# Instant Team Sessions 3.6

## Installation Guide

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# Table of Contents

# Planning your TeamSessions installation

There are a number of important steps in planning your deployment of Instant TeamSessions. Working out how many servers to deploy, where the servers will be installed, and important details such as deciding a naming convention for the TeamSessions Server archive agent.

The first consideration should be how many servers will be installed. It is important to note that this number may not directly relate to the number of Sametime Servers installed in an organization. Instant TeamSessions can function in many situations as a single Server installation servicing many Sametime Servers.

For other organizations it may be important to have multiple TeamSessions Servers running on multiple Servers to offer continuation of service in each location in situations where servers may become disconnected from each other.

# Creating PlaceLoggers

PlaceLoggers are nothing but Domino-Directory person documents. PlaceLoggers are the virtual users who monitor the chat places for Team Sessions. The person documents should be created in the Domino Directory of the server on which the Teams Sessions database will be installed on.

1. Login to the Lotus Notes client with the Administrator's ID or an ID which has rights to create a Person documents in the server's Domino Directory.

2. Click on File → Database → Open to get the dialog for opening the Domino Directory
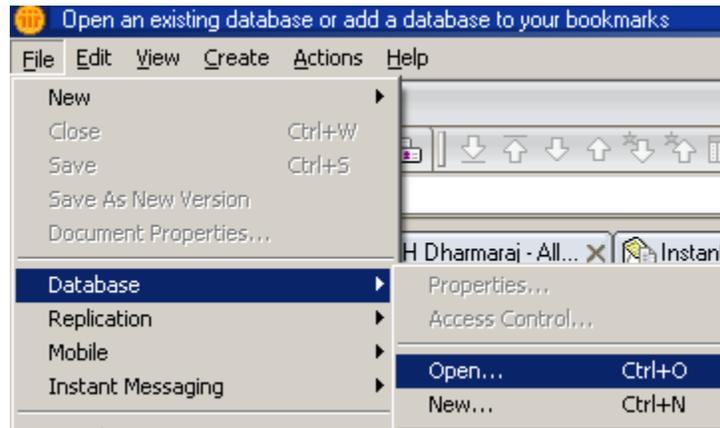


3. Select the Server and locate the server's domino directory 'names.nsf' and click 'Open'
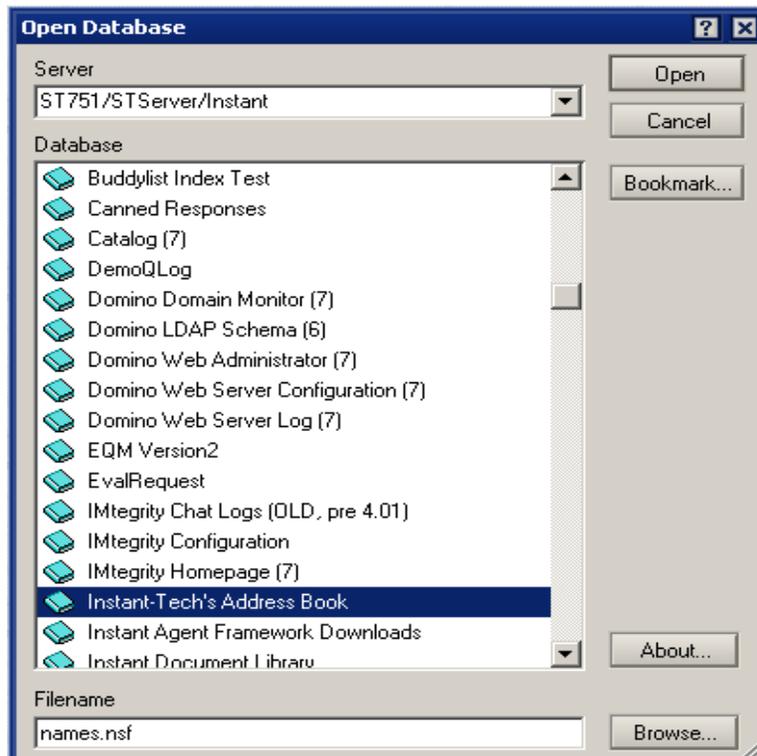
4. Use the button 'Add Person' to create new users
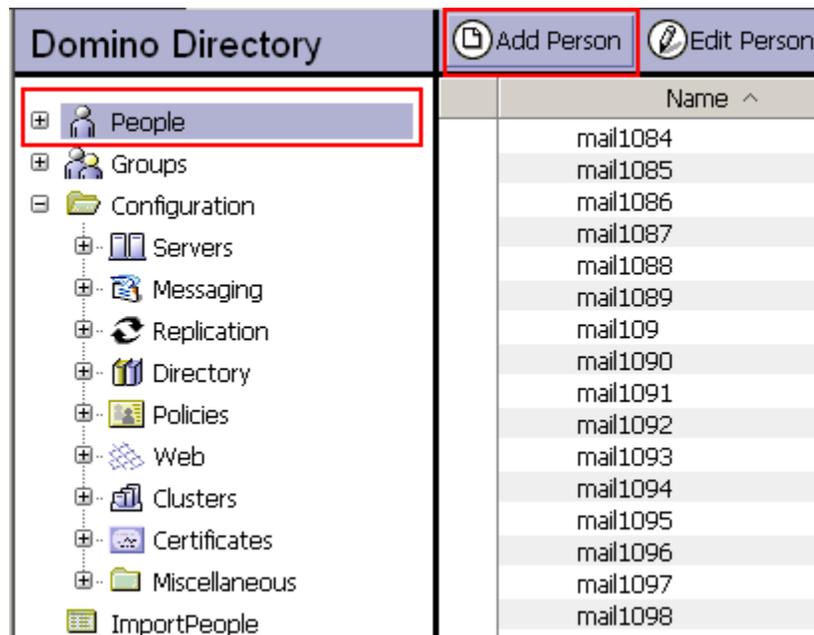


5. Specify the Last name, User name and Short name/UserID as 'PlaceLogger100' as shown in the screenshot below

6. Use the 'Enter Password' button to specify the password.

7. Using the same procedure, create 'PlaceLogger200', PlaceLogger300'… if Team Sessions database will be installed on secondary servers

# Creating Sametime Login ID for ITS Alert Bot

ITS Alert bot is similar to PlaceLoggers (described in above section). ITS Alert bot acts like a virtual user which delivers notifications to other Sametime users and TeamSession places. Preferred LoginID for Alert bot is: **ITSAlertManager**. Follow the exact steps as defined in the above section to create bot login ID.

# Type A - TeamSessions Setup

The Type A configuration is suitable for installations where there is a single Sametime Server, or there are multiple Sametime servers where a single TeamSessions server will be suitable for the organization's needs.

1. On the Sametime server run the installation file: "TeamSessionsServerSetup.exe**"**

2. Enter the location of the Domino/Sametime Program Directory
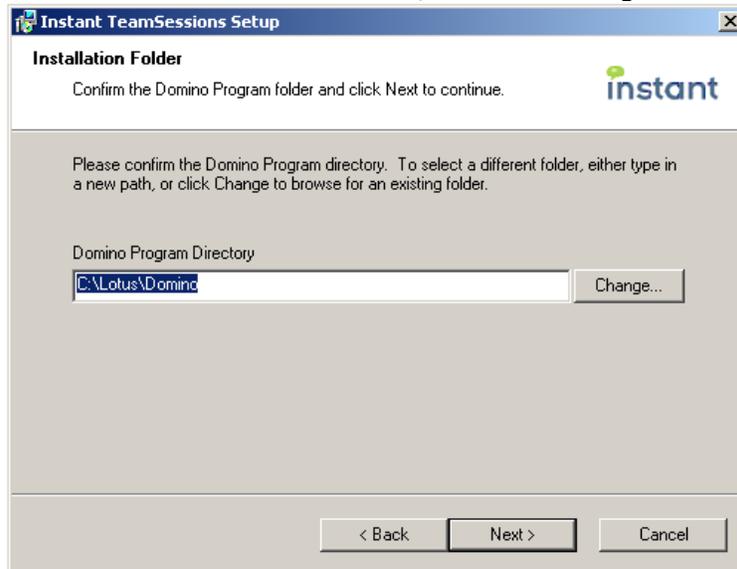


3. Enter the correct location of the Domino/Sametime Server Data Directory
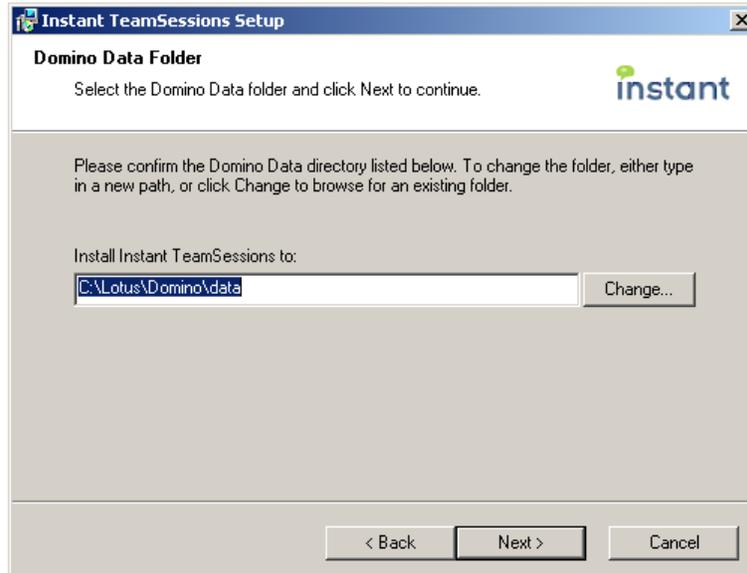
4. Specify path to SUN JRE 1.4 or above
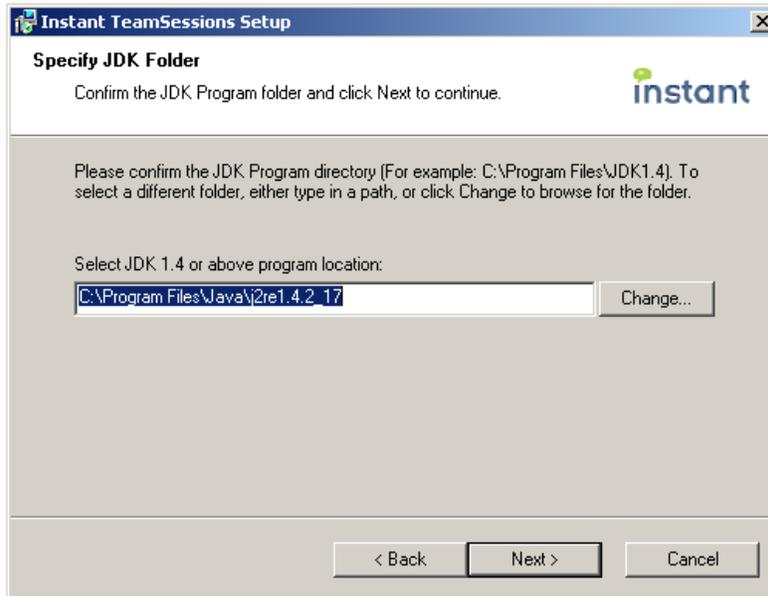


5. Enter the Full Hierarchical Name of the Domino Server the software is being installed on, and the Fully Qualified Host Name of the Sametime Server (this server)
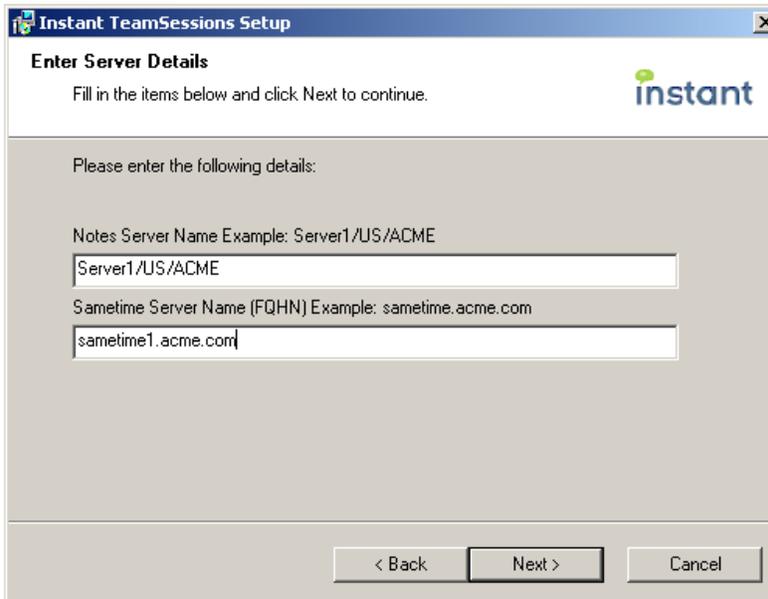
6. Enter the TeamSessions Logging ID information; see Appendix A to understand Logging ID naming details.



7. Enter login details for ITS Alert Bot



8. Complete server details

9. Enter the Sametime Login name and password for the Sametime ID that will be used for logging chats in a place. This is a regular Sametime ID, and should not be used for any other functions.

10. Sign the Team Sessions template.

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

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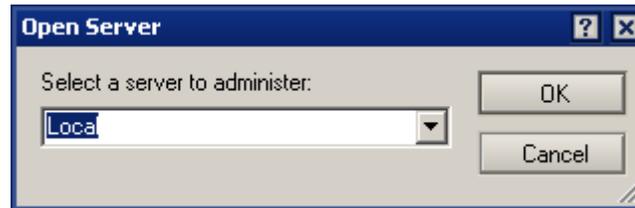


After the selected server has been loaded click select 'Templates Only' from the 'Show me' drop-down as shown in the figure below
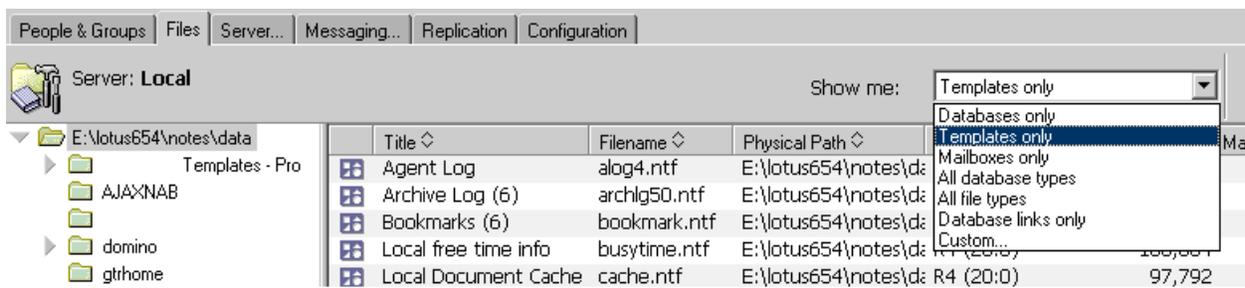


Right-click on the TeamSessions template after finding it from the list and click 'Sign'
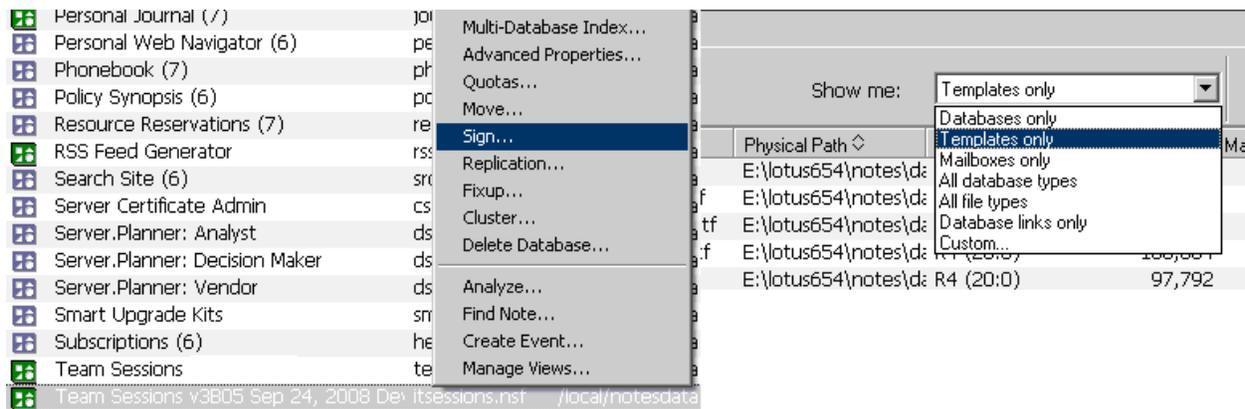
Click 'Ok' on the dialog shown below to sign the template.



11. Create a new Database 'ITSESSIONS.NSF' on the server using the signed TeamSessions Template.

Login to Lotus Notes client with the Administrator's ID or an ID that has rights to create a database on the server.

Click on File → Database → New to get the dialog for creating the new database
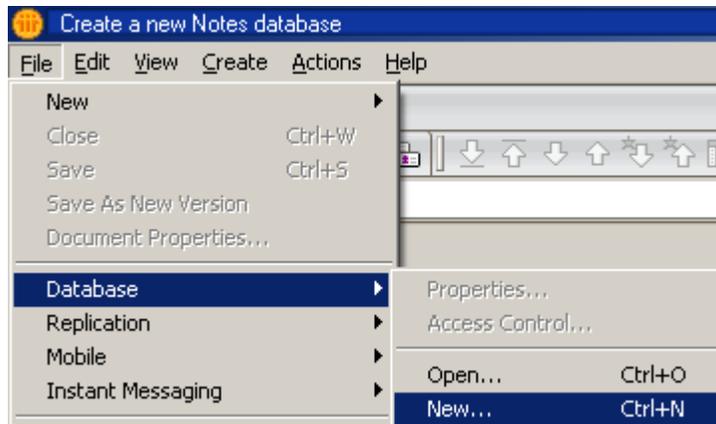
Select the Server on which the database needs to be created.

Specify a title for the database.

If you specify the file name other than 'itsessions.nsf', please specify the same in the 'SametimePersistentChat.properties' file which exists under '...\Instant TeamSessions\properties\'

Select the option 'Create full text index for searching'

Select the server on which the Team Sessions template is installed

Select the Team Sessions template from the templates list and click 'OK'
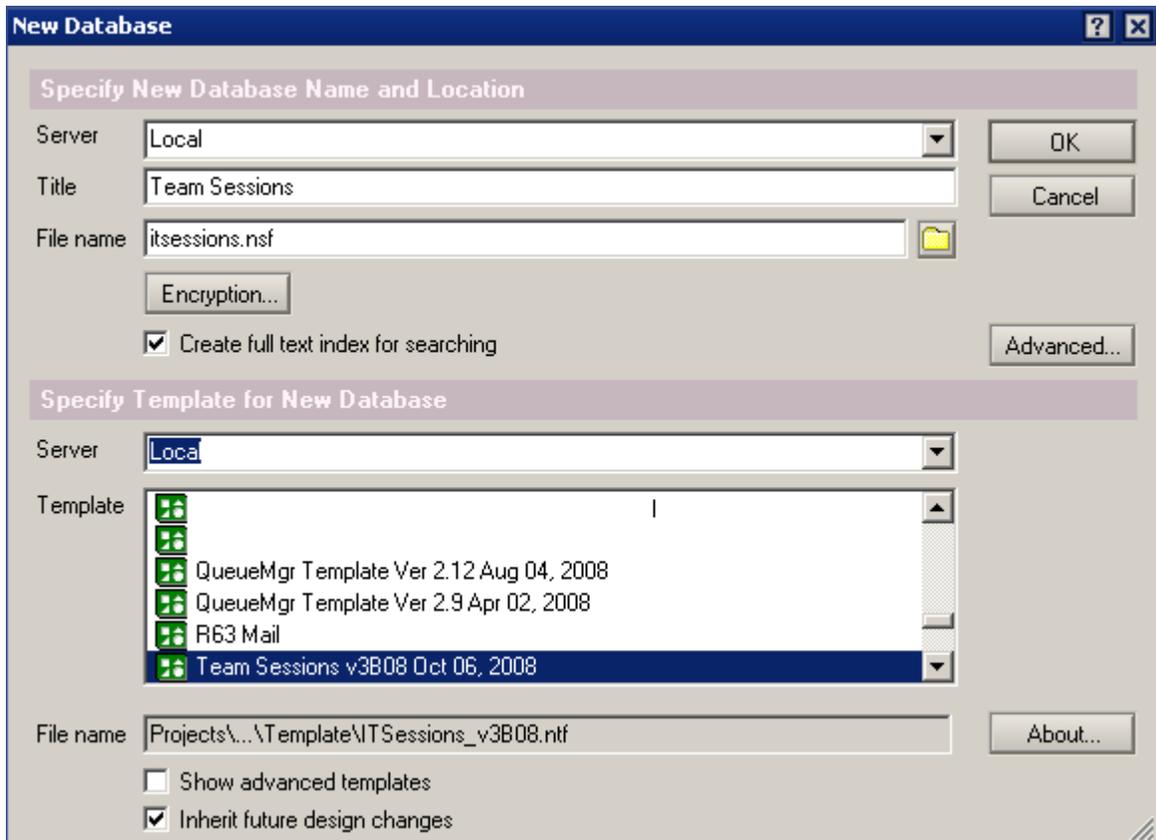


Select 'Yes' for the dialog prompted to index the database
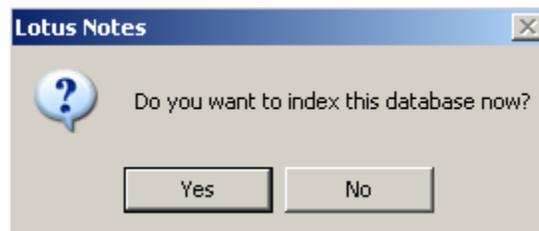
12. Configure the access to new database created.

Right-Click on database in the Lotus Notes workspace 'Database → Access Control' to get the dialog for specifying the access
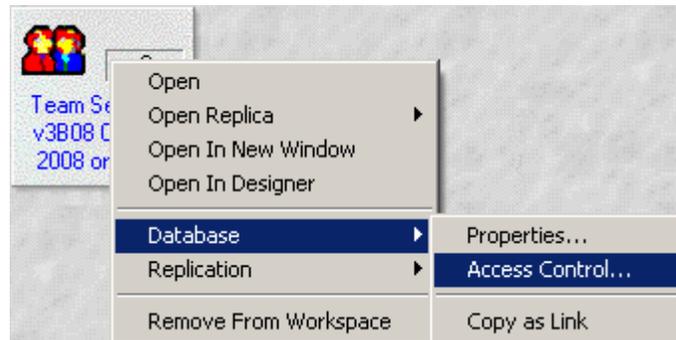


Click on 'ADD' to enter the new entries to the list

The server entry must have an access level of 'Manager', with all the roles except '[HideContentTab]' and of user type 'Server'

The default entry must have an access level of 'No Access', with none the roles and of user type 'unspecified

A entry called 'Anonymous' must be added, which will have an access level of 'No Access', with none the roles and of user type 'unspecified'

There must be an entry of a user or a group with access level of 'Manager', with all the roles except '[HideContentTab]' and of user type ''Person' or 'Person group' who will responsible for administrating the database

A group with the PlaceLoggers for the ITS must be entered with access level of 'Manager', with the role '[Administrators]' and of user type 'Person group'. PlaceLoggers can also added individually.

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

The role '[Auditor]' can be enabled for the above entry if global chat archive search facility is required.

The role '[PlaceCreator]' can be enabled for the above entry if the users' needs to create and manage chat places and alerts.

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**Note:** The Administrator role is required to see all chat places, and create new places.  If no one has the Administrator role assigned to them new places cannot be created.  Anyone that has the role of administrator, must also have a minimum of author access to the STCONF.NSF database, this is because the directory features of STONF.NSF are used to secure chat places.

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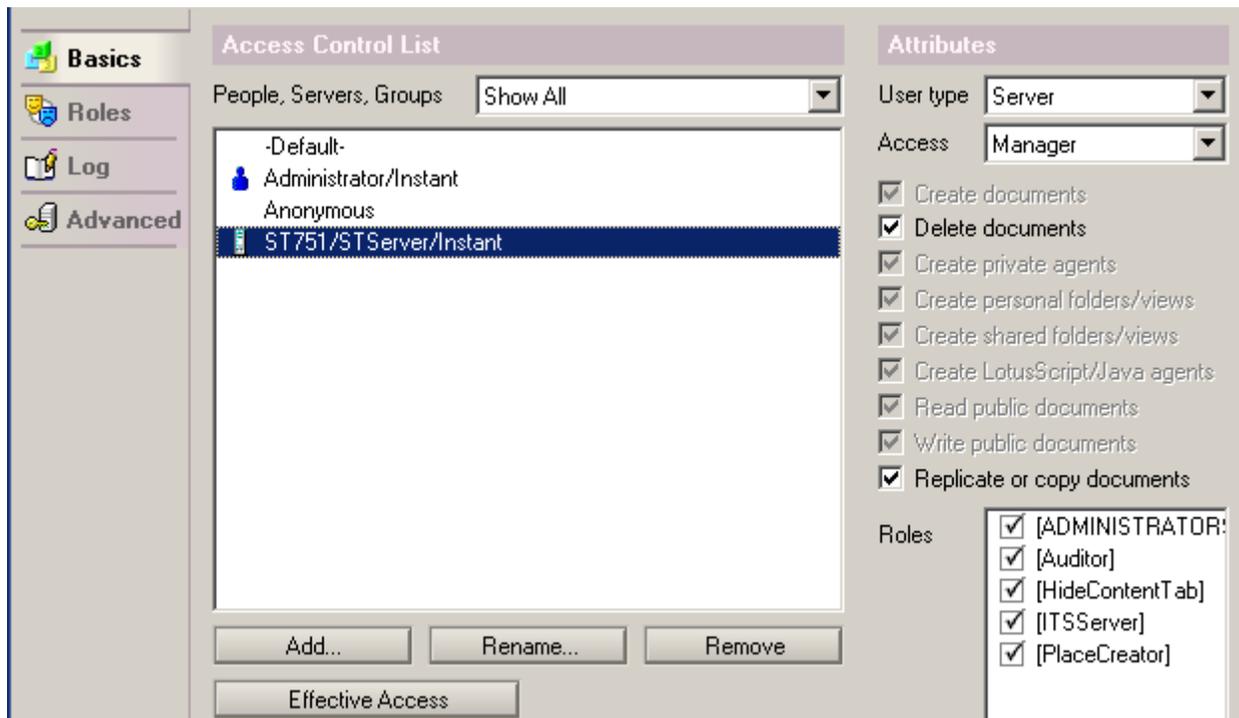


13. Start the persistent chat monitor, by choosing it from the Windows Services Control panel, look for "Sametime Persistent Chat", when you next start the Sametime server, the monitor will be started automatically and shutdown automatically by Sametime.

**Note:** Be sure to have setup the Sametime Logging ID before starting the monitor

14. Set the global configuration settings, by logging in with a browser to: http://stserverFQHN/itsessions.nsf

15. Select Edit Global Settings and change any settings you want to change and press update.

16. Now create your first place by selecting New, and entering at least a name for the place, and any other details that you wish to enter. Click 'OK'.

**Note:** It can take one to two minutes before a new place is archived.

17. Enter the place to check that the archiver is available.

# First Time Setup - Multi Server Setup

## Primary Server Setup

1. On the Primary Sametime server run SametimePersistentChatSetup.exe

2. Complete server details

3. Enter the Sametime Login name and password for the Sametime ID that will be used for logging chats in a place. This is a regular Sametime ID, and should not be used for any other functions.

4. Sign the Team Sessions template. (Refer point 11 of Type A - TeamSessions Setup section for details)

5. Create a new Database 'ITSESSIONS.NSF' on the server using the signed TeamSessions Template. (Refer point 12 of Type A - TeamSessions Setup section for details)

6. Configure the access to new database created. (Refer point 13 of Type A - TeamSessions Setup section for details)

7. Start the persistent chat monitor, by choosing it from the Windows Services Control panel, and then look for "Sametime Persistent Chat". When you next start the Sametime server, the monitor will be started automatically and shutdown automatically by Sametime.

> **Note:** Be sure to have setup the Sametime Logging ID before starting the monitor

8. Set the global configuration settings, by logging in with a browser to: http://stserverFQHN/itsessions.nsf/joiningroom

9. Select Edit Global Settings and change any settings you want to change and press update.

> **Note:** When running with multiple Sametime servers, be sure not to enter a value for the Sametime hostname field. This field is required if you have a single Sametime server supporting multiple Domino servers.

10. Now create your first place by selecting New, and entering at least a name for the place, and any other details that you wish to enter. Click OK.

> **Note:** It can take one to two minutes before a new place is archived.

11. Enter the place to check that the archiver is available.

## Secondary Server Setup

a. On the Primary Sametime server run ITSessionsHTMLSetup.exe

b. Create a new replica of the database called ITSESSIONS.NSF from Primary Sametime server.

c. Be sure to enable Full Text Indexing for the new replica

d. Be sure to check that the secondary and primary servers have regular replication, otherwise users on secondary servers will not see new chat places, attachments, notes, etc.

e. Enter the place to check that the archiver is available.

f. Repeat this step for as many secondary servers are required.

# PlaceLogger Commands

PlaceLogger supports a number of commands that can be executed by an Administrator to perform various important tasks. Commands can be executed by initiating a chat session with the PlaceLogger user.

When a chat session is initiated you will see:

| | |
|---|---|
| PlaceLogger200 | Welcome to the ITS server administrative interface. |
| PlaceLogger200 | Current Server version: 600b, Build time: 09/15/2008 |
| PlaceLogger200 | Type 'refresh' to ask the server to refresh the list of persistent chat rooms. |
| PlaceLogger200 | If you have alerts enabled on your system, type 'refreshalerts' to ask the server to refresh the list of alerts. |
| PlaceLogger200 | Type 'registerPlaceWatcher' or 'unregisterPlacewatcher' to enable/disable IM-based server monitoring |

Commands supported by PlaceLogger are as follows:

1. **refresh:** This command will instruct PlaceLogger to enter newly created rooms and verify that archiving process is running successfully for all rooms. Following screenshot displays typical server response when command has been successfully received by PlaceLogger:
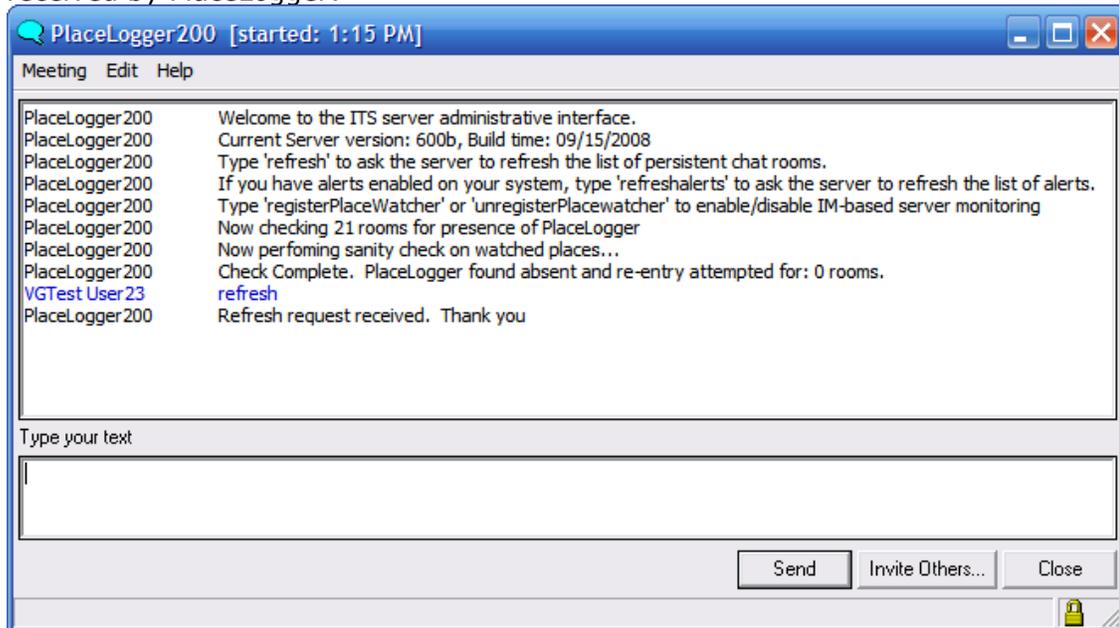


2. **refreshalerts:** This command loads newly created alerts and refreshes properties for existing alerts. **Note:** This command should be executed every time a new alert is added or an existing alert is modified.

3. **registerPlaceWatcher:** This command allows System Administrators to view Place Watcher activity over a chat session. Once this command is executed, the Administrator will be notified via instant message when place watcher enters a specific room or leaves a specific room for archiving chat history.

4. **unregisterPlaceWatcher:** This command should be executed only if the **registerPlaceWatcher** command was previously executed. This command will stop the notifications sent over IM channel by PlaceLogger.

# Enable 'ArchiveDayOfChat' Agent

Right-Click on database in the Lotus Notes workspace and click 'Open In Designer' to open the database in Lotus Domino Designer
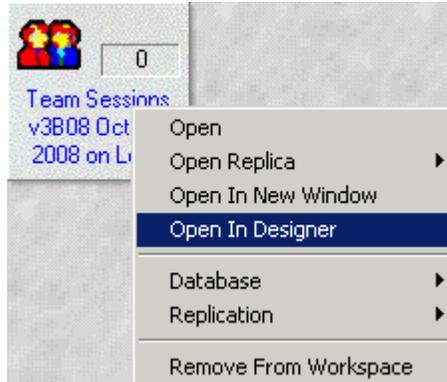
Browse through Shared Code --> Agents, select 'ArchiveDayOfChat' and click 'Enable'
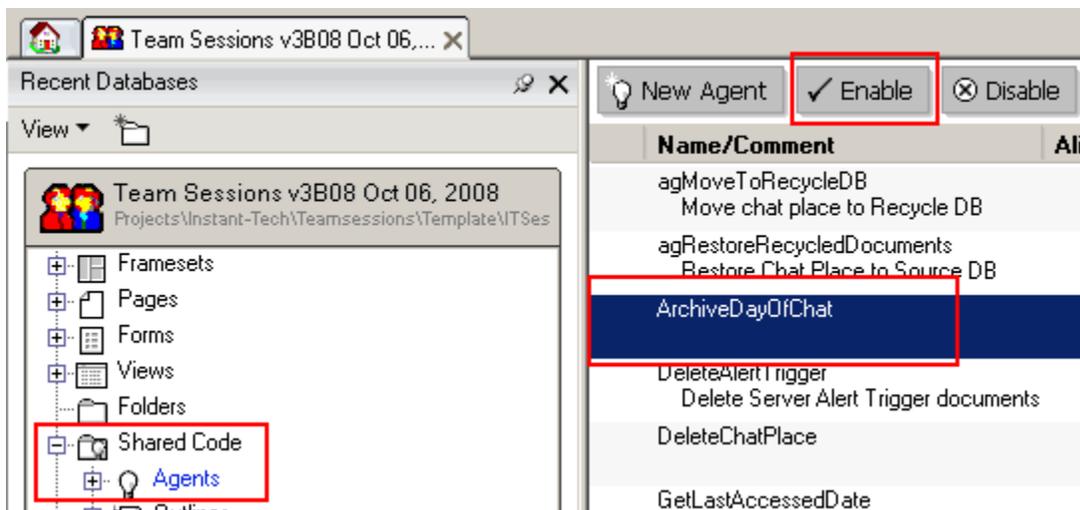
Select the Server on which the agent should run and click ok to enable the agent

# License Key for Team Sessions Database

The license key for the Team Sessions database will be generated at the time when the database is opened for the first time in Lotus Notes client/Web. By default, the database will be assigned an eval license key which allows the creation of 25 chat places for one month from the time the database is accessed for the first time. Please contact the Instant Tech support team for acquiring the license key for the full version of the database.

Once the license key for the full version of the database is acquired, open the database in Lotus Notes client, browse to the 'Administration' section, and click 'Update License'.

Enter the license key and click 'Update License'.
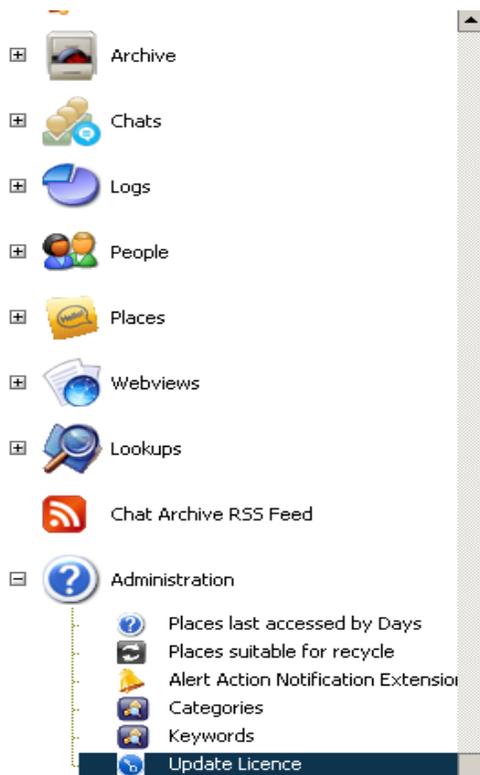
# Configure DRDC web service

Open the Teamsessions database from the browser with the url
'http://<Server address or url>/itsessions.nsf'
Browse to the 'Global Settings' section of the database by clicking on the link 'Edit Global Settings' link.
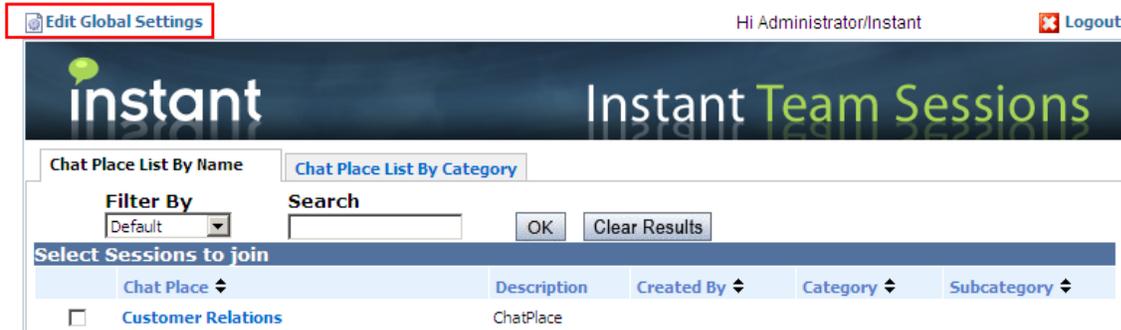


Browse to the 'Alert Notifications' section and click 'New Alert Notification'



The 'Name' in the document will be available for selecting 'Web Service Function Name' while creating an alert of type 'Call a Web Service'.

# Manage Alerts

Click on the link 'Manage Alerts' in the landing page to create/edit/delete the alerts.
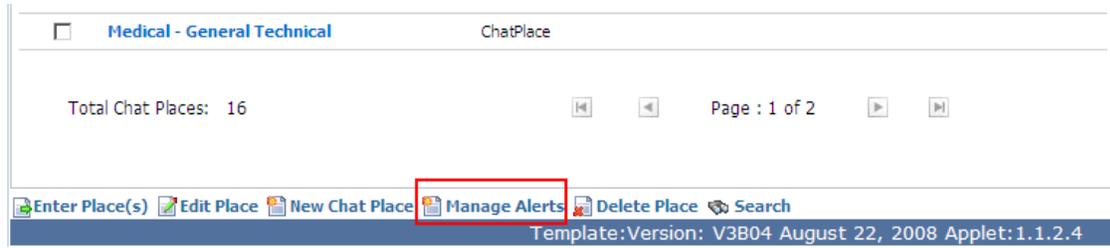


## Create Alerts

Two types of alerts can be created in the database 'My Alerts' & 'Server Alerts'.

'My Alerts' are nothing but personal alerts created by the users of the database. 'Server Alerts' section will be visible only to Administrators of the database and managed by them.



New Alerts can be created in the database by clicking on the action 'New Alert Trigger' in the 'Manage Alerts' page.

Enter the name and the description for the alert to be created. The 'Alert Type' will be of 'Keyword' by default. Enter the 'Trigger Keyword' on which the alert needs to be triggered.
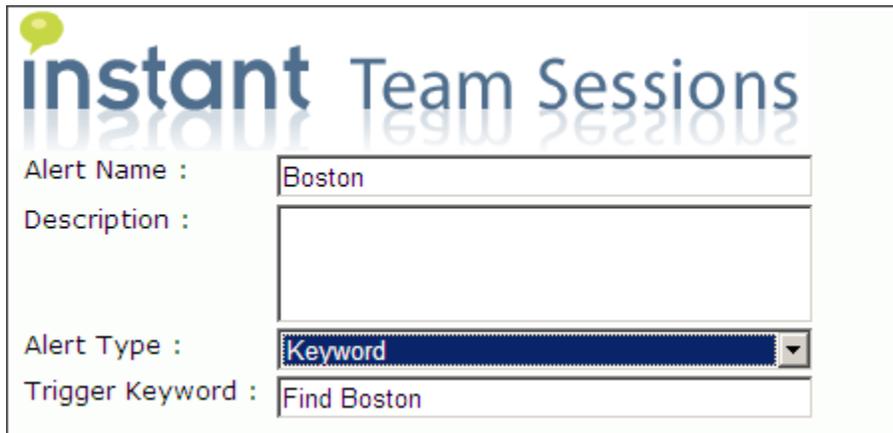


'Action Alert' is the section where the action needs to be taken when this alert is triggered. Four types of actions can be configured.
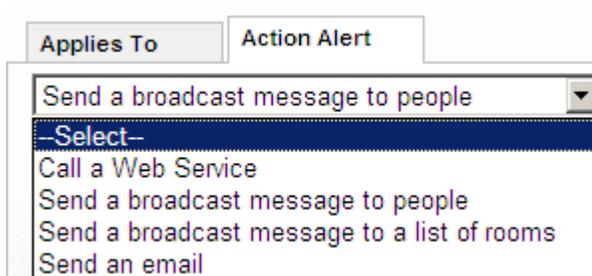


**'Call a Web Service'**



Select 'DRDC Notification Bus' from the drop down list to call the DRDC web service when alert has been triggered.

### 'Send a broadcast message to people'

Select this action for when a broadcast message needs to be sent to a set of users when the alert has been triggered.



### 'Send a broadcast message to a list of rooms'

Select this action for when a broadcast message needs to be sent to a list of rooms defined when the alert has been triggered.



### 'Send an email'

Select this action for when an email needs to be sent to a set of users when the alert has been triggered.

# Configure Categories

Categories are used to categorize the chat places. Chat places can be categorized with up to two levels categories and sub categories.

Categories in the database can be defined through the section 'Categories/Keywords' of 'Global Settings'.



New Category can be created using the action 'Create Category'. A category document can be edited by clicking on the link provided as shown above.

# Configure and Recycle the chat places

Browse to the 'Other Settings' section of 'Global Settings' page to configure the recycle settings.

Enter the server name where the recycle database needs to be created.

Enter the recycle database name with the extension 'RecycleDB.nsf' in the field 'Recycle database name.

Enter the number of days in the field 'No of days to Recycle a room' for the chat places to be available for recycle if they have not been accessed after the number of days entered in this field.



The chat places which have not been accessed for the number of days specified in the config document will be displayed in the view 'Administration\Places suitable for recycle'.

Select the chat places which need to be recycled by clicking the action 'Move to Recycle DB'. If this is the first time this action has been triggered then a recycle database will be created on the server and with the name specified in the config document. The database will be created under 'ITS\' of the server data directory.

When the chat places are moved, then all its related contents like files, bookmarks, and placenotes are too.
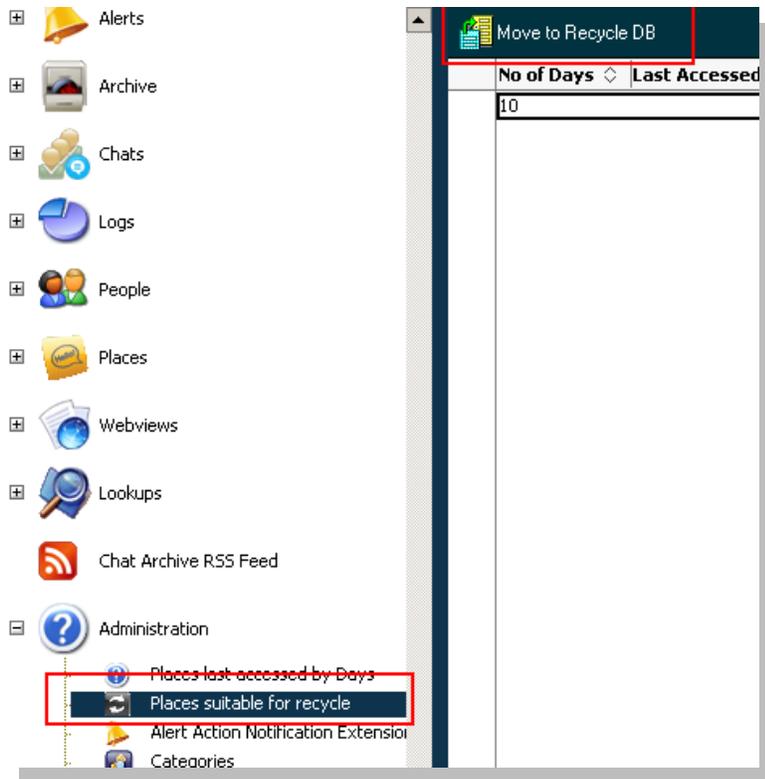


After the process has been finished, click on 'File → Database → Open', select the server and browse to 'ITS' folder to open the Teamsessions recycle database.
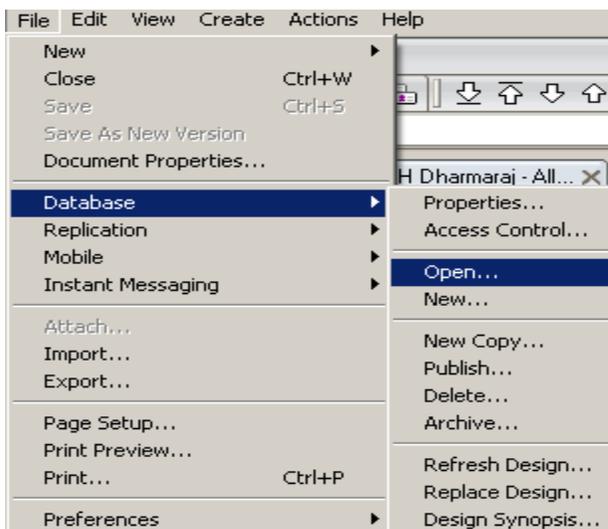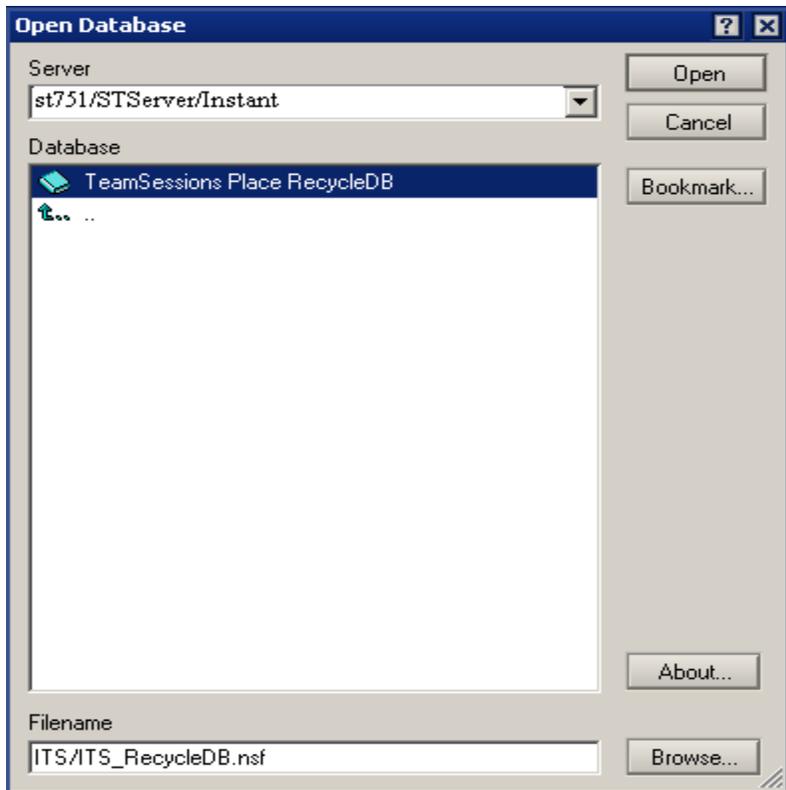
The chat places can also be restored back to the parent database by using the action 'Restore to Parent DB' of the view 'Administration\Recycled Places' in the recycle database.
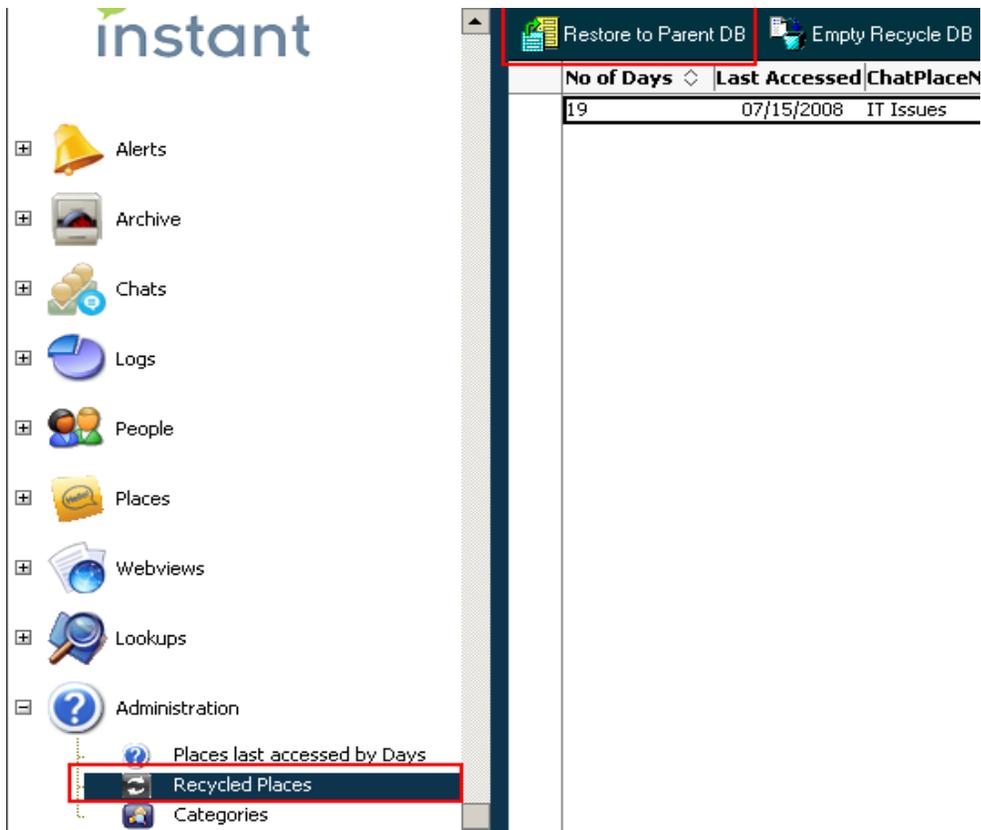
# Configuring the Directory Service

In order to support IBM Sametime 9, the applet directory lookup module has been replaced with a new Ajax based module.  In order to use this Ajax based directory picker, the Directory service should be selected as 'Domino' as indicated in the following screen shot.

Located in the "Other Settings" tab is the Directory Service picker. Here you can choose between two types of directories to use, Domino and LDAP.

- **Domino:** Sametime embedded address book
- **LDAP:** Microsoft Active Directory

Click "Update" on the lower right to save your changes.  In both cases, LDAP and Domino, the Ajax based directory picker will be utilized.



Directory Service allows administrators to quickly search for users in the Organization's enterprise directory.

Once enabled, the directory picker will look like the following (no longer applet based):

## Choose one or more names... - Google Chrome

□ Not secure | 34.226.69.1/itsessions.nsf/NABPickerMultiXpage?open&returnfield=invit...

Search for... smi

From... Instant-Tech's Address Book ▼

| | | |
|---|---|---|
| Smiley | Deepak | Click any name to add it to this list |
| Smith | Aditya | |
| Smitha | Chinnabhatini | |
| Sobhanan | Anchu | |
| Solomon | Yvonne | |
| Somnath | Akshatha | |
| Spanish | InstantSupport | |
| Sparks | Suzy | |
| sp_OPS3 | sp_OPS3 | |
| SRI HARSHA | Saripalli S | |
| Srikanth | Shruthi | |
| Srinivasan | Arun | |
| Srivastava4 | Ankita | |
| Srujitha | Murathoty | |
| St751 User | East | |
| St8 User | West | |

|< <   1823 to 1838 of 2747 records   > >|

Remove All

OK    Cancel

# Selecting a New Landing Page

1. Notice the layout of the current screen. To change it, open the drop-down by the red arrow and select "Edit Global Settings."

2. Open the "Display Settings" tab, and under "Joining Room to Display?" select a new layout for your default landing page. The link for this layout will display below the preview image.

Rev 5 – VG
12/12/2017

3. Click "Update" to save it, and navigate back to your home page. You will now see the newly selected landing page layout.