GEDYS INTRAWARE 8
Quick Installation Guide

January 2017
Version 8.8

GEDYS IntraWare GmbH
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1. General

This manual describes the administrative features and procedures for the'GEDYS IntraWare 8' modules of Version 8.8 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 8.8**.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

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

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.

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2. Before you start …

… you will find some useful information here.

2.1. System Requirements

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 anIBM Domino Server is essential to operate the databases.

'GEDYS IntraWare 8.notes' in version 8.8 is approved for IBM Domino Server versions 8.5.1 up to 9.0.1 FP7.

'GEDYS IntraWare 8.web'in Version 8.8 is approved forIBM Domino Server version 9.0.1 FP7 (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 from version 3.3 up to version 4.1can be installed.

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

'GEDYS IntraWare 8 **goMobile'**version 8.8.is approved for Domino 9.0.1 FP7 (64Bit). 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 9.0.1FP7.

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 9.0.1FP7.

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 38 for Windows 10
- Firefox Version 49 for Windows or Mac OS X.
- Safari 10for Mac OS X und iOS6 and iOS7 (limited functionality under iOS (no Import and Export, no clientside PDF generation, no creation of Office documents)
- Google Chrome version 54 for Windows

The configuration of Office integration determines whether or not Java SE 8ab update 112 (JRE) must be available.

Mobile devices ('GEDYS IntraWare 8 goMobile')

- iPad and iPhone with iOS 10 with integrated Safari browser

- Android 4.2 up to 5.0.1 with Google Chrome 53

- Blackberry 10 with integrated Blackberry 10 browser

- Windows Phone 8 with integrated Internet Explorer

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

Microsoft Office or OpenOffice is required for various correspondence and quotation functions. 'GEDYS IntraWare 8.8' is approved for:

- MS Word individual letter with Word 2000 to Word 2016
- MS Word form letter with Word XP to Word 2016
- MS Excel document with Excel 2000 to Excel 2016
- OpenOfficeindividual letter or spreadsheet from OO 2.0 up to 4.1
- OpenOffice mail merge from OO 3.2.1 to 4.1
- 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.

Remarks

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

Analytics Exporter Server Task and Analytics Reporting

Pentaho BI Server Version 4.8.2 GA is supported.

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!) and Oracle 11g (driver version 11.2)
- 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

BM4Outlook is approved for MS Outlook 2007 (with restrictions – see BM4Outlook documentation), MS Outlook 2010, 2013 and 2016 run under Windows XP SP2, Windows 7 and Windows 8.1. To run BM4Outlook you need version 4.0 of the .NET framework.

Installation requirements for the plugins
  - Microsoft .NET Framework 4.0 Full
  - VSTO (Visual Studio Tools for Office) 2010
  - Microsoft Office 2007 PIA (Primary Interop Assemblies)

For the installation you need an internet connection and administrator rights.

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.

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

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.

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

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

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 trom 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/mapsearth/) 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.

ABBY
ABBY (http://ocrsdk.com/) for scanning and for business cards
General conditions: www.abbyy.com/Legal/
Data protection guidelines: http://www.abbyy.com/privacy/
Developer Agreement: https://cloud.ocrsdk.com/Account/DisplayDeveloperAgreementTransferred 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

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.

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

Database	Agent	Activation required
Office	HandleMailedIn	Yes. **Sign with the Server ID of the server on which the "Office" is entered as Mail-in!**
	(Clean up)	Yes. **Run time**: once daily recommended. **Target:**all database documents.
	MovedocsToArchive	No

Database	Agent	Activation required
Mailing	(MMMControl)	Yes. **Run time**: recommended every 30 min. **Target:** all new and changed documents.
	Mail-In	Yes. **Event driven**:after new mail has arrived.

Database	Agent	Activation required
Marketing	Process automatic Campaign Action	Yes. **Run time**: recommended hourly. **Target**: all database documents.
	Automatic data selection	Yes. **Run time**: once daily. **Target**: all database documents.
	Reminder	Yes. **Run time**: once daily. **Target**: all database documents.
	(Clean up)|aaCECleanUp	Yes. **Run time**: recommended once daily. **Target:**all database documents.

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. **Run time**: recommended once daily. **Target:**all database documents.

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

Database	Agent	Activation required
Service	Mail-in	Yes. **Event-driven**: after the arrival of a new e-mail.
	(Clean up)	Yes. **Run time**: recommended once daily. **Target:**all database documents.
	CleanPrivOFUViewsFolders	No. Deletes all private instances of views and folders of the type "private, for first use" **Run time**: once daily recommended. **Target:**all database documents.

Database	Agent	Activation required
Contracts	CheckContractLimits	Yes, when using the limited SLAs.
	CheckNumberOfAssignedIncidents	Yes, when using the limited SLAs.
	Expiring Alarm to approver	Yes. **Run time**: recommended once daily. **Target:**all database documents.
	Set Expired	Yes. **Run time**: recommended once daily. **Target:**all database documents.
	(Clean up)	Yes. **Run time**: recommended once daily. **Target:**all database documents.

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

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

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

Database	Agent	Activation required
Workflow Example	(aaRefresh)	-------------------

Database	Agent	Activation required
Database Settings (DBSet)	(AdminProcess)|	Yes. **Run time**: recommended every 15 min. **Target**: all database documents.
	aaRemoveFinishedAdminRequestAndLogs	Yes. **Run time**: recommended once daily. **Target:**all database documents.
	(CreateAdminRequestToRefreshScheduleCfg)	Yes. Checks and updates group definitions and global entries for Schedule. **Run time**: Once daily **Target**: all database documents
	(ImportAgentSettings)	No. Updates the current status in the agent settings document. **Run time**: every 2 hours. **Target:**all new and changed documents.
	(InformLogErrors)	No. Informed by error in log. **Run time**: once daily. **Target**: none.

Database	Agent	Activation required
Event	aaCEReservationsSynchronization	
	(Clean up)	Yes. **Run time**: recommended once daily. **Target:**all database documents.
	(MoveEventsToArchive)	Only when archiving is used. **Run time:** recommended once a week. **Target:** all database documents
	InformOverdue	Yes. **Run time**: recommended once daily.
	(MailConvert)	No.
	EventWordPressSync	Only when the GEDYS IntraWare WordPress event calendar is used and the data is to be synchronized with this. **Run time:** every 4 hours

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

Database	Agent	Activation required
Filing Structure Inventory Items Service catalog Templates Event archive Opportunity ZIP Followings	(Clean up)|aaCECleanUp	Yes. **Run time**: recommended once daily. **Target:**all database documents.

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

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

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

2.6.   Access control lists

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

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

3. Installation, Configuration, and Registration

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 W).
>
> 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.

See "**Fehler! Verweisquelle konnte nicht gefunden werden.**" on page **Fehler! Textmarke nicht definiert.** 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 completeare 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'

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.

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.

    Tip

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

    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.

    Tip

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

    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 …**

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 thefiles it contains.

By the way …

… good to know: You will find detailedmanuals in the'Help' database after theinstallation.

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 W).

Installed **databases for which you do not purchase license keys** can only be used in restricted **demo mode**.
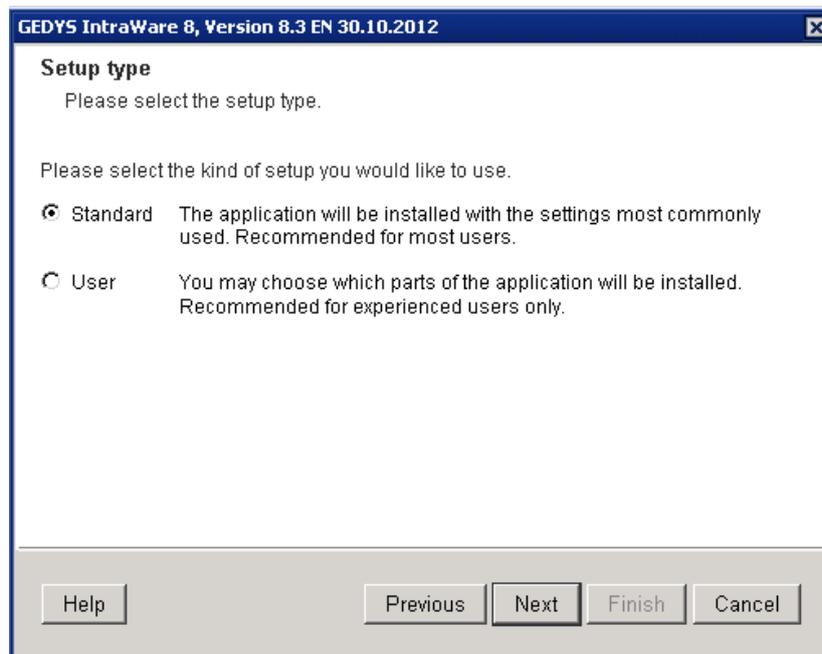
If you select "**Standard**",'GEDYS IntraWare 8' will be installed with the standard options required by most users. This type of installation**ensures** that all the modules necessary for problem-free operation of'GEDYS IntraWare 8' will be installed.

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'.

See "**Fehler! Verweisquelle konnte nicht gefunden werden.**" on page **Fehler! Textmarke nicht definiert.** to find out how to set up a scaled environment.

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.
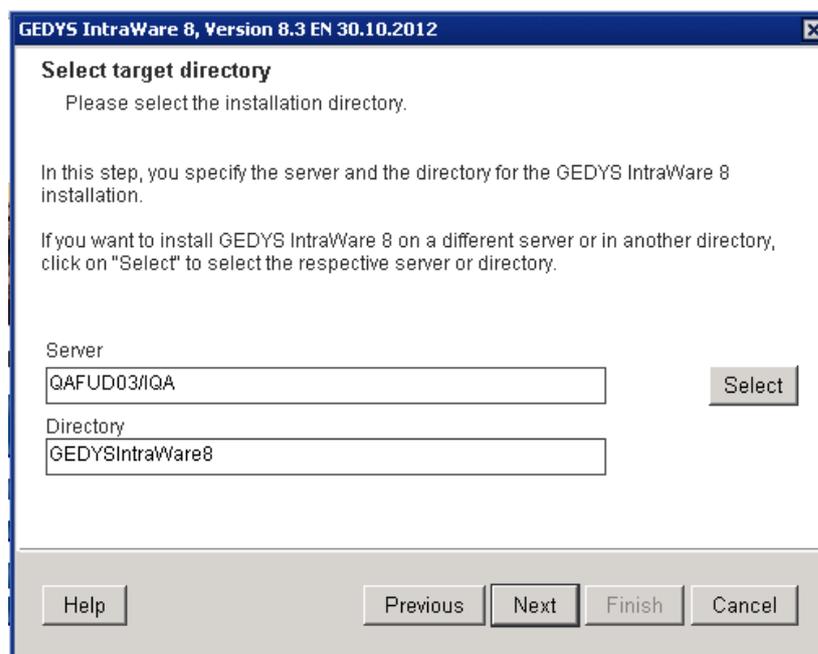
If the details are correct, click "**Next**".

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.
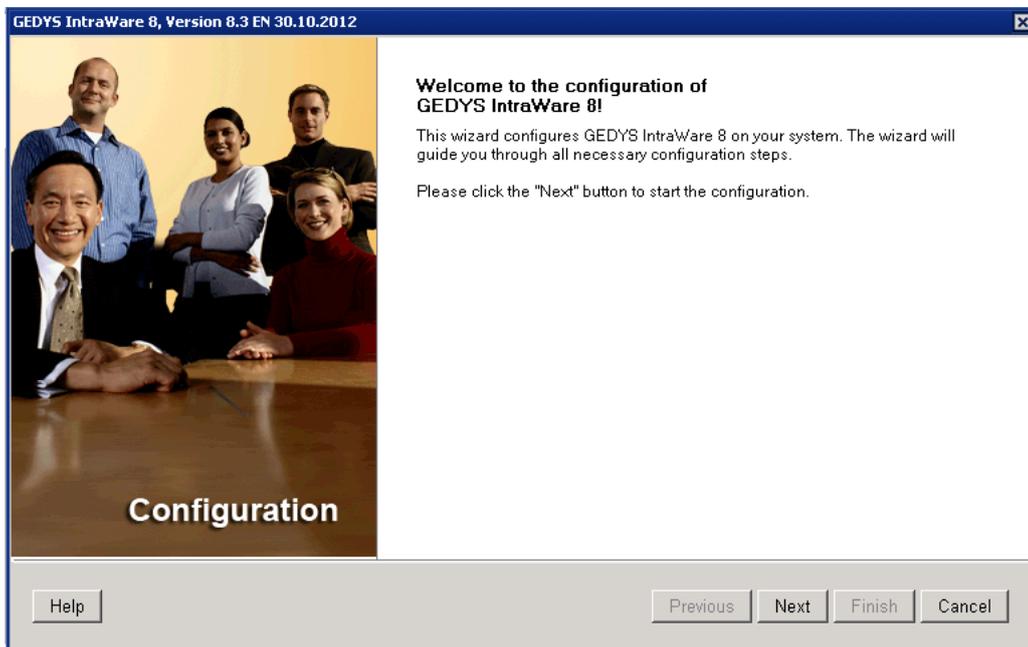
Click the "**Finish**" button to install'GEDYS IntraWare 8' to the specified directory.

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
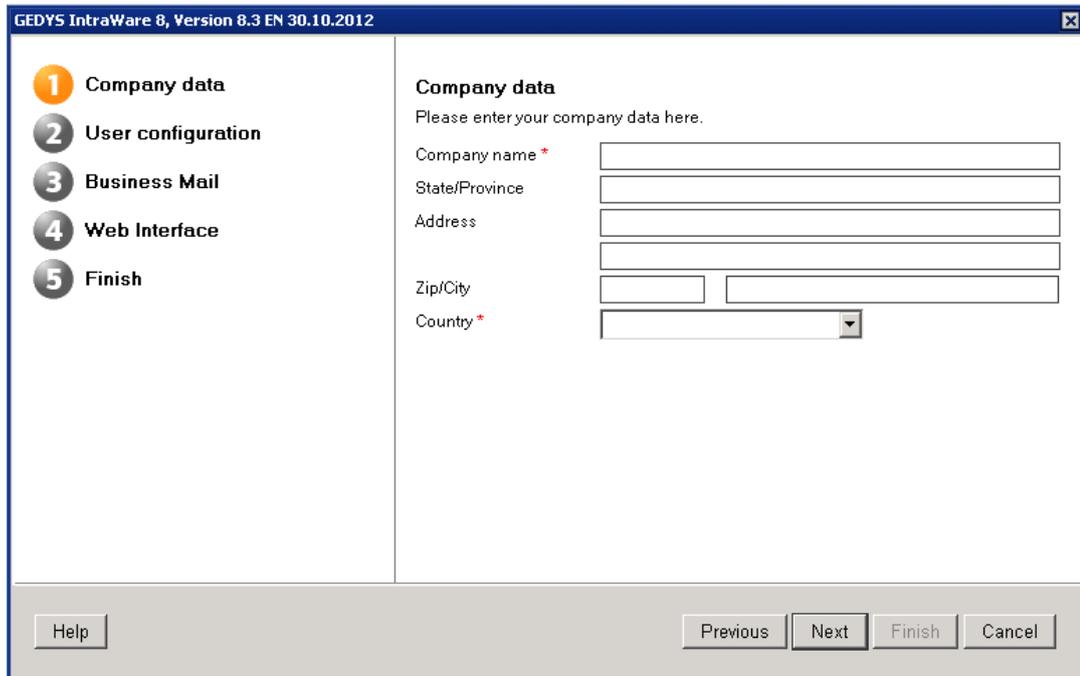
If not already done so, start the'Configuration Wizard'. Click the "**Configure**" button in the'Installation and Configuration Assistant'.

The'Configuration Wizard' will support you in, among other things, setting up user groups, setting up the Workspace, and installing'GEDYS IntraWare 7 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).
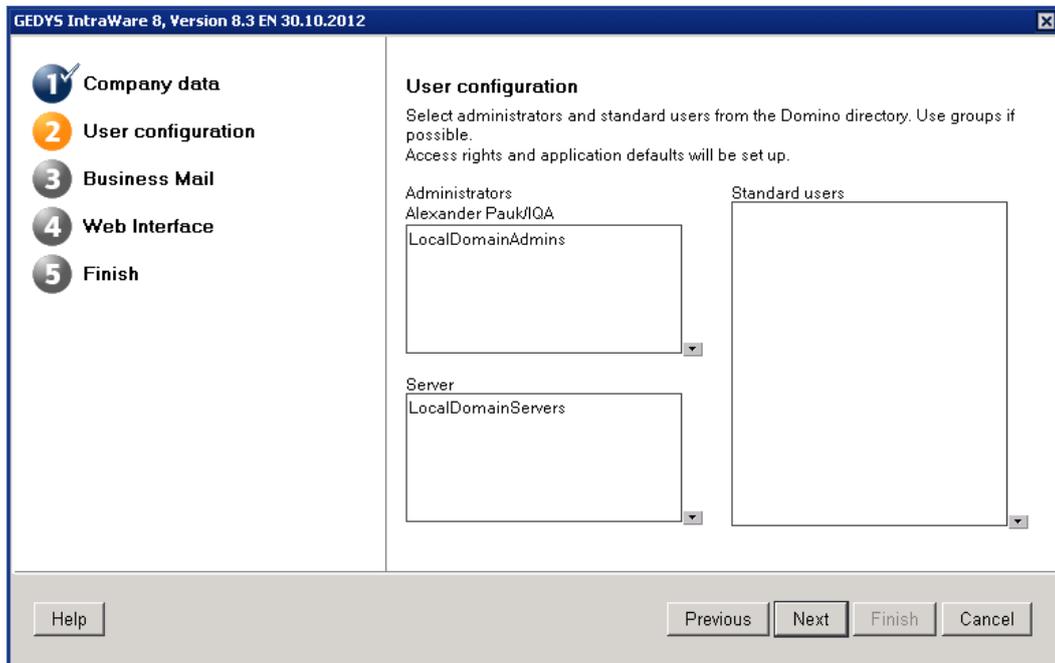
Then click "**Next**".

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**".
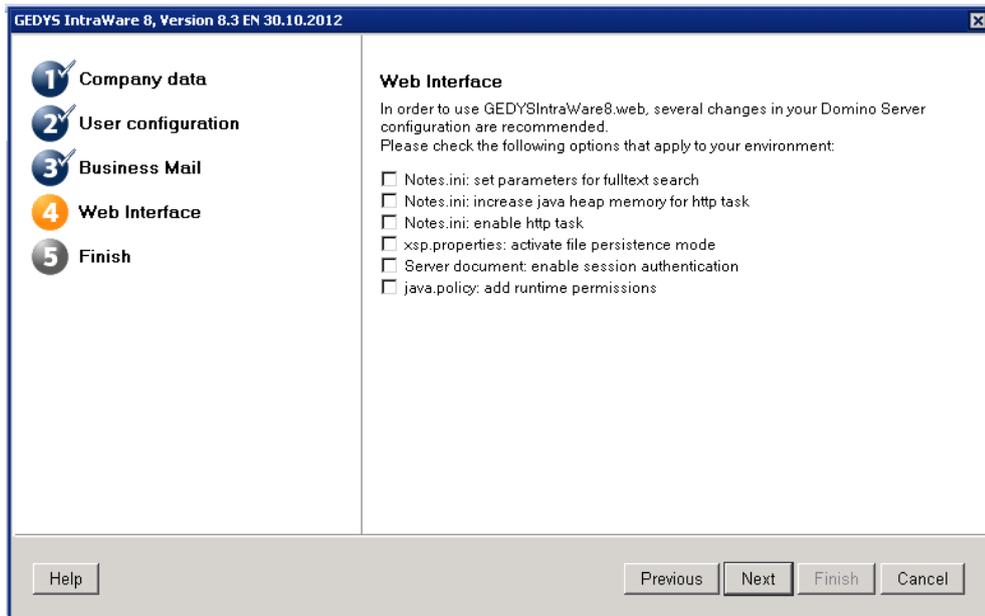

Note

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.**

As a sensible minimum value for the heap memory of the Java Virtual Machine GEDYS IntraWare 8.web presupposes 1024 MB. This value is very much dependent on the setting concerning the XSP persistence mode and must as a matter of priority be modified.

```
HTTPJVMMaxHeapSize=1024M
```

If when running GI8.web you get the error message "Out of memory", then you need to increase this parameter.

- **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 authentification**

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

- **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 key at a later date, please read the "*Fehler! Verweisquelle konnte nicht gefunden werden.*" section under "*Fehler! Verweisquelle konnte nicht gefunden werden.*" starting on page **Fehler! Textmarke nicht definiert.**.

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~xxxxxxxxxxJ043xxxxxxxxxx˝F9Gxxxxxxxxxx˝CFIxxxxxxxxxx90xxxxxxxxxxF600xxxxxxxxxx˝0~xxxxxxxxxx˝BDxxxxxxxxxx3A

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.

4. First Steps after the Installation

4.1. First Administrative Settings after Installation

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 counterin 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.