Domino Synchronizer for SuperOffice CRM

Preparation

Two way synchronization between SuperOffice CRM and Lotus Domino

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Welcome to the Domino Synchronizer for SuperOffice CRM

1

Overview of the installation steps

First we install the Domino part of the synchronizer; then we install the SuperOffice part of the Domino Synchronizer. All steps are described in this installation manual and are split up in a manual installation and an automated installation.

General installation steps:

System requirements
Before you start with the installation please read the following knowledge base article about the system requirements for the Domino Synchronizer.

http://kb.infobridge.com/knowledgebasearticle10345.aspx

After installation the short cuts to register, schedule and to run Data Synchronizer will be added to the Windows start menu.

NOTE
*No matter what installation you are performing you have to **restart** the Notes Domino server.*

Installing the Domino Synchronizer (Domino Part)

Domino Server part of the Synchronizer

This is the first part of the installation process for the Domino Synchronizer for SuperOffice CRM.

To install Domino Synchronizer for SuperOffice CRM (Domino part) you'll need to run the setup file, double-click on the file to start the installation procedure.

Follow the steps of the installation procedure to install Domino Synchronizer for SuperOffice CRM. The installation program will create a temporary folder that holds the Domino Synchronizer for SuperOffice CRM files for the Domino part.

When the installer is started you see the welcome screen of the Domino Synchronizer for SuperOffice CRM

- Click on the "**Next**" button.

During the rest of the installation follow the instructions presented to you during the installation.

The installation will ask you for the location where the temporary installation files will be stored for the final installation of the Domino Synchronizer for SuperOffice CRM. Change the folder if needed.

After a successful installation of the Domino Synchronizer for SuperOffice CRM components we have the following options:

- Launch Set-up:

This option shows you a configuration form where all the changes will be made for you. This is the most save option to choose when you are not an experienced Lotus Notes Domino System Administrator.

- Do a manual configuration:

  This option is for the Lotus Notes Domino System Administrator that knows his system.

- Check the option "**Launch Set-up**" to use the configuration tool:

  Go to the chapter "**Domino Synchronizer configuration**" and read the installation instructions.

- Leave the option "**Launch Set-up**" unchecked when you want to perform a manual configuration:

  Go to the chapter "**Manual installation of the Domino Synchronizer**" and read the installation instructions.

- Press the "**Finish**" button to finish this step of the installation.

ATTENTION

*If you have not checked the option "**Launch Set-up**" and you want to start the configuration tool, go to the following location to start it by hand.*

Go to the folder you have set during the installation and launch the setup program.

Domino Server configuration settings

- Open the Domino Administrator console on the Notes client.
- Open the Domino server where the Synchronizer has been installed.
- Select the 'Configuration' tab on the '[COMPANY NAME] Domain' tab.
- Select and click on the "**Arrow**" to open the "**Server**" settings.

- Click on the "Current Server Document" item.

NOTE

Please ensure that the Domino Server has access to the
<SuperOffice Connector address> <Server Port>

For more information see the following knowledge base article:
http://kb.infobridge.com/KnowledgebaseArticle10233.aspx

- Now the "**Domino Server Settings**" will become visible.
- Select the "Internet Protocols…" tab.
- Select the "**HTTP**" tab.

- Check the following setting:
  - Check and change (if necessary) the following setting:
    Setting: "**Allow HTTP clients to browse databases**"
    Value: "**No**"

- Select the "**Domino Web Engine**" tab.
- The following settings must be the same as explained below.

NOTE

*When you want to make changes to the "**Domino Server Settings Document**" you must **double click with your mouse on the setting** you want to change or **press CTRL+E***

Generating References

Setting	Description
Does this server use IIS?	This must be set to "**No**"; It violates with the pre-requisites of the Domino Synchronizer.
Port number	This is 80 by default; But can be set to any available free port.

Java Servlets

Setting	Description
Java Servlet Support	Must be set to "**Domino Servlet Manager**" When it is set to another value it violates with the pre-requisites of the Lotus Notes Synchronizer.
Servlet URL path	This must be **/servlet**.
Class path	Must hold the following entries for the Lotus Notes Synchronizer: **domino\servlet;** **domino\servlet\sono\jdom.jar;** **domino\servlet\sono\joda-time-1.6.jar;** **domino\servlet\sono\commons-lang-2.5.jar;** **domino\servlet\sono\commons-codec-1.4.jar;** **domino\servlet\sono\sono.jar** Entries are separated with a "**;**" **NOTE** *When there are other entries already in the list then **do not** change these entries, just append the new values.*
Servlet file extensions	Must include **.class** **NOTE** *When there are other entries already in the list then **do not** change these entries.*

Session persistence	Must be "**Disabled**".
Session state tracking	Enabled.

NOTE
Remember to save the configuration document after making changes.

- Press 'Save & Close'.
- You are ready with this step of the configuration.

Automatic Domino Synchronizer installation

Domino Synchronizer configuration tool

Question: Why a configuration tool?
Answer: We made this tool to help you configure and deploy the Domino Synchronizer within your organization.

NOTE
*During the configuration steps everything is logged in the **InfoBridge.SONO.Setup.log** file. The file can be found in the installation folder you choose when you started the Lotus Notes Synchronizer installation wizard.*

For example:
C:\Program Files\InfoBridge Software B.V\Lotus Notes Synchronizer - Domino

When you have chosen the option "**Launch Set-up**" then the following screen is presented to you:

A	**Welcome:** Current step
B	**Deploy as 32/64-bit:** Installation Step 2.
C	**System Check:** Installation Step 3.
D	**Copy Files:** Installation Step 4.
E	**Update Configuration:** Installation Step 5.
F	**Finished!:** Installation Step 6.

1. **Welcome** screen, if you want to proceed with the installation press "**Next**".
2. **Deploy As 32/64-Bit**; Choose 32-bit or 64-bit .
   - Press '**Next**' when you want to proceed with the installation.

3. **System Check**; This step will perform several checks to see which processes are running and if the important files are in place and if the tasks that is used by the Lotus Notes Synchronizer is available.

Explanation of messages

The icons can visible in the configuration tool when you are performing step 2. The meaning of these icons is explained below

Warning icon	Description
	OK - Everything is alright we can continue without further action.
	WARNING – Action will be taken in the following steps.
	STOP – You must take immediate action before you can continue.
	INFO – You must take immediate action before you can continue.

- The following checks are performed:
  Is the Domino Server running; If the server is running please shut down the server:
  - Go to the **Domino Server**;
  - Open the Domino Administrator and go to the "**Server**" tab (see image below);

  - go to the **Server Console** and press the '**Live**' button (see image below).

  - and enter the following command: '**Quit**'.

- the Domino Server is now shutting down.

- Check the **Lotus Notes Domino program path**; If this path is not correct then cancel the installation and perform a manual installation.
- Check the **Lotus Notes Domino data path**; If this path is not correct then cancel the installation and perform a manual installation.
- The **notes.ini** file is found in the **Lotus Notes Domino program folder**; If this file is not found your Lotus Notes Domino installation will not function properly.
- The **servlets.properties** file is found in the **Lotus Notes Domino data folder**; If this file is not found, it will be copied to the correct **Lotus Notes Domino program\data path** when you perform the step '**Copy Files**'.
- Check if the **HTTP server** is enabled; If this is not enabled you have to add this to the Notes.ini file manually.
- When you are ready for the next installation step press '**Next**'.

4. **Copy Files**; This step copies the necessary installation files that are needed for the Lotus Notes Synchronizer. The files are copied to the **program and/or program/data path** of your Lotus Notes Domino installation. The following files are copied:
   - **nfobridg.dll** file:
     - this file is installed in the **Lotus Notes Domino program path**.

EXAMPLE
C:\Program Files\Lotus\Domino\nfobridg.dll.

- **Servlets** files:
  - these files are installed in the **Lotus Notes Domino program\data path**.
  - the servlet files are installed in the domino\servlet folder.
  - there is one separate folder named **sono.**

  EXAMPLE
  C:\Program Files\Lotus\Domino\data\domino\servlet\sono.
- **databases** and **templates** files:
  - these files are installed in the **Lotus Notes Domino program\data path**.
  - the database files are installed in the **infobridge** folder.
  - the templates files are installed in the **infobridge\template** folder**.**

  EXAMPLE
  C:\Program Files\Lotus\Domino\data\infobridge.
  C:\Program Files\Lotus\Domino\data\infobridge\templates.
- **notes.ini** file:
  - this file is located in the **Lotus Notes Domino program path**.
  - a backup is made before changing of the original notes.ini file.

  EXAMPLE
  The backup of the notes.ini file is placed in the folder:
  C:\Program Files\Lotus\Domino\data\infobridge\backup
  notes_20101217_165623.ini.

  - The following settings are added or changed in the notes.ini file;
    EXTMGR_ADDINS=nfobridg.dll
- **servlets.properties** file (backup is made before changing):
  - this file is located in the **Lotus Notes Domino program path**.
  - a backup is made before changing of the original servlet.properties file.

  EXAMPLE
  The backup of the notes.ini file is placed in the folder:
  C:\Program Files\Lotus\Domino\data\infobridge\backup
  servlet_20101217_165650.properties

  - The following settings are added or changed in the servlet.properties file:
    - **servlet.std.code=com.infobridge.sono.sotodom.SOToDom**
    - **servlet.dts.code=com.infobridge.sono.domtoso.DomToSO**
    - **servlets.startup=dts std**

After the files have copied to the to the program and/or program/data path of your Lotus Notes Domino installation you see an overview of the copied files. You can check what has been copied, where is it located and did the file copy successfully.

- When you are ready for the next installation step press '**Next**'.

5. **Update Configuration**; This step makes changes to the **notes.ini** and **servlets.properties** file for you. The changes that will be made are explained below:
   - **Servlet.properties** updates:
     - **Configure the SONO Servlet Aliases:**
       - **Add** if not exists or **update** if exists:
         servlet.dts.code=com.infobridge.sono.domtoso.DomToSO
       - **Add** if not exists or **update** if exists:
         servlet.std.code=com.infobridge.sono.sotodom.SOToDom
   - Configure the **Servlet startup**:
     - **Add** if not exists or **update** if exists:
       servlets.startup=dts std

6. **Finished!**; This step, shows you a log file overview where all the actions are registered during the installation of the Domino Synchronizer:
   - You can find the log file in the folder you choose when you had to set the installation folder.

EXAMPLE

The backup of the notes.ini file is placed in the folder:
C:\Program Files\Lotus\Domino\data\infobridge\backup
servlet_20101217_165650.properties

- After finishing the installation you have to start the Domino Server again.
- Press the "**Exit**" button.

Please go to chapter 'Finalizing the installation' to continue the installation.

Manual installation of the Domino Synchronizer

Notes.ini settings

1. Go to the Domino program folder (see image below).

NOTE

*The '**Notes.ini**' file should be located in the Domino program file folder (This is the directory containing the Domino executable such as nserver.exe).*

2. Open the "**Notes.ini**" file in a text editor such as Notepad.

3. Locate the line which starts with "**ServerTasks=**"

4. Ensure that the "**HTTP"** task is included in this line, so that the line appears similar to the image above (there can be more specific Domino tasks present do not change these specific settings).

5. Locate the line which starts with "**EXTMGR_ADDINS=**".

6. We have to add the "**nfobridg.dll**" setting to the "**EXTMGR_ADDINS=**" line.

7. If the line does not exists then **add** the line to the '**notes.ini**' file.

8. We need to add the "**SONO_Task_List**" line to the "**notes.ini**" file.

9. Add the following line to the end of the "**notes.ini**" file.

   a. SONO_Task_List=nserver.exe, nhttp.exe

NOTE

When auto-processing of meeting-requests is used nrouter.exe should be added to SONO_Task_List, see chapter Auto-accepting meeting requests - nrouter.exe for more information.

NOTE

When Lotus Notes Traveler is used ntraveler.exe should be added to SONO_Task_List, see chapter Lotus Notes Traveler - ntraveler.exe for more information.

10. Save the file.

NOTE

Be sure that you save the notes.ini file after making changes.

Auto-accepting meeting requests - nrouter.exe

This application is part of the Lotus Notes Domino installation; it handles the auto-processing of meeting requests. This can be turned on by the Lotus Notes System Administrator.
When auto-processed meetings should be synchronized to SuperOffice the nrouter.exe task should be added to the SONO_Task_List in the notes.ini.

Please note that this will result in a slight decrease in the Synchronizer performance.Lotus

Notes Traveler - ntraveler.exe

By default the Lotus Notes Synchronizer does not handle any appointments created through the Lotus Notes Traveler. To make sure these appointments are captured as well ntraveler.exe should be added to the SONO_Task_List in the notes.ini.

Replication – nreplica.exe

All appointments and tasks that are replicated from a different Domino Server will be pickup by the Domino Synchronizer. However if the Domino Server is running the Domino Synchronizer execute replication by a "PULL" a task should be added in the SONO_Task_List section in the Notes.ini file.

For more information about replication visit the InfoBridge knowledge base article: http://kb.infobridge.com/KnowledgebaseArticle10238.aspx

Stop the Domino server

1. Go to the **Domino Server.**
2. Open the Domino Administrator and go to the "**Server**" tab (see image below).

3. Go to the **Server Console** and press the '**Live**' button (see image below).
4. and enter the following command: '**Quit**'.

5. The Domino Server is now shutting down.

REMARK / NOTE

If this is the first Domino Synchronizer for SuperOffice CRM installation you perform, you don't have to shut down the Domino Server before you install the Domino Synchronizer databases and templates.

6. Continue with the chapter "**Installing the Domino Synchronizer databases and templates**".

Installing the Domino Database and Templates

In the installation folder that was created during the setup procedure of the Domino Synchronizer for SuperOffice CRM we can find all the files we need for the installation

1. First we are installing the Domino Synchronizer databases and Domino Synchronizer templates.
2. Open the installation folder.

EXAMPLE

C:\Program Files\InfoBridge Software B.V.\Lotus Notes Synchronizer - Domino.

What you find in this installation folder are the following components:

- Database files.
- Templates files.
- Servlet files.
- nfobridg.dll file.
- servlets.properties file.

3. Copy the content of the "**infobridge\Template**" folder (containing several Domino Synchronizer databases and templates).

4. To the **Domino program path** you can copy the complete "**infobridge**" folder.

REMARK

It's possible that the Domino Server files are in a different folder on the server than the image below shows.

5. Open the Domino Administrator console on the Notes client.
6. Select the '**Files**' tab on the '**[COMPANY NAME] Domain**' tab.
7. Select the '**InfoBridge**' folder.

8. Now we have to sign all the databases in the **'infobridge'** folder with a "**Server ID**" or an "**Administrator ID**".

NOTE

*It is recommended that either the Server ID or an Administrator ID is used. The ID which you use to sign **MUST** have at least Editor (with Delete) Access to all the Domino user's mail databases.*

9. In the drop down box '**Show me**' make sure that you have selected "**Databases only**".

10. Select all the files in the folder "**infobridge**"

11. Right click with the mouse on one of the selected file items and a context sensitive menu is shown.

12. Click the '**Sign…**' menu item.

13. A popup screen is shown, here you have to select the '**ID**' to sign the database files with.

14. When you have made the appropriate choices you can press the '**OK**' button.

15. A progress bar is shown in the bottom of the screen when the settings you have set are applied to the databases (see image below).

16. Now we have to sign the templates files.

17. Now we have to sign all the databases in the **'infobridge\Template'** folder with a "**Server ID**" or an "**Administrator ID**".

18. Select in the '**Show me**' selection box '**Templates Only**'.

19. Select all the files in the folder **'infobridge\Templates'.**

20. Right click with the mouse on one of the selected file items and a context sensitive menu is shown.

21. Click the '**Sign…**' menu item

22. A popup screen is shown, here you have to select the '**ID**' to sign the database files with.

23. When you have made the appropriate choices you can press the '**OK**' button.

24. A progress bar is shown in the bottom of the screen when the settings you have set are applied to the templates (see image below).

Install the servlet files

1. Open the installation folder.

EXAMPLE
C:\Program Files\InfoBridge Software B.V.\Lotus Notes Synchronizer - Domino.

2. Copy the complete "**servlet**" folder which contains all the files from the installation folder.

3. to the **Domino program\data\domino path** folder.

4. You are done copying the "**servlet**" files.

Install the "nfobridg.dll" server file

1. Open the installation folder.

EXAMPLE
C:\Program Files\InfoBridge Software B.V.\Lotus Notes Synchronizer - Domino.

2. Verifying the Domino Server Architecture version (32bit/64bit)

   http://kb.infobridge.com/KnowledgebaseArticle10247.aspx

3. Pick the correct version of the dll according to the Domino server version, either "**nfobridg.dll**" or "**nfobridg_64.dll**".

4. Copy the selected dll from the installation folder and rename it to "**nfobridg.dll**".

5. Place it in the **Domino program path** folder.

NOTE
This is the directory containing the Domino executable such as nserver.exe.

Servlets Properties

1. Locate the "**servlets.properties**" file.

2. This should be located in the **Domino program\data path** on the Domino server.

3. Open the installation folder.

EXAMPLE
C:\Program Files\InfoBridge Software B.V.\Lotus Notes Synchronizer - Domino

4. Copy the file "**servlets.properties**" from the installation folder.

5. to the **Domino program\data path** folder

6. You have to check that the "**servlets.properties**" file contains the following lines

servlet.dts.code=com.infobridge.sono.domtoso.DomToSO
servlet.std.code=com.infobridge.sono.sotodom.SOToDom

servlets.startup=dts std

NOTE
Be sure that you save the file after making changes.

Finalizing the installation

Start the Domino server

1. Go to the installation folder of your Domino installation and start the Domino server.
2. The Domino Server is starting up.
3. Verify the installation of the components.
4. After the Domino server has started again, check for the following lines on either the Domino server console, or in the Domino server log (log.nsf).

```
9/11/2010 04:27:56 PM  InfoBridge SONO Capture: v1.2.x     loading....
9/11/2010 04:28:18 PM  InfoBridge SONO Capture: v1.2.x     loaded successfully.
```

```
9/11/2010 04:29:02 PM  HTTP JVM: com.infobridge.sono.domtoso.DomToSO: init
9/11/2010 04:29:03 PM  HTTP JVM: SONO: DomToSo 1.2.x loaded successfully
9/11/2010 04:29:04 PM  HTTP JVM: com.infobridge.sono.sotodom.SOToDom: init
9/11/2010 04:29:04 PM  HTTP JVM: SONO: SOToDom 1.2.x loaded successfully
9/11/2010 04:29:15 PM  HTTP Server: Started
```

NOTE

The dates, time and version number will differ on your system.

Refresh the database design

After you have signed the databases and the templates for the Domino Synchronizer we have to refresh the design of the database and template files.

1. Open the Domino Administrator console on the Notes client (if it's not already open).
2. Select the '**Files**' tab on the '**[COMPANY NAME] Domain**' tab.
3. Select the '**InfoBridge**' folder.

4. Now we have to refresh all the databases in the **'infobridge'** folder.
5. In the drop down box "**Show me**" make sure that you have selected "**Databases only**".
6. Select the database file you want to refresh the design for in the folder "**infobridge**".

7. Go to the menu item "**File - > Database**" in the upper left corner of the "**IBM Domino Administrator**" window.

8. Click the '**Refresh Design…**' menu item.
9. A popup screen is shown, default it shows the "**Local**" server.

10. Select the correct server (*this is the server you have installed the database and template files on*)
11. Press the '**OK**' button
12. A message will pop up.

13. Press "**Yes**" if you want to refresh the database design or press "**No**" to abort this operation
14. After pressing "**Yes**" a progress bar is shown in the bottom of the screen when the database design is refreshed

NOTE
You have to do this for all the database files that are used by the Domino Synchronizer.

www.crmplaza.com/Apps/Domino Synchronizer

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