

ESSENTIALS FOR DOMINO EVALUATION MANUAL - INSTALLATION

STEP 1: Make a new copy of the Essentials for Domino database on your server. You can choose any file name and path for your new database.

As shown in Figure 1.1, make sure to select 'Application design and documents' for the 'Specify What To Copy' option. Also, choose to copy the 'Access Control List'.

Figure 1.0

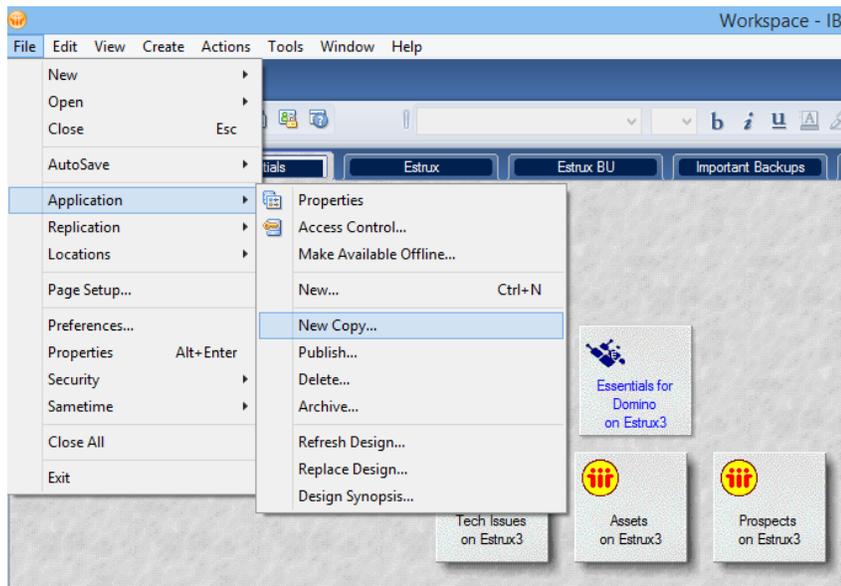
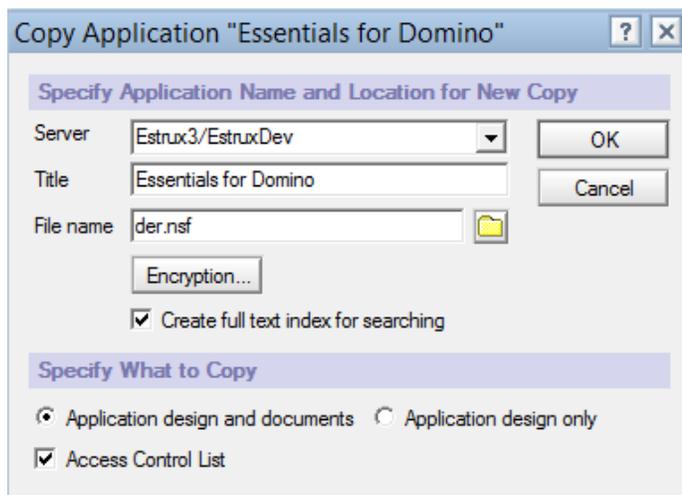


Figure 1.1



STEP 2: Prior to attempting to open your new database, use your Domino Administrator application to sign the design of the database. The signer should have high levels of access on the server, as all scripts will run with the authority of the signer.

As shown in Figure 2.1, turn OFF 'Update existing signatures only (faster)'. Once the database has been signed you can close out of the Domino Administrator application.

Figure 2.0

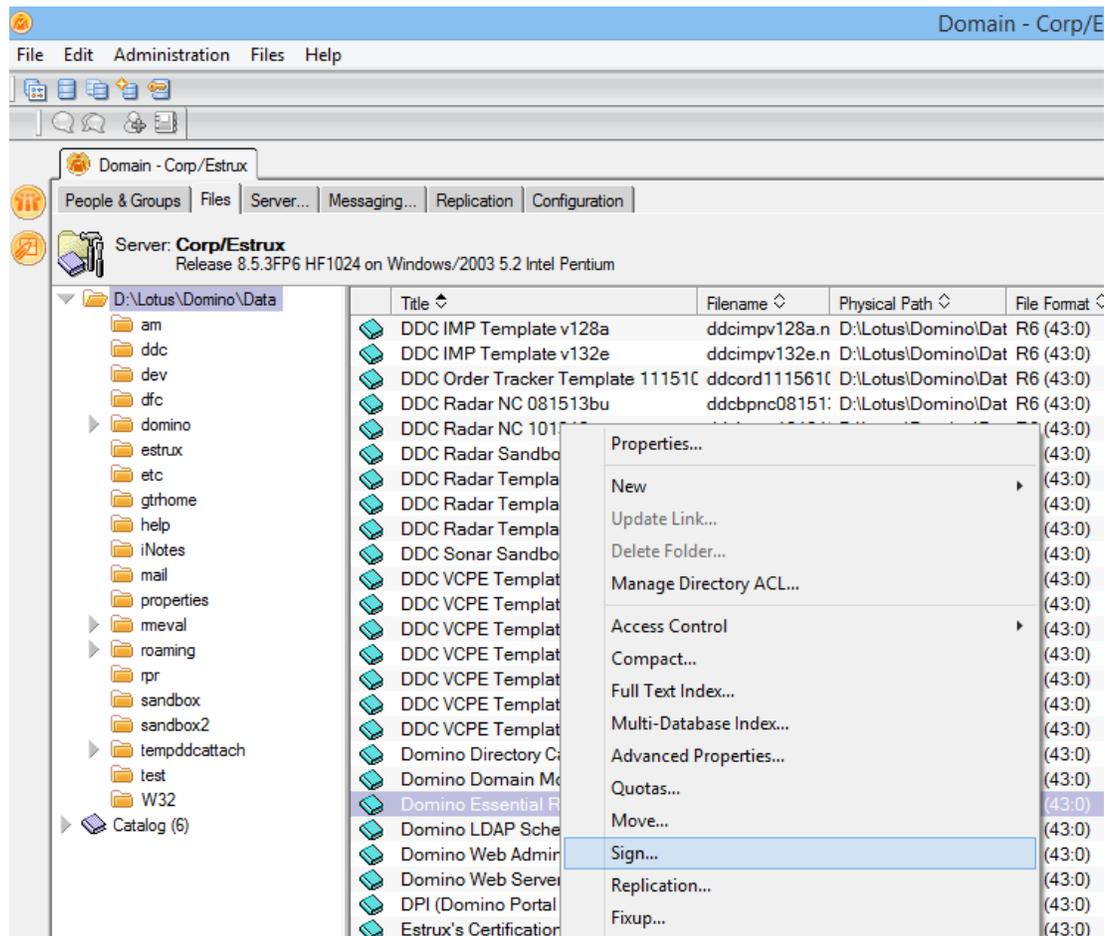
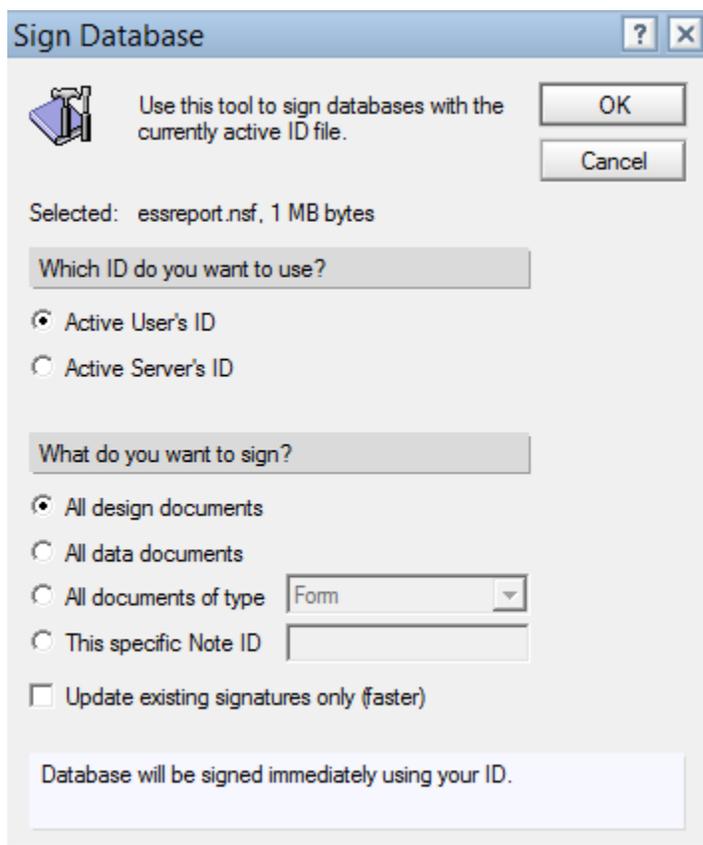


Figure 2.1

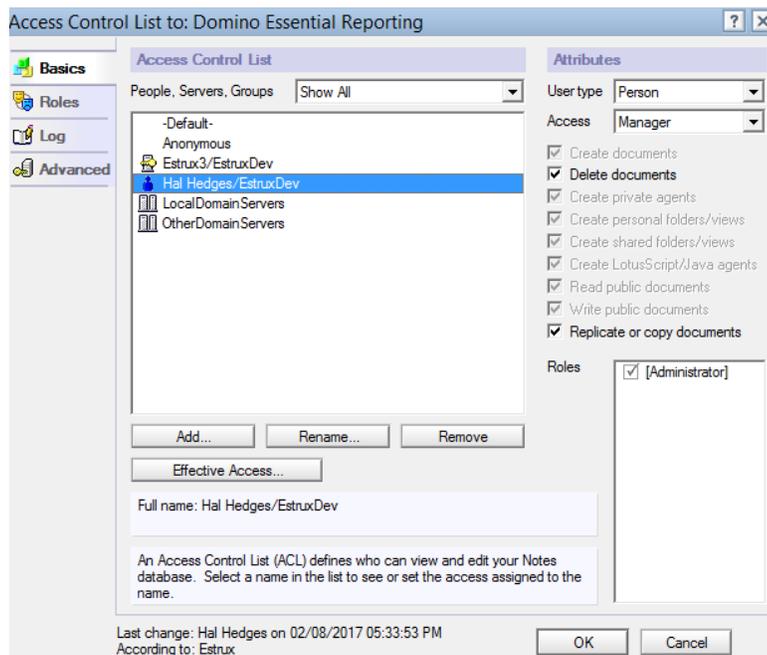


STEP 3: Set the Access Control List on your new Essentials for Domino application as appropriate. There is a single role in the database called 'Administrator'. Add this role to all users and groups you wish to have editor access to the application. Those in the 'Administrator' role can perform all application functions, such as creating and editing reports, etc. Those without the 'Administrator' role see only the 'Run Report' action and can perform no other operations against the database.

The ACL entry for 'Anonymous' should be set to Reader, with attributes for 'Read public documents' and 'Write public documents' turned on.

The ACL entry for '-Default-' is set to Manager so you can add whatever groups you wish. It is recommended that you set '-Default-' to Reader with attributes for 'Read public documents' and 'Write public documents' turned on, after you have finished explicitly adding users and groups with access to the application.

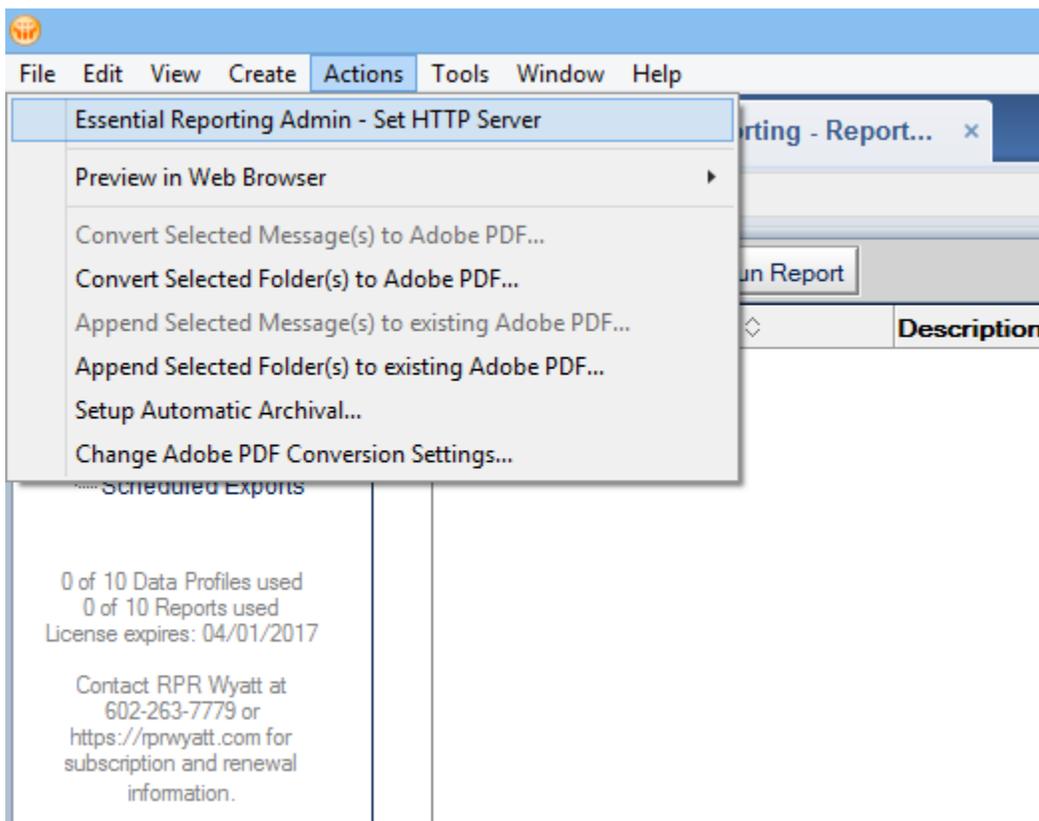
Figure 3.0



STEP 4: Set the HTTP server name using the action 'Essential Reporting Admin – Set HTTP Server', available from any view in the newly created Essentials for Domino database. HTTP Server name is the distinguished DNS name of your Domino Web Server, and will take the following format: <http://apps.acme.com>

You can test if your HTTP server name is valid by trying it in a web browser.

Figure 4.0



STEP 5: Congratulations. Setup of your new Essentials for Domino database is now complete!

ESSENTIALS FOR DOMINO EVALUATION MANUAL – SESSION BASED AUTHENTICATION

If your Domino server is using ‘Session Based Authentication’, you will need to make one final adjustment to your configuration.

Some technologies, such as Microsoft Excel, RSS feed readers and WebDAV clients, are only able to use Basic Authentication. The goal here is to add an Internet Site Rule to make basic authentication work for Excel.

See the following tech note for more information:

<http://www-01.ibm.com/support/docview.wss?uid=swg21250004>

STEP 1: Figure out if your Domino server is using ‘Session Based Authentication’.

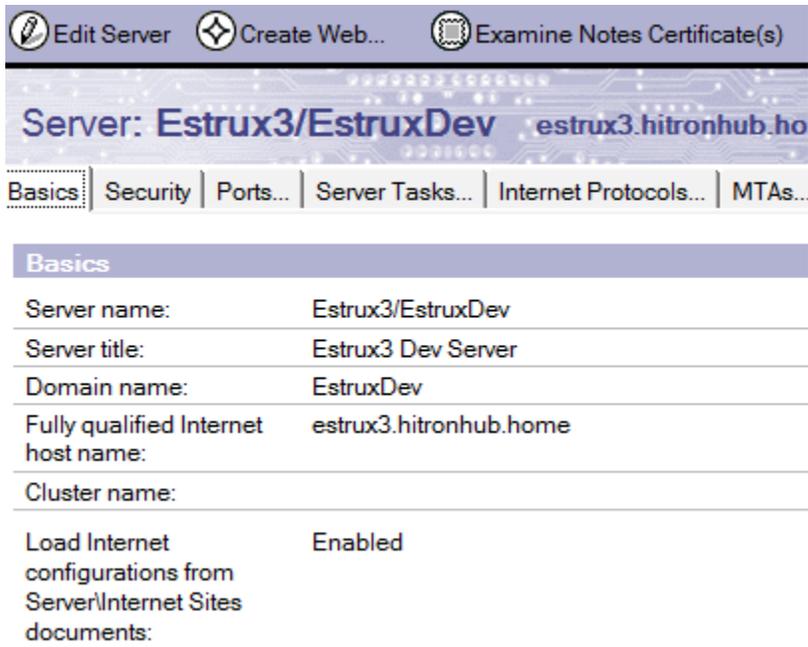
Open the Domino Directory database on the server where Essentials has been installed. Navigate to the ‘Internet Protocols’ tab on your server document. Open the ‘Domino Web Engine’ tab.



STEP 2: If your Domino server is NOT using ‘Session Based Authentication’, you can skip the remainder of this section and proceed to: “ESSENTIALS FOR DOMINO EVALUATION MANUAL – DATA PROFILES” (Page 11 of this manual.)

STEP 3: You will need to enable Internet Site documents next.

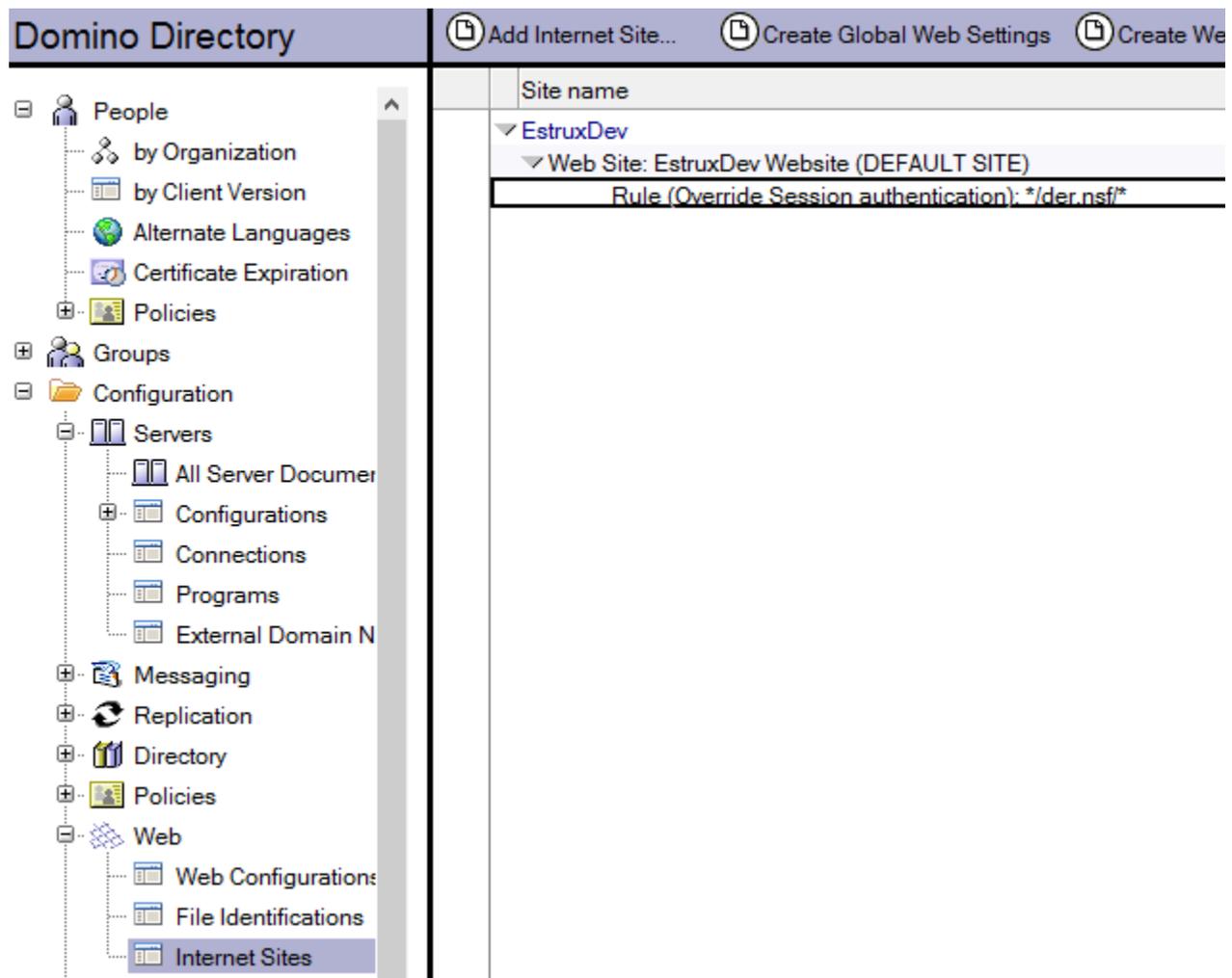
On the 'Basics' tab of your server document, make sure 'Load Internet configurations' is enabled.



| Basics | |
|--|------------------------|
| Server name: | Estrux3/EstruxDev |
| Server title: | Estrux3 Dev Server |
| Domain name: | EstruxDev |
| Fully qualified Internet host name: | estrux3.hitronhub.home |
| Cluster name: | |
| Load Internet configurations from Server\Internet Sites documents: | Enabled |

STEP 4: Navigate to 'Web\Internet Sites' in your Domino Directory.

If there is already an internet site, skip to Step 6 in this section.

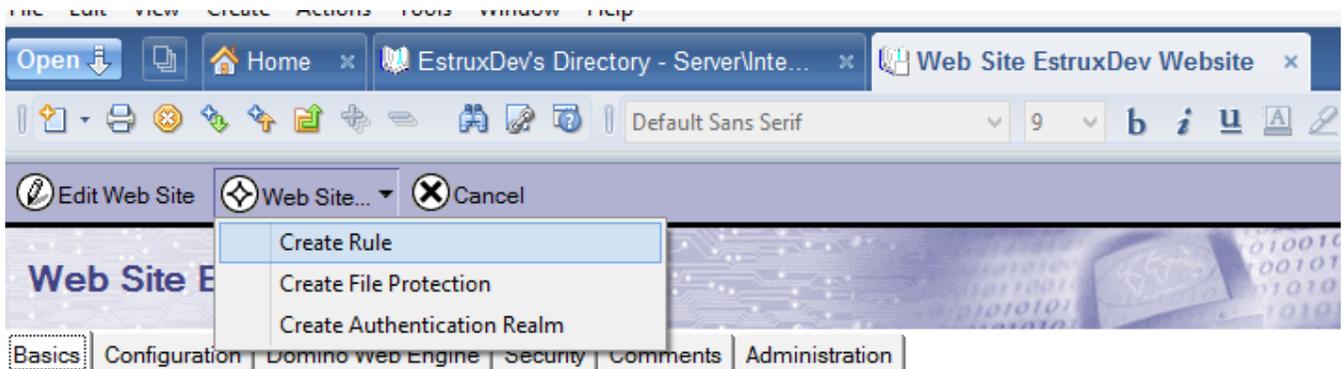


STEP 5: If there are no Internet Site documents configured for your server, you will need to add at least one. See Domino Administrator help for questions on filling out Internet Site documents.

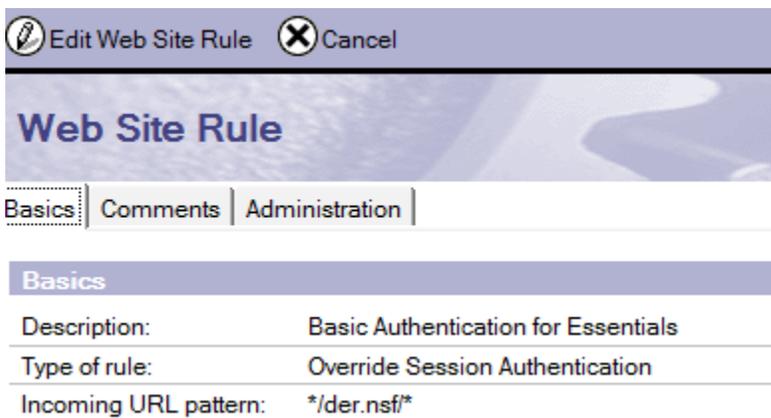
The screenshot shows the 'Web Site EstruxDev Website' configuration dialog box. At the top, there are three buttons: 'Edit Web Site' (pencil icon), 'Web Site...' (diamond icon), and 'Cancel' (X icon). Below the title bar is a header with the text 'Web Site EstruxDev Website' and a decorative background of binary code and circuit patterns. A tabbed interface is visible with the following tabs: 'Basics' (selected), 'Configuration', 'Domino Web Engine', 'Security', 'Comments', and 'Administration'. The 'Basics' tab is active, showing the following fields:

| Site Information | |
|---|---|
| Descriptive name for this site: | EstruxDev Website |
| Organization: | EstruxDev |
| Use this web site to handle requests which cannot be mapped to any other web sites: | <input checked="" type="radio"/> Yes <input type="radio"/> No Note: only one web site should have this option set to Yes |
| Host names or addresses mapped to this site: | |
| Domino servers that host this site: | * |

STEP 6: Click 'Web Site\Create Rule'



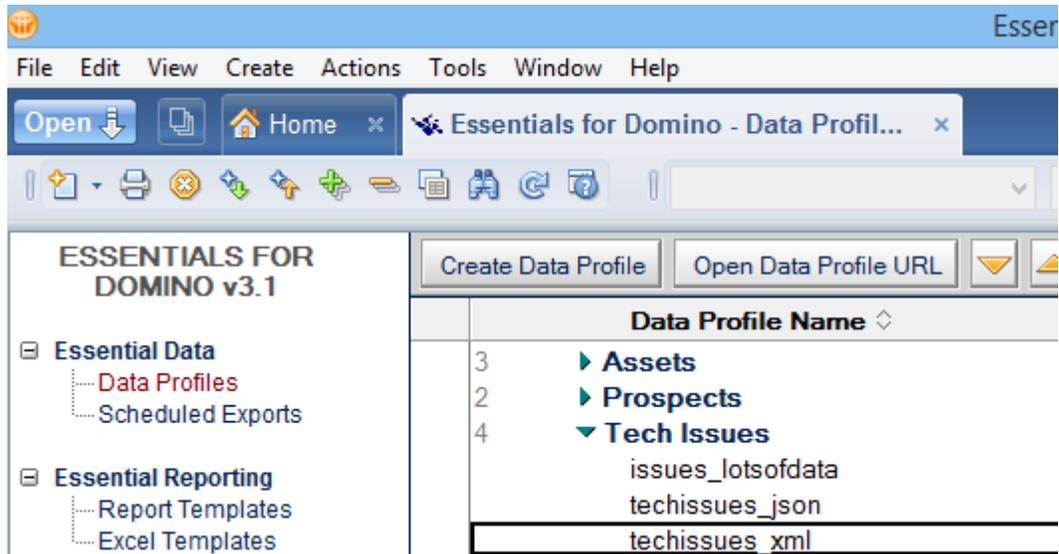
STEP 7: Fill out 'Web Site Rule' document, selecting 'Override Session Authentication' as the type of rule. Enter the relative path of the Essentials database.



STEP 8: Restart the HTTP server. Session based authentication is still in place for all traffic not specified by the 'Incoming URL Pattern'.

ESSENTIALS FOR DOMINO EVALUATION MANUAL – DATA PROFILES

STEP 1: Create a Data Profile by clicking ‘Create Data Profile’ in the Data Profiles view.



STEP 2: Fill out Data Profile Basics section using these guidelines.

DATA PROFILE

| DATA PROFILE BASICS | |
|---------------------------|--|
| Profile Name: * | Enter a short key name with no spaces or special characters, all lowercase. |
| Category: | Enter a category to assist in organizing this document in Notes views. |
| Output Type: * | <input checked="" type="radio"/> XML <input type="radio"/> JSON Select an output type, XML or JSON. |
| HTTP Server Name: * | http://estru3.hitronhub.home:8088 Specify the fully qualified http or https server name. Example: http://dev.acme.com |
| Require Authentication: * | <input checked="" type="radio"/> No <input type="radio"/> Yes If Yes is selected, user must be authenticated with the system. |
| Description: | Enter a detailed description for this Data Profile. |
| URL: | http://estru3.hitronhub.home:8088/der.nsf/er_agent_getdata?openagent&datapofile= |

1. Enter a Data Profile Name. This name will be used in URLs, so it needs to be short but descriptive.
2. Select an Output Type. For our first Data Profile, let's go with XML.
3. Specify if access to this data profile requires authentication by end user with their Notes http credentials.

STEP 3: Fill out the Data Selection section using these guidelines.

| DATA SELECTION | |
|------------------------|--|
| Select Database: | <input type="button" value="Select Database"/> |
| Database Server: | <input type="text"/> Enter the server of a Lotus Notes database which will serve as the source for this Data Profile. |
| Database Replica ID: * | <input type="text"/> Enter the replica id of a Lotus Notes database which will serve as the source for this Data Profile. |
| Database Name: * | <input type="text"/> Enter the database name of a Lotus Notes database which will serve as the source for this Data Profile. |
| Database Path: * | <input type="text"/> Enter the database path of a Lotus Notes database which will serve as the source for this Data Profile. |
| Method: * | <input checked="" type="radio"/> All Docs In View <input type="radio"/> Categorized View <input type="radio"/> Database Full Text Search If a role name is entered, only users having the specified role can use this Data Profile. |
| View: * | <input type="button" value="Select View"/> Select a view from specified database to serve as the source for this Data Profile. |

1. Start by finding the database using the 'Select Database' action. When selecting a database via this prompt, values for Database Server, Replica ID, Name and Path will be automatically filled in.
2. Choose a Data Selection Method. 'All Docs in View' returns all documents in the specified view as the data set. 'Categorized View' allows you to specify a single category of document in a categorized view. 'Database Full Text Search' allows you to specify any valid Lotus Notes full text search string using the @Formula language.
3. Clicking on the 'Select View' button will present users a list of all views for the selected database.

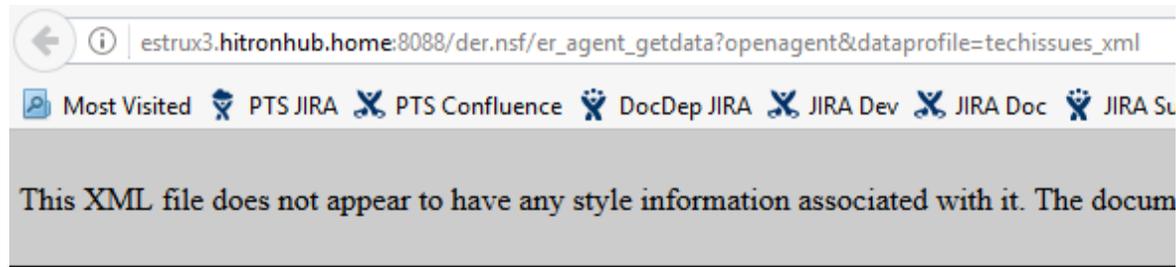
STEP 4: Fill out the Data Output section using these guidelines.

| DATA OUTPUT | |
|--------------------------------|---|
| Nodes Container Name: * | <input type="text"/> Enter a short descriptive name for data generated from spaces, and no special characters. |
| Individual Node Name: * | <input type="text"/> Enter a short descriptive name for each node in data generated in lowercase text, no spaces, and no special characters. |
| Node Based On Form: | <input type="text"/> <input type="button" value="Select Form"/> Selecting one or more Form and Subform names here i |

1. Enter a 'Nodes Container Name'. Technically you can use any string, but try to come up with something that makes logical sense. For instance, if you were making a Data Profile for Tech Issues in a Help Desk application, it would make sense to set 'techissues' as the value for 'Nodes Container Name'.
2. Enter an 'Individual Node Name'. Again, any string is valid, but following our example...if the 'Nodes Container Name' is 'techissues' then a good value for 'Individual Node Name' might be 'issue'.
3. Using the 'Select Form' button, specify one or more forms and subforms from the selected database. Selecting a Form will allow you to easily fill out the next section by allowing selection of fields from the specified form.

STEP 6: Verify the Data Output section using these guidelines.

1. If everything has been filled out correctly, you will see a screen of xml.

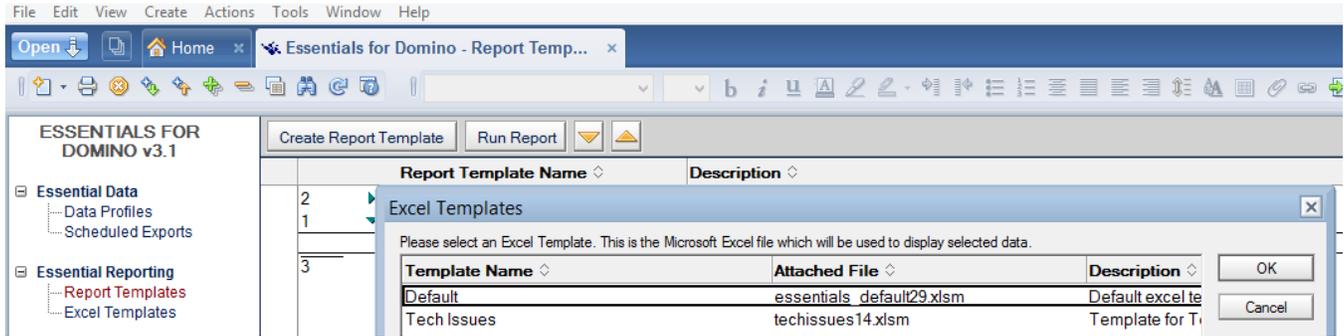


```
- <techissues>
  - <techissue>
    <techissue_num>001</techissue_num>
    <techissue_name>No Network Connectivity</techissue_name>
    <techissue_status>Open</techissue_status>
    <techissue_severity>Critical</techissue_severity>
    <techissue_category>Network</techissue_category>
    <techissue_customer>Acme</techissue_customer>
    <techissue_customerdept>IT</techissue_customerdept>
    <techissue_customercost>122.99</techissue_customercost>
    <techissue_tech>Tommy Tech</techissue_tech>
    <techissue_created>3/26/2017 10:52:35 AM</techissue_created>
    <techissue_desc>No Network Connectivity to Acme</techissue_desc>
  </techissue>
  - <techissue>
    <techissue_num>002</techissue_num>
    <techissue_name>Bad XML for Customers Report</techissue_name>
    <techissue_status>Open</techissue_status>
    <techissue_severity>Low</techissue_severity>
    <techissue_category>Programming</techissue_category>
    <techissue_customer>Acme</techissue_customer>
    <techissue_customerdept>Sales</techissue_customerdept>
```

2. CONGRATULATIONS! You've got data!

ESSENTIALS FOR DOMINO EVALUATION MANUAL – REPORT TEMPLATES

STEP 1: Create a Report Template by clicking ‘Create Data Profile’ in the Report Templates view. Select ‘Default’ for the Excel Template when prompted.



STEP 2: Fill out Report Template Basics section using these guidelines.

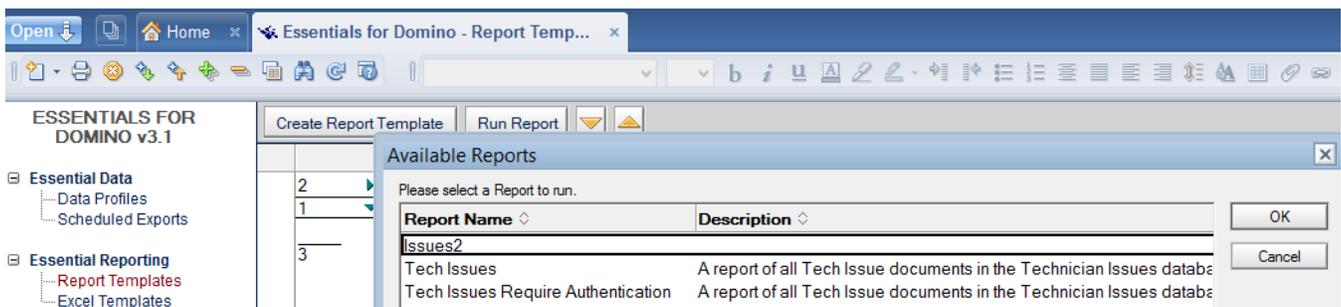
REPORT TEMPLATE

| REPORT TEMPLATE BASICS | |
|------------------------------------|---|
| Report Template Name: * | Enter a descriptive report template name. |
| Category: | Enter a category to assist in organizing this document in N |
| Data Profile for Data Set 1: * | Select a Data Profile which will be used to supply data for |
| Data Profile for Data Set 2: | Select a Data Profile which will be used to supply data for resultant report. |
| Report Attachment: * |  <input type="button" value="Select Attachment"/> essentials_default29.xlsm |
| Saved Report File Name: * | Enter the file name, with no extensions. Report will be s |
| Starting Path for Local XML Files: | Enter a path where local xml files related to this Report re 'C:\data\'. Make sure the path ends with the \ character. |
| Include in Run Reports Menu: | Yes |

1. Report Template name is what shows when end users click Run Report, so make it a descriptive name.
2. Select a Data Profile. This will be the data source for your report.
3. Select a name for the saved excel file. Make it short and descriptive. Do NOT enter extensions or any special characters.
4. Save and Close.

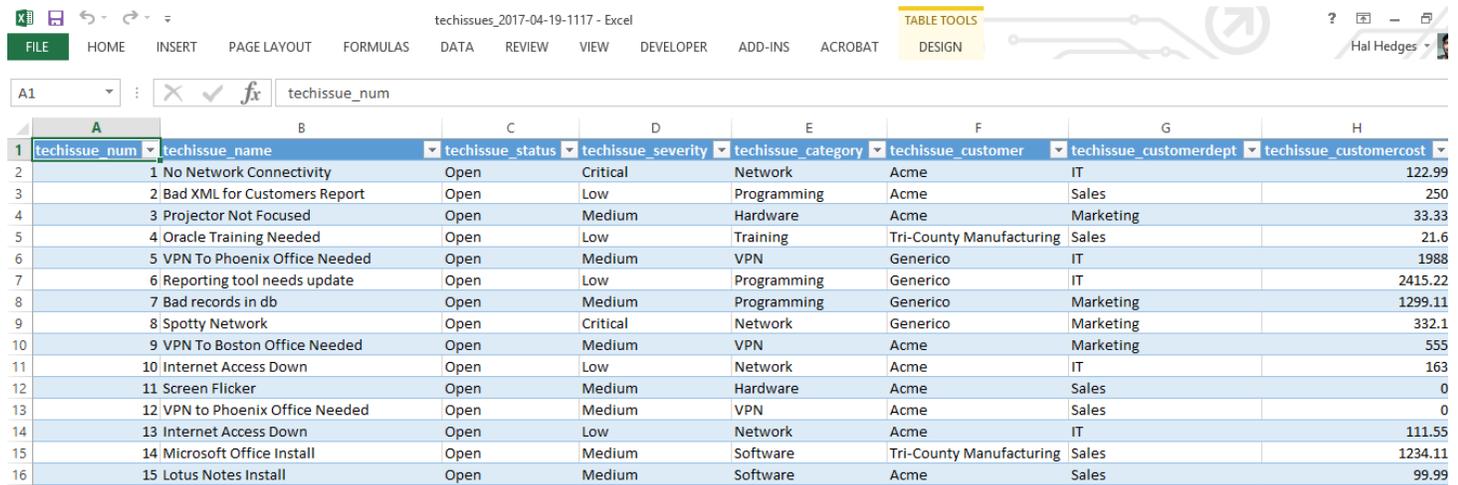
STEP 3: Run the report using these guidelines.

1. Once the Report Template has been created, click on the 'Run Report' view action.
2. You will be presented a list of available reports.
3. Select the report you've just created.
4. You will be prompted for a location where this result will be downloaded.
5. Once you specify a location, the excel file will open and data will be downloaded.
6. If the data requires authentication, you will be prompted to enter your Lotus Notes http credentials.



ESSENTIALS FOR DOMINO EVALUATION MANUAL – REPORTS

STEP 1: The default report has been created and opened. You are presented with the opening screen which displays raw imported data.



The screenshot shows an Excel spreadsheet with a table of technical issues. The table has 8 columns: techissue_num, techissue_name, techissue_status, techissue_severity, techissue_category, techissue_customer, techissue_customerdept, and techissue_customercost. The data is as follows:

| techissue_num | techissue_name | techissue_status | techissue_severity | techissue_category | techissue_customer | techissue_customerdept | techissue_customercost |
|---------------|------------------------------|------------------|--------------------|--------------------|--------------------------|------------------------|------------------------|
| 1 | No Network Connectivity | Open | Critical | Network | Acme | IT | 122.99 |
| 2 | Bad XML for Customers Report | Open | Low | Programming | Acme | Sales | 250 |
| 3 | Projector Not Focused | Open | Medium | Hardware | Acme | Marketing | 33.33 |
| 4 | Oracle Training Needed | Open | Low | Training | Tri-County Manufacturing | Sales | 21.6 |
| 5 | VPN To Phoenix Office Needed | Open | Medium | VPN | Generico | IT | 1988 |
| 6 | Reporting tool needs update | Open | Low | Programming | Generico | IT | 2415.22 |
| 7 | Bad records in db | Open | Medium | Programming | Generico | Marketing | 1299.11 |
| 8 | Spotty Network | Open | Critical | Network | Generico | Marketing | 332.1 |
| 9 | VPN To Boston Office Needed | Open | Medium | VPN | Acme | Marketing | 555 |
| 10 | Internet Access Down | Open | Low | Network | Acme | IT | 163 |
| 11 | Screen Flicker | Open | Medium | Hardware | Acme | Sales | 0 |
| 12 | VPN to Phoenix Office Needed | Open | Medium | VPN | Acme | Sales | 0 |
| 13 | Internet Access Down | Open | Low | Network | Acme | IT | 111.55 |
| 14 | Microsoft Office Install | Open | Medium | Software | Tri-County Manufacturing | Sales | 1234.11 |
| 15 | Lotus Notes Install | Open | Medium | Software | Acme | Sales | 99.99 |

By default there are two Excel workbook sheets at the bottom of your report, 'DataSet1', which is the default view, and 'Preferences'.

Congratulations, you've run your first report!

In all respects, this is a normal Microsoft Excel file. It can be modified, saved, emailed, etc.

STEP 2: The next goal is to extend your report.

You can extend your report via normal excel techniques or...

Click on the 'Preferences' worksheet, and then click on 'Create New Pivot Table'.

You will be presented with the following Wizard:

The image shows an Excel spreadsheet with a worksheet named 'Preferences' selected. The spreadsheet has columns A and B. The 'Preferences' worksheet contains the following content:

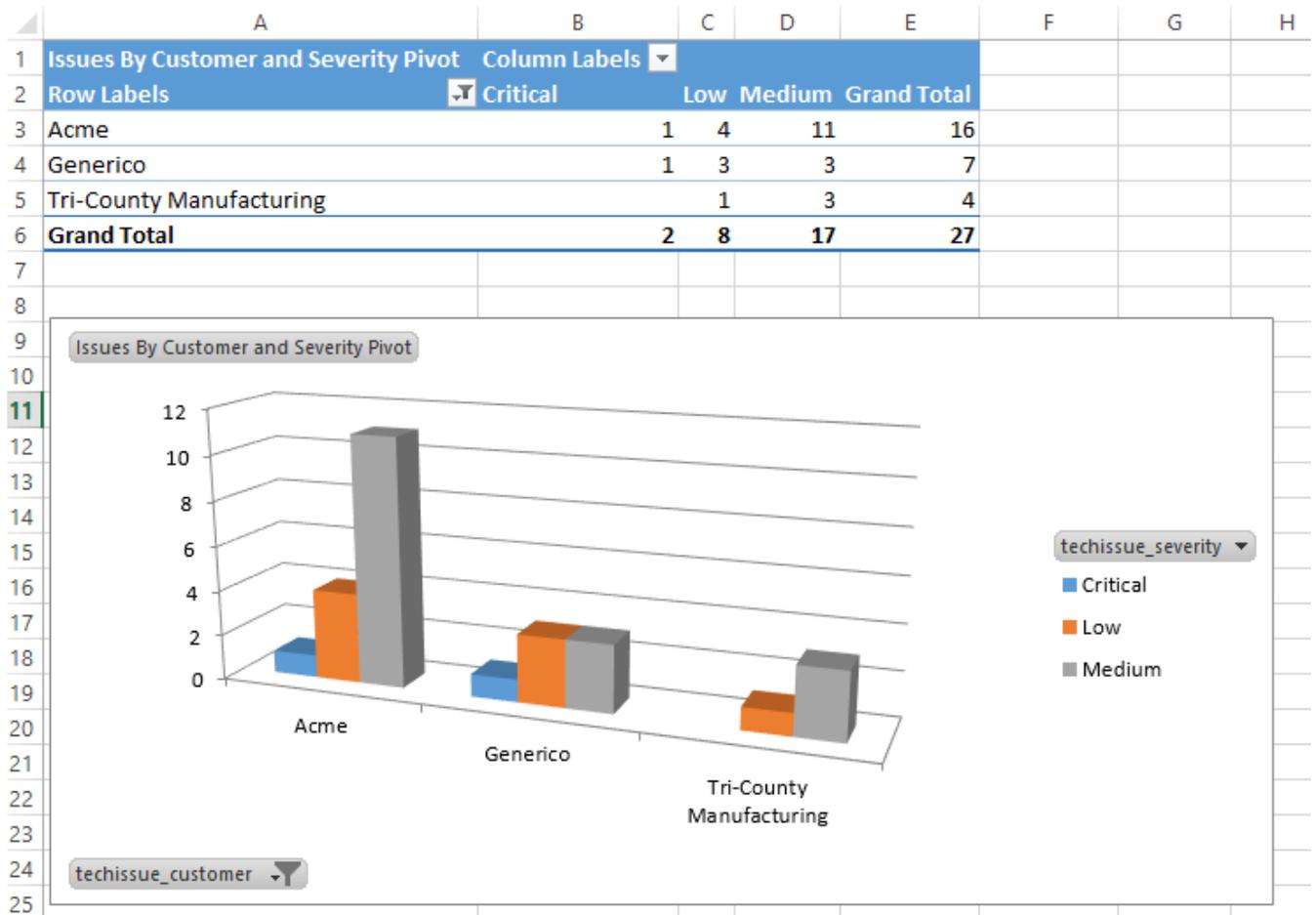
| | A | B |
|---|--------------------|---|
| | Step 1: | |
| | Step 2: | |
| | Step 3: | |
| | Step 4: | |
| | Perform Login: | |
| | Data Set 1 Source: | |
| 0 | Data Set 2 Source: | |
| 1 | Last Updated: | |
| 2 | | |
| 3 | | |

A 'New Pivot Table' wizard dialog box is overlaid on the spreadsheet. The dialog box has the following fields and options:

- Pivot Table Name: Issues By Customer and Severity
- Data Set: DataSet1
- Row 1: techissue_customer
- Row 2: (empty)
- Column 1: techissue_severity
- Column 2: (empty)
- Data Field: techissue_num
- Chart Type: 3D Column Clustered

At the bottom of the dialog box, there are three buttons: Cancel, Clear, and OK.

Filling out the wizard will result in a new Pivot Table and matching Pivot Chart on a new Excel workbook page as shown below.



Make as many updates to the excel file as you'd like.

Now we save the Excel file and re-attach into the Report Template document in the Essentials database.

The next time a user selects the report it will be drawn with the extended reports and formatting you've added.

You can repeat the iterative process of modifying your excel template and re-attaching it into the Report Template document as many times as it takes.

ESSENTIALS FOR DOMINO EVALUATION MANUAL – VIEW PROFILES

STEP 1: Create a View Profile by clicking ‘Create View Profile’ in the View Profiles view using these guidelines.

STEP 2: Fill out the View Profile Basics section using these guidelines.

| | |
|--|---|
| <input type="button" value="Close"/> <input type="button" value="Save"/> | |
| VIEW PROFILE | |
| VIEW PROFILE BASICS | |
| View Profile Name: * | <input type="text"/> Enter a short key name with no spaces or special characters, all lowercase. |
| Category: | <input type="text"/> Enter a category to assist in organizing this document in Notes views. |
| HTTP Server Name: * | <input type="text" value="http://estru3.hitronhub.home:8088"/> Specify the fully qualified http or https server name. Example: http://dev.acme.com |
| Require Authentication: * | <input checked="" type="radio"/> No <input type="radio"/> Yes If Yes is selected, user must be authenticated with the system. |
| View Profile URL: | URL will be calculated once document has been saved. |

1. Enter a View Profile Name. This name will be used in URLs, so it needs to be short but descriptive.

STEP 2: Fill out the View Profile Display Settings section using these guidelines.

| DISPLAY SETTINGS | |
|------------------|--|
| Data Profile: * | <input type="text" value="▼"/> Select a Data Profile which will be supply data for the rendered view. |
| View Title: | <input type="text"/> Enter a View Title for the rendered view. |
| Header Include: | <input type="text"/> Enter a url to be included as the view header. |
| Footer Include: | <input type="text"/> Enter a url to be included as the view footer. |

1. Select a Data Profile to serve as the data source for this web view. The selected Data Profile must supply JSON type data. Report templates and Microsoft Excel use XML as a data format, and View Profiles use JSON, so you'll need a json version of the view profile your working with.
2. Enter a descriptive title for the view.
3. You may alternately choose to enter any url to be the header and footer on the web view.

STEP 3: Fill out the Columns section using these guidelines.

Close Save Open View Profile URL

| COLUMNS | | |
|---------|---|-----------------------------------|
| Col Num | Element | Display Name |
| 1 | techissue_num <input type="text"/> | Issue Number <input type="text"/> |
| 2 | techissue_status <input type="text"/> | Status <input type="text"/> |
| 3 | techissue_category <input type="text"/> | Category <input type="text"/> |
| 4 | techissue_severity <input type="text"/> | Severity <input type="text"/> |
| 5 | techissue_name <input type="text"/> | |
| 6 | techissue_created <input type="text"/> | |
| 7 | techissue_tech <input type="text"/> | |
| 8 | techissue_customer <input type="text"/> | |
| 9 | techissue_customerdept <input type="text"/> | |
| 10 | techissue_customercost <input type="text"/> | |
| 11 | techissue_desc <input type="text"/> | |
| 12 | <input type="text"/> | |
| 13 | <input type="text"/> | |
| 14 | <input type="text"/> | |
| 15 | <input type="text"/> | |

Available Columns on Data Profile

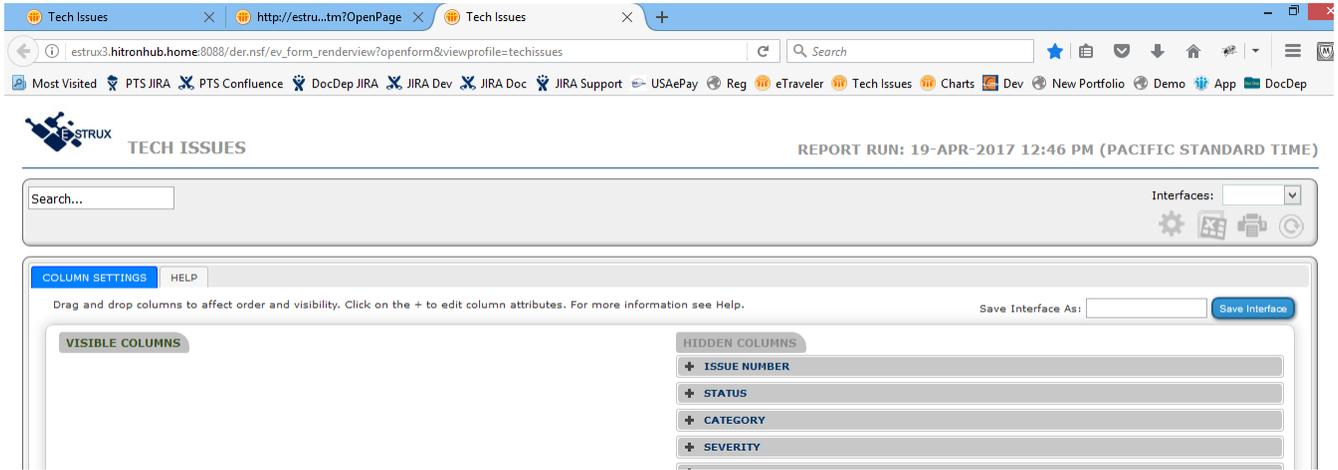
Select a Column...

- techissue_category
- techissue_created
- techissue_customer
- techissue_customercost
- techissue_customerdept
- techissue_desc
- techissue_name
- techissue_num
- techissue_severity
- techissue_status
- techissue_tech

OK Cancel

1. After selecting a Data Profile, the action button next to each element allows you to pick and choose a data column from the Data Profile. Select at least a couple of data columns and enter corresponding display names.
2. Click the 'Save' action.
3. Click the 'Open View Profile URL', which will open the view in a browser.

STEP 4: Configure the view using a browser.



1. Start by dragging at least one column from the Hidden columns over to the Visible columns. You can expand the column and edit properties as you see fit.
2. When you've done enough to make a coherent report, enter an Interface Name in the space supplied and click on 'Save Interface'.
3. You can create as many interfaces as you'd like before turning this over to the end users, who can also extend the View by creating and modifying Interfaces.
4. Created interfaces are available to all users.
5. In no time at all you will have crisp browser views of your notes data.

