iPhora Automate - Installation Instructions

PREPARATION

iPhora is an HCL Domino application that consists of multiple databases (nsf files). All databases are contained in a single installer database (iphora_install_basic_vXXX.nsf). Although iPhora itself is a web-based application, the installation and initial configuration are done using the HCL Notes and/or Admin client.

Note that your Domino server must already be configured to allow web access. In order to provide data security, all web access should be secured with TLS (in other words, https). It is your responsibility to properly configure the Domino web server.

Listed below are guidelines and recommendations for setting up an HCL Domino web server for use with iPhora:

- Use session-based authentication (either single server or multi-server).
- If you already have a domcfg.nsf database with a suitable login form, you may use that. Otherwise, the installer can provide a pre-configured domcfg.nsf. If you want to use the iPhora version of domcfg.nsf, you must first delete any existing domcfg.nsf before the installation begins.
- Make sure the http task is running and is included in the serverTasks setting.
- Test and confirm web access to the server

The iPhora application needs to create Domino web users and groups. These are usually created in a secondary directory named iphora_names.nsf, which is configured using directory assistance. If this server is not already configured to use directory assistance, you can allow the iPhora installer to configure directory assistance for you.

If you are already using directory assistance to resolve group names, then in the installation settings you can specify the name of an existing Domino directory (either primary or secondary) where iPhora can create users and groups. In this case, you would select the option to skip having iPhora set up directory assistance.

When you create a user in iPhora, that user will be created as a web user, not as a full HCL Notes user. However, during the user creation process, you may specify an existing HCL Notes user who will then be configured as an iPhora user. This does not apply to the first iPhora user, the one that is created during the installation process.

INITIAL STEPS

1. Unzip the installation file that you have downloaded from myiPhora customer portal. Copy the installer database (iphora_install_basic_vXXX.nsf) to the target server. You may place it directly in the Data folder or into a subfolder of the Data folder. If you are using Notes Database Copy to bring the installer database over to the server, you need to use a HCL Notes 12.x or higher client.

2. Use the HCL Admin client to sign the installer database with either the server ID or a user ID that has full admin rights to the server.

3. Using either the HCL Notes or Admin client, open the installer database. Be sure to open the server replica of this database, not a local replica.

4. Read the initial Welcome page, then click Continue.

5. When the Agreement page is displayed, review the terms (and optionally print them). If you accept the terms, click Accept.

6. When the Instructions page is display, review the steps (and optionally print them). When done, click Continue.

7. When the Settings page is displayed, complete all required fields. These are the installation settings, which are used to control the installation process. These settings are described next:

INSTALLATION SETTINGS

Installation Information:
The name of the existing Domino Organization Name is displayed automatically.

If you want the iPhora organization to be the same as the Domino organization, then place a checkmark on "Use existing Domino organization name". Otherwise, remove the checkmark and click on the button to generate a new, unique organization name for iPhora.

If your Domino organization name contains spaces or special characters, then you should generate a new organization name for iPhora.

Enter your license key into the License Key field. You must have a valid license key to install and use iPhora. The license key can if found in the myiPhora customer portal. Log in credentials to the portal would have been sent to you by email after you have successfully registered and have been verified.

Enter the name of the subfolder (relative to the Domino Data folder) wherein the iPhora will be installed. If this folder does not exist, the installer will create it.

Company Information:
In this section, enter your company name and a brief description.

Server Settings:
In the Domino Server Name field, enter the name of the Domino sever on which you are installing iPhora. This should be the same server where the installer database currently resides. Enter the name exactly as it appears on the Basics tab of the Server document (example: server1/acmecorp).

In the Domino Domain field, enter the name of your Domino main domain. This can be found in the Domain Name field on the Basics tab of the Server document.

In the Server FQHN field, enter the fully qualified host name of the server, that is, the web DNS name for the server (example: https://server1.acmecorp.com).

Administrator Information:

In this section, enter the information needed to create the account for the first iPhora user. This user will be the iPhora admin.

Note that the Salutation should be the preferred salutation for that user, as it would appear at the top of an email (examples: "Hi John" or "Dear Mr. Smith").

County and Privacy:

In the Country field, select the country code of the country in which the server resides.

In the Privacy Jurisdiction field, select the country or the state/province (if applicable) whose privacy laws will apply to this installation.

Outbound Notification Email Settings:

iPhora can generate outbound notification emails to support workflow activity. These are used to inform users of the status of workflows, as well as other situations. The two fields in this section are used to configure the name and email address that will appear on these notifications.

Enter a sender name and a sender email address. For example, the sender name could be "Acme Corporation" and the sender email address could be "no_reply@acmecorp.com".

Directory Assistance:

If needed, iPhora can set up and configure directory assistance using iphora_da.nsf and iphora_names.nsf.

If you already have directory assistance configured on this server (or if you do not wish to use directory assistance), then select "Yes" to skip this setup; you will then be asked for the directory filename that iPhora should use for creating users and groups (such as "names.nsf").

If you are uncertain of your existing directory assistance configuration, then select "Yes" to skip this step and then specify the primary or secondary directory you are already using.

WARNING: If you have already configured directory assistance, then select "Yes" to skip this step. Otherwise, you may break your existing directory assistance configuration.

Installation Files:
If you already have a web login form configured using domcfg.nsf, then select "Yes" to skip the installation of iPhora's domcfg.nsf installation. You only need to install iPhora's domcfg.nsf if you currently do not have a domcfg.nsf database present on your server.

WARNING: If you allow iPhora to install its version of domcfg.nsf, then you must first delete any existing domcfg.nsf file that exists in the Data folder on that server.

iPhora requires that certain JAVA JAR files are present and configured for use on the server. In general, you should allow the installer to install and configure these JAR files. They are required by iPhora.

If you would prefer to install the JAR files manually, you can select "Yes" to have the installer skip the installation of the JAR files. Later, when you reach the Complete page, you will find a feature to download the JAR files.

Next Button:
When all fields on the Settings form have been filled in or selected, click Next (at the bottom of the form).

TEST COMMUNICATION

In this section, click on the Verify Connection button to test communication with the iPhora server. This test will confirm that outbound HTTP/HTTPS communication to the web is open and that the iPhora registration/activation server can be reached.

Note that the outbound API call for the communication test will originate from your server and not from your HCL Notes or Admin client.

You must successfully confirm communication before continuing. If communication is unsuccessful, refer the installation log for details. The test may take up to 30 seconds to complete.

INSTALL
In this section, clicking the Install button will start the installation process. It will be initiated on the server and once started, it will run independently of your HCL Notes or Admin client.

The installation may take anywhere from a few minutes to as long as 20 minutes depending on your server and its existing load. The single longest part of the installation is the signing of the databases, which may take several minutes.

You can use Check Status button to check on the progress of the installation. You can use the log to identify installation problems with a failed installation.

- During the installation process, the following tasks are automatically performed:

- the installation folder is created (unless it already exists)
- the iPhora databases are extracted and copied into the installation folder
- the iPhora databases are signed with the server's ID
- the iPhora databases have their ACLs configured
- other configuration operations are performed on the iPhora databases
- unless skipped, the JAVA JAR files are installed and configured
- unless skipped, directory assistance databases is installed and configured
- unless skipped, the iPhora domcfg.nsf database is installed and configured
- the first user account (the admin account) is created
- the initial Domino groups are created in the specified Domino directory

When the installation is 100% done, click Next.

JAR FILES

If you elected to manually install the required JAVA JAR files, there is a feature on this page to download the files. Click the "Download JAR Files" button to see a list of JAR Files. You can them place in them in your preferred location for the server to access them.

RESTART SERVER

If directory assistance is configured by iPhora, or if JAR files have been installed by iPhora, then you must restart the Domino server. You can do this using the Domino Admin client.

ACTIVATION

In this section, click Activate to activate the installation. This will cause the server to initiate communication with the iPhora registry/activation server. If the communication is successful and the license key is recognized, then the license information is automatically downloaded into the installation.

The Activation procedure usually takes 30 to 60 seconds.

When the activation is successful, click Next.

FINAL STEPS

If directory assistance is configured by iPhora, then after restarting the server, the following actions must be performed manually:

A. When the server has restarted, open the iphora_da.nsf database, select the first (and only) document present, and click Edit Directory Assistance.

B. When the document is opened for editing, click Save & Close.

C. After the document is closed and the view is visible again, select the document and click on the appropriate button to enable it.

E. Close the iphora_da.nsf database.

COMPLETE

At this point, the installation process and activation are complete.

The URL for accessing iPhora is of the general form:

https://server1.acmecorp.com/iphora/xportal.nsf/portal

Where server1.acmecorp.com is the FQHN of the server and iphora is the installation folder.

Note that you may need internet site documents and/or rules to support this URL.

If immediately after logging into iPhora, the browser navigates to a non-iPhora webpage, then reenter the correct URL. Proper configuration of internet site documents can avoid this.