



Installation and Upgrade Guide

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Chapter 1

Installation and Upgrade Overview

This chapter provides overview information on IBM® Lotus® Team Workplace 6.5.1 installation. Team Workplace is the new name for IBM Lotus QuickPlace®. This chapter also describes new features, how to install a Team Workplace 6.5.1 server, how to start and stop a Team Workplace server, how to sign in to the server as an administrator, and how to configure the server for local Team Workplace users.

What's New in this release?

The following features related to installation are new in Team Workplace 6.5.1. For changes to system requirements in this release, including Domino server version requirements, see the *Team Workplace 6.5.1 Release Notes*.

New product name

The name QuickPlace has changed to Team Workplace. The documentation uses the new name, as do parts of the product user interface, for example the installation user interface. The name QuickPlace still occurs in various other parts of the product, for example in Team Workplace server URLs and file names, qpconfig.xml settings, and notes.ini settings.

UNIX and Windows installation instructions in one book

This book describes how to install a Team Workplace server on IBM® AIX®, Sun Solaris, or Microsoft® Windows®. Previously, there were separate installation guides for Windows and for AIX and Solaris.

Installation and upgrade overview

Team Workplace is a self-service Web tool for team collaboration. Teams can use Team Workplace to store project-related resources (such as files, discussions, and schedules) in a common place where everyone can access the latest information.

This book is intended for administrators installing Team Workplace 6.5.1 for the first time, or upgrading their current environment to Team Workplace 6.5.1.

Installing Team Workplace 6.5.1 involves the following tasks:

- Installing a Domino server. For information on the supported versions of the Domino server, see the *Team Workplace 6.5.1 Release Notes*.
- Installing Domino 6.5.1 Interim Fixpack 1. This fixpack provides important Domino fixes for proper operation of Team Workplace 6.5.1 on Domino 6.5.1. It is required only if you install Team Workplace 6.5.1 on Domino 6.5.1. Install the fix pack after you install Domino and before you install Team Workplace. For more information, see Technote #4006552 on the Web at <http://www.ibm.com/support/docview.wss?uid=swg24006552>.
- Installing the Team Workplace server on the Domino server.
- (Optional) Setting up Team Workplace for users to take places offline.
- (Optional) Setting up Team Workplace to work with IBM® Lotus® Instant Messaging and Web Conferencing (Sametime®).

Team Workplace 6.5.1 supports upgrades from a QuickPlace 2.0.8, 2.0.9, or 3.0 or later server.

In addition to this documentation, the following Team Workplace 6.5.1 documentation is available on the Web at www.lotus.com/ldd/doc:

- *Team Workplace Administrator's Guide* — Describes how to set up connections to a user directory, how to configure a Place Catalog, PlaceTypes, clustering, security, and other configuration options, and how to use QPTool commands to administer the server.
- *Team Workplace Developer's Guide* — Describes how to customize a place, how to use Placebots, and how to use XML to perform actions in a Team Workplace service.
- *Team Workplace Release Notes* — Describes the system requirements and workarounds for known problems.

Installing the Team Workplace server

The topics that follow describe how to install the Team Workplace server. It is recommended that the language versions of the Team Workplace server and the Domino server on which you install it be the same. However, Team Workplace and Domino servers running different language versions is a supported configuration.

Installation on partitioned Domino servers is supported in this release. However, the server must be configured for TCP/IP using IP Aliasing, not Port Mapping. For more information on configuring the server for TCP/IP, see Domino Administrator Help.

Before you install the Team Workplace server, make sure to read the *Team Workplace 6.5.1 Release Notes* on the Web at www.lotus.com/ldd/doc. The release notes describe the system requirements and other important installation information.

Installing the Team Workplace server on Windows

Follow these steps to install a Team Workplace 6.5.1 server on a Windows system.

1. Before continuing, refer to the following documentation:
 - Read the *Team Workplace 6.5.1 Release Notes* available on the Web at www.lotus.com/ldd/doc for system requirements and other important installation information.
 - If you want users to take places offline, read the chapter “Setting Up Team Workplace for Users to Take Places Offline.”
 - If you want the server to work with Sametime, read the chapter “Setting Up Team Workplace to Work with Sametime.”
 - If you are upgrading a QuickPlace 2.0.8, 2.0.9, or 3.0x server to Team Workplace 6.5.1, read the chapter “Upgrading to Team Workplace 6.5.1.”
2. Install and set up or upgrade a server to a Domino version supported for Team Workplace 6.5.1. See the *Team Workplace 6.5.1 Release Notes* for the supported Domino versions. For information on installing, configuring, and administering Domino, see Domino 6 Administrator Help and the *Domino Release Notes*. All are available on the Web at <http://www.lotus.com/ldd/doc>.
 - During Domino installation choose to install either the Domino Application server or the Domino Enterprise server.
 - To configure the server for users to take places offline, enable Domino Off-Line Services (DOLS) during setup by choosing the Advanced Server option and selecting DOLS.
3. Install Domino 6.5.1 Interim Fixpack 1. For more information, see Technote #4006552 on the Web at <http://www.ibm.com/support/docview.wss?uid=swg24006552>.

Note This step is required only if you will run Team Workplace on Domino 6.5.1.
4. Stop the Domino server if it is running.

5. Insert and start the Team Workplace installation CD. If you are installing Team Workplace from a network drive, navigate to the directory with the Team Workplace installation kit.
6. Click setup.exe.
7. In the setup wizard, choose Lotus program directory for the server files.
8. Type the user name and password for a new Team Workplace server administrator. The name and password cannot match a user in any external directory that you plan to use with Team Workplace.
Note You are prompted for a Team Workplace administrator name and password only when installing a new Team Workplace server. You are not prompted if you are upgrading the Team Workplace server.
9. Follow these steps to enable single sign-on authentication for this server. If single sign-on is already enabled on the server, follow these steps to confirm that it is set up correctly.
 - a. Start the Domino server.
 - b. Follow the steps for setting up multi-server single sign-on authentication described in the chapter “Setting Up Security” in the *Team Workplace Administrator’s Guide*. Note that after you enable “Session authentication” in the Server document in the Domino Directory, you must also create a mapping form in the domcfg.nsf database as described in the guide. *If the mapping form does not exist when you start Team Workplace, you will not be able to sign in as the Team Workplace server administrator specified during installation.*
 - c. Stop the Domino server. Do not skip this step.
10. Continue to the topic “Starting and stopping Team Workplace.”

Installing the Team Workplace server on AIX or Solaris

Follow these steps to install a Team Workplace 6.5.1 server on systems running AIX or Solaris.

1. Before continuing, refer to the following documentation:
 - Read the *Team Workplace 6.5.1 Release Notes* available on the Web at www.lotus.com/1dd/doc for information on system requirements, and other important installation information.
 - If you want users to take places offline, read the chapter “Setting Up Team Workplace for Users to Take Places Offline.”
 - If you want the server to work with Sametime, read the chapter “Setting Up Team Workplace to Work with Sametime.”

- If you are upgrading a QuickPlace 2.0.8, 2.0.9, or 3.0x server to Team Workplace 6.5.1, read the chapter “Upgrading to Team Workplace 6.5.1.”
2. Install and setup or upgrade a server to a Domino version supported for Team Workplace 6.5.1. See the *Team Workplace 6.5.1 Release Notes* for the supported Domino versions. For information on installing, configuring, and administering Domino, see Domino 6 Administrator Help and the *Domino Release Notes*. All are available on the Web at <http://www.lotus.com/ldd/doc>.
 - During Domino installation choose to install either the Domino Application server or the Domino Enterprise server.
 - To configure the server for users to take places offline, enable Domino Off-Line Services (DOLS) during setup by choosing the Advanced Server option and selecting DOLS.
 3. Install Domino 6.5.1 Interim Fixpack 1. For more information, see Technote #4006552 on the Web at <http://www.ibm.com/support/docview.wss?uid=swg24006552>.

Note This step is required only if you will run Team Workplace on Domino 6.5.1.
 4. Stop the Domino server.
 5. Open a terminal window and log in to the server as a root user.
 6. Navigate to the directory that contains the Team Workplace installation kit.
 7. Enter this command to start the Team Workplace installation:
./install
 8. When prompted, type the number that corresponds to the language in which you prefer to read the Lotus Software Agreement. Press Enter to continue, then press Enter again to display the license agreement.
 9. When you have read the agreement, press 1 to accept the agreement and continue with the installation.

Note Many of the following steps require that you accept a default or type a new value. To change a default, press Enter and type a new value. After you enter a new setting, press Enter to accept the change and continue with the installation.
 10. Specify the Domino program directory as the directory where the Team Workplace program files will be installed. The default Domino program directory is opt/lotus. You must install the Team Workplace program files to the directory that holds the Domino program files. Press TAB to continue.

11. Specify the Domino data directory as the directory where the Team Workplace data files will be installed. The default Domino data directory is /local/notesdata. You must install the Team Workplace data files into the directory that holds the Domino data files. Press TAB to continue.
12. Specify the UNIX® user who will own the Team Workplace server files. This must be the same user who owns the Domino server files.
13. Specify the UNIX group that will own the Team Workplace server files. This must be the same group that owns the Domino server files. The UNIX user specified in Step 12 must be a member of this group.
14. Type the name and password of a Team Workplace administrator. This first Team Workplace administrator signs in to the Team Workplace server to configure Team Workplace server settings, create places, and give other users access to create places or administer the Team Workplace server. The name and password cannot match a user in any external directory that you plan to use with Team Workplace.

Note You are prompted for a Team Workplace administrator name and password only when installing a new Team Workplace server. You are not prompted if you are upgrading the Team Workplace server.

15. When the installation program displays “Configuration of the Install program is complete,” press TAB to review your installation settings. For example:

Installation type: New Install (this is “New Upgrade” if you are upgrading)

Program directory: /opt/lotus

Data directory: /local/notesdata

UNIX user: UNIX user

UNIX group: UNIX group

16. Press TAB to install Team Workplace.
17. Follow these steps to enable single sign-on authentication for this server. If single sign-on is already enabled on the server, follow these steps to confirm that it is set up correctly.
 - a. Start the Domino server.
 - b. Follow the steps for setting up multi-server single sign-on authentication described in the chapter “Setting Up Security” in the *Team Workplace Administrator’s Guide*. Note that after you enable “Session authentication” in the Server document in the Domino Directory, you must also create a mapping form in the domcfg.nsf database as described in the guide. *If the mapping form does not exist when you start Team Workplace, you will not be able to sign in as the Team Workplace server administrator specified during installation.*

- c. Stop the Domino server. Do not skip this step.
18. Continue to the topic “Starting and stopping Team Workplace.”
-

Starting and stopping Team Workplace

To start a Team Workplace server, start the Domino server on which it is installed. To stop a Team Workplace server, stop the Domino server.

To start Domino and Team Workplace (Windows)

If the Team Workplace server runs on Windows, start Domino and Team Workplace as follows:

Choose Start - Programs - Lotus Applications - Lotus Domino Server.

To start Domino and Team Workplace (UNIX)

If the Team Workplace server runs on UNIX, start Domino and Team Workplace as follows:

1. Log in as the UNIX user specified during the Team Workplace installation.
2. Navigate to the Domino data directory.
3. Enter the following command to start the Domino and Team Workplace servers:

```
<Domino program directory>/bin/server
```

For example, if you used the default Domino program directory, enter:

```
/opt/lotus/bin/server
```

To stop Domino and Team Workplace (Windows and UNIX)

On any operating system, stop Domino and Team Workplace as follows:

1. Enter either of the following commands at the server console:

```
exit
```

or

```
quit
```

Signing in as the Team Workplace administrator

You must sign in as the Team Workplace administrator to change Server Settings in the administration place.

To sign in as the administrator:

1. Open a browser and type the server's host name appended by /QuickPlace. For example:
http://servername.enterprise.com/QuickPlace
2. Click Sign In.
3. Type the Team Workplace administrator user name and password that you specified during Team Workplace installation.
4. Click Server Settings in the table of contents.

For information on the administration place and assigning administrators to a Team Workplace server, see the *Team Workplace Administrator's Guide*.

Configuring the Domino server for local users

The Domino server certifier must use no more than two Organizational Units (OUs) in an environment with local Team Workplace users. There is no such limitation if users are from an external LDAP directory, including a Domino Directory accessed through LDAP. Managing users in an external LDAP directory is easier than managing local users.

If you use local users, to generate the name of a local member or group for a place, Team Workplace adds the OUs `ou=placename`, `ou=QP` to the user's or group's common name. Then Team Workplace adds the OU and O components generated by the certifier of the server on which Team Workplace runs. For example, if the Domino server certifier ends in `/ou=Dallas/ou=Div1/o=Acme`, the local user John Doe becomes `cn=John Doe/ou=Place1/ou=QP/ou=Dallas/ou=Div1/o=Acme` when added as a member of the place, Place1.

If the Domino server certifier has more than two OUs, the Team Workplace-specific OUs are removed and the user cannot access places. You can use a Team Workplace server with more than two OUs in the certifier if you only use external users and groups as members, and not local users and groups.

You can convert local users to external users with the QPTool `changemember` command if the local users are valid. If you already have local users that were created on a server with more than two OUs, follow these steps to change the format before you use the QPTool `changemember` command.

For more information on using the QPTool `changemember` command, see the *Team Workplace Administrator's Guide*.

If your server uses more than two OUs

If you have already used more than two OUs on a Domino server and the Team Workplace OUs are being removed from the names of local users and groups, you can correct the problem by moving the places to a server with two or fewer OUs as follows:

1. Install a new Team Workplace server that has no more than two OUs.
2. Copy the places with the truncated local user names to the new Team Workplace server.
3. If you are copying places from a QuickPlace 2.0.x or 3.0x server, run `qptool upgrade -p placename(s)` on the place. Otherwise, skip this step.
For more information on qptool upgrade, see the chapter “Upgrading to Team Workplace 6.5.1.”
4. Run `qptool register -install -p placename(s)` on the new server. Verify that the local names in the places are in the correct format, for example, that they contain the `/ou=placename/ou=QP` components followed by the OU components (maximum of 2) from the server certifier.

Chapter 2

Setting Up Team Workplace for Users to Take Places Offline

This chapter explains how to set up Team Workplace so that users can take places offline with Domino Off-Line Services (DOLS).

Overview of setting up Team Workplace for users to take places offline

You can set up the Domino server so that users can take places offline with DOLS. Do the following tasks:

- Install the Domino and Team Workplace servers.
For more information on installing Domino and Team Workplace servers, see the chapter “Installation and Upgrade Overview.”
- Enable DOLS on the Domino server (only if it was not enabled during Domino setup).
- Connect Team Workplace to an LDAP directory that contains user information.
- Edit the Domino server's notes.ini file.
- Create a certifier ID.
- Create a DOLS Security Policy document.

For answers to frequently asked questions about offline setup, see the topic “Offline setup FAQs” later in this chapter. For information on troubleshooting offline problems, see the *Team Workplace Administrator's Guide*.

Enabling DOLS after Domino server setup

If you did not enable DOLS during Domino server setup, you can enable it as follows:

1. Start the Domino server.
2. Open the Server document in the Domino Directory.
3. Click the Internet Protocols - HTTP tab.
4. Add one of the following values to the “DSAPI filter file names” field:

- On Windows: ndolextn
 - On AIX or Solaris: libdolextn
5. Restart the server by entering the following command at the server console:
restart server

Connecting the Team Workplace server to an LDAP directory

You must connect your Team Workplace server to an LDAP directory to enable users registered in the directory to take places offline.

If Domino does not recognize the format of the distinguished names in your LDAP server, you must configure the qpconfig.xml file on the Domino server to translate the LDAP names into a format that Domino can understand. Domino recognizes only the following components in a directory name: "CN," "OU," "O," and (optionally) "C."

For more information on configuring Team Workplace to work with an LDAP directory, see the *Team Workplace Administrator's Guide*.

To connect the server to an LDAP directory

1. Open a browser.
2. Type the URL of the Team Workplace server administrator's area. For example: <http://yourqpserver.company.com/quickplace>
3. Click SignIn and type the name and password of a Team Workplace administrator.
4. Click Server Settings in the table of contents.
5. Click User Directory in the table of contents.
6. Click Change Directory.
7. Change the Directory Type to LDAP and type the host name of your LDAP server. For example: yourLDAP.company.com
8. Click Next to save the changes.

Editing the Domino server's notes.ini file

You must add the following settings to the Domino server's notes.ini file so that users can take places offline.

1. Stop the Domino and Team Workplace servers if they are running.
2. Navigate to the Domino program directory, and open the Domino server's notes.ini file.

3. Add one of the following settings to the file, depending on the operating system:
 - On Windows: EXTMGR_ADDINS=nqpxextmgr.dll
 - On AIX: EXTMGR_ADDINS=libqpxextmgr_r.a
 - On Solaris: EXTMGR_ADDINS=libqpxextmgr.so
4. For all operating systems, add the following setting to the file:
CheckCacheBeforeDSAPI=1
5. Save the file.
6. Start the Domino and Team Workplace servers.

Certifier IDs for authenticating users

You must create Domino certifier IDs to authenticate offline users, and then create a DOLS Security Policy document and attach the ID to it. When users install places offline, the Domino server uses the certifier ID to generate new user IDs, and downloads the IDs to the users' computers. These IDs authenticate users when they synchronize the offline and online versions of places.

You must create separate Security Policy documents and IDs for local users (users stored in places), and external users (users stored in an LDAP directory). You can attach only one certifier ID to each Security Policy document.

For local users, you create an ID based on the server's certifier ID.

For external users you must create a certifier ID based on the hierarchical names of the users. For example, the ACME company might have an LDAP directory with the following hierarchical user names:

Jo Smith/Sales/ACME
Ed Black/Marketing/ACME
Sami Jordan/Research/ACME
Sue Lee/Engineering/ACME
Joe Contractor/ACME

The hierarchical name scheme for ACME is:

/Sales/ACME
/Marketing/ACME
/Research/ACME
/Engineering/ACME
/ACME

Do one of the following actions to create IDs for external users:

- For users in the same hierarchy as the Domino server or one level down from it, create a certifier ID based on the server's certifier ID, as you would for local users.
- For users who are more than one organizational unit down the hierarchy from the server, create a Security Policy document and an ID, and cross-certify the new ID with the server's certifier ID.

The certifier ID authenticates offline users one level down from the last Organization or Organizational Unit in the certifier ID's hierarchical name. For example, if users in /Sales/ACME are going to take places offline, the certifier ID /ACME will authenticate them. However, if users in /East/Sales/ACME are going to take places offline, you must create another Security Policy document for /Sales/ACME and create a certifier ID with the hierarchical Organizational Unit name /Sales/ACME. If users in NY/East/Sales/ACME are going to take places offline, you must create another Security Policy document for East/Sales/ACME and create a certifier ID with the hierarchical Organizational Unit name East/Sales/ACME.

- For users in a different organization from the server, you also must create a certifier ID and cross-certify that ID with the server's certifier ID.

For example, users in /Sales/ACME and /Marketing/ACME are going to take places offline from ServerA. But ServerA is in the ORG organization and its hierarchical organization name is /ORG. Therefore, you must create an /ACME certifier ID and cross-certify this ID with the server's /ORG certifier ID. After you provide users in /Sales/ACME and /Marketing/ACME with this new cross-certified ID, they can access the server in the /ORG organization.

For more information on creating certifier IDs, see Domino Administrator Help.

Caution For security reasons, create certifier IDs for offline users instead of using existing certifier IDs. Even if the new ID is based on an existing ID, it is a duplicate only in name. Creating a certifier ID ensures that users do not get certifiers that give them more access than they should have.

For more information, see the topics “Creating IDs from the server's certifier ID” and “Creating IDs and cross-certifying with the server's certifier ID.”

Creating IDs from the server's certifier ID

For local users, create a certifier ID based on the server's certifier ID. For external users that are in the same hierarchy as the Domino server or one level down from it, create a separate certifier ID based on the server's certifier ID.

Note To create a certifier ID for local users that is based on the server's certifier ID, the server's certifier ID must be on the same machine as the Domino Administrator. By default, the server's certifier ID file is named cert.id and is located in the Domino data directory on the server.

For more information on creating certifier IDs, see Domino Administrator Help.

To create a certifier ID from the server's certifier ID

1. From the Domino Administrator, select the Domino server, for example, ServerA/ACME.
2. Click the Configuration tab.
3. From the Tools pane, click Registration - Organizational Unit.
4. Click Server and select the server that stores the certifier ID you want to use.
5. Click Certifier ID and choose the certifier ID.
6. Type a password for the certifier ID and click OK.
7. If you see the message "The certifier ID you have chosen does not contain recovery information", read the message and click OK.
8. In the Register Organizational Unit Certifier dialog box, click Registration Server and choose the Domino server, for example, ServerA/ACME.
9. (Optional) Click Certifier ID to change which certifier ID to use to register the new certifier ID.
10. (Optional) Click "Set ID File" and set the location where Domino will store the certifier ID file.

Note For security reasons, after this ID is attached to a Security Policy document in the doladmin.nsf database, you should back up doladmin.nsf and delete the ID file from your system directory.

11. In the Organizational Unit field, type the Organizational Unit of the certifier ID file. If you are creating the ID for local users, type QP. If you are creating the ID for external users, type the name of the unit you are creating based on their name hierarchy. For example, if the users are in Sales/ACME, type "sales." This automatically names the ID "SALES.id."
12. In the certifier password field, type a password. For more information about the password scale, see the Domino Administrator Help.
13. (Optional) Select one of the following security types:
 - North American (default) - This type of certifier ID can stamp only servers or users with a Domino North American license. North American security is stronger than International security.

- International - This type of certifier ID can stamp only servers or users with a Domino International license.
14. (Optional) Do any of the following actions:
 - In the “Mail certification requests to (Administrator)” field type the name of the administrator who handles re-certification requests. The name specified here displays in the Certifier document in the Domino Directory. If you create a certifier ID for an off-site administrator, type that administrator's name in this field.
 - In the Location field enter optional text that displays in the Location field of the Certifier document.
 - In the Comment field enter optional text that displays in the Comment field of the Certifier document.
 15. Click Register at the bottom of the dialog box to create the certifier ID file in the Domino data directory.

Creating IDs and cross-certifying with the server's certifier ID

In the following external user cases, you must create a certifier ID and cross-certify it with the server's certifier ID:

- If external users are more than one level down from the last Organization or Organizational Unit in the server's hierarchical name. For example, if you want users in East/Sales/ACME to take places offline from ServerA/ACME, you must create a Sales/ACME certifier ID and cross-certify it with the server's certifier ID.
- If external users are in a different organization from the server. For example, ServerA is in the organization ORG, and you want users in East/Sales/ACME to take places offline from ServerA. You must create a Sales/ACME certifier ID, and cross-certify it with ServerA's ID.

For more information on creating certifier IDs, see Domino Administrator Help.

To create a certifier ID and cross-certify it with the server's certifier ID

1. From the Domino Administrator, select your server, for example, ServerA/ORG.
2. Click the Configuration tab.
3. On the right pane of the Domino Administrator, click Registration, and then click Organization.
4. Click Registration Server and choose your server's name. For example: ServerA/ORG.
5. Click “Set ID File” and choose a directory in which to save the new certifier ID file. For example, C:\Lotus\Domino\data.

6. In the Organization name field, type the organization name of the external users. For example: ACME.
7. (Optional) Type a country code.
8. In the Certifier password field, type a password for this certifier ID.
9. Click Register to create the certifier ID.
10. From the Domino Administrator, click the Configuration tab.
11. From the Domino Administrator, click Certification, and then click Cross Certify.
12. Choose the server's certifier ID file. By default, the server's certifier ID file is called cert.id and is located in the Domino data directory on the server.
13. Type the password for your server's certifier ID when prompted. This password was created by the administrator who set up the Domino server.
14. Choose the certifier ID you want to cross-certify. For example: ACME.ID.
15. In the Issue Cross Certificate dialog box, click Cross Certify.

Creating an offline Security Policy document

You must create a DOLS Security Policy document that specifies the security policy for offline users. Create a Security Policy document for each certifier ID you created.

DOLS Security Policy documents are stored in the doladmin.nsf database on the Domino server. For security reasons, after a certifier ID is attached to a Security Policy document, back up doladmin.nsf and delete the ID file from your system directory.

1. From the Domino Administrator, select your server, for example, ServerA/ACME.
2. Click the Configuration tab.
3. In the left pane, click Offline Services, then click Security.
4. Click New Security Policy to create a new offline Security Policy document.
5. In the Security domain field provide the following information:
 - If the document is intended to allow local users to take places offline, type /QP, and then the domain of the server the places are on. For example, for users in places on a server in the ACME domain, type /QP/ACME.

- If the document is for external users, type the hierarchical name of their certifier ID. For example, if the document is for users in Sales/ACME type /Sales/ACME. If the document is for users in the East/Sales/ACME, type /East/Sales/ACME.
6. Select “Automatically generate user IDs” as your security policy.

Note “Automatically generate user IDs” is the recommended DOLS Security Policy method. The other security policy methods require that your Team Workplace users be registered in a Domino Directory. Team Workplace 6.5.1 only supports external LDAP directories. If you choose one of these other methods, either your Domino Directory must also be your LDAP directory, or you must maintain your Team Workplace users in two separate directories -- one LDAP and one Domino - and make sure the two are always synchronized. These methods do not require that you create a certifier ID. For more information on the other two methods, on making your Domino server an LDAP server, and on registering users in a Domino Directory, see the Domino Administrator Help.
 7. Click the Automatic tab.
 8. Click the Certifier ID to use field.
 9. Choose File - Attach from the menu and attach the new certifier ID file.
 10. In the Password for Certifier ID field, type the certifier ID password.
 11. Save the document.

Configuring Team Workplace for offline in different environments

This section describes offline configuration steps for various supported environments.

To configure an IBM Network Dispatcher cluster environment

To configure a Team Workplace server cluster that uses the IBM Network Dispatcher to work with DOLS, you must add the following line to the notes.ini file of all servers in the cluster:

`$DOLS_TCPIPAddress=FullHostNameOfOneServerInTheCluster` or the *IP Address* of that server

For example, in a cluster with servers named blue.enterprise.com, green.enterprise.com, and red.enterprise.com, with a network dispatcher called colors.enterprise.com, add

`$DOLS_TCPIPAddress=blue.enterprise.com` to the notes.ini file on blue.enterprise.com, green.enterprise.com, and red.enterprise.com. Then users can take places offline from any server in the cluster.

To configure a Sun ONE Portal Server environment

The Sun ONE Portal Server serves as a reverse proxy server to handle inbound requests. To configure a Team Workplace server and Sun ONE Portal Server to work with DOLS, add the following setting to the server's notes.ini file:

```
NoWebFileSystemACL=1
```

Without this setting, users must reauthenticate when the place is downloaded to their machine.

To configure a Netegrity SiteMinder environment

To set up a server for offline use in a Netegrity SiteMinder environment, you must list the DOLS DSAPI filter first in the list of DSAPI filters in the Server document.

1. Open the Server document in the Domino Directory.
2. Click the Internet Protocols - HTTP tab.
3. Make sure one of the following values is the first listed in the "DSAPI filter file names" field.
 - On Windows: ndolextn
 - On AIX or Solaris: libdolextn
4. If you make a change to the field, restart the server by entering the following command:
restart server

Note The required order of the three DSAPI filters (DOLS, Netegrity SiteMinder, and QuickPlace) in the "DSAPI filter file names" field is:

1. DOLS DSAPI filter
2. Netegrity Siteminder DSAPI filter
3. QuickPlace DSAPI filter

To configure a passthru server environment

To configure a Team Workplace server in a passthru server environment to work with DOLS, you must do the following:

1. Sign in to the Team Workplace server as an administrator.
2. Click Server Settings in the table of contents.
3. Click Other Options in the table of contents.
4. Click Edit Options.
5. In the Domino Offline Passthru Server section, type the canonical name and host name of the passthru server.

6. Save the page.

To use an alternate Web server for DOLS downloads

When users take their first place offline, the DOLS client software is installed on their machines so that they can manage their offline places. Because the DOLS client software files are relatively large, the place's performance could be affected while a user is installing offline. To help avoid this, you can copy the DOLS files to a directory on an alternate Web server, and then specify a URL that points to that directory. When users install their first place, the DOLS software files are installed from the alternate server.

Note If you use Policy Director, using an alternate Web server for downloads is recommended.

Note In QuickPlace 2.0x, this alternate URL was intended to point to the file instokqp.exe. This file is not applicable with Team Workplace 6.5.1.

To create an alternate DOLS download Web site, do the following:

1. Copy the contents of the
 \Lotus\Domino\Data\domino\html\download\filesets directory from the Team Workplace server to any directory the Web server used for downloads.
2. Sign in to the Team Workplace server as an administrator.
3. Click Server Settings in the table of contents.
4. Click Other Options in the table of contents.
5. Click Edit Options.
6. In the Alternate Offline download URL section, type an alternate URL that points to the directory with the copied offline files.
7. Click Next.

Reducing download time with the DOLS Pre-Installer CD

The DOLS Client Pre-Installer CD provides an alternative for installing places offline over a slow connection. With the CD, users can pre-install the offline client software and place files to their client machines.

To obtain a DOLS Client Pre-Installer CD, contact an IBM Software Services for Lotus representative. Download the CD code from <http://www.lotus.com/dols> and create your own CD.

To set up the DOLS Pre-Installer CD for Team Workplace

1. Double-click the DOLS Client Pre-Installer CD executable to extract the program files into the root drive of a new CD, or into a folder on a client hard drive or shared network drive.

2. Create a \Content directory inside the program directory for the DOLS Client Pre-Installer CD.
3. Create a \CustomFilesets directory inside the \Content directory you just created.
4. Copy the following files from the Team Workplace server's data directory to the \Content\CustomFilesets directory on the CD:
 - <server data directory>\domino\html\download\filesets\n_QuickPlace.exe
 - <server data directory>\domino\html\download\filesets\n_QuickPlace.inf
5. To further reduce the initial download and synchronization time for offline places on your servers, add places to the CD:
 - a. Create a \Subscriptions sub-directory in the \Content directory on the CD.
 - b. Under \Content\Subscriptions, create a directory structure unique to each place. Create each new subscription folder using the replica ID of the Main.nsf database of the place, name the second folder "QuickPlace," and name the third folder with the title of the place. For example, for the place "MyPlace" you would create the following directory:


```
\Content\Subscriptions\72638271927F46D8\QuickPlace\MyPlace
```

 To get the replica ID of a place's Main.nsf database, open the database in Domino Administrator. Then choose File - Database - Properties from the menu, and click the "info" tab. Do not include colons in the folder name, only numbers. For example, if a replica ID of the Main.nsf for a place is 72638271:927F46D8, create the folder \72638271927F46D8.
 - c. Use the local file system to copy the directories of local replicas into the appropriate directory on the CD for each subscription. For example, if the file location for the place called "MyPlace" is in \Data\QuickPlace\MyPlace on the server, copy or move the place files (such as, Main.nsf, Contacts1.nsf, Search.nsf, and all PageLibraryxxx.nsf files) from \Data\QuickPlace\MyPlace into the \Content\Subscriptions\72638271927F46D8\QuickPlace\MyPlace directory on the CD. Do not copy the Search.ft directory to the CD.

Distributing the CD to users

After you prepare the CD, distribute copies to your users. The installer runs automatically when the user puts the CD in the drive. If it doesn't run, users can double-click setup.exe on the CD. After the files are installed, users can open the place in their browser and install it offline.

Note See the readme file on the CD for system and browser requirements, tasks for administrators and users, and more reference information.

Offline setup FAQs

This section answers questions frequently asked about offline setup.

Question: We do not allow local users in our organization. All of our users are in an LDAP directory or a Domino Directory. Do we still need to create a DOLS Security Policy?

Answer: Yes, you must create one or more DOLS Security Policy documents for your external users, who must be in an LDAP directory.

Question: Is the Super User considered a local user? If Super Users are our only local users, do we still have to create the certifier ID for local users?

Answer: No. Beginning in QuickPlace 3.0 Super Users are always external users, never local users. You do not have to configure a DOLS Security Policy document for local users just because you have Super Users.

Question: Our users already have Notes ID files. Do we have to configure the DOLS Security Policy document to “Automatically generate user IDs”?

Answer: No. If your users have Notes IDs, you can configure the DOLS Security Policy document “ID deployment policy” to “Prompt for ID during download.” Users are then prompted to supply their Notes ID files during the installation of the offline place.

Question: In our organizational hierarchy, our organization (O) is ACME, our organizational unit (OU) is ACMEWEB, and our domain is ACMEWEB. Our Team Workplace server is W1SERVER/ACMEWEB/ACME. Should the certifier for our local users be QP/ACMEWEB/ACME?

Answer: Yes, this would be the correct hierarchical name for the certifier ID, which would allow your local users to take places offline. However, for easier management, we recommend that all of your Team Workplace users be made external users (meaning their information is stored in an LDAP directory).

Question: We have a large organization. To set up our external users to take places offline, is it necessary to create a different DOLS Security Policy document and certifier ID for each of our organizational units?

Answer: The number of different DOLS Security Policy documents and certifier IDs you must create depends on your organization's hierarchy. When a user takes a place offline, an ID is automatically generated by the Notes registration API. This ID is based on the certifier ID attached to the

DOLS Security Policy document. The Notes registration API can only create ID files for users as far as one organizational unit down from the root organizational unit for the certifier ID. For example, the following local users can take places offline with the certifier ID QP/<Organization>:

Fred/QP/<Organization>

John/MyWorld/QP/<Organization>

However, the user Mike/Westford/MyWorld/QP/<Organization> cannot take places offline with this certifier ID. For Mike to take places offline, you must create a new DOLS Security Policy document, then create and attach one of the following certifier IDs:

Westford/MyWorld/QP/<Organization>

or

MyWorld/QP/<Organization>

If all your external users are in the same hierarchy except for the last organizational unit before their user name, you only need one certifier ID for all of those users. Otherwise, you must create multiple certifier IDs. For example, both the following external users can take places offline with the certifier ID /ACME:

Joe/PHIL/ACME

Will/BOS/ACME

However, the following users require two separate certifier IDs:

Mary/PHIL/PA/ACME

Caroline/BOS/MA/ACME

Mary can use either PA/ACME or PHIL/PA/ACME. Caroline can use either MA/ACME or BOS/MA/ACME.

Question: The documentation says to create an organizational unit (OU)/Organization certifier. Do we need to create duplicate certifier IDs, or can we make copies of the certifier ID files that were used to create the users?

Answer: For security reasons, we do not recommend using existing Domino certifiers. We recommend that you create new certifiers, even if they are based on existing certifiers, because new certifiers based on existing certifiers are duplicates in name only. If you create new certifiers, you do not have to worry about the original certifiers falling into the wrong hands. You must create ID files for users as far as one organizational unit down from the root organizational unit for the certifier ID. See the previous question for more information.

Question: Do the offline certifier ID files need to be stored on the Team Workplace server permanently?

Answer: Yes, but only in the doladmin.nsf database. You do not need to store these ID files on the server's file system, only in the doladmin.nsf. Please note that you should always back up this database.

Question: How exactly are these certifier ID files used by Team Workplace?

Answer: They are used to generate an offline ID file that maintains secure access between the online and offline versions of a place. When users install a place offline, an ID based on the certifier ID is generated for them and installed on their computer. This offline ID authenticates users when they synchronize the place. The offline ID file password is set by users in the "offline password" field in their Member page in the online version of the place.

Question: Does DOLS support Windows XP?

Answer: Yes, a user with administrator access on a Windows XP Professional client workstation can install a place offline to that computer. After the installation is complete, any user can then work with the place normally. This functionality is the same as Team Workplace offline with Windows 2000 workstations. Please note that Microsoft Windows XP Home Edition is not supported.

Question: What's different about Windows XP and Windows 2000 compared to Windows 98?

Answer: For offline purposes, the significant difference from Windows 98 is that users are assigned access levels on Windows 2000 Professional and Windows XP Professional. Only a user with administrator access on these client workstations can install places offline. After the installation is complete, users with more limited access can then work with the places normally. Users who do not have administrator access cannot install places offline to these client workstations.

Chapter 3

Setting Up Team Workplace to Work with Sametime

This chapter describes how to set up the Team Workplace 6.5.1 server to work with Sametime.

Sametime setup planning

Before you set up Team Workplace to work with Sametime, note the following points:

- If you enable SSL on the Team Workplace server, you must also enable it on the Sametime server, and vice versa. Also, in the Team Workplace administrator's area, in Server Settings - Other Options - Sametime Servers, you must specify the address of the Sametime server beginning with `https://` rather than `http://`. If you do not take these steps users will see a warning dialog box each time they open a page in a place.
- If you upgraded a 2.0.x QuickPlace server that worked with Sametime to a Team Workplace 6.5.1 server, you can remove the following notes.ini settings, which are no longer necessary: `SametimeInstallType`, `SametimeLog`, `SametimeConference`, `SametimeAdmin`, `Sametime_NameLookup_Server`.

Installing and configuring the servers

The following steps describe how to set up Team Workplace 6.5.1 to work with Sametime.

For information on troubleshooting problems with Team Workplace working with Sametime, see the *Team Workplace Administrator's Guide*.

1. Install or upgrade to Team Workplace 6.5.1. Connect the Team Workplace server to the LDAP directory that you will also use for the Sametime server. Both servers must use the same LDAP directory for Team Workplace and Sametime to work together.

For more information on installing or upgrading, see the topic "Installing the Team Workplace server." For information on connecting Team Workplace to an LDAP directory, see the *Team Workplace Administrator's Guide*.

2. Install Sametime on a separate Domino server that is in the same Domino and DNS domain as the Team Workplace server. When you are prompted for a user directory during Sametime server installation, enter the name of the LDAP directory that you also use for Team Workplace. For more information on installing Sametime, see the *Sametime Installation Guide on the Web* at <http://www.lotus.com/ldd/doc>.
3. Set up multi-server single sign-on authentication on both servers.
For more information on setting up multi-server single sign-on on a Team Workplace server, see the *Team Workplace Administrator's Guide*.
For more information on setting up multi-server single sign-on on a Sametime server, see the *Sametime Administrator's Guide*.
4. Make sure Web SSO for Lightweight Third-Party Authentication is enabled and working between the Team Workplace and Sametime servers.
5. Install the Sametime Java™ Toolkit on the Sametime server. You can download the Sametime Java Toolkit from the Downloads section of the Sametime Developer's Web site at <http://www.lotus.com/ldd/products.nsf/products/sametime>.
Note You can use the Sametime 3.1 Java Toolkit on a Sametime 6.5.1 server for the purpose of integrating Team Workplace with Sametime.
6. Follow the instructions in this chapter to enable Sametime Awareness, Chat, and Meetings for Team Workplace.

Setting up Sametime Awareness and Chat

These instructions assume that the Team Workplace server administrator has set up the Sametime server, that the Awareness feature has been independently tested and is functioning properly, and that multi-server single sign-on is set up between the Sametime and Team Workplace servers.

For more information on setting up multi-server single sign-on on a Team Workplace server, see the *Team Workplace Administrator's Guide*.

For more information on setting up multi-server single sign-on on a Sametime server, see the *Sametime Administrator's Guide*.

To enable online Awareness and Chat for Team Workplace users, you must do the following steps:

- Copy the Java files required for Sametime Chat and online Awareness.
- Specify the Sametime Community server for Team Workplace to use.

To copy the Java files required for Sametime Chat and online Awareness

1. Install the Sametime Java Toolkit, as described in the topic “Installing and configuring the servers.”
2. In the Domino data directory of the Sametime server, create the following subdirectory:

<domino data directory>\Domino\html\QuickPlace\peopleonline

For example, on a Windows computer, if the path to the Domino data directory is C:\Lotus\Domino\Data, the path to the peopleonline subdirectory is:

c:\lotus\domino\data\domino\html\QuickPlace\peopleonline

3. Copy the STComm.jar, CommRes.jar, and PeopleOnline31.jar files to the QuickPlace\peopleonline subdirectory you created in the previous step. These files can be found in the following locations for both Sametime 3.1 and Sametime 6.5.1:

Files to copy from the Sametime server

<i>File name</i>	<i>Location</i>
STComm.jar	<data dir>\domino\html\sametime\toolkits\st31javatk\bin where <data dir> is the Domino data directory on the server. For example: c:\lotus\domino\data\domino\html\sametime\toolkits\st31javatk\bin\STComm.jar
CommRes.jar	<data dir>\domino\html\sametime\toolkits\st31javatk\bin where <data dir> is the Domino data directory on the server. For example: c:\lotus\domino\data\domino\html\sametime\toolkits\st31javatk\bin\CommRes.jar

Files to copy from the Team Workplace server

<i>File name</i>	<i>Location</i>
PeopleOnline31.jar	<data dir>\QuickPlace For example: c:\lotus\domino\data\QuickPlace\PeopleOnline31.jar

To specify the Sametime Community server for Team Workplace to use

1. In a browser, type the URL of the Team Workplace server. For example: http://servername.enterprise.com/QuickPlace
2. Click Sign In and sign in as a Team Workplace server administrator.
3. Click Server Settings in the table of contents.

4. Click Other Options in the table of contents.
5. Click Edit Options.
6. Under the Sametime Servers heading, make sure that the Sametime Community Server is in the community field. Use the full name of the server. For example, `http://meetingserver.enterprise.com`.
7. Click Next.
Note The Team Workplace server is not immediately integrated with Sametime. Wait a few minutes for the setting to take effect, or restart the Team Workplace server to integrate immediately.
8. Do the following to verify that places are enabled for instant messaging:
 - a. Sign in to the place as a Manager.
 - b. Click Customize.
 - c. Click Basics.
 - d. Click Change Basics.
 - e. On the Change Basics page, scroll down to the bottom. Under the Real-time collaboration heading, make sure the box next to "Members can see who is online and send instant messages" is checked.
 - f. Click Done.
9. Enter a place and verify that Awareness is working by checking for the Awareness icon next to the name you typed when you logged in.
Note You must log in as an external user. Sametime features are not available to local users.
10. To test Chat, find a document that was created by a user listed online and click the user's name. Then select Chat, or click the Chat link beside your name in the top left corner of the screen.

Setting up Sametime Meetings

These instructions assume that the Team Workplace server administrator has set up the Sametime server, that the Meetings feature has been independently tested and is functioning properly.

To set up Team Workplace to create and update Sametime Meetings on a Sametime server, do the following steps.

1. On the Sametime server, add a user name with a Web password to the local Domino Directory. This user name should be used only for integration of Sametime and Team Workplace.

2. On the Sametime server, add the user as a manager in the ACL of the STConfig.nsf database. Assign the user type Person give the [SametimeAdmin] role at minimum. For more information on database ACLs, see Domino Administrator Help.
3. Shut down and restart the Sametime server.
4. Copy the STMtgManagement.jar, STCore.jar, and ibmjsse.jar files from the Domino program directory of the Sametime server to the following directory on the Team Workplace server:
 - Windows: Domino program directory (default \lotus\domino)
 - Solaris: /opt/lotus/notes/latest/sunspa/<.jar> (use your own Domino program directory structure)
 - AIX: /opt/lotus/notes/latest/ibmpow/<.jar> (use your own Domino program directory structure)
5. On the Team Workplace server, find the notes.ini setting JavaUserClassesExt. Change the contents of the setting as described below, substituting your own Domino program directory structure:
 - On Windows, change the contents to:
JavaUserClassesExt=QPJC1,QPJC2,QPJC3,QPJC4,QPJC5,QPJC6,QPJC7,QPJC8
QPJC1=C:\LOTUS\DOMINO\quickplace.jar
QPJC2=C:\LOTUS\DOMINO\xercesImpl.jar
QPJC3=C:\LOTUS\DOMINO\xalan.jar
QPJC4=C:\LOTUS\DOMINO\xml-apis.jar
QPJC5=C:\LOTUS\DOMINO\log4j-118compat.jar
QPJC6=C:\LOTUS\DOMINO\ibmjsse.jar
QPJC7=C:\LOTUS\DOMINO\STCore.jar
QPJC8=C:\LOTUS\DOMINO\STMtgManagement.jar

- On AIX, change the contents to:

JavaUserClassesExt=QPJC1,QPJC2,QPJC3,QPJC4,QPJC5,QPJC6,QPJC7,QPJC8

QPJC1=/opt/lotus/notes/latest/ibmpow/quickplace.jar

QPJC2=/opt/lotus/notes/latest/ibmpow/xercesImpl.jar

QPJC3=/opt/lotus/notes/latest/ibmpow/xalan.jar

QPJC4=/opt/lotus/notes/latest/ibmpow/xml-apis.jar

QPJC5=/opt/lotus/notes/latest/ibmpow/log4j-118compat.jar

QPJC6=/opt/lotus/notes/latest/ibmpow/ibmjsse.jar

QPJC7=/opt/lotus/notes/latest/ibmpow/STCore.jar

QPJC8=/opt/lotus/notes/latest/ibmpow/STMtgManagement.jar

- On Solaris, change the contents to:

JavaUserClassesExt=QPJC1,QPJC2,QPJC3,QPJC4,QPJC5,QPJC6,QPJC7,QPJC8

QPJC1=/opt/lotus/notes/65010/sunspa/quickplace.jar

QPJC2=/opt/lotus/notes/65010/sunspa/xercesImpl.jar

QPJC3=/opt/lotus/notes/65010/sunspa/xalan.jar

QPJC4=/opt/lotus/notes/65010/sunspa/xml-apis.jar

QPJC5=/opt/lotus/notes/65010/sunspa/log4j-118compat.jar

QPJC6=/opt/lotus/notes/65010/sunspa/ibmjsse.jar

QPJC7=/opt/lotus/notes/65010/sunspa/STCore.jar

QPJC8=/opt/lotus/notes/65010/sunspa/STMtgManagement.jar

6. On the Team Workplace server, create a qpconfig.xml file if one does not exist. Then open the qpconfig_sample.xml file and copy the following <sametime> XML section to the qpconfig.xml file. Within the <credentials> element, add the name and password of the user you created in Step 1. See the qpconfig_sample.xml file for information on these settings.

```

<sametime local_users="false" ldap="true">
  <meetings invite_servers="false">
    <tools>
      <audio enabled="true"/>
      <video enabled="true"/>
    </tools>
    <credentials>
      <dn>cn=John Doe/o=Enterprise</dn>
      <password>password</password>
    </credentials>
  </meetings>
</sametime>

```

Note The <local_users> attribute should be "false." This release of Team Workplace does not support local users using Sametime.

7. Open a browser and type the URL of the Team Workplace server. For example, <http://servername.enterprise.com/QuickPlace>.
8. Click SignIn in the left corner of the screen.
9. Type the user name and password of a Team Workplace server administrator.
10. Click Server Settings in the table of contents.
11. Click Other Options in the table of contents.
12. Click Edit Options.
13. Under Sametime Servers, type the full URL of the Sametime Meeting Server. For example, <http://meetingserver.enterprise.com>
14. Click Next.
15. Do the following to verify that places allow members to schedule online meetings.
 - a. Sign in to the place as a Manager.
 - b. Click Customize.
 - c. Click Basics.
 - d. Click Change Basics.
 - e. Scroll down to the bottom of the Change Basics page. Under the Real-time collaboration heading, make sure "Members can schedule online meetings" is checked.
 - f. Click Done.

16. To test Meeting Services, create a calendar entry in a Place. From the place, choose Calendar - New - Online Meeting. Fill in the relevant fields, and click Publish. Users who subscribe to calendar events should receive an invitation in their mail, with a link to the meeting. For more information on subscribing to calendar events, click Help in a place.

Chapter 4

Upgrading to Team Workplace 6.5.1

This chapter provides instructions for upgrading from QuickPlace 2.0.8, 2.0.9, or 3.0x to Team Workplace 6.5.1. It also explains how to upgrade a cluster and a super user to work with Team Workplace 6.5.1. The steps for upgrading a super user apply only to upgrades from 2.0.8 or 2.0.9 — upgrading a super user is not necessary for upgrades from 3.0x.

Upgrading to Team Workplace 6.5.1

The process of upgrading a server and places from QuickPlace 2.0.8, 2.0.9, or 3.0x to Team Workplace 6.5.1 is separated into independent stages. This separation minimizes the downtime required to upgrade your servers.

After you install the new Team Workplace server, users can continue to work in their old places and create new places. The old places remain available except when they are locked for the relatively short time when they are being upgraded. (Pre-3.0 PlaceTypes are not available until they are upgraded.) You can choose to upgrade places and PlaceTypes when it is convenient.

If you are upgrading from QuickPlace 2.0.8 or 2.0.9, Domino Directories accessed over NRPC are supported only during the upgrade; after you have fully upgraded, only directories accessed through LDAP are supported. You can switch to an LDAP directory either just before or just after upgrading places and PlaceTypes on the server.

For information on switching directories, see the chapter “Connecting to a User Directory” in the *Team Workplace Administrator’s Guide*.

Upgrading to Team Workplace 6.5.1 involves these steps:

1. Install or upgrade to a version of Domino supported for Team Workplace 6.5.1. For supported Domino versions, see the *Team Workplace 6.5.1 Release Notes*.
2. Install the Team Workplace 6.5.1 server on Domino.
3. Upgrade the design of databases on the server.
4. Upgrade the places and PlaceTypes.
5. Register the places and PlaceTypes with the Place Catalog.

For more information on upgrading a Domino server, see the Domino 6 Administrator Help and the Domino 6.5.1 *Release Notes*.

For more information on installing Team Workplace, see the chapter “Installation and Upgrade Overview.”

How features are affected by upgrading PlaceTypes and places

Many new features were introduced in QuickPlace 3.x and carried over to Team Workplace 6.5.1. If you upgrade from QuickPlace 2.0.8 or 2.0.9 to Team Workplace 6.5.1, these features are automatically available in new places. However, for most of these feature to be available in PlaceTypes and places created in 2.0.x, you must upgrade the PlaceTypes and places. The following table describes the status of some new and old features before and after PlaceTypes and places are upgraded from QuickPlace 2.0.8 or 2.0.9 to Team Workplace 6.5.1.

Note Fewer new features were introduced in Team Workplace 6.5.1 than in QuickPlace 3.0.x. Nevertheless, if you upgrade from QuickPlace 3.0.x to Team Workplace 6.5.1, you should upgrade PlaceTypes and places to ensure that all new features are available in places created in 3.0.x.

<i>Feature</i>	<i>Before place and PlaceType upgrade from 2.0x</i>	<i>After place and PlaceType upgrade from 2.0x</i>
MyPlaces	Works in newly created places. The MyPlaces link is in old places. However the list of MyPlaces will not include any old places.	Available in all places (2.0.x and 6.5.1)
Sametime Meeting	Not available in old places	Available
Sametime Awareness	Works in some pages of old places, but does not work in folders.	Available
2.0.8 super user	Available in 2.0.8 places only	No longer available. To enable the super user functionality for 6.5.1 places, you must set the super user in <code>qpconfig.xml</code> .
6.5.1 super user	Available only in new places	Available in all places.
Search Places	Available but upgrade places and register places with the Place Catalog before enabling.	Available

“continued”

<i>Feature</i>	<i>Before place and PlaceType upgrade from 2.0x</i>	<i>After place and PlaceType upgrade from 2.0x</i>
2.0.x PlaceTypes	Not available. After the Team Workplace server is installed, old PlaceTypes cannot be used to create places, and old places cannot be used to create PlaceTypes. Old places cannot be refreshed from their PlaceTypes, and old PlaceTypes cannot be refreshed from their places, until both are upgraded.	Available
QPTool commands	The following qptool commands are not available for old places and PlaceTypes: <ul style="list-style-type: none"> • register • unregister • changehierarchy • changemember • placecatalog • refresh • removemember • repair • report • sendmail 	Available
Admin Utility, including replicamanager for creating replica stubs in a cluster	Replaced by QPTool commands and super user functionality set in qpconfig.xml.	Replaced by QPTool commands and super user functionality set in qpconfig.xml.
QPMove	Replaced by qptool register -install.	Replaced by qptool register -install.
QPUser	Replaced by qptool password.	Replaced by qptool password.
QPCheck	Replaced by qptool repair.	Replace by qptool repair.
nquickplacenightly	Replaced by: <ul style="list-style-type: none"> • qptool newsletter • qptool deadmail • qptool remove -cleanup 	Replaced by: <ul style="list-style-type: none"> • qptool newsletter • qptool deadmail • qptool remove -cleanup

For more information on setting super users in qpconfig.xml, see the *Team Workplace Administrator's Guide*.

Some features changes introduced in QuickPlace 3.0x

If you are upgrading from QuickPlace 2.0.8 or 2.0.9, the following table describes some feature changes introduced in QuickPlace 3.0x and carried forward to Team Workplace 6.5.1 of which you should be aware.

<i>Feature</i>	<i>Description</i>
Update of local directory without affecting 2.0.x servers that share the directory	<p>After server upgrade in an overlay configuration, the QuickPlace h_members and local group entries for each place on the server are removed from the local Domino Directory. For example, h_members/[placename]/qp/[certifier] and [groupname]/[placename]/qp/[certifier] are removed.</p> <p>If this Domino Directory is shared by other QuickPlace 2.0.x servers, upgrade only removes h_members and local groups for the specific server being upgraded, so you can maintain the Team Workplace 6.5.1 server in the same domain as QuickPlace 2.0.x servers.</p>
Show CGI variables in HTML source pages	<p>In QuickPlace 2.0.x, HTML source pages displayed CGI variables with potentially sensitive information, like details of QuickPlace administrative accounts and server IP addresses. This information is hidden by default in Team Workplace 6.5.1. However, you can show it again (for example, to hook the information from a custom program) by adding the following settings to the qpconfig.xml file:</p> <pre><server_settings> <cgi_variables enabled="true"> </server_settings></pre> <p>This feature replaces the QuickPlaceEnableCGIVariables notes.ini setting made available in a hotfix for QuickPlace 2.0.8 and 3.0.</p>

"continued"

<i>Feature</i>	<i>Description</i>
Searches of nested groups	If a user directory has nested groups (groups within groups) that contain Team Workplace users, add the following notes.ini setting on the Team Workplace server to allow searches of the nested groups: QuickPlaceNestedGroupLimit= <i>value</i> where <i>value</i> 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. The Team Workplace 6.5.1 default behavior is different from the Quickplace 2.0.x default behavior which allowed searches of eight levels of nested groups.
Force upgrade on server startup	When the Team Workplace server is installed, the notes.ini setting QuickPlaceUpgradeServerOnStartup is set to 1. The server is upgraded during the first startup, and QuickPlaceUpgradeServerOnStartup is then set to 0 so that the server will not be upgraded during subsequent server startups. To force a new upgrade, shut down the server, set QuickPlaceUpgradeServerOnStartup to 1, and restart the server.
Control over upgrade logging detail	You can add the setting QuickPlaceUpgradeLogging to the Domino server's notes.ini file to send log information about the upgrade to the Domino server console and Notes log. Specify values from 0 (default) to 4 to increase the level of detail.

For more information on the qpconfig.xml file, see the *Team Workplace Administrator's Guide*.

Upgrading from a standalone configuration (2.0x upgrades only)

You could configure QuickPlace 2.0.8 and 2.0.9 servers as standalone servers or you could overlay them on Domino servers. Team Workplace 6.5.1 must be overlaid on a Domino server; it cannot be configured as a standalone server.

If you used a standalone configuration in QuickPlace 2.0.8 or 2.0.9, do the following steps to upgrade QuickPlace 2.0.9 or 2.0.9 to Team Workplace 6.5.1.

1. Back up your data by copying the server data, user place subdirectories (except for “help” and “quickplace”), and PlaceType subdirectories from the data\QuickPlace directory to a temporary directory.

Caution Do not copy the .ntf files from the AreaTypes directory. Copy only the PlaceType subdirectories from the AreaTypes directory.

2. Uninstall the QuickPlace 2.0.x server.
3. Install a Domino server supported for Team Workplace 6.5.1 to its own directory. For supported Domino versions, see the *Team Workplace 6.5.1 Release Notes*.

4. Shut down the Domino server.

5. Install the Team Workplace 6.5.1 server.

For more information on installing Team Workplace, see the chapter “Installation and Upgrade Overview.”

6. Restart the Domino and Team Workplace servers. (Starting the Domino server starts the Team Workplace server.)

7. Configure the Team Workplace server and specify server settings.

For more information, see the *Team Workplace Administrator’s Guide*.

8. Copy user places back to the data\QuickPlace directory from the temporary directory.

Caution Do not overwrite the new AreaTypes, help, or quickplace directories.

9. Copy PlaceTypes back to the data\QuickPlace\AreaTypes directory.

Caution Do not overwrite the .ntf files in this directory.

10. Upgrade the design of all databases on the server.

For more information on upgrading the design of databases, see the topic “Upgrading the design of databases on the server” later in this chapter.

11. Upgrade places and PlaceTypes.

For more information on upgrading places and PlaceTypes, see the topic “Upgrading places and PlaceTypes” later in this chapter.

12. Register the server and all places with the Place Catalog. When you upgrade from a standalone environment, existing places are not available until you register them. When upgrading from standalone, you must use “-install” in the arguments for QPTool register command. For example, qptool register -a -install.

For more information on registering the server and places, see the topic “Registering places with the Place Catalog” later in this chapter.

13. Sign PlaceTypes using the new server's ID. For information on signing templates (a PlaceType is similar to a template), see Domino Designer Help.

Note In a QuickPlace 2.0.x standalone environment, you enabled SSL and mail in the QuickPlace administrator settings. When you upgrade to Team Workplace 6.5.1, you must set SSL and mail on the Domino server. For more information on setting SSL and mail, see Domino Administrator Help.

Note Connecting to an external Domino Directory over NRPC is supported throughout the upgrade. However, after the upgrade is finished, you must switch to an LDAP external directory. The LDAP directory can be a Domino Directory accessed through LDAP.

Upgrading from an overlay configuration

Do the following steps to upgrade a QuickPlace 2.0.8 or 2.0.9 server that used an overlay configuration or to upgrade a QuickPlace 3.0x server.

1. Back up your data by copying the server data, user place subdirectories (except for “quickplace”), and PlaceType subdirectories from the data\QuickPlace directory to a temporary directory.
2. If you are upgrading a QuickPlace 3.x server set up for offline use, tell users who have taken places offline in QuickPlace 3.x to synchronize the offline places with the online versions before you upgrade the Domino server.
3. Upgrade the Domino server to a version supported for Team Workplace 6.5.1. For supported Domino versions, see the *Team Workplace 6.5.1 Release Notes*.
4. Install the Team Workplace 6.5.1 server.

For more information on installing Team Workplace, see the chapter “Installation and Upgrade Overview.”

5. Start the Team Workplace server. (When you start the Domino server you also start the Team Workplace server.)

Note If you start the Domino server before upgrading the Team Workplace server to 6.5.1, you may see a “javai.dll could not be found” error, which you can ignore. When you shut down the server, upgrade to Team Workplace 6.5.1, and restart the server, the error no longer displays.

6. Upgrade the design of all databases on the server.

For more information on upgrading the design of databases, see the topic “Upgrading the design of databases on the server” later in this chapter.

7. Upgrade places and PlaceTypes.

For more information on upgrading places and PlaceTypes, see the topic “Upgrading places and PlaceTypes” later in this chapter.

8. Register the server and all places with the Place Catalog.

For more information on registering the server and places, see the topic “Registering places with the Place Catalog” later in this chapter.

9. Tell your offline users to reinstall their offline places (they do not have to uninstall them). After reinstalling their offline places, the offline users should delete the old Lotus iNotes icon on the desktop and the Lotus iNotes icon on the Start Programs menu — these items are now obsolete, and the Lotus Domino Web Access (DWA) Sync Manager icons are used instead.

Upgrading the design of databases on the server

Use the QPTool upgrade command to upgrade the design of all databases on the Team Workplace server.

To upgrade the design of databases:

1. From the Domino server console, enter the following command

```
load qptool upgrade -server
```

2. When the upgrade is finished, the qptool.upgrade.xml is created in the Domino program directory by default. This file indicates if the upgrade was successful. It contains the following xml:

```
<?xml version="1.0"?>
  <service>
    <servers>
      <server>
        <hostname>servername</hostname>
        <placetypes />
        <places />
        <action_status action="upgrade">
          <code>code number(0 if successful)</code>
          <message>error message(if there's an error)</message>
        </action_status>
      </server>
    </servers>
  </service>
```

Upgrading places and PlaceTypes

Use the QPTool upgrade command to upgrade places and PlaceTypes created on the server prior to Team Workplace 6.5.1. After you upgrade places and PlaceTypes, all Team Workplace 6.5.1 features work in them.

While a place is being upgraded it is locked. After it has finished upgrading, it is unlocked again. When you upgrade multiple places at once, only the place being upgraded is locked, then upgrade unlocks it and moves to the next place. You can only upgrade places and PlaceTypes created on a QuickPlace 2.08 or later server.

Before you upgrade places and PlaceTypes, old PlaceTypes cannot be used to create places, and old places cannot be used to create PlaceTypes. Old places cannot be refreshed from their PlaceTypes, and old PlaceTypes cannot be refreshed from their places, until both are upgraded.

To upgrade places and PlaceTypes, enter the following command from the Domino server console:

```
load qptool upgrade arguments
```

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

For more information on QPTool commands see the *Team Workplace Administrator's Guide*.

<i>Argument</i>	<i>Description</i>
-?	Prints help on the command.
-server	Runs the design task for all data on the server. Use this command right before you upgrade all places and PlaceTypes with "qptool upgrade -a" command or multiple specified places 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 <i>place(s)</i>	Upgrades a specified place or space-separated list of places.

"continued"

<i>Argument</i>	<i>Description</i>
-pt <i>PlaceType(s)</i>	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.
-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

The following table provides examples of using the upgrade command.

<i>Task</i>	<i>Command</i>
Run the design task on the server to upgrade the design of databases before upgrading multiple places and PlaceTypes	>load qptool upgrade -server
Upgrade all places and PlaceTypes on the server	>load qptool upgrade -a
Upgrade all places and PlaceTypes on the server to Team Workplace 6.5.1	>load qptool upgrade -a -f
Upgrade place P1	>load qptool upgrade -p P1
Upgrade place P1 to Team Workplace 6.5.1	>load qptool upgrade -p P1 -f
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

Note If you upgrade places and PlaceTypes incrementally (using -p or -pt), upgrade places first, then PlaceTypes. You cannot change or refresh PlaceTypes until they are upgraded. Users should be told not to change or refresh PlaceTypes until all PlaceTypes are upgraded.

When the upgrade is finished, the file qptool.upgrade.xml is created by default in the Domino program directory. This file indicates whether the upgrade was successful. It contains the following xml:

```

<?xml version="1.0"?>
  <service>
    <servers>
      <server>
        <hostname>servername</hostname>
        <placetypes />
        <places>
          <place>
            <name>placename</name>
            <action_status action="upgrade">
              <code>code number(0 if successful)</code>
              <message>error message(if there's an error)</message>
            </action_status>
          </place>
        </places>
      </server>
    </servers>
  </service>

```

Note When a place is upgraded, the UI components “SiteMapLauncher” and “MyPlaces” are not added to custom themes. Place managers must add these components themselves.

For information on UI components, see the *Team Workplace Developer’s Guide*.

Registering places with the Place Catalog

Use the QPTool register command to register upgraded places with the Place Catalog. You use the register command to add information about a place to the Place Catalog, and to adjust server-specific names when a place has been moved from one server to another, or if a place has been renamed on the same server. The server is automatically registered with the Place Catalog when a place is created.

Note Place names in the Place Catalog must be unique. If your configuration allows for a single Place Catalog across multiple servers, you might receive an error if a name already exists when you attempt to register a place. Change the unregistered place name to a unique name by copying the place directory to a uniquely named directory.

For more information, see the chapter “Setting up the Place Catalog” in the *Team Workplace Administrator’s Guide*. For more information on the QPTool register command, see the *Team Workplace Administrator’s Guide*.

To register places do the following steps:

1. From the Domino server console, enter any the following commands:

To register a specific place with the Place Catalog:

```
load qptool register -p placename -placecatalog
```

To register all places on the server with the Place Catalog:

```
load qptool register -a -placecatalog
```

To update server information for places that have been moved from another server, renamed on the current server, or restored from archive (required if upgrading from a QuickPlace 2.0.8 or 2.0.9 standalone configuration):

```
load qptool register -install -a
```

Note The qptool register -install command is the equivalent of the QuickPlace 2.0x QPMove utility.

2. When registration is finished, the file qptool.register.xml is created by default in the Domino program directory. This file indicates whether the registration was successful. It contains the following xml.

```
<?xml version="1.0"?>
  <service>
    <servers>
      <server>
        <hostname>servername</hostname>
        <places>
          <place>
            <name>placename</name>
            <action_status action="RegisterInPlaceCatalog">
              <code>code number(0 if successful)</code>
              <message>error message(if there's an error)</message>
            </action_status>
          </place>
        </places>
      </server>
    </servers>
  </service>
```

Upgrading Team Workplace servers in a cluster

To upgrade Team Workplace servers in a cluster, do the following steps:

1. Shut down one Team Workplace server in the cluster. If you are using Network Dispatcher, redirect HTTP traffic to the other cluster members.
2. Install Team Workplace 6.5.1 on the server.
3. Restart the server, and disable replication between it and other cluster members.
4. Follow Steps 1 to 3 with each server in the cluster. Do not allow 2.0.x or 3.0.x servers to replicate with 6.5.1 servers.
5. When all servers in the cluster are running 6.5.1, re-enable cluster replication and enable qptool replicamaker between the servers.
6. Use the QPTool upgrade -server command on only one server in the cluster to upgrade the design of databases. Let replication pass the design upgrades to all servers. At this point you can make the cluster accessible to users again.
7. Use the QPTool upgrade -a command on only one server in the cluster to upgrade places and PlaceTypes. Then delete the PlaceTypes on all the other servers and let the upgraded PlaceTypes replicate throughout the cluster. After replication, sign in to each server as an administrator and refresh the list of PlaceTypes.
8. Use the QPTool register -a command on all servers in the cluster to register all places with the Place Catalog.

Note You can install a new Team Workplace 6.5.1 server in the same domain as a 2.0.x or 3.0.x server, and users can work in places on both. However, you should upgrade all clustered servers at the same time.

Upgrading a super user

Do the following steps to upgrade from a configuration with a super user on a QuickPlace 2.0.8 or 2.0.9 server to a super user on a Team Workplace 6.5.1 server. If you are not using an LDAP directory, you must switch to an LDAP directory to get super user functionality in release 6.5.1.

Note These steps are not necessary if you are upgrading from QuickPlace 3.0x.

1. Install the Team Workplace 6.5.1 server. Do not uninstall the Admin Utility or disable the existing super user.

2. Use the QPTool upgrade command to upgrade the design of databases on the Team Workplace server.

For more information, see the topic “Upgrading the design of databases on the server.”

3. Use the QPTool upgrade command to upgrade places on the Team Workplace server.

For more information, see the topic “Upgrading places and PlaceTypes.”

The super user is removed from the ACL of upgraded places.

4. Configure the super user settings in qpconfig.xml to use new super user functionality.

For more information on configuring the super user in qpconfig.xml, see the *Team Workplace Administrator’s Guide*.

Note Any previous super user remains in the ACL until a place is upgraded. If your server is configured to use an LDAP directory and there is a new super user set in qpconfig.xml, then the old super user has access to old places and the new super user has access to new places. The old super user is removed from the ACL when the place is upgraded. If you are not planning to upgrade places right away, it is recommended that you create a super user in qpconfig.xml with the same name as the old so that you can access all places.

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