license models:

- **Demo license**  
Use for a short period of time up to a specified expiration date
- **Database license**  
Use for a specified number of users and modules
- **Corporate license**  
Unrestricted use for employees in an organization

During the installation of 'GEDYS IntraWare 8', the 'Registration Wizard' will help you to apply for the license key.

To find out how to request and enter a license read the admin guide.

### Requesting a license key

If you have not done so already, launch the 'Registration Wizard' by clicking “**Register...**” in the 'Installation and Configuration Wizard'.

The 'Registration Wizard' will welcome you. Click “**Next**”.

The window for requesting the license key appears.

You can order this key as follows:

1. Check the data shown here and make any necessary changes. The order number can be found in the order confirmation.
2. Then click “**Finish**” to start the online registration process.  
The online registration window opens up in the browser, and the 'Registration Wizard' is closed. The information you entered in the “**E-mail address**” field is automatically copied across to the license key application.
3. If all the information is correct then click “**Send**”. The license key is sent to the specified e-mail address.

### Note

This license key concludes all licenses for the 'GEDYS IntraWare 8' databases that correspond to your order number.

You will only receive the e-mail with the license key once. Please keep this e-mail in a safe place or print it out.

### Entering the license key

Have you received the e-mail with the license key? If you have then you can now enter the license key, or simply copy and paste it for greater ease.

1. Open the e-mail and copy the long license key to the clipboard by pressing <Ctrl>+<C>.

Please copy the following code into the registration form

```
900~xxxxxxxxxj043xxxxxxxxx"FGxxxxxxxxxCFxxxxxxxxx90xxxxxxxxxF600xxxxxxxxx20~xxxxxxxxx"BDxxxxxxxxx3A
```

2. Launch the 'Installation and Configuration Wizard' and click the "**Register**" button.
3. In the "**Enter license key**" window, paste the license key into the designated field. To do this, press the key combination <Ctrl>+<V> or click "**Insert**".
4. Then click "**Finish**" to complete the online registration.

The license key will be evaluated, and the respective 'GEDYS IntraWare 8' databases will be registered.

This completes the standard installation of 'GEDYS IntraWare 8'. You can now use the full software functionality with the installed default settings.

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## 4. First Steps after the Installation

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### 4.1. First Administrative Settings after Installation

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Before starting the product, carry out the settings described in the installation notes for the agents and Access Control Lists of the individual databases for the application.

Complete the access lists according to your company's specific requirements and sign all databases with the ID of the Domino server.

### 4.2. First Steps for Basic Configuration

---

Once you have installed the product from the CD, you can access a non-scaled application, i.e. a database is created and installed for each database type. The default settings in the '**Database Settings (DBSet)**' configuration database are selected to ensure that the databases can be found immediately on the current server in the current directory.

To adapt and configure your application to your requirements, please consider certain points in advance:

1. Which databases should be scaled?
2. How is the company's sales organization structured?
3. Which item positions are required for proposals?
4. Which templates are required?
5. How should addresses be classified?
6. Which distribution lists are required?
7. Who is given which roles?
8. What does the security concept look like?

Once you have installed the application using the installation program, 'GEDYS IntraWare 8' is ready to use.

Full configuration including security and scaling settings consists of more than five steps, however a few simple amendments are sufficient for an initial basic configuration.

1. Set language.
2. Specify the base currency.
3. Enter or request license key.  
To request an activation key for your licenses, please inform us of the replica IDs of the main modules installed (see above).
4. Set up roles.
5. Create user profiles.
6. Set up sales organization in the 'Organization' module.
7. Set up number counter in the 'Numbers' database.
8. Amend keywords.
9. 'Database Settings (DBSet)'  
Specify paths and module configuration.  
Configure user-defined fields and sub-forms.

For details of the procedure, please refer to the corresponding chapter in this manual.

## 4.3. Activate server tasks

---

You can install the server tasks for Schedule and Analytics on the Domino server as required.

## 4.4. Exchanging the JavaMail API

---

Domino is delivered with a JavaMail API, but this is too old to support SSL connections. The error message “javax.mail. NoSuchProviderException: No provider for imaps” is a clear indication for this issue. If this functionality is required, then the corresponding JAR file on the server must be replaced with a more up-to-date version (tested with JavaMail API 1.4.4.). It is unfortunately not known, whether and under what circumstances there may be side-effects.

Please shutdown the domino server before going on.

The original file resides on the server path:

```
<dominoinst>\osgi\shared\eclipse\plugins\com.ibm.designer.lib.javamail_<*>\lib
```

“<\*>” is a placeholder for the current version of the plugin which will be different for different versions of the domino server.

”The packet containing the JAR file can be downloaded from the following URL:

<http://www.oracle.com/technetwork/java/javasebusiness/downloads/java-archive-downloads-eeplat-419426.html#javamail-1.4.4-oth-JPR>

You will find the file mail.jar in the main directory, not in the sub directory “lib”! Copy it to the server side directory.

In addition the file “activation.jar” in this folder must be deleted, so that the server-side editing of MS Office documents functions properly. It will not be replaced by anything.

### Tip

The changes described in this chapter are needed to run the e-mail widgets, if e-mails are to be retrieved encrypted via IMAP.

If the mail server uses a self-signed certificate, this must be imported into the “cacerts” using ikeman.

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## 5. Updates and Migrations

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Updates and migrations between maintenance releases are written into the right-hand side of documents in the Installations database.

In the following, you will find a comprehensive explanation of the steps necessary for updates and migrations, which are part of a release. The “Interim update installer” is an assistant, which will lead you step-by-step through the processes of update and migration.

### 5.1. General information prior to making updates/migrations

---

Before you execute an update with migration, you should take note of the following:

**PLEASE READ THE FOLLOWING SAFETY INFORMATION CAREFULLY BEFORE YOU PROCEED!**

It is assumed that before an update or migration takes place on the current version that steps have been taken to secure the data!

For an update or migration of a previous version on to the current GEDYS IntraWare 8 software it is necessary to have a comprehensive knowledge of the administration of the GEDYS IntraWare 8 system. This is provided exclusively by GEDYS IntraWare employees and approved partners of GEDYS IntraWare in possession of GEDYS IntraWare 8 certification. Furthermore a thorough grounding in Notes/Domino administration is also a requirement for undertaking updates. Should updates or migrations be undertaken without authorization or certification, then this invalidates any liability and guarantee claims against GEDYS IntraWare relating to the software and the update/migration. Some steps also require IBM Domino Designer.

The update/migration should only be undertaken by your Notes Administrator (Domino Designer rights required).

If you are updating/migrating from a version of GEDYS IntraWare 8 prior to 8.8, then please undertake first the updates/migrations according to the separate migration descriptions (this documentation can be found in the installation programs of earlier versions and in the ‘Help’ database of this GEDYS IntraWare 8 application).

**WARNING:**

**An update/migration must never be undertaken in a productive environment where people are currently working.**

**BEFORE you make the update ensure you have made a security copy of your current GEDYS IntraWare 8 environment.**

**The documentation describes the update/migration for a standard environment. If individual modifications have been made to the installed databases, then this must be taken into account following the update/migration as required, and in accordance with the modification documentation.**

**GEDYS IntraWare accepts no liability and provides no guarantee for damages which result from a failure to act in accordance with these safety instructions.**

### 5.2. The “Interim update installer” (Assistant for updates and migrations)

---

#### 5.2.1. Start Assistant from the download file

## Start 'Interim update installer' from the download file

1. Unzip the downloaded file e.g. in the folder "\notes\data".
2. Open your Notes client and select from the menu "File" the command "Database > open..." (for Notes 8: "File>application>open").
3. Select from the list the unzipped "Database".
4. Click on the button "Open".

The Assistant for updates and migrations will then be started. The corresponding database symbol will be inserted in your Notes workspace.

### Note

During the update and migration it is possible - dependent on the security settings of your local Notes client - that the Lotus Notes "security alarm" appears.

Should this be the case then activate the option "Execute action and trust the sub-folder", in order to be able to continue with the installation.

Once you have opened the assistant then you have two buttons for update and migration. Run the update before you run the migration.

### Note

The settings which you undertake during the update, will be saved, in case you must break off the process. Once you have successfully undertaken an update and then make another update, this data from the previous update is then lost.

If you have already begun or completed an update, then on clicking again on the update button you will be informed of this.

## 5.2.2. Update

### 5.2.2.1. Safety instructions

In the "Safety Instructions" window please read carefully all information and follow the instructions. When you are ready, confirm that you have done this by activating the checkbox and then click on the button "Continue".

### 5.2.2.2. Setup type

If you select "Standard" then all updates will be made to your environment.

The option "User" is exclusively for highly-experienced users who know exactly which updates they wish to execute.

Specify the setup type and click on "Continue".

### 5.2.2.3. Database settings

During the next step select the database settings, from which the databases in your environment which are to be updated can be read.

Click on the button "Continue".

### 5.2.2.4. Central Design Elements database

If your installation uses a central database for design elements, then please select here the central design elements database (CDE).

Click on the button "Continue".

### 5.2.2.5. Comments in design elements

If you have selected the "User" setup type, then you can enter your own text here. If modifications are made to modules in Domino Designer, then the design elements are often assigned comments e.g.

'Custom' is often used. Some programmers also write the company name in the comment of a design element. In one of the following steps undertaken by this assistant all requirements for an update will be checked and as part of this all necessary design elements in your environment will be individually considered. At the end, in case not all requirements are met, these will then be displayed in a list for checking. If you want to have design elements display a specific term in the comments field, then enter that here.

Click on the button "Continue".

#### **5.2.2.6. Update selection**

If you have selected the "User" setup type, then on clicking on the selection link you will be offered here a selection of all the possible updates. Select those which you wish to carry out. After making your choice all those selected will be displayed in a list. Some entries in the list are indented (--entry), which means that these are updates which also must be installed if the update immediately above it in the list is to be included. The list contains only the update numbers, but if you select an entry in the list, then the corresponding description will be displayed alongside the number.

#### **5.2.2.7. Check requirements**

All databases (selected database settings) and their design elements which are affected by an update, are checked. The process checks here whether a template name is entered in the databases or design element and whether the design element has activated the checkbox for "design cannot be modified during update or replacement". In addition the process will check whether the current user has sufficient rights to carry out the update (designer rights). Furthermore design elements may not be blocked. If you have selected the "User" setup type and have entered a comment text, then the design elements will be correspondingly checked. A version check will also be carried out.

Once all requirements are met, then click on "Continue".

If the above-mentioned requirements have not all been fulfilled, these will be displayed in a list. You can then decide on how to proceed:

A) You close the dialog box using the button "Cancel" and can then see the list on the start page of the update assistant in order to check all the elements. Once you have checked all the elements you can once again execute the installation of updates from the beginning. All previously entered information has been retained.

B) You ignore the information and activate the checkbox "Ignore requirements and overwrite all elements", in order to be able to continue with the update. You can then click the "Continue" button.

#### **5.2.2.8. Completion of the update process**

If you wish to start the migration directly after completing the update, then check the box "Start data migration".

Click on the button "Complete" in order to carry this out.

Depending on the scale and number of databases to be updated, the update process may take a considerable time.

#### **Tip**

In case an update could not be successfully executed, you can open a log file which contains all necessary information concerning the errors arising.

# Notes

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