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Lotus QuickPlace 3.0

Administrator's Guide

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Chapter 1
QuickPlace Administration Overview

Administration overview

IBM® Lotus® QuickPlace™ is a self-service Web tool for team collaboration. QuickPlace allows you to publish, share, and track all information relevant to a project. Teams can then use QuickPlace to store resources (such as files, discussions, and schedules) related to a project in a common place, where everyone can access the latest information.

This document is intended for QuickPlace Administrators, and describes the features and functionality available in QuickPlace 3.0.

As the administrator of the QuickPlace server, you can:

- Enable and disable QuickPlace features for all places on the QuickPlace server.
- Manage all places on the QuickPlace server.
- Manage PlaceTypes in order to use an existing place as a model, or template, for a new place.
- Set up e-mail communications.
- Manage the Search Places feature that uses Domain Search to search across places.
- Set up client authentication and specify access control features.
- Establish connections to an LDAP user directory on the company network or on the Internet, to simplify the registration of new members in each place on the QuickPlace server.

Note You configure QuickPlace mail routing through Domino™. For more information, see Domino Administrator Help.

For information on installing and upgrading QuickPlace servers, including information on setting up QuickPlace to work with Sametime® and Domino Off-line Services (DOLS), see the *QuickPlace Installation and Upgrade Guide*.

What's new in this release?

The following features are new for Administrators in QuickPlace Release 3.0.

The Place Catalog

The Place Catalog collects data about places and provides administrators with a central point of control across multiple QuickPlace application servers and clusters. Administrators can generate reports from the Catalog to set management policies. The My Places end-user feature also depends on the Catalog.

QPTool command line tool

QuickPlace server administrators can run a command line tool called QPTool from their server console, the program directory, or from a batch file or other program. QPTool replaces the Admin Utility available previously. Administrators can use the administration utilities in the QPTool application to complete a variety of tasks, including locking and unlocking places, changing user names, registering and unregistering places, generating reports. These are just a few of the tasks you can do using QPTool. For complete information, see the chapter "Using QPTool commands."

SSL for LDAP directories

Administrators can now set up the QuickPlace 3.0 server to use SSL between the QuickPlace server and the LDAP user directory.

Integration with a full-featured Sametime server

Administrators can now connect the QuickPlace server to a full-featured Sametime server, rather than using a built-in modified version of the Sametime server. This change provides two new end-user features: the ability for users to see and chat with other users who are online and the ability to schedule online meetings in the QuickPlace calendar. For information on setting up the QuickPlace server to work with Sametime, see the *QuickPlace Installation and Upgrade Guide.*

Mapping to the QuickPlace schema

If the QuickPlace server is connected to an LDAP user directory, the LDAP and QuickPlace servers may use and understand different properties for the same directory object. You must translate the LDAP server's entries so that the QuickPlace server can understand its information. You translate, or map, the information using XML.

Customizing the directory lookup filter

Administrators can customize the LDAP search filter used to look up entries in a user directory. By default, the filter uses fairly narrow criteria to look up entries in the directory, but by using XML you can customize the filter to expand the range of entries you can find.

Web caching

QuickPlace now includes a Web cache on the server's disk to store pages users have previously accessed. When a user reopens a page, the server retrieves the page from the cache, instead of rebuilding the page. Building a page can require numerous individual steps, so retrieving an existing page from the cache can save significant time.

Native Directory Names

Native Directory Names provides better integration of member management between QuickPlace and other applications that share an external directory for authenticating users. QuickPlace no longer changes the format of names for members from an external directory. Using native name format, QuickPlace supports multiple users with the same first and last names as members of the same place. Each user is uniquely identified through the native directory. This feature is backward-compatible, to ensure places built with earlier releases of QuickPlace work with 3.0, even before they have been upgraded.

PlaceTypes

You can replicate PlaceTypes.

Advanced Search and Search Places

The Advanced Search feature allows users to search within specific rooms or folders in a place, as well as search an entire place. The Search Places capability with Advanced Search allows users to conduct searches beyond their local place.

Clustering support across platforms

QuickPlace 3.0 supports the same clustering functionality and the replicamaker command on all supported server platforms, including AIX® and Solaris.

Double-Byte Character Set (DBCS) user name support

QuickPlace managers can also now add member names that have double-byte characters from an external directory for QuickPlace servers configured with session-based authentication.

Installation and upgrading

To improve the scalability, manageability, and interoperability of QuickPlace deployments, QuickPlace 3.0 no longer supports a standalone configuration. QuickPlace 3.0 must always be installed in an overlay configuration on a Domino 5.0.10 server. Sametime 3.0 is also installed and managed separately from QuickPlace 3.0. No Sametime components are installed with QuickPlace 3.0.

In addition, installation, server setup, and upgrade are separate processes, which minimize downtime. (These were previously combined in a single procedure.) You can stop the server to install QuickPlace 3.0, and immediately restart it. You can then upgrade your server, places, and PlaceTypes without stopping the server. In addition, you can upgrade in stages, upgrading only certain places and PlaceTypes at a time.

Tools available for administering a QuickPlace server

The following tools are available for completing QuickPlace server administration tasks:

- QPTool commands
- QPCONFIG.XML file
- Server Settings in the administration place
- NOTES.INI file settings

In addition to these tools, you configure features through Domino settings as well. For example, for mail routing, QuickPlace relies on the mail routing configuration set up through Domino.

QPTool commands

You can use QPTool commands to complete many administrative tasks, for example, locking and unlocking places, changing user names, and registering places. For a complete description of all the commands available, see the chapter “Using QPTool Commands.”

QPCONFIG.XML file

You can specify many QuickPlace server configuration settings by creating an XML file called QPCONFIG.XML and specifying the desired settings in the file. A QuickPlace server comes with a sample, template file called QPCONFIG_SAMPLE.XML which is installed in the server data directory. The file includes all of the settings you can specify in the QPCONFIG.XML file, descriptions of the settings, the default values, and sample values. Many of the settings in QPCONFIG.XML are described in this book.

However, for information on all of the available settings, look at the QPCONFIG_SAMPLE.XML file. The types of settings you can specify in QPCONFIG.XML are:

- Authentication
- My Places
- Offline services (enable or disable)
- Server messages
- Super users
- User directory
- Search Places
- Place Catalog
- Cluster
- Sametime
- Notifications, such as calendar, invitation, and e-mail

To customize a setting described in QPCONFIG_SAMPLE.XML, you create an XML file called QPCONFIG.XML as described in the following procedure. If you do not create a QPCONFIG.XML file, the QuickPlace server uses all of the default settings.

1. Create a file called QPCONFIG.XML in the data directory. Save it as a text file.
2. Copy the following lines from the QPCONFIG_SAMPLE.XML file to the QPCONFIG.XML file.

```
<?xml version="1.0" encoding="UTF-8" standalone="yes" ?>

<!--

  IBM Lotus QuickPlace Server Settings configuration

   ================================================

If you modify this file, please restart the http server.
The values are only read

during server startup.

 -->

<server_settings>

</server_settings>
```

3. Between the two server_settings statements, copy from the QPCONFIG_SAMPLE.XML file the section that contains the settings you want to modify and paste the section into the QPCONFIG.XML file. For example, to modify super_user settings, copy these settings into QPCONFIG.XML as follows:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes" ?>
<!--
  IBM Lotus QuickPlace Server Settings configuration
   ================================================
If you modify this file, please restart the http server.
The values are only read during server startup.
 -->
<server_settings>
<super_user enabled="true">
<!--  the dn can be for a user or group
  -->
  <dn>cn=QuickPlace Admin,o=ibm</dn>
  </super_user>
  </server_settings>
```

Note To change a child setting under a parent setting, make sure to copy the parent setting, too.

4. Modify the settings as desired, for example, the distinguished name of a super user, and then save the QPCONFIG.XML file.
5. Restart the HTTP server task on the QuickPlace server so it recognizes the changes.

Server Settings in the administration place

Some server settings you specify in the Server Settings room in the administration place. You can use the Server Settings room to specify some server security settings, to set up the server to connect to an external LDAP directory, and to specify other settings, too. To use the Server Settings room to specify administration settings, you first sign in to the QuickPlace homepage as an administrator.

1. In the Address or Location box in your browser, enter the URL for the QuickPlace server, for example:

   http://servera.acme.com/quickplace

2. Click SignIn.

3. Enter the user name and password for a QuickPlace server administrator.
4. Click Server Settings in the table of contents.

The settings you can specify are described in the appropriate chapters in this document. For example, the chapter “Connecting to a User Directory” describes how to connect to an external LDAP directory.

NOTES.INI file settings

The NOTES.INI file on the server controls some QuickPlace configuration settings. For example, you specify server cache settings in the NOTES.INI file.

Starting and stopping QuickPlace on a server

To start QuickPlace on a server, start the Domino server on which you have installed QuickPlace. For example, click the Domino Server icon on the desktop.

To stop QuickPlace on a server, stop the Domino server on which it runs. For example, type exit at the server console.

Chapter 2
Connecting to a User Directory

This chapter describes how to connect the QuickPlace server to an external LDAP directory and how to configure the QuickPlace server to work with the directory.

User directories

A place can have local users or external users. Local users have contact and authentication information stored in the membership database of the place (Contacts1.nsf). Managers of the place can create users, change the users' access levels, and delete users. Local users can only access the place where their membership information is contained.

The contact and authentication information for external users is stored in a user directory on a separate server. When an external user is made a member of a place, a copy of their contact information is stored in the membership database of the place, but their authentication information is stored only in the user directory. These users can be added or removed as members of a place without their information in the user directory being affected.

You can connect the QuickPlace server to a user directory on an LDAP server so that place managers can add users from that directory as members of the place. After you've connected to a user directory, you can edit a place member's information in the directory and the information is automatically updated in the place. For example, if John Smith is both a user in the directory and registered as a member of a place called Sales Support, and you change John's password or e-mail address in the user directory, those changes are updated in Sales Support. However, if you change John Smith's member information in Sales Support, it does not change in the user directory.

Connecting to a user directory

User directories store information about users in an enterprise. They usually contain information such as user names, group names, and e-mail addresses, but can contain much more. You can connect the QuickPlace server to a user directory in your enterprise, making it easier to add and manage place members in your QuickPlace service. There are many advantages in connecting to a user directory:

- User information can be managed in one location — the directory — instead of in each place.
- Place managers can select new place members from the directory without entering any information for them. (When new local place members are added, the manager must enter their name, password, and e-mail address.)
- Place managers can select groups listed in the directory as new place members. This saves the manager from having to create each group member as a new place member.
- A user can be a member of many places and access any one of them with the same user name and password. This is possible because the user's user name and password are stored in one place — the directory — and QuickPlace authenticates them against the directory. If the user is a local member of many places, their user name and password could be different in each place.
- Users can use single sign-on authentication to sign on to one place, and then access other places they are a member of without re-entering their user name and password.

A QuickPlace server can connect to a user directory on any server configured to use the Lightweight Directory Access Protocol (LDAP) version 3, including a Domino server that runs the LDAP service or any other LDAP directory server. LDAP is a standard way for Internet servers to present directory information. A QuickPlace server can connect to only one user directory at a time.

Upgrading from a Domino Directory configuration

Connecting to a non-LDAP Domino Directory is only supported during the upgrade to QuickPlace 3.0 from a configuration that used a Domino Directory. See the following steps for information on switching directories.

For more information on upgrading, see the *QuickPlace Installation and Upgrade Guide* on the Web at www.lotus.com/ldd/doc.

You can configure a Domino Directory server to use LDAP. For information on configuring LDAP on a Domino server, see Domino Administrator Help.

To connect to an LDAP server

To create a connection to an LDAP server, you might need to specify values for one or more of the following QuickPlace server settings, depending on the way the LDAP server is set up. If you're not sure whether you need to change these settings, consult the LDAP server administrator.

- Port number. By default, the QuickPlace server is set up to connect to an LDAP server that uses port 389. If the LDAP server communicates over a different port, find out what that port number is before you follow the steps below.
- Search base. LDAP user directories can be divided into different sections as part of a tree-like hierarchy. The search base determines where in the hierarchy QuickPlace begins its search when someone uses the Lookup feature to search for user and group names. The higher the search base, the greater the number of sections in the search. By default, no search base is specified for a connection to an LDAP server, which means QuickPlace starts all directory searches at the highest possible level.

  Specify a search base when connecting to the server if the LDAP implementation requires it, or if you want to limit searches to specific sections of the user directory hierarchy. By default the search base you specify applies to searches of both users and groups, however you can use the QPCONFIG.XML file to configure a separate search base for group searches.
- User name and password. The LDAP server might require users who access directory information on the server to enter a user name and password. If this is the case, you must specify a user name and password when you set up the connection to the LDAP server. QuickPlace then supplies the user name and password to the LDAP server automatically every time it sends a request to the LDAP server.

Note The QuickPlace Server must connect to the LDAP server to perform searches and authentication. Make sure that this connection is possible and obtain configuration details from the LDAP server administrator.

To connect to the LDAP server:

1. Sign in to the QuickPlace homepage as an administrator.
2. Click Server Settings in the table of contents.
3. Click User Directory in the table of contents.
4. Click Change Directory.

5. In the Type field, select “LDAP Server.”
6. In the Name field, enter the name of the server on which the user directory resides. For example, elvis.acme.com.
7. In the Port number field, enter the number of the port the LDAP server uses to communicate with other servers, if necessary. The default is 389.
8. (Optional) Check “Check for SSL connection with LDAP user directory.” If you select this option and SSL is configured correctly on the QuickPlace server and the LDAP server, the QuickPlace server will initiate all requests to the LDAP user directory as SSL encrypted requests.
9. (Optional) In the Search base field specify a search base using the following Distinguished Name format: ou=*organizational_unit_name,* o=*organization_name.*

   For example, if the organization is called Acme and you want LDAP searches to start at the highest level, you would enter o=Acme. If you want LDAP searches to start at a lower level in the organization hierarchy, also specify an organizational unit name. For example, to make sure that LDAP searches are confined to the organizational unit East in organization Acme, you would enter ou=East, o=Acme.

   By default the Search base you specify applies to both user and group searches. However, you can use the qpconfig.xml file to specify a different search base for group searches. For more information, see the next topic.
10. (Optional) Check “Narrow searches to the place name” to confine searches launched from a place to user directory names that include the name of that place.

    For example, with this option checked, if a user does a directory search from a place called “Sales Support,” the search looks only for users who have “Sales Support” in their user names.
11. (Optional) If a user name and password are required to access directory information on the LDAP server, do the following:
    - Put a check mark next to “Check to use credentials specified below when searching the directory.”
    - Enter the user name, an LDAP distinguished name, for example cn=admin,o=acme.
    - Enter the password.

12. (Optional) In the Authentication Timeout and Search Timeout fields, change the maximum amount of time, in seconds, the QuickPlace server can take to authenticate a user from the user directory or to perform a search. The default value for both time-out settings is 120 seconds and is adequate in most environments. If connections to the LDAP server are very slow consider increasing the time-out values. If connections are very fast, consider reducing the values. If you leave the fields blank, the default settings are used. Specifying 0, which allows the QuickPlace server to take an unlimited amount of time for user authentication and searches, is not recommended.

    Note The LDAP server might also have time-out limits configured. In this case, the effective time-out limits are whichever are lowest between the QuickPlace server and the LDAP server.

13. Decide whether or not you want place managers to be able to register new users — meaning members who are not listed in the user directory.

    - To allow managers to register members who are not listed in the user directory, click "Allow managers to create new users in each place."
    - To limit the members of places on the server to users who are listed in the user directory, click "Disallow new users — Require managers to select existing users from the available directory."

14. Click Next.

Specifying a search base for group searches

By default, the search base you specify when you set up a connection to a user directory is used for both user and group searches. You can use the QPCONFIG.XML file to specify a search base specifically for group searches. For example, if the names of the groups you want to search are under ou=groups,o=acme in the directory name hierarchy, you could specify ou=groups,o=acme as the search base for groups. Then, the search base specified when you set up the connection to the user directory in the Server Settings room under User Directory applies only to searches of users.

1. Create the QPCONFIG.XML file, if one does not exist. For more information on creating and using the QPCONFIG.XML file, see the chapter "QuickPlace Administration Overview."

2. Copy the following sample section from the QPCONFIG_SAMPLE.XML file to the QPCONFIG.XML file:

```
<user_directory>
 <ldap>
  <base_dn>
       <group>ou=groups,o=ibm</group>
  </base_dn>
 </ldap>
</user_directory>
```

3. Replace the sample search base, ou=groups,o=ibm, with the desired search base.
4. Save qpconfig.xml.
5. Restart the HTTP task on the QuickPlace server.

Mapping to the QuickPlace schema

Users, groups, and all other objects in an LDAP directory are described by a variety of attributes. For example, the value for a user's first name is often stored as the *givenname* attribute and the last name as the *sn* (surname) attribute. Not all LDAP directories define attributes for users and groups in the same way. To display accurate information in the QuickPlace user interface about users and groups, such as names, phone numbers, and e-mail addresses, you might have to change some of the default attributes that QuickPlace assumes. For example, by default the QuickPlace server assumes an LDAP server uses the *sn* attribute to define a user's last name. However, if the LDAP server instead uses the *lastname* attribute, you must change the QPCONFIG.XML file so QuickPlace knows the correct attribute to display for the last name.

To configure which attributes the QuickPlace server retrieves from the LDAP directory to display information about users and groups, do the following:

Note The QuickPlace server must have the access necessary to use a particular LDAP field in the schema map, and the field must be accessible to the QuickPlace server. See the topic "Accessing LDAP" later in this chapter.

1. Create the QPCONFIG.XML file, if one does not exist. For more information on creating and using the QPCONFIG.XML file, see the chapter "QuickPlace Administration Overview."

2. To configure which attributes the QuickPlace servers uses for users in places, copy the following section from the QPCONFIG_SAMPLE.XML file to the QPCONFIG.XML file.

```
<user_directory>
 <ldap>
  <schema>
      <user>
         <object_class>objectClass</object_class>
         <object_class_value>person</object_class_value>
         <common_name>cn</common_name>
         <display_name>cn</display_name>
         <first_name>givenname</first_name>
         <last_name>sn</last_name>
         <email>mail</email>
         <phone>telephone</phone>
      </user>
      <group>
         <object_class_value>
         groupOfNames</object_class_value>
         <common_name>cn</common_name>
         <display_name>cn</display_name>
         <member>member</member>
      </group>
 </ldap>
</user_directory>
```

3. Replace any of the default values specified in bold text in Step 2 with values used by your directory.
4. Save QPCONFIG.XML.
5. Restart the HTTP task on the QuickPlace server.

Customizing search filters

You can use the QPCONFIG.XML file to customize the LDAP search filters that QuickPlace uses to search for user and group names in a user directory. You can configure a custom search filter for the QuickPlace server to use when it:

- Searches for external user names when authenticating users
- Searches for external user names to include in places
- Searches for external groups to include in places
- Searches for the external groups of which an authenticated external user is a member

To configure search filters, add the following section from the QPCONFIG_SAMPLE.XML file to the QPCONFIG.XML file and then customize the settings. You must create QPCONFIG.XML, if you haven't already done so. For more information, see the chapter "QuickPlace Administration Overview."

```
<user_directory>
  <ldap>
   <search_filters>
        <authentication><![CDATA[(I(cn={0})(uid={0})(shortname={0}))]]></authentication>
        <user_lookup><![CDATA[(&(objectclass=person)(sn={0})(givenname={1}))]]></user_
        lookup>
        <group_lookup> <![CDATA
        [(&(objectclass=groupOfNames)(cn={0}))]]></group_lookup>
        <group_membership> <![CDATA
        [(&(objectclass=groupOfNames)(member={0}))]]></group_membership>
   </search_filters>
  </ldap>
</user_directory>
```

Note For more information about the ldapsearch utility and LDAP search syntax, see Domino Administrator Help.

Customizing the search filter to use for authentication

When QuickPlace cannot find the user name entered at login in the Contacts database, it searches the LDAP user directory to get a distinguished name for login. QuickPlace issues the following authentication filter, which returns all matches for *cn*=username, *uid*=username and *shortname*=username.

```
<authentication> <![CDATA[(I(cn={0})(uid={0})(shortname={0}))]]></authentication>
```

For the matches that result from the search, each distinguished name and password is passed to the user directory for verification. The first successful verification sets the current user to that distinguished name.

Edit this line to customize the search filter used for authentication. For example, to look for the name specified by the user first as a *cn* attribute value or a *mail* attribute value, change the line as follows:

```
<authentication><![CDATA[( | (cn={0})(mail={0}))] ]></authentication>
```

Note that the zero (0) indicates that the client can supply only one name as input for authentication. You cannot specify another value and accept more than one name for input.

Customizing the search filter used to find users to add to places

The following line shows the default search filter QuickPlace uses when place managers search for external user names to add to places:

```
<user_lookup><![CDATA[(&(objectclass=person)(sn={0})(givenname={1}))]]></user_lookup>
```

This filter indicates that when a user searches for the name of an external user, QuickPlace searches for the *objectclass* attribute value, person. It also indicates that it accepts two, comma-separated values from a user who is searching the directory for an external user. It searches for the first value specified as the value for the *sn* attribute, and the second value specified as the value for the *givenname* attribute. Edit this line to customize this search filter. For example, to search for the second specified name as a value for the *mail* attribute rather than the *givename* attribute, change the line as follows:

```
<![CDATA[(&(objectclass=person)(sn={0})(mail={1}))]]>
```

If you customize the user search filter, you should also customize the hint the interface provides for searching and possibly other directory lookup user interface settings. For more information, see the topic "Customizing the directory lookup user interface" later in this chapter.

Note that zero (0) and one (1) indicate the first and second, comma-separated input values, respectively. QuickPlace does not accept more than two input values from a user.

Note When a user adds an external user name to a place, the user can type the name in the text area directly without clicking the Directory button and searching for the name. To find the specified name in this case, the user must specify a unique name in the directory. This unique name can be the distinguished name or another form of the name, for example, Smith or Smith, J. If the distinguished name is not specified, then the user lookup search filter described above is used to search for the name.

Customizing the search filter used to find group names to add to places

The following line shows the default search filter a QuickPlace server uses when users search for external group names to add to places:

```
<group_lookup><![CDATA
[(&(objectclass=groupOfNames)(cn={0}))]]></group_lookup>
```

This filter indicates that when a user searches for an external group, the QuickPlace server searches for the *objectclass* attribute value groupOfNames. It also indicates that the QuickPlace server accepts one name as input from a user and that it searches for the group name as the *cn* attribute value. Edit this line to customize the search filter. For example,

to search for the *objectclass* value groupOfUniqueNames and search for the *grouptitle* attribute, change the line as follows:

```
<group_lookup><![CDATA
[(&(objectclass=groupOfUniqueNames)(grouptitle={0}))]]></group_lookup>
```

The zero (0) indicates that the client can supply only one name as input for a group name. You cannot specify another value and accept more than one group name for input.

Customizing the search filter to use to search the groups of which an authenticated user is a member

After a QuickPlace server authenticates an external user, the QuickPlace server searches for all the external groups of which the user is a member. Then the QuickPlace server can determine the access the user has to places through group members. The following line shows the default search filter a QuickPlace server uses to search for the external groups of which an authenticated user is a member:

```
<group_membership><![CDATA[(&(objectclass=groupOfNames)(member={0}))]]>
</group_membership>
```

This filter indicates that the QuickPlace server searches the user directory for the *objectclass* attribute value groupofNames and the *member* attribute value. Edit this line to customize the search filter. For example, to search for the *objectclass* attribute value groupOfUniqueNames and the *uniquemember* attribute value, change the line as follows:

```
<group_membership><![CDATA[(&(objectclass=groupOfUniqueNames)(unique
member={0}))]]></group_membership>
```

The zero (0) indicates that QuickPlace accepts only name as input for the group members. You cannot configure QuickPlace to accept more than one.

How the Exact Match search option affects search filters

When a user searches for an external user or group to add to a place, whether or not the user selects the Exact Match search option has an effect on the search filters that the QuickPlace server uses. For example, assume the QuickPlace server is configured to use the following search filter when users search for external users:

```
<user_lookup><![CDATA[(&(objectclass=person)(sn={0})(mail={1}))]]></user_
lookup>
```

The following table describes the search filter that QuickPlace uses when a user searches for one value and for two comma-separated values, depending on the Exact Match setting.

Exact Match setting	*Search filter used when users searches for: smi*	*Search filter used when user searches for: smi, @acme*
Selected	sn=smi mail=*	sn=smi mail=@acme
Not selected	sn=smi* mail=*	sn=smi* mail=@acme*

Customizing the directory lookup user interface

Use the QPCONFIG.XML file to customize the user interface for directory lookups. You can customize the search hint and also customize how the user interface displays the results of user searches. Add the following section from the QPCONFIG_SAMPLE.XML file to the QPCONFIG.XML file and then customize the settings.

```
<user_directory>
 <ldap>
    <member_lookup_ui>
      <column_name>
        <person>sn, givenname</person>
      </column_name>
      <column_disambiguate>
        <person>dn</person>
      </column_disambiguate>
    </member_lookup_ui>
    <search_ui_hint>
      <![CDATA[( enter <B>last name, first name</B>)]]>
    </search_ui_hint>
    <search_ui_index>sn</search_ui_index>
 </ldap>
</user_directory>
```

Customizing the hint provided for user searches

To help users search for users in the directory, the search interface provides a hint indicating how to do the search. By default the hint is “enter last name, first name.” If you have customized the search filter QuickPlace uses when users search for external user names to add to a place, customize the search hint too, so users can search successfully.

For example, if you specify the following in the <search filters> section of QPCONFIG.XML:

<user_lookup><![CDATA[(&(objectclass=person)(sn={0})(mail={1}))]]></user_lookup>

you might then specify the following for in the <search_ui_hint> section:

<![CDATA[(enter <B>last name, email</B>)]]>

Customizing what the user interface shows as the result of user searches

By default, when a user searches a directory for external users, for the results QuickPlace displays values for the *sn* and *givename* attributes in the first column, and the distinguished names in the second column. To display different attribute values, change the member_lookup_ui section in QPCONFIG.XML. To change the attributes in the first column, modify the column_name section. To change the attributes in the second column, modify the column_disambiguate section.

For example, to display the *sn* and *mail* attribute values in the first column, specify:

<person>sn, mail</person>

Any attributes you specify should be valid ones defined in the schema map. For more information, see the topic “Mapping to the QuickPlace schema” earlier in this chapter.

You can also use the <search_ui_index> section to customize the attribute value that shows in the range field in the results box. By default the value for the *sn* attribute shows in the range.

Sample user directory settings for iPlanet and IBM Directory Server

The following QPCONFIG.XML customizations are recommended if your LDAP directory server is iPlanet or IBM Directory Server (formerly SecureWay). Changing default settings in the LDAP section not mentioned below is optional.

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<server_settings>
 <user_directory>
  <ldap>
       <schema>
          <group>
             <object_class_value>groupOfUniqueNames</object_class_value>
             <member>uniquemember</member>
          </group>
      </schema>
      <search_filters>
         <group_lookup><![CDATA[(&(objectclass=groupOfUniqueNames)(cn={0}
         ))]]></group_lookup>
         <group_membership><![CDATA[(&(objectclass=groupOfUniqueNames)(
         uniquemember={0}))]]></group_membership>
      </search_filters>
  </ldap>
 </user_directory>
</server_settings>
```

Using nested groups

If a user directory has nested groups — groups that are members of groups — that contain QuickPlace users, use the following NOTES.INI setting on the QuickPlace server to allow searches of the nested groups:

QuickPlaceNestedGroupLimit=*value*

where *value* represents the number of levels of groups the server can search. By default the level is 1, meaning that the server doesn't search nested groups. Note that in Release 2.0.*x* the default was 8 levels. Note that searching nested groups can have a negative effect on performance.

Accessing LDAP

To use a particular LDAP field in the schema map, the field must be accessible to the QuickPlace server. If you connect to the directory anonymously (that is, without supplying credentials in the User Directory section of the QuickPlace server), the LDAP directory server must permit anonymous reading of the fields to all users. If Domino is your LDAP directory, you can edit the Domain Configuration Settings document and update the list of fields allowed for anonymous access, or change the

database ACL and extended ACL to define anonymous LDAP search access to a directory.

For more information on setting access to a Domino LDAP directory, see Domino Administrator Help.

Testing QuickPlace access to fields on the LDAP server

You can confirm the fields accessible to the QuickPlace server by using the ldapsearch tool. From the program directory on the QuickPlace server, enter the following:

```
ldapsearch -h servername.acme.com cn=arch*
```

In this example, servername.acme.com is the LDAP directory server. The command returns the list of accessible users with common names that begin with the string "arch". If your LDAP directory server is configured to only allow access with specific credentials, you can use the same search, supplying the credentials on the command line:

```
ldapsearch -h servername.acme.com -D [username] -pw [password] cn=arch*
```

In this case, the QuickPlace server must also be configured to use these credentials for LDAP searches in the User Directory scene of the admin room.

Seeing the LDAP schema

If the Domino Directory is running the LDAP task, Domino fields are mapped to LDAP fields. To view the mapping, on the server console of the Domino Directory enter: >tell ldap exportschema. This command creates a database called SCHEMA50.NSF that shows the mapping. QuickPlace and ldapsearch use the LDAP schema names. So, for example, the field OfficePhoneNumber in the Domino Person document is mapped to the LDAP schema entry called telephonenumber. That is the name you see in ldapsearch and in QuickPlace, and the name you should use in the schema map of QPCONFIG.XML.

Switching to another user directory

To switch to a different user directory:

1. In the Address or Location box in your browser, enter the address of the QuickPlace server.
2. Click SignIn in the top right corner of the QuickPlace window.
3. Enter the user name and password of a QuickPlace administrator.
4. Click Server Settings in the sidebar.
5. Click User Directory in the sidebar.
6. Click Change Directory.

7. Complete Steps 5-14 in the topic “Connecting to a user directory,” earlier in this chapter.

Note If there are distinguished names in the new directory that are different than the names in the original directory, use the QPTool changehierarchy or changemember commands to update the names in places. For more information on these commands, see the chapter “Using QPTool Commands.”

Disconnecting from a user directory

If you disconnect from a user directory, place managers can specify only local members. Any existing external place members no longer have access to the places. To disconnect from a user directory:

1. In the Address or Location box in your browser, enter the address of the QuickPlace server.
2. Click SignIn in the top right corner of the QuickPlace window.
3. Enter the user name and password of a QuickPlace administrator.
4. Click Server Settings in the sidebar.
5. Click User Directory in the sidebar.
6. Click Change Directory.
7. Select No Directory.
8. Click Next.

Chapter 3
Setting Up the Place Catalog

This chapter describes the Place Catalog and how to set it up.

The Place Catalog

The Place Catalog is a centralized database in which you can collect information about all your QuickPlaces and QuickPlace servers.

The Place Catalog has two audiences: administrators and users. Administrators can use the QPTool command line tool or an XML interface to the QuickPlace Java™ XML API to access the Place Catalog to query information. Users access the Place Catalog indirectly, through features such as My Places, which allows them to see the places they belong to, and Search Places, which allows them to search in places across the enterprise. For information on how to access the Place Catalog with the QuickPlace Java XML API, see the *QuickPlace Developer's Guide*.

Setting up the Place Catalog

The Place Catalog feature is automatically enabled on all QuickPlace 3.0 server installations. When you install a QuickPlace server, a local Place Catalog database (PLACECATALOG.NSF) is created. If you want to change Place Catalog settings, or disable the Place Catalog, create a file called QPCONFIG.XML and copy into it the Place Catalog section from the file QPCONFIG_SAMPLE.XML. Then change settings. For more information on creating a QPCONFIG.XML file, see the chapter "QuickPlace Administration Overview."

For example, if your enterprise has several QuickPlace servers and you want more than one QuickPlace server to share a Place Catalog on a remote server, each QuickPlace server must have its own QPCONFIG.XML which specifies the server and file name of the Place Catalog. After you have set QPCONFIG.XML to point to the correct Place Catalog server, you can delete the local Place Catalog database on the QuickPlace server.

After you set up Place Catalog you must register any previously existing places.

You can set up one Place Catalog to service your enterprise, or set up several Place Catalogs to service different areas of your enterprise. It is recommended that an enterprise have a designated Place Catalog server (or servers) whose only purpose is to contain the Place Catalog. Each Place Catalog server should be part of a cluster with at least one failover server.

To set up a remote Place Catalog server shared by more than one server

1. Install a QuickPlace server over a Domino 5.0.10 server.
2. Make sure the server is accessible to other QuickPlace servers over Notes RPC (TCP/IP port 1352) and the HTTP protocols. This is set up by default.
3. In the ACL of the Place Catalog database, give access to QuickPlace servers and system administrators only. By default, the database has the following listed as Managers in the ACL: QuickPlace server, the system administrator, LocalDomainServers, and QuickPlaceAdministratorsSUGroup.
4. Open the Place Catalog database from the Domino Administrator client and create a full-text index. The Place Catalog database must be full-text indexed for the QPTool report command and the My Places feature to work. For more information on creating and updating full-text indexes, see Domino Administrator Help.

To configure Place Catalog QPCONFIG.XML settings

1. On each QuickPlace server that will communicate with the Place Catalog server, create a file called QPCONFIG.XML and save it as a text file.
2. Copy the following content to QPCONFIG.XML from QPCONFIG_SAMPLE.XML, replacing sample values with your own values. For descriptions of each XML tag, see the next topic “Place Catalog XML.” For more information on copying from the sample file, see the chapter “QuickPlace Administration Overview.”

```
<?xml version=“1.0” standalone=“yes”?>
  <server_settings>
   <place_catalog enabled=“true” log_level=“0”>
    <connection_pool size=“8” />
    <place_catalog_servers>
     <server>

<domino_server_name>servername/enterprise</domino_server_name>
       <nsf_filename>PlaceCatalog.nsf</nsf_filename>
```

```
    </server>
  </place_catalog_servers>
 </place_catalog>
</server_settings>
```

3. If the QuickPlace server is part of a cluster, set the appropriate values within the <cluster> node. For more information on configuring a clustered QuickPlace server to work with the Place Catalog, see the chapter "Administering QuickPlace Servers in a Cluster."
4. Restart the server.

To register existing places and servers with the Place Catalog

A QuickPlace 3.0 server may already contain existing places that were created prior to configuring the Place Catalog, or that were added from a different server. In this case, the Place Catalog must be told of the existence of these places. This is done by using the QPTool register command.

Note Because the Place Catalog must uniquely identify a place by its name, two different places cannot have the same name. This is important when upgrading an existing QuickPlace installation where two different places can have the same name on two different servers. In this case, the administrator must first resolve the conflict by unregistering one of the places, renaming its directory, and then registering the place with the new name. Registration is a QuickPlace 3.0 feature that includes functionality from the previous utility Qpmove. For more information on the QPTool register command, see the chapter "Using QPTool Commands."

For more information on considerations when upgrading to a QuickPlace 3.0 enterprise, see the *QuickPlace Installation and Upgrade Guide* on the Web at http://www.lotus.com/ldd/doc.

QuickPlace servers must also be registered with the Place Catalog. You can do this either by creating a place on the 3.0 server, which automatically creates a server entry in the Place Catalog, or by using the QPTool command "qptool register -server."

Note If a server is registered in the Place Catalog and you change the port, protocol settings, or a URL prefix for the server, use "qptool unregister -server" to unregister the server, then use "qptool register -server" to register the server with the Place Catalog again so that place URLs are constructed correctly. Or update the appropriate fields in the server's PlaceServer document manually in the Place Catalog.

To populate the Catalog with entries for servers, and for places which existed before the Catalog was enabled, enter the following in the Domino server console:

Server console command	*Description*
load qptool register -server	Registers the server with the Place Catalog.
load qptool register -placecatalog -a	Registers existing places with the Place Catalog.

For more information on registering places and servers with QPTool commands, see the chapter “Using QPTool commands.”

Place Catalog XML

Below are descriptions for each Place Catalog XML setting in the QPCONFIG.XML file.

Element or attribute	*Description*
place_catalog enabled	The place_catalog section contains settings to enable the server to use a Place Catalog. Set the “enabled” attribute to “true” to tell the server to search for an existing Place Catalog. The default setting is enabled=“true”. To prevent the server from looking for a Place Catalog, change the enabled attribute to enabled=“false” or remove the entire <place_catalog> section.
log_level	You can log operations related to the Place Catalog in the Domino server console as follows: Level 1 - Logs all Catalog database open and close operations Level 2 - Logs all server registration operations Level 3 - Logs all place registration operations Level 4 - Logs all member registration operations Each level also includes the information in the levels below it.
connection_pool size	For efficiency, the QuickPlace server creates a pool of connections to the Place Catalog so they can be shared by the different requests on that QuickPlace server. This number should reflect the number of simultaneous requests that could result in a query or update to the Place Catalog. These types of requests include creation of places, the addition of or changes to place membership, and administration requests made by QPTool. You may want to start with a number representing a third of the maximum HTTP threads. For example, if the server uses 90 threads, then set this value to 30.

continued

Element or attribute	*Description*
place_catalog_ servers	This section lists all Place Catalog servers the local QuickPlace server will communicate with. QuickPlace 3.0 supports only one Place Catalog server.
server	This section specifies settings for a particular Place Catalog server.
domino_server_ name	Specify in Domino format the name of the server hosting the Place Catalog, for example, server/organization.
nsf_filename	Specify the name of the Place Catalog database, for example, PlaceCatalog.nsf.
cluster	This section is only relevant if the local QuickPlace server is part of a cluster. The Place Catalog feature must understand the local QuickPlace server's clustering configuration so it can make the proper decisions when registering places. For more information on clustering QuickPlace servers, see the chapter "Administering QuickPlace Servers in a Cluster."
master virtual ssl*	A cluster could be used as a master/slave topology in which all users use the master server while the slave server is kept as a backup in case the master is not available. With this topology, users manually enter the URLs to the slave server. A cluster could also be used together with a network dispatcher to represent a group of computers as one logical computer. In this case, the network dispatcher usually has a network name and there is an entry for it in the Place Catalog. Specify a master server, if there is one. Specify whether the master server is a virtual server or not, and specify whether the master server has SSL security turned on. The master server in a cluster acts as a user's entry point to places on other servers in the cluster. The master server can be a QuickPlace server, or it can be a network dispatcher that acts as a "virtual" server. In the virtual attribute, specify whether the master server is a virtual server (a dispatcher) or a QuickPlace server. By default the virtual setting is "no." In the SSL attribute, specify whether the master server has SSL enabled.
port*	This value represents the TCP port used to access QuickPlace requests by browsers. The default is 80 (default) for non encrypted (HTTP) connections and 443 for encrypted (HTTPS) connections.

continued

Element or attribute	*Description*
hostname	Specify the hostname, in TCP/IP format, of the master server in the QuickPlace cluster (for example, qp.acme.com). This must be the hostname of a network dispatcher or local director (virtual must be "yes" above) or the hostname of a QuickPlace server (virtual must be "no" above).
path_prefix*	Certain configurations of QuickPlace require a path_prefix to be used in all QuickPlace URLs. For more information on configurations that use a path_prefix, see the *QuickPlace Deployment Guide* on the Web at http://www-10.lotus.com/ldd/notesua.nsf/

*Features such as My Places and Search Places require this value to construct URLs to places specified in the Place Catalog.

How the Place Catalog works

The Place Catalog contains data on the QuickPlace servers in your service, the places that live on those servers, and the members of those places. Each server and each place in your service has a separate entry in the Catalog. A Catalog entry is implemented as a Lotus Notes® document.

Below is an example of a Catalog entry for a place called "Sales team."

Place

PlaceName	Sales Team
PlaceTitle	Sales Team Meeting Room
PlaceServerName	server1.enterprise.com
PlaceServerIsMaster	1
PlaceServerIsVirtual	1
PlaceSize (K)	2998
PlaceLastAccessed	05/31/2002 10:19 AM EDT
PlaceLastModified	05/30/2002 03:03 PM EDT
PlaceIsLocked	0
PlaceReaders	CN=John Doe/OU=Sales/O=Enterprise
PlaceAuthors	CN=Jane Clark, OU=Sales, O=Enterprise; CN=Bob Crash, OU=Sales, O=Enterprise
PlaceManagers	CN=Robert Tanaka/OU=Sales/O=Enterprise

Below is a Catalog entry for a QuickPlace server called “server1.”

PlaceServer

PlaceServerName	server1.enterprise.com
PlaceServerIsMaster	1
PlaceServerIsVirtual	1
PlaceServerClusterName	
PlaceServerAccessProtocol	http
PlaceServerAccessTCPPort	80
PlaceServerAccessURLPrefix	

How entries are updated

Some entries are created or updated in the Place Catalog in real time — the moment an event happens. Other entries are created or updated manually by a server task, or on a scheduled basis.

It is essential that certain data be sent in real time to avoid conflicts. For example, in a QuickPlace service there cannot be two places with the same name. The creation of a new place is an event that creates a new Catalog entry in real time. When a user creates a new place, QuickPlace first checks the Catalog for that name before creating a new entry. If it finds an existing place with that name, the user is prompted to choose a different name. If the creation of a place did not immediately create an entry, it would be possible for two users to successfully create two places with the same name, which would cause a conflict when QuickPlace attempted to create entries for both in the Catalog. For this reason, it is essential that a Place Catalog server a QuickPlace server is configured to use remains available. To increase availability of the Place Catalog, the Domino clustering feature can be used to make several Place Catalog servers available.

The following events create or update Place Catalog entries in real time:

Event	*Description*
A QuickPlace server is registered in, or unregistered from, the QuickPlace service.	A server becomes part of the service when *qptool register -server* command is issued, or when a place is created on the server. When a place is created, an entry for the server is immediately created in the Catalog if one does not already exist. Similarly, when *qptool unregister -server* is issued, the entry for the server is immediately removed from the Catalog.
Removal of a place from the service by *qptool unregister*.	The server’s place entry is removed. If the place is part of a QuickPlace server cluster with a virtual server, the virtual server place entry is also removed. For more information on virtual servers in a cluster, see the chapter “Administering QuickPlace Servers in a Cluster.”

continued

Event	*Description*
Creation of a place from a browser or registration of a place by *qptool register*.	A new entry is created. The Place Catalog server must be running for users to create new places in the service. If the place is created on one server in a cluster, an entry for the virtual server is also created.
Creation of a place on a cluster server node by *qptool replicamaker*	A place entry for that server cluster node is created.
Deletion of a place from a browser or by *qptool remove*.	The place's entry is deleted. Its name cannot be used for a new place until the QPTool remove — cleanup command has run, either automatically overnight, or manually by the administrator. In a cluster environment, this would have to be done on all cluster nodes.
Deletion of a place in a cluster server node by *qptool remove -cleanup*	The place's entry for that server node is deleted from the catalog.
Creation of a member.	The new member is added to the place entry with the proper access level.
Deletion of a member.	The member is removed from the place entry.
A change in member access.	The member moves to the field appropriate to their new access level.
A place is accessed	The PlaceLastAccessed field is updated, which can take up to a minute.
Locking a place by *qptool lock*.	The PlaceIsLocked field of the Place Catalog entry is set to 1. If the place is in a cluster with a virtual server, the PlaceIsLocked field in the virtual server entry is also set to 1.
Unlocking a place by *qptool unlock*.	The PlaceIsLocked field of the Place Catalog entry is set to 0. If the place is in a cluster with a virtual server, the PlaceIsLocked field in the virtual server entry is also set to 0.

The following data can be updated using the QPTool placecatalog -push command or on a schedule on the QuickPlace server.

In an enterprise with a QuickPlace server cluster, the QPTool placecatalog -update command can be run on the Place Catalog server to synchronize data between a place's entries on each physical server, and the place's virtual entry. For example, before QPTool placecatalog -update is run, the place's virtual entry contains the membership information, but the place's physical server entries do not. After QPTool placecatalog -update, both

entries contain the same field values. For more information on clusters, see the chapter "Administering QuickPlace Servers in a Cluster."

Event	*Description*
Place size	The PlaceSize field is updated.
Dates and times the place was last modified.	The PlaceLastModified field is updated.

Note For more information on qptool commands, see the chapter "Using QPTool Commands."

To update place entries manually

To update the PlaceSize and PlaceLastModified data on a particular place, enter the following from the server console:

Server console command	*Description*
load qptool placecatalog -p placename(s) -push	Updates size and last modified data for the place you specify. To specify more than one place, separate the placenames with spaces.
load qptool placecatalog -a -push	Updates size and last modified data for all places on the server.
load qptool placecatalog -?	Ouputs quick help on the syntax of all the placecatalog arguments.
load qptool placecatalog -i inputfilename -push	Takes an XML file specifying the places to update. For more information on updating the Place Catalog with an XML input file, see the *QuickPlace Developer's Guide*.
load qptool placecatalog -p placename(s) -o outputfilename -push	Outputs the places that have been updated to a non-default output file. (The default file is qptool.placecatalog.xml in the server's program directory.)

Note This command cannot be used on a pre-3.0 place that has not been upgraded by qptool upgrade.

To update entries on a schedule

To update the PlaceSize and PlaceLastModified fields at 2 AM, add the appropriate command line entry from the above table to the ServerTasksAt2= line in the server's NOTES.INI file. Or, if you want multiple servers in the QuickPlace / Domino domain to share the schedule, create a server program document in the Domino Directory of the QuickPlace domain. For more information on creating a server program document, see Domino Administrator Help.

Enabling DBCS members to use My Places

For double-byte character set (DBCS) users to use My Places:

- The users must be from an external user directory. For more information on external user directories, see the chapter “Connecting to a User Directory.”
- The server must be configured for session-based authentication. You configure session-based authentication through Domino. For more information on configuring authentication in Domino, see Domino Administrator Help.
- You must open the NOTES.INI file on the Place Catalog server and add the following variable:

  Country_Language=xx[-xx]

  Use one of the following codes for xx[-xx]:

CollationName	*Code*
Japanese	ja
Korean	ko
Simplified Chinese	zh-cn
Traditional Chinese	zh-tw

  You must restart the server. Then open the Place Catalog database in Notes and press CTRL+SHIFT+F9 to re-index the views.

Recovering if the Place Catalog server goes down

If QuickPlace servers uses a remote Place Catalog server and the Place Catalog server goes down, users cannot create new places, but they can continue to work with existing places. While the users work with these existing places, the following fields in the Place Catalog change automatically due to the user activity.

- PlaceSize
- PlaceLastAccessed
- PlaceLastModified
- PlaceReaders
- Place Authors
- PlaceManagers

When the Place Catalog server is back up, use the QPTool placecatalog -push -p command on the QuickPlace server to update these fields:

- PlaceSize
- PlaceLastAccessed
- PlaceLastModified

If there are any place membership changes made when the Place Catalog server is down, you must use the QPTool register -placecatalog command to unregister and then re-register the place. For more information, see the chapter “Using QPTool Commands.”

Note It’s important to keep Place Catalog servers highly available.

Chapter 4
Managing PlaceTypes

This chapter describes how to create PlaceTypes to use as blueprints for creating places, order PlaceTypes in the list of PlaceTypes, refresh PlaceTypes, and copy and delete PlaceTypes.

PlaceTypes

As you set up a place to meet the needs of your team or organization, you may want to preserve your customizations for use in other places. For example, if a manager has created a theme that gives a particular place the look and feel of your corporate Web site, you may want to make that design available for the creation of other places in your organization.

You can preserve the design and content of a place by creating a custom PlaceType. A PlaceType is a blueprint from which users can create places. You can take a snapshot of a place and make it a PlaceType. Also, you can control the design and content of a child place by refreshing it with updates from the PlaceType.

Creating a PlaceType and making it available to users is a two-step process. A user with Manager access to a place customizes the place, allows it to be a PlaceType, and specifies which design elements will be preserved in the PlaceType. Then a server administrator must create the PlaceType on the server so it is available to users. For more information on customizing a place, allowing it to be a PlaceType, and determining which membership and design elements will be inherited from it, see the Help.

Creating a PlaceType

To create a PlaceType, do the following.

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. Click Create PlaceType.
4. Enter a name for the PlaceType. The name you enter here appears in the list of PlaceTypes a user sees when they create a place.

5. Select the name of the place you want to use as a PlaceType.

   The Manager of the place must have allowed the place to be a PlaceType and specified the design elements that are preserved in the PlaceType. For more information, see the Help.

6. Click Next.

To give users information about the PlaceType

When users create a place, they see a list of the available PlaceTypes on which they can base their new place. To help them understand the choices, you can include a short description of the PlaceType, a thumbnail sketch of the PlaceType, and a link to a Web page with a more detailed description of the PlaceType.

To give users information about a PlaceType, do the following:

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. Click the name of the PlaceType.
4. Click Edit.
5. Do one of the following:
   - To add the description and other information shown and also to refresh the PlaceType, click "Yes (default), copy changes and update the information below."
   - To update the description and other information shown but not refresh the PlaceType, click No.

     For more information, see the topic "Refreshing a PlaceType from the PlaceTypes view in the administration place" later in this chapter.
6. Do one or all of the following:
   - Enter a short description for the PlaceType. The description appears next to the PlaceType in the list.
   - Choose an image file that contains a "thumbnail sketch" of a page in the PlaceType. The image file must be a GIF or JPG file, and the image itself should be no larger than 100 pixels by 80 pixels. The thumbnail sketch appears next to the PlaceType name in the list.
   - Specify the address of a Web page under "Optionally, you can provide a URL for users to visit for more information." When you specify the address of a Web page, QuickPlace displays the link text "More info" below the description of the PlaceType in the list.
7. Click Next.

Note You cannot edit the description of the default PlaceType.

Editing the server's PlaceType list

You can change the order of the PlaceType names in the list of PlaceTypes users see when they create a place. For example, if your list contains 150 PlaceTypes, but "MeetingRoom PlaceType" is the most popular, you can move "MeetingRoom PlaceType" to the top of the list. To reorder the PlaceType list:

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. Click Reorder.
4. Click the PlaceType name you want to move.
5. Click the up or down arrow to move the place.
6. Click Next.

To hide or display PlaceType names in the list

You can hide the name of a PlaceType in the list of PlaceTypes users see when they click "Create a Place." For example, if you are experimenting with the contents of the PlaceType and are not yet ready to make it available to QuickPlace creators, you can hide the PlaceType while it is in progress. The word "hidden" appears next to the name of the PlaceType in the list of PlaceTypes you see as the QuickPlace server administrator.

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. Click Show / Hide.
4. To hide the name of a PlaceType in the list, remove the check mark next to the name of that PlaceType. To display the name of a PlaceType in the list, check the box next to the name of that PlaceType.
5. Click Next.

Refreshing PlaceTypes and places

You can create a PlaceType from a place and a place from a PlaceType. When one is created from the other, the server maintains a "parent-child" relationship between the two. You can refresh a child place or child PlaceType so the child inherits new and modified elements from its parent.

For example, a QuickPlace developer creates a new place called "Sales" and gives it the look and feel you want to appear in places created by the Sales team. The developer allows it to be a PlaceType, and you create a PlaceType from it called "Sales PlaceType." To test it, you create a place called "Sales

Test" from "Sales PlaceType." If you want to change some design elements, you can ask the developer to change the elements in "Sales," then refresh "Sales PlaceType," then refresh "Sales Test." "Sales PlaceType" inherits from "Sales," and "Sales Test" inherits from "Sales PlaceType."

The QPTool refresh command refreshes places and PlaceTypes. By default, QPTool refresh runs daily at 4 AM to refresh all child places (not including PlaceTypes) on the server. For more information on QPTool refresh, see the chapter "Using QPTool Commands." The place manager can control whether QPTool refreshes a place. To refresh a PlaceType, administrators can initiate the refresh command from the administration PlaceTypes room or use the traditional method for running QPTool commands.

When you refresh a place or PlaceType in a cluster, do the refresh on one server only and then let the changes replicate to the other servers.

Place membership

If the place manager allows it, membership of a place can be passed to a PlaceType when the PlaceType is created. That membership is then passed to new places created from the PlaceType. For example, if Annie was a member of "Sales" with Author access, she became an Author in "Sales PlaceType" and "Sales Test" when they were created.

However, changes to members and membership are not inherited when you refresh. For example, if the manager of "Sales" changes Annie's access to Reader in "Sales," when you refresh "Sales PlaceType" and "Sales Test," Annie still has Author access in "Sales PlaceType" and "Sales Test."

Caution When a new room is inherited, membership to the room is not inherited, but instead is determined by the room's parent room in the place. For example, to continue the example described above, assume the manager of "Sales" adds a new room called "Finances" and gives only herself access to read sensitive information in it. When "Sales PlaceType" and then "Sales Test" are refreshed, "Sales Test" inherits the room "Finances" but all "Sales Test" members with Reader access or above can read "Finances" unless the "Sales Test" manager changes access.

How refresh affects the elements in places

If there are no changes in a parent PlaceType, basic refresh causes no changes in the child place. The following table describes what happens as the result of a basic refresh of a place when elements have changed in the parent PlaceType.

Element (Changed in PlaceType)	*Not changed in place*	*Changed in place*	*Deleted in place*
Page	Updated	No change	No change
Folder	Updated	No change	No change
Room	Updated	No change	No change
Form	Updated	No change	No change
Field	Updated	No change	No change
Theme	Updated	No change	No change
PlaceBot	Updated	No change	No change
Room Setting	Updated	No change	No change
Aesthetic Settings	Updated	No change	No change
Member	No change	No change	No change
Local group	No change	No change	No change

The following table describes what happens as the result of a basic refresh of a place when elements have been deleted in the parent PlaceType.

Element (Deleted in PlaceType)	*Not changed in place*	*Changed in place*	*Deleted in place*
Page	Deleted	No change	No change
Folder	Deleted*	No change	No change
Room	Deleted**	No change	No change
Form	Deleted	No change	No change
Field	Deleted	No change	No change
Theme	Deleted	No change	No change
PlaceBot	Deleted	No change	No change
Room Setting	N / A	N / A	N / A
Aesthetic Settings	N / A	N / A	N / A
Member	No change	No change	No change
Local group	No change	No change	No change

*Folders that contain inherited pages that have been modified by place users or that contain pages created by place users (rather than inherited) are not deleted.

**Rooms that contain inherited elements that have been modified by place users or that contain elements that were created by place users (rather than inherited) are not deleted.

Controlling whether the QPTool refresh command refreshes a place

Place managers control whether the QPTool refresh command refreshes places created from a PlaceType. By default, places are refreshed. The QPTool refresh command runs on all places created from PlaceTypes daily at 4 AM, but administrators can also run it on specific places.

To specify whether the QPTool refresh command refreshes a place:

1. Open the place.
2. Click Customize in the table of contents.
3. Click Basic.
4. Click "Change Basics."
5. In the Updates section, check "Receive updates" (default) to allow QPTool refresh to refresh the place. Remove the check mark to prevent QPTool refresh from running on this place.

Refreshing a PlaceType from the PlaceTypes view in the administration place

If a place used to create a PlaceType is modified, you can use the PlaceTypes view in the administration place to initiate the QPTool refresh command to do a basic refresh of the child PlaceType. If you use this method, at the same time you refresh you can modify the description that users see, the image, and the URL provided to users for more information.

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. Click the name of the PlaceType you want to refresh.
4. Click Edit.
5. Do one of the following:
   - To update the description and other information shown and also to refresh the PlaceType, click "Yes (default), copy changes and update the information below."
   - To update the description and other information shown but not refresh the PlaceType, click "No, simply update the information below."
6. (Optional) Change the description for the PlaceType.
7. (Optional) Change the image selection for the PlaceType.
8. (Optional) Change the URL information shown.
9. Click Next.

Choosing to refresh the PlaceType in Step 5 starts QPTool refresh in the background. If QPTool refresh is already running when you click Next, the PlaceType is not refreshed since only one instance of QPTool refresh can run at a time. Check the server console to determine whether a PlaceType has been refreshed.

You can also refresh a PlaceType by running the QPTool refresh command from the server console or command line. For more information, see the chapter "Using QPTool Commands."

Signing a newly inherited scheduled PlaceBot in a place

When a place first inherits a new scheduled PlaceBot (agent), the place manager must sign the PlaceBot before it runs. This step is necessary only for a newly inherited scheduled PlaceBot:

1. Open the place.
2. Click Customize in the table of contents.
3. Click PlaceBots.
4. Select the PlaceBot and click Sign PlaceBot.

Copying a PlaceType

You can use operating system commands to copy a PlaceType from one QuickPlace server to another.

A PlaceType consists of a set of Notes database files (NSF files) in the AreaTypes subdirectory on the QuickPlace server. For example, if you create a PlaceType called Rapid Response, and your Domino and QuickPlace servers are installed in the c:/ /lotus/domino directory, the NSF files for Rapid Response would be stored in the following location:

c:\Lotus\Domino\data\QuickPlace\AreaTypes\Rapid Response\

To copy a PlaceType from one QuickPlace server (server A) to another QuickPlace server (server B):

1. On server B, create a subdirectory for the PlaceType in x:\Lotus\Domino\data\QuickPlace\AreaTypes, where x is the drive on which Domino and QuickPlace are installed.
2. Copy the PlaceType files from server A to the subdirectory you created on server B.
3. If the PlaceType has PlaceBots, you must sign the agents in the database using the server ID of the current server, that is, server B. For more information on signing a database, see Domino Designer Help.

4. Use the following procedure to add the copied PlaceType to the list of PlaceTypes on server B.

To add copied PlaceTypes to the PlaceType list

If you copied PlaceType files to the QuickPlace server, you can add that new PlaceType to the list of PlaceTypes on the current server. You see the list of PlaceTypes when you sign in to the current server as the server administrator and click PlaceTypes in the table of contents. The new PlaceType is also available to QuickPlace creators until or unless you hide the name of the PlaceType.

To add a PlaceType copied from another server to the list of PlaceTypes on the current server, do the following:

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. Click Refresh List.

Deleting a PlaceType

When you follow the steps below or when you use the QPTool remove command without the -now argument, to mark a PlaceType for deletion on the current server, it is no longer available to users. However, the file and directory are not actually deleted until the QPTool remove -cleanup command runs on the server at 2 AM. You can remove the PlaceType immediately by running the QPTool remove -now command. For more information on the remove command, see the chapter "Using QPTool Commands."

Note You cannot delete the default PlaceType.

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. In the list of PlaceType names on the screen, click the name of the PlaceType you want to delete.
4. Click Delete.

In QuickPlace server cluster, do the following on each additional server in the cluster to remove the PlaceType from the PlaceTypes view of the administration place. This step is necessary because the administration place does not replicate in a cluster.

1. Sign in to the QuickPlace home page as an administrator.
2. Click PlaceTypes in the table of contents.
3. Click Refresh List.

Chapter 5
Administering QuickPlace Servers in a Cluster

This chapter describes how to set up QuickPlace servers in a clustered server environment.

QuickPlace servers in a cluster

A Domino cluster is a group of two to six servers that provides users with constant access to data, balances the workload between servers, improves server performance, and maintains performance when the size of your enterprise increases. The servers in a cluster contain replicas of databases that you want to be readily available to users at all times. If a user tries to access a database on a cluster server that is unavailable, Domino opens a replica of that database on a different cluster server, if a replica is available. Domino continuously synchronizes databases so that whichever replica a user opens, the information is always identical.

Clusters provide high availability of important databases, and clustered servers can redirect database open requests to other servers in the clusters, allowing users uninterrupted access to their databases. You can use clustering to provide high availability of a QuickPlace service, or group of servers. You can administer servers in a cluster by adding, removing, or upgrading them.

Using clustering to provide high availability of the QuickPlace service consists of setting up:

- Two or more servers to replicate the data.
- A solution to distribute HTTP requests to one or more of the servers in the cluster.

Domino Enterprise Server software is used to set up and manage the cluster. The servers in the cluster are sometimes referred to as cluster nodes. QuickPlace is installed on each of these nodes.

There are several solutions available for distributing HTTP traffic among a number of servers. The QuickPlace application requires that HTTP requests sent to one node are continuously sent to that node for a predetermined amount of time. This time period is sometimes known as “sticky time.”

Upgrading an existing QuickPlace server to provide high availability involves:

- Setting up a separate cluster of servers.
- Using the QPTool application to move the QuickPlaces to the newly set up cluster.

Administering and managing a QuickPlace server that is in a cluster is the same as administering and managing a server that is not clustered. With the exception of adjustments to the load balancing hardware and software, you make changes individually to each server by addressing the server directly by its hostname or Domino name when you use any of the following methods or tools:

- Using the browser to sign in to the server and visiting the Server Settings page, also known as the QuickPlace Admin Room.
- Using the Domino Administration Client to make changes, usually to the Domino Name and Address Book.
- Making changes using the file system such as modifying the NOTES.INI file or inspecting HTTP logs.

Note For information on upgrading a QuickPlace server in a cluster, see the book *QuickPlace Installation and Upgrade Guide*.

Clustering support for QuickPlace 3.0

QuickPlace 3.0 supports the same clustering functionality and the replicamaker command on all supported server operating systems, including AIX and Solaris. Below is a list of supported cluster configurations for QuickPlace 3.0.

- Cluster with AIX or with AIX and Windows NT® and Windows® 2000 mixed.
- Cluster with Solaris or with Solaris and Windows NT and Windows 2000 mixed.
- Cluster with Windows NT and Windows 2000

Note QuickPlace 3.0 does not support Solaris and AIX in the same cluster.

Planning capacity

Before you set up a QuickPlace cluster, you must first decide:

- How many concurrent users need to be supported.
- The type of clustering solution to be implemented.

These decisions determine the how many servers of a given specification are required to support the user population for a given rate of QuickPlace usage.

Types of clustering solutions

The total number of servers required depends on the type of clustering solution.

The simplest clustering solution is failover to a "hot spare," in which a primary server and a secondary server are clustered. The primary server handles user requests, and the secondary server is held in reserve in case the primary server fails or requires a scheduled stoppage. When the primary server is taken offline, user requests fail over to the hot spare until the primary server comes back online. In this type of cluster, the resources of the hot spare are not utilized while the primary server is active: the capacity of the cluster is the capacity of the primary server. Therefore, if a given server specification supports 1,000 concurrent users, two such servers are required to support 1,000 users. If the hot spare is identical to the primary server, the capacity remains the same after the primary server fails over.

To make full use of all available servers, a load-balancing solution can be implemented. With load balancing, servers share the user load, and the maximum capacity of the cluster is approximately the sum of the capacities of the servers in the cluster. For example, a cluster of three servers that each support 1,000 users has approximately a maximum capacity of 3,000 concurrent users. However, if one server goes offline, the capacity of the cluster is reduced correspondingly (to 2,000 users in the example). Therefore, the average capacity of a load balanced cluster is less than the maximum possible, and allowance should be made for server downtime so that response times do not significantly decrease when a single server becomes unavailable. Having more than two servers in a cluster provides greater flexibility and reliability because when a server is taken offline for scheduled maintenance, failover can still occur among the remaining available servers.

Creating a cluster

To create a cluster, you must have at least Author access and Delete Documents rights and the ServerModifier and ServerCreator roles in the Domino Directory, and at least Author access in the Administration Requests database. If possible, use the administration server when creating a cluster. The administration server does not have to be part of the cluster.

Note If a server belongs to a different cluster, you do not have to remove the server from that cluster before you add it to the new cluster. The Cluster Administration Process removes the server from the original cluster and then adds it to the new cluster.

1. From the Domino Administrator, make sure the administration server or another server is current.
2. Click the Configuration tab.

3. Expand Server, and click All Server Documents.
4. In the Results pane, select the servers that you want to add to the cluster.
5. Click Add to Cluster.
6. When asked to choose the cluster you want to add the servers to, choose Create New Cluster, and then click OK.
7. Type the name of the new cluster, and click OK.
8. Choose Yes to add the servers to the cluster immediately, or choose No to submit a request to the Administration Process to add the servers to the cluster.
9. (Optional) If you chose No in Step 8 and you did not add the servers on the administration server, force replication between this server you used and the administration server so that the administration server receives the requested changes sooner.
10. (Optional) If you chose No in Step 8, force replication between the administration server and the cluster servers so the cluster servers receive all the changes sooner.
11. (Optional) If you chose Yes in Step 8, the cluster information is added immediately to the Domino Directory of the server you used to create the cluster. If this server is not part of the new cluster, replicate the changes to one of the servers you added to the cluster.

Note For information on managing replication in clusters, refer to the Domino Administrator Help.

Adding a QuickPlace server to a cluster

If you want to add a new QuickPlace server to a cluster, all of the existing QuickPlace data first must be copied and replicated to the new server before it can be available for use. To add a new QuickPlace server to a cluster:

1. Install the new QuickPlace server using the installation instructions.
2. Using the browser, sign in to the QuickPlace server as an administrator and edit the Server Settings appropriate for this server.
3. Start the server.
4. Shut down the HTTP task by typing the following at the server console:

   ```
   tell http quit
   ```

5. To create replica stubs on the new server for all existing QuickPlaces in the cluster, run the replicamaker command on the new server, using one of the other servers in the cluster as the source for the QuickPlace databases. Type the following at the server console:

   load qptool replicamaker -s <*remote server name*>, where <*remote server name*> is the domino server name.

   For more information on the replicamaker command, including running the command in verbose mode, see the chapter "Using QPTool Commands."

6. Wait for the replicamaker command to finish running successfully. This step may take several minutes.

7. Use the Domino Replicator to replicate all the data and initialize all replica subs on the local and remote systems. Type the following at the server console:

   replicate <*remote server name*>, where <*remote server name*> is the domino server name, for example, qp1/Company.

8. Wait for the Domino Replicator to finish. This step may take several hours.

9. Start the HTTP task. Type the following in the server console:

   `load http`

10. (Optional) Create all search indexes for all newly replicated QuickPlaces. This task can take several hours and can be done while the server is running. It is optional because it runs automatically at 2 AM. Type the following at the server console: load updall.

11. Add the server to the IBM Network Dispatcher cluster for all relevant ports (80, 443, 25, 1533).

Adding a QuickPlace server after a long down time

If a QuickPlace server has been removed from a cluster for a period of time, you can add it to the cluster again. To add a QuickPlace server after a long down time:

1. Start the server.

2. Shut down the HTTP task. Type the following at the server console:

   `tell http quit`

3. To create replica stubs for any new QuickPlaces or rooms that were created in the cluster since the server was taken out of service, run replicamaker on the server, using one of the other servers in the cluster as the source for the QuickPlace databases. Type the following at the server console:

   load qptool replicamaker -a -s <*remote server name*>

   where <*remote server name*> is the domino server name, for example, qp1/Acme.

4. Wait for the replicamaker command to finish running successfully.
5. Replicate all the data and initialize all replica subs on the local and remote systems using the Domino Replicator. Type the following in the server console:

   replicate <*remote server name*>

   where <*remote server name*> is the domino server name, for example qp1/Acme.

6. Wait for the Domino Replicator to finish. This step may take several hours.
7. Start the HTTP task. Type the following at the server console:

   load http

   Note Because each server in the cluster has independent server settings, you must update the settings (for example, User Directory) in the QuickPlace Administration room.

8. (Optional) Create all search indexes for all newly replicated QuickPlaces. This task can take several hours and can be done while the server is running. It is optional because it runs automatically at 2 AM. Type the following at the server console:

   load updall

9. Enable the server in the IBM Network Dispatcher cluster for all relevant ports (80, 443, 25, 1533).

Removing a QuickPlace server from a cluster

When you remove a QuickPlace server from a cluster, some QuickPlaces and rooms created and deleted on the server to be removed may not have propagated around the cluster. You must ensure that all the changes are propagated correctly before you stop the server; otherwise data may be lost.

To remove a QuickPlace server from a cluster:

1. Disable the QuickPlace server in the IBM Network Dispatcher cluster for all relevant ports (80, 443, 25, 1533).

2. Shut down the HTTP task. Type the following in the server console:

   `tell http quit`

3. Run the replicamaker command with one of the other servers in the cluster. Type the following at the server console:

   load qptool replicamaker -a -s <*remote server name*>

   where <*remote server name*> is the Domino server name, for example, qp1/Acme.

   For more information on the replicamaker command, see the chapter "Using QPTool Commands."

4. Wait for replicamaker to finish running successfully.
5. Replicate all the data and initialize all replica subs on the local and remote systems using the Domino Replicator. Type the following in the server console:

   replicate <*remote server name*>, where <*remote server name*> is the domino server name, for example, qp1/Company.

6. Wait for the Domino Replicator to finish.
7. Run qptool remove -cleanup to remove any databases that have been marked for deletion.

   Note You might have to run dbcache flush at the server console before issuing the remove command to release handles to newly deleted place databases.

   For more information on the remove command, see the chapter "Using QPTool Commands."

8. Shut down the server.

Configuring clustered servers for the Place Catalog

For the Place Catalog to work properly in a clustered environment, you must configure the QuickPlace server's qpconfig.xml file with details of the cluster environment.

Configuring cluster settings in QPCONFIG.XML

If the QuickPlace server is part of a cluster, copy the following XML content from qpconfig_sample.xml to your qpconfig.xml file. Replace the sample values with your own values. For descriptions of each XML element, see the chapter "Setting Up the Place Catalog."

```
<?xml version="1.0" standalone="yes"?>
 <server_settings>
  <cluster>
    <master virtual="true" ssl="false">
```

```
        <port>80</port>
        <hostname>servername.enterprise.com</hostname>
        <path_prefix />
      </master>
    </cluster>
  </server_settings>
```

Place Catalog entries and clusters

There are two QuickPlace server cluster environment alternatives for storing QuickPlace server cluster data in the Place Catalog.

- If the cluster does not have a virtual server, data is maintained in separate entries in the Place Catalog for each physical server, and for each place on a physical server.
- If the cluster has a virtual server, each physical server and place has an entry. But there is also an entry for the virtual server that represents the combination of all physical servers. And there is an entry for each place in the cluster that represents all the replicas of the place in the cluster.

When the cluster has a virtual server, real-time updates to the Place Catalog (such as place creation, locking of a place, and place membership changes) are made in the place entries corresponding to the virtual server. The non-real time updates (such as place size, time last accessed, and time last modified) are made to the place entries corresponding to the physical servers in the cluster. This information allows the administrator to know the differences in access and size for the places in each of the physical servers in the cluster.

The QPTool placecatalog command with the -update flag synchronizes the place entries that correspond to the physical servers, and the place entries that correspond to the virtual server. For more information on the placecatalog command, see the chapter “Using QPTool Commands.”

To set up a virtual server for a QuickPlace cluster, you must configure a network dispatcher, such as IBM Network Dispatcher Version 3.6. Then you must configure the proper settings in the QPCONFIG.XML file on each server in the cluster. For information on setting up a network dispatcher, see your server documentation. For information on configuring cluster settings in QPCONFIG.XML, see the chapter “Setting Up the Place Catalog.”

Chapter 6
Setting Up Security

This chapter describes setting up QuickPlace authentication and access control.

QuickPlace authentication

QuickPlace supports these types of authentication for Web browsers connecting to a QuickPlace server:

- Basic name-and-password authentication
- Multi-server session-based name-and-password authentication (single sign-on)

Basic authentication is implemented by default. You can enable multi-server session-based authentication, also known as single sign-on. Single sign-on allows Web users to log on once to a server and then access any other server in the DNS domain enabled for single sign-on.

Although QuickPlace 3.0 does not support single-server session-based authentication, setting up multi-server session-based authentication on a single server achieves a similar result as setting up single-server session-based authentication on the server.

Note To use SSL to encrypt the data transferred between Web browsers and a QuickPlace server, enable SSL on the Domino Web server. For more information, see Domino Administrator Help.

QuickPlace supports custom authentication applications through the Domino Server API (DSAPI). This interface allows some third-party vendors to design a DLL to support authentication for access to QuickPlace databases.

Setting up multi-server session-based authentication

To set up multi-server session-based authentication for a QuickPlace server:

1. Add the following settings to the NOTES.INI file:

   NoWebFileSystemACLs=1

   h_ScopeUrlInQP=1

2. To enable session-based authentication in the Domino Directory:
   a. Edit the Server document.
   b. Click the Internet Protocols - Domino Web Engine tab.
   c. Next to Session authentication, select multi-server.

   For additional information on setting up multi-server session-based authentication, see Domino Administrator Help.

3. To customize an existing Domino Web Server Configuration database, go to Step 4. To create a Domino Web Server Configuration database, do the following:
   a. Create a database from the Domino Web Server Configuration (5.0) template and give it the file name DOMCFG.NSF.
   b. Open the new database.
   c. Choose Create - Mapping a Login Form.
   d. In the "Target Database file name" field, enter QUICKPLACE/RESOURCES.NSF.
   e. In the "Target form name" field, enter QuickPlaceLoginForm.
   f. Save the new form.

4. To customize an existing Domino Web Server Configuration database that you already use, do the following:
   a. From Domino Designer, open QUICKPLACE/RESOURCES.NSF.
   b. Open the QuickPlaceLoginForm.
   c. Copy the <Computed Value> field from this form to the login form in DOMCFG.NSF.

Note URLs issued to servers configured for multi-server session-based authentication must specify the full DNS server name, not the hostname or IP address. See the Domino Release Notes for more information.

Modifying user cache settings

After a QuickPlace server successfully authenticates a user, it adds the user's name, password, and the groups of which the user is a member to its user cache. The next time the user attempts to authenticate, the server can quickly access the information in the cache to speed up authentication.

Specifying the number of user entries allowed in the cache

To specify the maximum number of user entries allowed in the cache, use the following NOTES.INI setting:

QuickPlaceMaxCachedUsers=*number*

where number is a number of user entries.

When the cache reaches the specified number, older entries are removed to make room for new ones that are needed. By default, 64 user entries are allowed in the cache.

Specifying the length of time user entries remain in the cache

To specify the length of time user entries remain in the cache before the server removes them, use the following NOTES.INI setting:

QuickPlaceExpireCachedUsers=*interval*

where *interval* is the length of time in seconds. By default, the interval is 120 seconds.

Access control

As an administrator of a QuickPlace server, you can use the Security option in the Server Settings room of the administration place to do the following:

- Specify other users as administrators of the QuickPlace server
- Change the password you use when you sign in as an administrator of the QuickPlace server
- Specify who can create places on a QuickPlace server

In addition, you can use the QPCONFIG.XML file to specify a user or group who has super user access to the server.

Specifying administrators of a QuickPlace server

You specify an administrator for a QuickPlace server when you set up the server. You can specify additional local users, external users, or external groups as administrators of a QuickPlace server. An administrator can do the following:

- Configure Security settings in the Server Settings room to control who can administer the server and who can create places.
- Configure User Directory settings in the Server Settings room to set up server connections to a user directory
- Configure Other Options in the Server Settings room to configure a variety of other server options
- Create and delete PlaceTypes on the server

Specifying local users as administrators

To specify a local user as an administrator, to remove a local user from the list of administrators, or to modify the information for a local administrator, do the following:

1. Sign in to the QuickPlace home page as an administrator.
2. Click Server Settings in the table of contents.
3. Click Security in the table of contents.
4. To add a local administrator when the QuickPlace server is not connected to a user directory, click Add and do the following:
   a. Specify the user name, password, and e-mail address for the administrator.
   b. Click Next.
5. To add a local administrator when the QuickPlace server is connected to a user directory, click Add and do the following:
   a. Click "Create new users specially for access to this QuickPlace server."
   b. Type the user name.
   c. Click Next.
   d. Specify the password and e-mail address.
   e. Click Next.
6. To remove a local administrator from the list of administrators, do the following:
   a. Under "Who can administer this server?," select the user.
   b. Click Remove.
   c. Select the name from the list of administrators.
   d. Click Next to remove the name from the list of administrators.
7. To modify the information for a local administrator, do the following:
   a. Under "Who can administer this server?," select the user.
   b. Click Modify.
   c. Specify a different user name, password, and/or e-mail address.
   d. Click Next.

Specifying external users and groups as administrators

If the QuickPlace server is connected to a user directory, do the following to designate an external user or group as an administrator or to remove an external user or group from the list of administrators. To modify the information for an external administrator, edit the user directory.

1. Sign in to the QuickPlace home page as an administrator.
2. Click Server Settings in the table of contents.
3. Click Security in the table of contents.
4. To add a name from a user directory as an administrator, do the following:
   a. In the "Who can administer this server?" section, click Add.
   b. Select "Add existing network users from the directory."

      Note You can also add a new local user as an administrator by selecting "Create new users specially for access to this QuickPlace server."

   c. Type the name of the user or group from the directory, or click Directory and search for the name. If you search for the name, when results appear, you can use the arrow boxes above the name list to view the next or previous page of results. When you find the name you are looking for, check the box next to the name and click Add. The name appears in the name list on the "Server Security: Add Access" page.

      For more information on typing the name directly, see the chapter "Connecting to a User Directory."

   d. When you finish adding names, click Close.
   e. Click Next to add the names to the list of administrators.
5. To remove a name from an external directory from the list of administrators, do the following:
   a. Under "Who can administer this server?," select the user.
   b. Click Remove.
   c. Select the user from the list.
   d. Click Next to remove the name from the list of administrators.

Changing a local administrator password

If you are an administrator from a user directory, you must change your password in the user directory. If you are a local administrator, do the following to change your password:

1. In the Address or Location box in your browser, enter the address of the QuickPlace server.
2. Click SignIn in the left corner of the screen.
3. Enter your administrator user name and password.
4. Click Change Password.

5. Enter your current password.
6. Enter your new password, and then re-enter it.
7. Click Next.
8. Sign in again and enter the new password.

Specifying a super user of a QuickPlace server

A super user can enter every place that exists now or in the future on a QuickPlace server, and can enter every room on the server as a manager. A super user can also specify administration settings in the Server Settings room in the administration place. Only an external user or group, and not a local user, can be a super user. Members of places are unaware of super users.

If you designate a user as a super user, and you also add the user name as a member of a place, the user gets the access defined for the user in the place, rather than super user access. So you should specify a super user that is not also a member of places.

By default no super user is defined. Use the QPCONFIG.XML file to add and remove the name of a super user. You can specify only one name as a super user, either the name of a user or the name of a group.

To add or remove a super user:

1. Create the QPCONFIG.XML file, if one does not exist. For more information on creating and using the QPCONFIG.XML file, see the chapter "QuickPlace Administration Overview."
2. Copy the following sample section from the QPCONFIG_SAMPLE.XML file to the QPCONFIG.XML file:

   ```
   <super_user enabled="true">
       <dn>cn=QuickPlace Admin,o=ibm</dn>
   </super_user>
   ```

3. Replace the text cn=QuickPlace Admin, o=ibm with the distinguished name of an external user or group you want to make a super user. For example, replace the name with cn=QuickPlace Administrators,o=acme.
4. To remove a super user, remove the line containing the user's or group's distinguished name.
5. To disable the super user feature, change the following line as follows:

   ```
   <super_user enabled="false">
   ```

6. Restart the HTTP task on the QuickPlace server.

Specifying which users can create places on a server

As administrator, you can decide who can create places on the QuickPlace server; you can grant this access to specific local users and to specific external users and groups. You can also specify that all users who have access to the server can create places.

Specifying local users who can create places

To specify local users who can create places on a QuickPlace server:

1. Sign in to the QuickPlace home page as an administrator.
2. Click Server Settings in the table of contents.
3. Click Security in the table of contents.
4. Under "Who can create new QuickPlaces on this server?," select "Only specific users (or groups) who provide a name and password."
5. To add the name of a local user to the list of users who can create places when the QuickPlace server is not connected to a user directory, click Add and do the following:
   a. Specify the user's name, password, and (optionally) e-mail address.
   b. Click Next to add the local user name to the list of users that can create places.
6. To add the name of a local user to the list of users who can create places when the QuickPlace server is connected to a user directory, click Add and do the following:
   a. Click "Create new users specially for access to this QuickPlace server."
   b. Type the user name.
   c. Click Next.
   d. Specify the password and (optionally) e-mail address.
   e. Click Next.
7. To modify information for a local user in the list of users who can create places, under "Who can create new QuickPlaces on this server?" do the following:
   a. Select the user.
   b. Click Modify.
   c. Change the user's name, password, and (optionally) e-mail address as desired.
   d. Click Next.

8. To remove a local user from the list of users who can create places, under "Who can create new QuickPlaces on this server?" do the following:
   a. Select the user.
   b. Click Remove.
   c. Select the local user name.
   d. Click Next.

Specifying external users who can create places

If the QuickPlace server is connected to a user directory, you can specify the external users and groups from the directory who can create places on the QuickPlace server.

1. Sign in to the QuickPlace home page as an administrator.
2. Click Server Settings in the table of contents.
3. Click Security in the table of contents.
4. To add the name of an external user who can create places, do the following:
   a. In the "Who can create new QuickPlaces on this server?" section, click Add.
   b. Select "Add existing network users from the directory."

      Note You can also add a new local user to the list of users who can create places by selecting "Create new users specially for access to this QuickPlace server."

   c. Type the name of the user or group from the directory, or click Directory and search for the name. If you search for the name, when results appear, you can use the arrow boxes above the name list to view the next or previous page of results. When you find the name you are looking for, check the box next to the name and click Add. The name appears in the name list on the "Server Security: Add Access" page.

      For more information on typing the name directly, see the chapter "Connecting to a User Directory."

   d. When you finish adding names, click Close.
   e. Click Next to add the names to the list of users who can create places.
5. To remove the name of an external user from the list of users who can create places:
   a. Below "Who can create new QuickPlaces on this server?," select the name of the external user.

b. Click Remove.

c. Select the name to remove.

d. Click Next to remove the user from the list of users who can create places.

Specifying that all users who have access to the server can create places

To specify that any user who can access a QuickPlace server can create a place on it:

1. In the Address or Location box in your browser, enter the address of the QuickPlace server.
2. Click SignIn in the left corner of the screen.
3. Enter the user name and password for a QuickPlace server administrator.
4. Click Server Settings in the table of contents.
5. Click Security in the table of contents.
6. Under "Who can create new QuickPlaces on this server?," select "Anyone who can connect to the server."

Chapter 7
Configuring Additional Server Settings

This chapter describes a variety of the server configuration options that are discussed in other chapters.

Server Settings in the administration place

Use the Server Settings room in the administration place on a QuickPlace server to:

- Control whether members can use ActiveX® controls and Java applets
- Control whether managers of places on a server can run agents (PlaceBots) within the places they manage
- Restrict the size of file attachments members can add to pages
- Enable or disable Sametime services
- Enable or disable a Domino Offline Passthru Server
- Enable or disable an Alternate Offline Download URL
- Specify an e-mail URL prefix if users access the QuickPlace server through a gateway server
- Control whether members can subscribe to receive e-mails integrated with their calendars

Note For information on using the Server Settings room to specify security settings, for example, who can administer a QuickPlace server or who can create places, see the chapter "Setting Up Security." For information on using the Server Settings room to connect to a user directory, see the chapter "Connecting to a User Directory."

To use Server Settings to configure the options described above:

1. Enter the URL of the QuickPlace server. For example:

   \\MyServer\QuickPlace
2. Click SignIn.
3. Enter the user name and password of a QuickPlace server administrator.
4. Click Server Settings in the table of contents.

5. Click Other Options in the table of contents.
6. Click Edit Options.
7. Do any of the following:
   - To enable members to use ActiveX controls when accessing places on the server, put a check mark next to Enable ActiveX. To disable this capability, remove the check mark.
   - To enable members to use Java applets when accessing places on the server, put a check mark next to Enable Java Applets. To disable this capability, remove the check mark.
   - To enable managers of places to use Domino agents — known as PlaceBots in QuickPlace — in the places they manage, put a check mark next to Enable Form PlaceBots. To disable this capability, remove the check mark.

     Managers can use PlaceBots to execute a Domino or QuickPlace task automatically according to a schedule or trigger. For example, a manager could use a scheduled PlaceBot to copy pages to a folder every morning.
   - To restrict the size of the files members of places can attach to pages, under Maximum Attachment Size, enter the maximum size in Kbytes. To allow attachments to be any size, leave the field blank.
   - To enable Sametime services on a QuickPlace server, enter the name of the Sametime Community server and the Sametime Meeting server in the boxes provided. To disable Sametime services, leave the boxes blank.

     To enable Sametime services on the QuickPlace server, you must also install and configure Sametime to work with the QuickPlace server. For more information, see the *QuickPlace Installation and Upgrade Guide*.
   - To enable a passthru server that can be used when accessing QuickPlace offline, enter the canonical name of the server and the hostname of the server in the boxes provided. To disable this feature, leave the boxes blank.
   - To specify a URL from an alternate source to download the QuickPlace Offline installer, enter the offline download URL in the box provided. To disable this feature, leave the box blank.
   - To specify an alternate e-mail URL prefix if the QuickPlace server is accessed using a gateway server, enter the URL prefix in the box provided.

- To enable members of places to subscribe to receive e-mails that are integrated with their personal calendars, put a check mark next to "Enable calendar subscriptions." To disable this feature, remove the check mark.

8. Click Next.

Configuring the Search Places feature

A manager of a place uses QuickPlace settings to enable or disable advanced search within a place. QuickPlace has two types of advanced search features: classic search and Search Places. Classic search is based on Domino search site and allows user to search for information within specific rooms or folders in a place or to search an entire place. The Search Places feature is based on Domino Domain Search and allows user to search all places of which they are a member. Unlike classic search, Search Places requires a Domain Catalog server and all search requests are handled by a QuickPlace server running on the Domain Catalog server.

For information on enabling advanced search for a place, see Help.

To set up the Search Places capability, administrators complete these steps:

1. Install the Domino server(s).
2. Configure Domain Search.
3. Install the QuickPlace server(s).
4. Install a QuickPlace server onto the Domain Catalog server.
5. Configure Search Place settings in QPCONFIG.XML.

For instructions on installing Domino servers and on configuring Domain Search, see Domino Administrator Help. For instructions on installing QuickPlace servers, see the *QuickPlace Installation and Upgrade Guide.* For instructions on configuring Search Place settings in QPCONFIG.XML, see the next topic.

Additional requirements for using the Search Places feature

In addition to the required configuration steps outlined above, note the following:

- The Search Places feature respects all access permissions on content, and so users must retain a single identity in order to be able to search across places. Therefore to search across places, authenticated users must be registered in an external user directory. Local users can search only within a place.

- If room access is controlled by a local group, even if the user has access through the local group, Search Places won't be able to find the document from the room. Restrict room access using external groups.
- If the QuickPlace service consists of more than two QuickPlace servers, including the Domain Catalog server, to use the Search Places feature you must configure multi-server session-based authentication (single-sign on). For more information, see the chapter "Setting Up Security."
- Do not use the QPTool remove command with the -now argument to remove places if the Search Places feature is used. Before removing places the search index must be cleared by the domain indexer. The qptool remove command with -cleanup argument runs nightly and removes places when the search index is cleared. For information, see the chapter "Using QP Tool Commands."
- If you use Search Places, using only QuickPlace servers in a domain is the recommended configuration. However if a domain includes non-QuickPlace Domino servers and QuickPlace servers, set up one Domain Catalog server for the QuickPlace servers and one Domain Catalog server for the non-QuickPlace servers. Use this configuration to keep the domain index for QuickPlace searches separate from the one used for Notes searches.

Configuring Search Places settings

Use the QPCONFIG.XML file to configure Search Place settings on each QuickPlace server. You must create this file, if you haven't already done so. For more information, see the chapter "QuickPlace Administration Overview." Copy the following sections in QPCONFIG_SAMPLE.XML to QPCONFIG.XML and modify them to suit your requirements:

```
<search_places enabled="true" anonymous="true">
  <domain_catalog_server ssl="false">
      <port>80</port>
      <domino_server_name>qpdcs/Haiku</domino_server_name>
      <path_prefix></path_prefix>
      <hostname>qpdcs.ibm.com</hostname>
  </domain_catalog_server>
</search_places>
```

The following table describes the settings.

Setting	*Description*
enabled	When set to true (default): Enables users to see and use the All Places advanced search option on the server. Allows users to use Search Places on the Domain Catalog server. When set to false: Hides the All Places advanced search option on the server. Returns an error when Search Places requests are made to the Domain Catalog server.
anonymous	When set to true allows anonymous users to search across places. When set to false (default) returns an error when anonymous users issue Search Places requests to the Domain Catalog server. If you allow anonymous users to search across places, if the manager of a particular place does not want to expose the contents of the place to anonymous users through the Search Places feature, the manager should make sure that anonymous access to the place is disabled, and limit the place membership to specified users and groups in the directory. If you allow anonymous access, make sure that anonymous users have the same access as the -Default- access in the ACL for CATALOG.NSF on the Domain Catalog server.
SSL*	When set to “true” defines that SSL generates the URL for the domain catalog server (HTTPS). When set to “false” (default) defines that HTTP generates the URL.
port*	Defines the port used in the URL for the Domain Catalog server.
path_prefix*	Defines a path prefix for the URL for the Domain Catalog server.
hostname*	Specifies the host name of the Domain Catalog server.
domino_server_name*	Specifies the Domino server name of the Domain Catalog server for example, ServerCatalog/Acme. Before removing places from this server, the server does a lookup to the Domain Catalog server to verify if the search index is cleared.

*Use these settings on any QuickPlace server that is not the Domain Catalog server. Do not use them on the Domain Catalog server.

Web page caching

Web page caching greatly improves the response time of the QuickPlace server. Without a cached copy of a Web page, the HTTP server must access the database upon every HTTP request, which results in a slower response time for the QuickPlace server. If a Web page is cached on the QuickPlace server, the server only has to pick up the page from the database one time, and then create a user-specific, cached copy of the page at that time. Upon subsequent requests for the page, the server retrieves and provides the cached copy, as long as it is still valid. If the server is brought down, the existing cache is maintained after the server is brought back up.

Certain actions cause the cache for a page to become invalid. Once a cached paged is invalid, the next time the page is accessed it is re-cached. Following are some examples of how the entire cache or specific pages within the cache can become invalid:

- A change to the QuickPlace Server Settings, for example a change to the default maximum attachment size allowed, invalidates all QuickPlaces on the server (the entire cache).
- If the Place Catalog is enabled, a change in the Place Catalog database invalidates the entire cache.
- A change in QPCONFIG.XML invalidates the entire cache.
- A change to place membership — a member is added, modified, or deleted — invalidates the cache for all databases associated with that place — MAIN.NSF and all the inner rooms. A change to inner room membership invalidates the cache for that particular room and its child rooms.
- A change in rooms — a room is created or deleted — invalidates the cache for all databases associated with that place.
- A page published in the Main room (MAIN.NSF) invalidates the cache for all databases associated with that place.
- A page published in a parent room invalidates the cache for the parent room and the child rooms below it.
- A page published in a child room invalidates the cache for the child room and for any rooms below it. The cache for the parent room pages remain valid.
- A customization to a parent room, for example a theme change or a custom form, invalidates the cache for the parent room and the child rooms below it.

Web page cache settings

QuickPlace administrators can use NOTES.INI settings to change the following preferences for the server cache:

- Enable or disable caching
- Set the cache directory
- Set the cache size limit
- Set the time interval for cache cleaning
- Set the cache for anonymous users only
- Enable or disable logging

To enable the cache

Set “QuickPlaceWebCacheEnabled=1” in the NOTES.INI file.

To disable server caching, set “QuickPlaceWebCacheEnabled=0”

The server cache is enabled by default.

To set the cache directory

Set “QuickPlaceWebCacheDir= <full path>” in the NOTES.INI file.

If this variable is not set in the NOTES.INI file, then it is automatically set to the default directory:
(<NOTESPROGRAM>\data\domino\quickplace\cache).

If a specified directory path is invalid, the server cache is disabled.

To set the cache size limit

Set “QuickPlaceWebCacheLimitInMB = <size in MB>” in the NOTES.INI file.

If this variable is not set in the NOTES.INI or if the size given is not a positive number, then the variable is automatically set to the default size of 50MB.

To set the time interval for cache cleaning

Add “QuickPlaceWebCacheGCIntervalInMIN= <time interval in minutes>” to the NOTES.INI file.

If this variable is not set in the NOTES.INI file, or if the value given is not a positive number, then it is automatically set to the default value of 60 minutes.

To set the cache for anonymous users only

Add “QuickPlaceWebCacheUsers= Anonymous” to the NOTES.INI file.

The default value for this setting allows server caching for all users when the cache is enabled. Changing this setting disables caching for all other users.

To enable logging for the server cache

Set QuickPlaceWebCacheLogging = < log level> in the NOTES.INI file.

The logging setting has three levels: 1, 2, or 3, where 1 is the least detailed and 3 is the most detailed. Logging is written to LOG.NSF.

Specifying the footer text that appears on all pages

You can use the QPCONFIG.XML file to specify the HTML that appears as a footer on all pages on the QuickPlace server. For example you might specify a corporate logo, administrative message, or corporate disclaimer. Create QPCONFIG.XML if the file doesn't already exist, copy the following section from it, and then modify it to suit your needs. For more information on creating the QPCONFIG.XML file, see the chapter "QuickPlace Administration Overview."

```
<server_messages>
  <footer>
     <![CDATA[ ]]>
  </footer>
</server_messages>
```

Customizing user notifications settings

Use the following section in QPCONFIG.XML file to specify a variety of settings for user notifications. Copy the following from QPCONFIG_SAMPLE.XML to QPCONFIG.XML, and customize the settings to suit your needs. For information on creating QPCONFIG.XML, see the chapter "QuickPlace Administration Overview."

```
<notifications>
  <place_invitation>
     <password_message>Your intranet password.</password_message>
  </place_invitation>
  <calendar>
     <client_types>
        <notes5 enabled="true"/>
        <msoutlook enabled="true"/>
     </client_types>
  </calendar>
  <recipient_rules>
```

```
<notifications>
      <expand_external_groups enabled="true"/>
       <allow_ambiguous_sendto enabled="false"/>
  </recipient_rules
  >
</notifications>
```

The following table describes these settings.

Setting	*Description*
password_message	Specifies the password prompt that appears in external users' invitations to visit places
notes5 enabled	When set to true (default), enables Notes 5 support for calendar notifications. When set to false, disables this support.
msoutlook enabled	When set to true (default), enables Microsoft® Outlook® support for calendar notifications. When set to false, disables this support.
expand_external_groups enabled	When set to true (default) when mail is sent to an external group, the notifications expand all the members of the group. When set to false, the notifications do not expand the group members.
allow_ambiguous_sendto enabled	When set to true, allows users to send notifications to ambiguous names from an external directory and have the Router resolve the names. When set to false (default), users cannot send notifications to ambiguous names from an external directory.

Enabling and disabling the UTF-8 Domino server setting

UTF-8 is an encoding format for Unicode. The Domino server document has a setting, "Use UTF-8 for Output," which changes the default character encoding of the Domino HTTP server to UTF-8. If the QuickPlace server is running with the GB-18030 code page, then this server setting must be set to Yes.

If the UTF-8 setting is not configured appropriately, your Domino server administrator must change the setting in Domino. For more information on changing the UTF-8 setting in Domino, see Domino Administrator Help.

Tracking the number of active QuickPlace users

To track the number of active users of a QuickPlace server, you use standard Domino Web server logging to log user access information to text files. Then you can use available tools to extract the names of each unique user. To retrieve the total number of active users in the QuickPlace service, you must set up each QuickPlace server in the service to generate log files.

When you set up the HTTP task to log user access information to text files, the HTTP task creates one log file a day that contains information about each user session with the QuickPlace server. The default name format for the log files is access<date>.log, where <date> is the date the log file is created in the format MMDDYYYY.

To set up logging

To set up the HTTP task on a QuickPlace server to log user access information to text files, do the following:

1. Open the Server document for the QuickPlace server in the Domino Directory in edit mode.
2. Click the Internet Protocols - HTTP tab.
3. In the Log files field, selected Enabled.
4. In the "Directory for log files" field, specify an existing directory path for the log files. The HTTP task only creates log files if the specified directory path exists.
5. In the Access log field, specify the prefix for the log files. The default prefix is: access.
6. Click Save and Close.

For more information on Web server logging and other log settings in the Server document, see Domino Administrator Help.

To extract the names of QuickPlace users from log files on UNIX systems

There are many tools available to use to extract the names of users from the log files and to exclude irrelevant information. One of the simpler methods available is using native operating system commands. Following are some examples of using the tr, grep, and sort commands on a UNIX® system to extract user names from log files.

Example of extracting names from one log file

The following commands translate the contents of the file, access03252002.log, to uppercase letters, extract only the lines that contain the character string " CN=", eliminate any duplicate names, and write the resulting list to the file, uniquename.log.

```
tr "[:lower:]" "[:upper:]" < access03252002.log | grep " CN=" | sort –u
–k 3,3 > uniquename.log
```

Example of extracting names from multiple log files

The following commands process two log files, access03252002.log and access03262002.log, to produce the unique user list.

```
tr "[:lower:]" "[:upper:]" < access03252002.log | grep " CN=" | sort –u
–k 3,3 >> tempname.log

tr "[:lower:]" "[:upper:]" < access03262002.log | grep " CN=" | sort –u
–k 3,3 >> tempname.log

sort –u –k 3,3 < tempname.log > uniquename.log
```

The following korn shell commands process all the log files generated by one server in the month of May to produce the unique user list.

```
for %f in (access05*.log) do tr "[:lower:]" "[:upper:]" < %f | grep "
CN=" | sort –u –k 3,3 >> tempname.log

for f in `ls -1 access05*log`

do

tr "[:lower:]" "[:upper:]" < %f | grep " CN=" | sort –u –k 3,3 >>
tempname.log

done

sort –u –k 3,3 tempname.log > uniquename.log
```

Example of extracting names from log files on multiple servers

To extract a list of active user names of a QuickPlace service that consists of multiple servers, you run the commands described in the examples above on each server, putting the output into a single network file that all servers can access. You then use that network file to generate the final output.

For example, if the QuickPlace service consists of two QuickPlace servers, X, and Y, and the network file is n:\log\tempname.log, run korn shell commands such as the following ones on each server:

On server X run:

```
for %f in (access*.log) do tr “[:lower:]” “[:upper:]” < %f | grep “ CN=” | sort –u –k 3,3 >> X_tempname.log
for f in `ls -1 access*.log`
do
tr “[:lower:]” “[:upper:]” < %f | grep “ CN=” | sort –u –k 3,3 >> X_tempname.log
done
sort –u –k 3,3 X_tempname.log > n:log\tempname.log
```

On server Y run:

```
for %f in (access*.log) do tr “[:lower:]” “[:upper:]” < %f | grep “ CN=” | sort –u –k 3,3 >> Y_tempname.log
for f in `access*.log`
do
tr “[:lower:]” “[:upper:]” < %f | grep “ CN=” | sort –u –k 3,3 >> Y_tempname.log
done
sort –u –k 3,3 Y_tempname.log > n:log\tempname.log
```

Then use the following command to sort and generate the final list of names:

```
sort –u –k 3,3 < n:\log\tempname.log > uniquename.log
```

If there are many servers and log files to process, you can automate the steps by programming them in a cmd file (Windows NT) or a script file (UNIX).

To extract the names of QuickPlace users from log files on Windows NT

The tr, grep, and sort commands mentioned in the previous topic are not available natively on the Windows NT operating system. However, you can obtain software that makes the UNIX functionality available on Windows NT through the following sources:

- MKS Toolkits, a commercial software package. For information, see: http://www.mkssoftware.com/products/.

- The GNU Project, sponsored by the Free Software Foundation. GNU provides the source form of the commands for Windows NT. The binary form of the commands can be obtained from the Internet, one example being http://gnuwin32.sourceforge.net/. Obtain textutils, grep, and their supporting libraries, libintl.dll in gettext package libiconv.dll in libiconv package, and pcre.dll in pcre package. For more information, see http://www.gnu.org/.

If you use either of these packages, the commands to use on Windows NT then are ones described below.

Note Windows NT has a sort command stored in the \WINNT\System32 directory, but the command does not work for the purpose described here. Make sure to use the sort command provided with the software you obtained, rather than the one provided with Windows NT.

Example of extracting names from multiple log files on Windows NT

The following commands process all the log files generated by one server in the month of May to produce the unique user list.

```
for %f in (access05*.log) do tr "[:lower:]" "[:upper:]" < %f | grep " CN=" | sort –u –k 3,3 >> tempname.log

tr "[:lower:]" "[:upper:]" < %f | grep " CN=" | sort –u –k 3,3 >> tempname.log

sort –u –k 3,3 tempname.log > uniquename.log
```

Example of extracting names from log files on multiple servers on Windows NT

For example, if the QuickPlace service consists of two QuickPlace servers, X, and Y, and the network file is n:\log\tempname.log, run commands such as the following ones on each server:

On server X run:

```
for %f in (access*.log) do tr "[:lower:]" "[:upper:]" < %f | grep " CN=" | sort –u –k 3,3 >> X_tempname.log

tr "[:lower:]" "[:upper:]" < %f | grep " CN=" | sort –u –k 3,3 >> X_tempname.log

sort –u –k 3,3 X_tempname.log > n:log\tempname.log
```

On server Y run:

```
for %f in (access*.log) do tr "[:lower:]" "[:upper:]" < %f | grep " CN=" | sort –u –k 3,3 >> Y_tempname.log

tr "[:lower:]" "[:upper:]" < %f | grep " CN=" | sort –u –k 3,3 >> Y_tempname.log

sort –u –k 3,3 Y_tempname.log > n:log\tempname.log
```

Then use the following command to sort and generate the final list of names:

sort –u –k 3,3 n:\log\tempname.log > uniquename.log

Setting Up QuickPlace Logging

You can use NOTES.INI settings to log a variety of types of QuickPlace activity. Output is logged to the server console and to the log file (LOG.NSF). Set up logging to troubleshoot a specific problem and then disable logging when you are finished. Logging degrades server performance so enable it only on a temporary basis.

To enable a specific type of logging, add the following line to the NOTES.INI file on the QuickPlace server:

setting=level

Where *setting* is a logging setting listed in the following table and *level* is the desired level of logging.

For example:

QuickPlaceAuthenticationLogging=5

The specified level of logging logs all messages on the server that are less than or equal to that level. The higher the level of logging, the more verbose the output.

Logging setting	*Levels*	*Description*
QuickPlaceAuthenticationLogging	5.00	Tracks authentication, events, failures, successes, group expansion, names list generation
QuickPlaceSpellCheckEngineLogging	1.00	Spell Checker engine logging
QuickPlaceWebCacheLogging	3.00	Web Caching logging (caches pages sent to browser)
QuickPlaceJavaServerLogging	3.00	QuickPlace Java Server Logging
QuickPlaceJvmLogging	1.00	Java Virtual Machine Logging
QuickPlaceLockLogging	1.00	Place Lock tool logging
QuickPlaceArchiveLogging	1.00	Archive tool logging
QuickPlacePlaceTypeCentralRefresh Logging	4.00	Place type refresh logging

continued

Logging setting	*Levels*	*Description*
QuickPlaceUserCacheLogging	1.00	User cache parameter logging
QuickPlacePerformanceLogging	1.00	Performance Data Collector logging
QuickPlaceUserDirectoryLogging	1.00	User Directory logging
QuickPlaceDbCommandPerformance Logging	3.00	QuickPlace Server Command Performance logging
QuickPlaceStubMakerLogging	3.00	Stub Creator logging for QuickPlace cluster support
QuickPlaceToolLogging	1.00	QPTool logging
QuickPlaceCalendarSubscription Logging	0.00	Calendar event logging; 0 indicates this is always on
QuickPlaceUpgradeLogging	4.00	Upgrade logging (upgrade from pre-3.0 QuickPlaces)
QuickPlacePlaceCatalogLogging	4.00	Place Catalog logging
QuickPlaceExtensionManagerLogging	2.00	Extension Manager Logging for handling events of authentication for DOLS replication
QuickPlaceDSAPILogging	5.00	DSAPI interface logging
QuickPlaceSearchPlacesLogging	2.00	Search across places logging
QuickPlaceJavaLogging	5.00	Java Debug Logging
QuickPlaceMyPlacesLogging	3.00	MyPlaces logging
QuickPlacePlaceCatalogQueryLogging	3.00	Queries into Place Catalog logging
QuickPlaceObjectPoolLogging	2.00	ObjectPool Memory management for PlaceCatalog
QuickPlaceMailLogging	4.00	Quickplace e-mail process logging

Chapter 8
Using QPTool Commands

This chapter describes how to complete various administration tasks using QPTool commands.

QPTool

QPTool is a server task that you run with arguments to do administrative tasks. You can use the QPTool command to complete the following tasks:

- Change user and group names in places
- Change the hierarchy of names in places
- Reset user passwords
- Remove members from places
- Send newsletters to subscribers
- Send mail to managers and members of places
- Register and unregister places
- Automate replica stub creation
- Upgrade places and PlaceTypes
- Refresh places and PlaceTypes
- Lock and unlock places
- Archive places
- Remove places or PlaceTypes
- Update statistics in the Place Catalog
- Generate reports about places and servers
- Repair places
- Clean up dead mail
- Execute an XML API file

Running QPTool

QPTool commands are designed to be used while the QuickPlace server is running. To run QPTool from a server console, enter:

```
load qptool [command] [arguments]
```

To run QPTool from the Domino program directory on the Windows NT platform, enter:

```
nqptool [command] [arguments]
```

To run QPTool from the Domino program directory on a UNIX platform, enter:

```
qptool [command] [arguments]
```

You can also run QPTool from a batch file or other program.

The Place Catalog reflects changes that result from QPTool commands. For more information on the Place Catalog, see the chapter "Setting Up the Place Catalog."

Note QuickPlace server administrators running QuickPlace for iSeries™ can also run QPTool commands from the OS/400® command interface. The OS/400 command interface syntax is different from the Domino server console syntax. For details on the OS/400 command interface syntax, see the book *Installing and Managing QuickPlace 3.0 for iSeries.*

Using QPTool commands in a cluster

When you run a QPTool command on a server in a cluster, QuickPlace applies the command immediately only to the server on which you run the command. The command is applied to other servers in the cluster after cluster replication next occurs to those servers. For example, if you lock a place on one server in a cluster, the place is locked immediately only on that server. After cluster replication replicates the place to other servers in the cluster however, the place is also locked on those servers.

The QPTool report command can gather information from all servers in a cluster. However, if the results of the report command are supplied as input to another qptool command, the other qptool command only acts immediately on the server from which you issue the command.

Changing user and group names

Use the QPTool changemember command to change the name of a local user, external user, or external group in specified places. The original name is known as the source name and the name you change to is known as the target name.

Using changemember, you can do the following tasks:

- Change a user or group name to a new name — for example, change the name of a user who recently married so the user can continue to access a place using the new name. In this case, the target name is a new name.
- Change the name of a user or group to the name of another existing user or group — for example, change the name of a user who leaves the company to the name of a remaining user who assumes the original user's responsibilities. The access the target name has to places is the higher level of access between the source and target names. For example, if the source name is a manager of a place and the target name is a reader of the place, the target name becomes a manager of the place and has access to all pages previously accessible to the source and target names. The same access control principle applies to room access.
- Change the name of a local user to the name of an external user in a user directory — for example, to move from a pilot deployment that uses local users to a production deployment that uses a corporate directory.

You can make these combinations of name changes:

- Local user name to local user name
- Local user name to external user name
- External user name to external user name
- External group name to external group name

You cannot make these combinations of name changes:

- External user name to local user name
- External group name to local user name
- External group name to external user name
- Local user name to external group name
- External user name to external group name

Note You can use the changemember command on a pre-3.0 place only if you have first used the qptool upgrade command to upgrade the place.

The syntax for the changemember command is:

`qptool changemember` ***`arguments`***

The following table describes the arguments. When a name specified as an argument contains spaces, include quotation marks (“”) around the name.

Argument	*Description*
-?	Prints help on the command.
-sourcedn *name*	Specifies the original distinguished name of an external user or external group exactly as the name appears in the external directory (including spaces), for example, “cn=Connor Jones, ou=Sales,o=Acme.”
-sourceu *name*	Specifies the original name of a local user, for example, “Joe Smith.”
-sourceg	Indicates that the specified source name is that of an external group.
-targetdn *name*	Specifies the new distinguished name of an external user or external group exactly as it appears in the external directory (including spaces) — for example, “cn=Representatives,ou=Sales,o=Acme.”
-targetu *name*	Specifies the new name of a local user, for example, “Joe Smith.”
-targetg	Indicates that the specified target name is that of an external group.
-p *place(s)*	Specifies a place or a space-separated list of places in which to rename the user or group.
-i *inputfilename*	XML input file that specifies the places in which to rename the user or group.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.CHANGEMEMBER.XML in the server program directory.

The following table provides examples of using the qptool changemember command.

Task	*Command*
Change the name of local user name to an external user name.	>load qptool changemember -p PlaceName -sourceu localuser -targetdn “CN=ExternalUser,O=[Organization]”
Change an external user name to an external user name.	>load qptool changemember -p PlaceName -sourcedn “CN=External User,O=[Organization]” -targetdn “CN=New External User,O=[Organization]”
Change an external group name in multiple places.	>load qptool changemember -p PlaceName1 PlaceName2 -sourcedn -sourceg “CN=External Group,O=[Organization]” -targetdn -targetg “CN=New External Group,O=[Organization]”

Changing the name hierarchy of names in places

You can use the QPTool changehierarchy command to change the hierarchy in the names of external users and groups in places. For example, if your company name changes and you change the names of users and groups in an external directory to reflect the change, you can then use the changehierarchy command to change the names in places. Or if you create a new group with a new hierarchy in your external directory to encompass what was previously two groups, you can change the names of the original groups in places to the name of the new group.

The changehierarchy command does not operate on local users.

The syntax for the changehierarchy command is:

`load qptool changehierarchy` ***`arguments`***

The following table describes the arguments you can use with the command.

Task	*Description*
-?	Prints help on the command.
-sourceh *hierarchy*	Specifies the original name hierarchy to change, for example, ou=people,o=group. If the hierarchy includes spaces, place quotation marks around it.
-targeth *hierarchy*	Specifies the new name hierarchy, for example, ou=people2,o=group. The name hierarchy you specify should correspond to a valid name hierarchy in the external directory. If the hierarchy includes spaces, place quotation marks around it.
-a	Changes the names of external users and groups that use the original name hierarchy to the new name hierarchy in all places.
-p *place(s)*	Changes the names of external users and groups that use the original name hierarchy to the new name hierarchy in a place or a space-separated list of places.
-i *inputfilename*	Changes the names of external users and groups that use the original name hierarchy to the new name hierarchy in places specified in an XML input file.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.CHANGEHIERARCHY.XML in the server program directory.

The following table provides examples of using the changehierarchy command.

Task	*Command*
Change the names of users and groups within the hierarchy ou=boston,o=acme to the hierarchy ou=detroit,o=acme in the place P1	>load qptool changehierarchy -sourceh ou=boston,o=acme -targeth ou=detroit,o=acme -p P1
Changes the names of users and groups with the hierarchy ou=boston,o=acme to the hierarchy ou=detroit,o=acme in all places	>load qptool changehierarchy -sourceh ou=boston,o=acme -targeth ou=detroit,o=acme -a

Resetting user passwords

Use the QPTool password command to reset passwords for a local user.

Note To change the password for an external user, change the entry for the user in the external directory.

The syntax for the password command is:

`load qptool password` ***`arguments`***

The following table describes the arguments for the command.

Argument	*Description*
-?	Prints help on the command.
-u *name*	Specifies of the name of the local user whose password you are changing. If the name has spaces, include quotations marks around the name, for example: “Joe Smith.”
-pw *password*	Specifies the new password.
-p *place (s)*	Specifies a place or a space-separated list of places on which to change the user’s password.
-i *inputfilename*	XML input file that specifies places on which to change the user’s password.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.PASSWORD.XML in the server program directory.

The following table provides examples of using the password command.

Task	*Command*
Change the password for a local user whose name has no spaces	>load qptool password -p placename -u joeuser -pw newpassword
Change the password for a local user whose name includes spaces	>load qptool password -p placename -u “joe user” -pw newpassword

Removing members from places

Use the QPTool removemember command to remove members from a place. You can use the removemember command on a pre-3.0 place only if you have first used the qptool upgrade command to upgrade the place.

The syntax for the removemember command is:

`load qptool removemember` ***`arguments`***

The following table describes the arguments you can use with the command.

Argument	*Description*
-?	Prints help on the command.
-dn *name*	Name of an external user or group to remove. If the name contains a space, include quotation marks around it. Specify the name exactly as it is defined in the external directory, for example: “cn=connor jones,ou=sales,o=acme”
-g	Indicates that a specified distinguished name is that of a group
-u *name*	Name of a local user to remove. If the name contains a space, include quotation marks around it, for example: “Jonathan Carter”
-a	Removes the specified name from all places.
-p *place(s)*	Removes the specified name from a place or a space-separated list of places.
-i *inputfilename*	XML input file that specifies the places from which to remove the specified name.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.REMOVEMEMBER.XML in the server program directory.

The following table provides examples of using the removemember command.

Task	*Command*
Remove the external user cn=connor jones,ou=sales,o=acme from the place P1	>load qptool removemember -dn “cn=connor jones,ou=sales,o=acme” -p P1
Remove the external group cn=managers,ou=groups,o=acme from the place P1	>load qptool removemember -g -dn “cn=managers,ou=groups,o=acme” -p P1
Remove the local user Jonathan Carter from the places P1 and P2	>load qptool removemember -u “Jonathan Carter” -p P1 P2
Remove the external user cn=connor jones,ou=sales,o=acme from all places	>load qptool removemember -dn “cn=connor jones,ou=sales,o=acme” -a
Remove the external group cn=managers,ou=groups,o=acme from places specified in the XML input file QPTOOL.MYREMMEM.XML	>load qptool removemember -i qptool.myremmem.xml -g -dn “cn=managers,ou-groups,o-acme”
Remove the external user cn=connor jones,ou=sales,o=acme from the place P1 and log the command output to the non-default XML output file QPTOOL.MYOUTFILE.XML	>load qptool removemember -dn “cn=connor jones,ou=sales,o=acme” -p P1 -o QPTOOL.MYOUTFILE.XML

Sending newsletters to subscribers

Use the QPTool newsletter command to send daily and weekly newsletters to members of places. This command replaces the QuickPlace 2.0 quickplacenightly send newsletter feature. Members of a place can receive daily newsletters if daily newsletters are enabled for the place in Customize, Basics, and can receive weekly newsletters if weekly newsletters are enabled in Customize, Basics. To receive a newsletter, a member must subscribe to newsletters in the member information page and must have a valid e-mail address.

Note QuickPlace cannot mail newsletters to external groups. If you want to mail a newsletter to a user who is a member of an external group, add the user as a member of the place.

The syntax for the newsletter command is:

`qptool newsletter` ***`arguments`***

The following table describes the arguments.

Argument	*Description*
-?	Prints help on the command.
-daily	Sends newsletters in daily format. By default the NOTES.INI file includes the setting ServerTasksAt1=qptool newsletter -daily -a so that daily newsletters are sent at 1 AM for all places. You can change the time when daily newsletters are sent by modifying the NOTES.INI file or scheduling the command through a Program document.
-weekly	Sends newsletters in weekly format. Weekly newsletters are not sent by default. Using a Program document to schedule the mailing of weekly newsletters for all places is recommended. For example, you might mail weekly newsletters Mondays at 2 AM. In QuickPlace 3.0, administrators have complete control over when weekly newsletters are mailed.
-a	Sends newsletters for all places.
-p *place(s)*	Sends newsletters for a place or a space-separated list of places.
-i *inputfile*	Sends newsletters for places specified in an XML input file.
-o *outputfile*	Logs results to a specified XML output file. By default logs results to QPTOOL.NEWSLETTER.XML in the program directory.

Sending mail to managers and members of places

Use the QPTool sendmail command to broadcast an e-mail message to all managers or all members of a place. The Send Mail command is useful for communicating administration issues to place managers. For example, you could send a broadcast e-mail to the managers of places if the places have exceeded a predetermined size limit and will be archived.

The syntax for the sendmail command is:

`load qptool sendmail` ***`arguments`***

The following table describes the arguments available for the command.

Argument	*Description*
-?	Prints help on the command.
-template *template*	XSL template file that specifies the message.
-managers	Sends mail to managers only. Without this argument, sends mail to all members, including the managers.
-i *inputfile*	A required argument that specifies the places and other data in an XML input file. If you are using tags for title, size, last_accessed or last_modified, values for those fields must exist in the input file. The qptool sendmail command only looks to the input file for its data; it does not query the places for the tag values.
-o *outputfile*	Logs results to a specified XML output file. By default logs results to QPTOOL.SENDMAIL.XML in the program directory.

Sample template file

You can use the following sample template and then customize it for your needs.

```
<?xml version="1.0"?>

<xsl:stylesheet

        xmlns:xsl="http://www.w3.org/1999/XSL/Transform"

        version="1.0"

        xmlns:lsxlt="http://xml.apache.org/xslt"

        xmlns:java="http://xml.apache.org/xslt/java"

>

<xsl:template match="place">

  <mail>

  <from>E-mail address here</from>

  <cc>List of e-mail addresses here</cc>

  <bcc>List of e-mail addresses here</bcc>

  <subject>Subject string here</subject>

  <body>
```

This mail is sent to members of place '<xsl:value-of select=". / name" / >' by qptool sendmail using xsl as a mail template. Some other fields you might want to use are:

TITLE: '<xsl:value-of select=". / title" / >',

SIZE: '<xsl:value-of select=". / size" / >',

LAST_ACCESSED: '<xsl:value-of select=". / last_accessed" / >',

LAST_MODIFIED: '<xsl:value-of select=". / last_modified" / >'

< / body>

< / mail>

< / xsl:template>

< / xsl:stylesheet>

Note You can include information about each place in the e-mail to managers or members of that place. The tags used in the template look like:

'<xsl:value-of select=". / *fieldname*" / >'

where *fieldname* is the name of a field in the input XML.

Registering and unregistering places on the server

Use the QPTool register command to do the following:

- Add place documents in the Place Catalog for places created prior to enabling the Place Catalog or for places added from another server. Places require place documents for the QuickPlace service to be aware of them.
- Adjust server-specific information for a place that has been moved from another server or renamed on the same server.
- Restore a place that was previously archived
- Register a server in the Place Catalog

Use the QPTool unregister command to remove a place's document from the Place Catalog. For example, if the Place Catalog is down for any period of time, unregister all places and then use the register command to register the place again so that the Place Catalog contains up-to-date place information. Note that when you use the remove command to remove a place, you do not have to use the unregister command because the remove command automatically removes the place document.

For more information on the Place Catalog, see the chapter "Setting Up the Place Catalog."

The syntax for the register / unregister command is:

`qptool register[unregister]` ***`arguments`***

The following table describes the arguments.

Argument	*Description*
-?	Prints help on the command.
-placecatalog	Registers / unregisters specified place(s) or server in the Place Catalog.
-server	Registers / unregisters the server on which the command is run in the Place Catalog. The first time you create a place on a server, the server is registered in the Place Catalog automatically if the Place Catalog is set up.
-install	Installs and resets server-specific information for places that have been: • Moved to this server from another server • Renamed on this server • Restored from archive **Note** This argument is the equivalent of the QuickPlace 2.0 QPMove functionality.
-a	Registers / unregisters all places.
-p *place(s)*	Specifies a place or a space-separated list of places to register / unregister.
-i *inputfilename*	XML input file that specifies the places to register / unregister.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.REGISTER.XML or QPTOOL.UNREGISTER.XML in the server program directory.

Note If you change the port or protocol settings for your server, run "qptool unregister -server" and then "qptool register -server" to reset the information in the Place Catalog.

The following table provides examples of using the qptool register / unregister command.

Task	*Command*
Register a server with the Place Catalog	>load qptool register -server
Unregister a server with the Place Catalog	>load qptool unregister -server
Register a place that has been moved from another server, renamed on the current server, or restored from archive	>load qptool register -p placename -install
Unregister a place	>load qptool unregister -p placename
Register a place in the Place Catalog only	>load qptool register -p placename -placecatalog
Register multiple places that have been moved from another server	>load qptool register -p place1 place2 place3 -install
Unregister multiple places	>load qptool unregister -p place1 place2 place3
Register all places on the server in the Place Catalog after upgrading to 3.0 and enabling the Place Catalog	>load qptool register -a -placecatalog
Unregister all places on the server (that is, remove from place catalog)	>load qptool unregister -a
Register places specified in an input file	>load qptool register -i qptool.myinput.xml
Unregister places specified in an input file	>load qptool unregister -i qptool.myinput.xml
Register a place and log results in a non-default output file	>load qptool register -p placename -o qptool.myout.xml
Unregister a place and log results in a non-default output file	>load qptool unregister -p placename -o qptool.myout.xml

Automating replica stub creation

After the creation of new places, rooms, and PlaceTypes, use the QPTool replicamaker command to create replica stubs for the new places, rooms, and PlaceTypes on other servers in a cluster. Note that after creation of the replica stubs, cluster replication or standard replication must then replicate the new places, rooms, and PlaceTypes to populate them initially and then keep them synchronized.

The replicamaker command does the following:

- Creates replica stubs for MAIN.NSF and CONTACTS1.NSF on the local server or another server when a place or PlaceType is created.
- Makes a new copy of SEARCH.NSF on the local server or another server when a place is created.
- Creates replica stubs on the local server or another server for any new rooms.

Note PlaceTypes replicate and the replicamaker command creates replica stubs for PlaceTypes the same way it creates replica stubs for places.

For more information on PlaceTypes, see the chapter "Managing PlaceTypes."

The syntax for the replicamaker command is:

`load qptool replicamaker` ***`arguments`***

The following table describes the arguments you can use with the command.

Argument	*Description*
-?	Prints help on the command.
-s *sourceserver*	The name of one server involved with the replication. If not specified, default is the local server. If you don't use -s, you must use -t.
-t *targetserver*	The name of another server involved with the replication. If not specified, default is the local server. If you don't use -t, you must use -s.
-a	Creates replica stubs for all new places, rooms, and PlaceTypes.
-p *place(s)*	Creates replica stubs for a specific new place or stubs for a space-separated list of new places.
-pt *placetype(s)*	Creates replica stubs for a specified PlaceType or stubs for a space-separated list of PlaceTypes.

Note You cannot use XML input and output files with this command.

Examples of using the replicamaker command

Task	*Command*
Do either of the following: For the new place P1 on the local server, create replica stubs on the server Server2/Acme. For the new place P1 on Server2/Acme, create replica stubs on the local server.	Either of the following: >load qptool replicamaker -p P1 -t Server2/Acme >load qptool replicamaker -p P1 -s Server2/Acme
For all new places, rooms, and PlaceTypes created on the local server, create replica stubs on Server2Acme. And for all new places, rooms, and PlaceTypes on Server2/Acme, create replicate stubs on the local server.	Either of the following: >load qptool replicamaker -t Server2/Acme -a >load qptool replicamaker -s Server2/Acme -a

To run replicamaker in verbose mode

You can run the replicamaker command in verbose mode. Verbose mode logs all activity and errors to the server console and helps identify any problems as they arise.

To turn on verbose logging for replicamaker on a server:

1. Shut down the server.
2. Edit the NOTES.INI file in the program directory and add the following:

   QuickPlaceStubMakerLogging=3
3. Start the server.

To ensure that new places and PlaceTypes are replicated quickly

To ensure that replica stubs of new places, rooms and PlaceTypes are created quickly and that replication then populates the places, rooms, and PlaceTypes quickly, do the following:

- Create Program documents in the Domino Directory that runs the QPTool replicamaker command with the -a argument between the servers in a cluster every 10 minutes. If there are more than two servers in the cluster, you must use more than one Program document to run the replicamaker command to ensure that replica stubs are created on all servers in the cluster.
- Schedule non-cluster replication between all servers in the cluster to occur at least every 20 minutes, to compensate for any lags in cluster replication.

For more information on Program documents and on scheduling replication, see Domino Administrator Help.

Upgrading places and PlaceTypes

If you are running QuickPlace 2.0.6 or higher, use the QPTool upgrade command to upgrade existing places and PlaceTypes to achieve full QuickPlace Release 3.0 functionality.

Before using the upgrade command, upgrade your server. If you are already running an overlay configuration, you must upgrade your existing Domino server to Release 5.0.10 and upgrade QuickPlace to Release 3.0. If you are running a standalone configuration, you must make the transition to the QuickPlace 3.0 overlay configuration.

You can upgrade the QuickPlace server without upgrading places and PlaceTypes created prior to server upgrade; however, you will not get full Release 3.0 functionality for those places and PlaceTypes until you run upgrade.

Caution Read the *QuickPlace Installation and Upgrade Guide* before upgrading your server and before using the QPTool upgrade command.

The syntax for the upgrade command is:

`load qptool upgrade` ***`arguments`***

The following table describes the arguments you can use with the command.

Argument	*Description*
-?	Prints help on the command.
-server	Runs the design task for all data on the server. If this is executed before server start up, then it also upgrades the administration place as well. Use this command right before you upgrade all places and PlaceTypes with “qptool upgrade -a” command or multiple specified place and PlaceTypes with “-p” or “-pt” arguments. Doing so gives you optimal performance when you upgrade a large number of places and PlaceTypes.
-a	Upgrades all places and PlaceTypes on the server.
-f	Runs upgrade even if system has not detected it needs to be run or even if it has detected the database version does not support upgrade.
-p *place(s)*	Upgrades a specified place or space-separated list of places.
-pt *PlaceType(s)*	Upgrades a specified PlaceType or space-separated list of PlaceTypes on the server If the place from which the PlaceType was created still exists, upgrade the place before upgrading the PlaceType.

continued

Argument	*Description*
-i	XML input file that specifies the places and PlaceTypes to upgrade.
-o	XML output file that logs the results of the command. By default the command logs results to QPTOOL.UPGRADE.XML in the server program directory. Check the output file for any upgrade errors.

Examples of the upgrade command

Task	*Command*
Run the design task on the server before upgrading multiple places and PlaceTypes	>load qptool upgrade -server
Upgrade all places and PlaceTypes on the server	>load qptool upgrade -a
Upgrade place P1	>load qptool upgrade -p P1
Upgrade PlaceTypes PT1, PT2, and PT3 and log results to the XML output file QPTOOL.MYUPGRADE.XML	>load qptool upgrade -pt PT1 PT2 PT3 -o qptool.myupgrade.xml

Refreshing places and PlaceTypes

Use the QPTool refresh command to refresh places and PlaceTypes on the QuickPlace server. The syntax for the refresh command is:

`load qptool refresh` ***`arguments`***

Note You cannot use the refresh command on a pre-3.0 place. You must use the qptool upgrade command to upgrade the place before you can use the refresh command on the place.

You can also refresh PlaceTypes using the PlaceTypes view in the administration place. For more information on PlaceTypes and refreshing them, see the chapter “Managing PlaceTypes.”

Argument	*Description*
-?	Prints help on the command.
-a	Refreshes the elements of all places on the server created from PlaceTypes with the parent PlaceTypes.
-p *place(s)*	Refreshes the elements of a specified place or space-separated list of places with the elements of its parent PlaceType(s).
-pt *placetype(s)*	Refreshes the elements of a specified PlaceType or space-separated list of PlaceTypes with design of the parent PlaceType(s).

continued

Argument	*Description*
-d *placetypes(s)*	Refreshes the elements of all places (not PlaceTypes) created from the specified PlaceType or space-separated list of PlaceTypes.
-i	XML input file that specifies places and / or PlaceTypes to be refreshed.
-o	XML output file that logs the results of the command. By default the command logs results to QPTOOL.REFRESH.XML in the server program directory.

Note By default the NOTES.INI file on a QuickPlace server includes the setting ServerTasksAt4=qptool refresh -a so that all child places (not PlaceTypes) are refreshed nightly at 4 AM.

The following table provides examples of the refresh command.

Task	*Command*
Refresh the elements of child PlaceTypes PT1 and PT2 with the design of their parent PlaceTypes	>load qptool refresh -pt PT1 PT2
Refresh the elements of child places P1 and P2 with the design of their parent PlaceTypes	>load qptool refresh -p P1 P2
Refresh the elements of all places on the server created from PlaceTypes	>load qptool refresh -a

Locking and unlocking places on the server

Use the QPTool lock / unlock command to take places in and out of service without stopping the server. Use the lock command to put places temporarily out of service during maintenance operations and then use the unlock command when the maintenance operations are complete. When you have locked a place, an end user trying to access that place receives a message that you specify, which explains that the place is temporarily out of service.

Other qptool commands lock places specified in the command automatically before running and then unlock the places when the operations are complete. However, you might want to lock a place before running multiple qptool commands to prevent users from accessing the place until you have finished running the commands. For example, you might want to lock a place while using the changemember command to change several member names within the place to prevent members from accessing the place until all the name changes are complete.

When a place is locked, the only QPTool command you can run on it is unlock.

The syntax for the lock / unlock command is:

`qptool lock[unlock] arguments`

The following table describes the arguments.

Argument	*Description*
-?	Prints help on the command.
-a	Locks / unlocks all places.
-p *place(s)*	Specifies a place or a space-separated list of places to lock / unlock.
-message *message*	Specifies a message to display to users who visit a locked place. Use quotes if the message contains spaces.
-i *inputfile*	XML input file that specifies the places to lock / unlock.
-o *outputfile*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.LOCK.XML or QPTOOL.UNLOCK.XML in the server program directory. To receive even more information during the lock / unlock process, you can set QuickPlaceLockLogging=1 in the NOTES.INI file.

The following table provides examples of using the qptool lock / unlock command.

Task	*Command*
Lock a place.	> load qptool lock -p *placename* -message “Place is undergoing membership changes. Please try back after 4 pm.” (where *placename* is the name of the place being locked)
Unlock a place.	> load qptool unlock -p *placename*

Archiving places

Use the QPTool archive command to copy places to a specified directory. Use the archive command when you want to:

- Back up active places by archiving them to a target directory without deleting them from their QuickPlace server.
- Back up inactive places before removing them from the QuickPlace server.

The syntax for the Archive command is:

`load qptool archive arguments`

The following table describes the arguments.

Argument	*Description*
-?	Prints help on the command.
-dir *path directory*	Directory in which to archive places. If you specify an archive directory without an explicit path, the specified archive directory is put in the server program directory. If the specified directory does not already exist, it is created.
-a	Archive all places.
-p *place(s)*	Specifies a place or a space-separated list of places to archive.
-i *inputfilename*	XML input file that specifies the places to archive.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.ARCHIVE.XML in the server program directory.

The following table provides examples of using the archive command.

Task	*Command*
Back up all places on the server	>load qptool archive -dir x:\qpbackup -a
Archive more than one place to a target directory below c:\	>load qptool archive -dir c:\threeplaces -p placeone placetwo placethree
Archive places specified in an XML input file to a directory below c:\	>load qptool archive -i qptool.archive.xml -dir c:\threeplaces
Archive a place to a directory below c:\ and log output to a non-default XML file location.	>load qptool archive -p placename -dir c:\placenameback -o c:\qptool.archive.xml

Restoring an archived place to an active server

If you archive a place and delete it from the QuickPlace server, and then later want to use the archived version of the place, use the QPTool register command to restore the place.

For example, if you execute these QPTool commands to archive a place and then to remove it from the data directory:

1. >load qptool archive -p placename -dir d:\archivedir
2. >load qptool remove -p placename -now

to later restore the archived place so that users can access it again from a browser, you would do the following:

1. Copy d:\archivedir\placename back to the *program*\data\QuickPlace directory.
2. Specify this QPTool command:

   `>load qptool register -p placename -install`

Removing places and PlaceTypes from the server

Use the QPTool remove command to remove places or PlaceTypes from the QuickPlace server. You might want to remove a place or PlaceType that is no longer used or that hasn't been used for a long time.

For additional information on removing PlaceTypes, see the chapter "Managing PlaceTypes."

The syntax for the remove command is:

`load qptool remove` ***`arguments`***

The following table describes the arguments for the command.

Argument	*Description*
-?	Prints help on the command.
-now	Deletes places or PlaceTypes immediately. If you do not use this argument, places or PlaceTypes are only marked for removal. A place or PlaceType that is marked for removal is inaccessible from a browser but still exists in the file system.
-cleanup	Deletes places or PlaceTypes that were previously marked for removal through the remove command or that were deleted through the QuickPlace user interface. The ServerTasksAt2 NOTES.INI setting includes qptool remove -cleanup, so that the command runs by default at 2 AM. Note that the -cleanup argument only works on databases that are not in the database cache. Use the dbcache flush command to flush databases from the cache before using -cleanup. For more information on the database cache, see the Domino Administrator Help. The -cleanup argument replaces the QuickPlace 2.0 quickplacenightly command used to delete places and PlaceTypes.
-a	Marks for removal or deletes all places on the server. This argument does not run on PlaceTypes.
-p *place(s)*	Specifies a place or a space-separated list of places to mark for removal or to delete.
-pt *PlaceTypes*	Specifies a PlaceType or a space-separated list of PlaceTypes to mark for removal or to delete.
-i *inputfilename*	XML input file that specifies places or PlaceTypes to mark for removal or to delete.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.REMOVE.XML in the server program directory.

Note If you use Search Places on the server, do not use the -now argument to remove places. Instead use the remove command without the -now

argument and mark the places for removal. After you mark the places for removal, run the Catalog and Domidx tasks on the Domain Catalog server. After the Domidx task has completed, use the remove command with the -cleanup argument to remove the places. Follow this removal procedure to ensure that information in documents from the deleted places is also removed from the search index. For more information on Search Places, see the chapter "Configuring Additional Server Settings."

The following table provides examples of using the remove command.

Task	*Command*
Mark the place P1 for removal	>load qptool remove -p P1
Mark all places on the server for removal	>load qptool remove -a
Mark PlaceType PT1 for removal	>load qptool remove -pt PT1
Mark places P1, P2, and P3 for removal	>load qptool remove -p P1 P2 P3
Mark places for removal that are specified in the XML input file QPTOOL.REMOVEINPUT.XML	>load qptool remove -i qptool.removeinput.xml
Mark the place P1 for removal and log output to the non-default XML file QPTOOL.REMOVEOUTPUT.XML	>load qptool remove -p P1 -o qptool.removeoutput.xml
Remove the place P1 immediately	>load qptool remove -p P1 -now
Remove all PlaceTypes on the server immediately. Note that you cannot use the -a argument to remove all PlaceTypes.	>load qptool remove -pt PT1 PT2 PT3 PT4 PT5 -now

Updating statistics in the Place Catalog

Use the QPTool placecatalog command to update statistics in the Place Catalog. Use the placecatalog command for two purposes: to update PlaceLastModified and the PlaceSize statistics, and to synchronize statistics in Place documents between a master server and the other servers in a cluster.

Updating PlaceLastModified and PlaceSize statistics

Generally when a statistic for a place changes the Place document in the Place Catalog is automatically updated to reflect the change. This automatic update occurs immediately, or in the case of the PlaceLastAccessed statistic, within a minute of the change.

Changes to the PlaceLastModified or the PlaceSize statistic are not updated in the Place Catalog automatically however. To update these statistics in the Place Catalog you use the placecatalog command with the -push argument on the place server. By default the NOTES.INI file on a QuickPlace server

includes the following setting so that this command runs nightly at 3 AM to update the Place Catalog with these two statistics for all places.

```
ServerTasksAt3=qptool placecatalog -push -a
```

Run the command manually, for example, before using the report command so that you report up-to-date statistics.

Synchronizing Place document statistics in a cluster

Within a cluster, a place's Place document for the master server might contain different statistics than place documents for the other servers. Use the placecatalog command with the -update argument on the Place Catalog server to synchronize a place's statistics across all Place documents. Use placecatalog -update, for example, before using the report command in a cluster environment to ensure that the report contains up-to-date statistics. For more information, see the chapter "Administering QuickPlace Servers in a Cluster."

Syntax for the placecatalog command

The syntax for the placecatalog command is:

```
qptool placecatalog arguments
```

The following table describes the arguments.

Note You can use the placecatalog command on a pre-3.0 place only if you have first used the qptool upgrade command to upgrade the place.

Argument	*Description*
-?	Prints help on the command.
-update	Synchronizes statistics between the Place document for the master server and the Place documents for other servers. Run this command only on a Place Catalog server.
-push	Pushes PlaceLastModified and PlaceSize statistics from this server to the Place Catalog. Run this command only on a place server.
-a	Updates statistics for all places on the server.
-p *place(s)*	Updates statistics on a specified place or space-separated list of places.
-i *inputfile*	Updates statistics on places specified in an XML input file.
-o *outputfile*	Logs results to a specified XML output file. By default logs results to QPTOOL.PLACECATALOG.XML.

For more information on registering a server with the Place Catalog, see the chapter "Setting Up the Place Catalog."

Generating reports about places and servers

Use the QPTool report command to pull information from the Place Catalog to generate reports about places in the QuickPlace service and about servers that use the service. You can use the report command on a pre-3.0 place only if you have first used the qptool upgrade command to upgrade the place.

Using the report command, you can retrieve the following information from the Place Catalog about places:

- Name
- Title
- Server name
- Size
- Date last accessed
- Date last modified
- Locked state

Note that although the Place Catalog lists the Readers, Authors, and Managers of places you cannot use the report command to generate this information in a report.

Using the report command, you can retrieve the following information from the Place Catalog about servers that use the QuickPlace service:

- Name
- Access Protocol
- Access TCP Port
- Access URL Prefix

If more than one server shares a Place Catalog, a report specifies data for all servers in the service.

Before using the report command

Before you use the report command, do the following:

1. Make sure the Place Catalog is installed and full-text indexed.
2. Use the QPTool placecatalog command to update the statistics in the PlaceCatalog. For more information, see the topic “Updating statistics in the Place Catalog” earlier in this chapter.
3. Make sure the Place Catalog full-text index is up-to-date. For information, see the chapter “Setting Up the Place Catalog.”

To use the report command

The syntax for the report command is:

`load qptool report` ***`arguments`***

The following table describes the arguments for this command.

Argument	*Description*
-?	Prints help on the command.
-a	Generates a report for all places.
-q *query*	Generates a report for places that match the criteria specified in a query. In a query, you refine a search by using operators in conjunction with any of the following fields: PlaceName PlaceTitle PlaceServerName PlaceSize PlaceLastAccessed PlaceLastModified For example, you can generate a report on all places last accessed before a specified date. Begin and end a query with quotation marks. For more information on using operators to refine a search, see Notes Help.
-p *place(s)*	Generates a report for a specified place or a space-separated list of places.
-s	Generates a report using information in the PlaceServers view for all servers listed in the Place Catalog.
-o *outputfilename*	XML output file that logs the results of the command. By default the command logs results to QPTOOL.REPORT.XML in the server program directory.

Examples of using the report command

The following table provides examples of using the report command.

Task	*Command*
Report on a specific place	>load qptool report -p placename
Report on all places in the Place Catalog	>load qptool report -a
Report on all places whose size is greater than 1000 kilobytes	>load qptool report -q [PlaceSize]>1000.
Report on all places last accessed before 5/30/2002	>load qptool report -q [PlaceLastAccessed]<5/30/2002

continued

Task	*Command*
Report on all places last modified after 5/30/2002	>load qptool report -q [PlaceLastModified]>5/30/2002
Report on all servers in the Place Catalog using information from PlaceServers view	>load qptool report -s
Report on all places and log results to a non-default XML output file QPTOOL.MYOUT.XML	>load qptool report -a -o qptool.myout.xml

Repairing places on the server

You can run the QPTool repair command to fix broken places on the QuickPlace server. The repair command fixes very specific problems that are described below. When the repair command fixes a problem on the server, record as much information as possible about the original problem and then report this information to a QuickPlace support technician, so that the technician can reproduce the error and address the source of the problem.

Note You can use the repair command on a pre-3.0 place only if you have first used the qptool upgrade command to upgrade the place.

The repair command is intended to get QuickPlace up and running as soon as possible, but it does not necessarily fix the source of the problem; rather, it renormalizes data that is no longer synchronized. That is, until the source of the problem is addressed, or until QuickPlace source code is fixed, the repair command will work as a temporary solution. Repair accounts for the following problems:

Error: Entry not found in index or document has been deleted

When a document page is opened, QuickPlace checks to see if there is a draft document associated with it, and if there is one, it shows two versions of that page: the published version and the draft version. To do this, QuickPlace checks a field in the published document called DraftVersionUNID. If a draft document exists for this document page, the field contains the UNID of the draft document.

The problem either occurs when 1) the field contains a UNID but the draft document itself does not exist, which generates the “Document has been deleted” error, or 2) when the field contains a wrong UNID, which generates the “Entry not found in index” error. This problem could be caused by abruptly ending a server or client process (that is, if there is no transaction rollback).

Deleting one of multiple images causes image corruption

If there are multiple images on a page and one of the images is deleted, the remaining images can become corrupted. Use the repair command to restore the remaining images.

To use the repair command

The syntax for the repair command is:

`qptool repair` *`arguments`*

The following table describes the arguments.

Argument	*Description*
-?	Prints help on the command.
-a	Repairs all places on the server.
-p *place(s)*	Repairs the specified place or space-separated list of places.
-i *inputfile*	Repairs places specified in an XML input file.
-o *outputfile*	Logs results to a specified XML output file. By default logs results to QPTOOL.REPAIR.XML.

Cleaning up dead mail

Use the QPTool deadmail command to clean up QuickPlace dead mail. The deadmail command replaces the quickplacenightly deadmail cleanup feature that was available in QuickPlace 2.0.

The syntax for the deadmail command is:

`qptool deadmail` *`arguments`*

The following table describes the arguments.

Argument	*Description*
-?	Prints help on the command.
-cleanup	Cleans up QuickPlace dead mail.
-o *outputfile*	Logs results to a specified XML output file. By default logs results to QPTOOL.DEADMAIL.XML.

Note By default the NOTES.INI file on a QuickPlace server includes the setting ServerTasksAt3=qptool deadmail -cleanup so that the QuickPlace server cleans up dead mail nightly at 3 AM.

Executing an XML API file

Use the QPTool execute command to execute an XML API file. The syntax for the execute command is:

`qptool execute` *`arguments`*

The following table describes the arguments.

Argument	*Description*
-?	Prints help on the command.
-i *inputfile*	Specifies the XML API file to execute. If you do not specify a path, the default location is the Domino program directory.
-o *outputfile*	Logs results to a specified XML output file. By default logs results to QPTOOL.EXECUTE.XML in the Domino program directory.

For more information on using XML to access the QuickPlace API, see the *QuickPlace Developer's Guide*.

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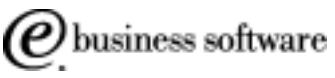

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