Installing Teamstudio Adviser

Teamstudio Adviser consists of two components, an IBM Domino application hosted on a Domino server, and an executable program that runs on a workstation with an IBM Notes client installed.

The Adviser server application provides Adviser's browser-based user interface, generates reports on databases and users for the Adviser modules, and stores all data collected by Adviser. Adviser server is deployed by creating an NSF based the template *TSAdviser.ntf* on the desired server, and configuring it via web browser.

Adviser workstation is responsible for collecting the data that forms the basis for the reports generated by the Adviser server. Adviser workstation is deployed by running an installer (contained in the server NSF) on a workstation installation of IBM Notes. The installed program is configured by the installer to connect to the Adviser server, and remains running to process Adviser scans as needed. Scans are resource intensive processes; running scans from a client workstation limits the impact of Adviser on server performance, and allows easier configuration and access to servers in multiple domains.

System Requirements

The web interface for Teamstudio Adviser can be hosted on any Domino server version 8.5.3 or above, with the HTTP task enabled.

- For Domino 8.5.3, the server must have a minimum of Fix Pack 3 installed, and must have Upgrade Pack 1 installed (or equivalent version of the Xpages Extension Library).
- The required components are included in Domino 9.0 and greater; no additional components are required.

The Teamstudio Adviser workstation is supported on Notes version 8.5.3 and higher (32-bit) running on supported versions of Microsoft Windows.

Upgrading an Existing Installation

If you are upgrading an existing installation of Adviser 6.0 or above, you can skip directly to the Upgrading section. Otherwise continue to follow the instructions below.

Prerequisites for Usage Data Collection

The Usage module of Teamstudio Adviser aggregates and reports on data collected by the IBM Domino server's Activity Logging task.

In order to use Usage Auditor, Activity Logging must be enabled on all servers you wish to include.

Activity Logging can be enabled on the Server Configuration document in the Domino Directory database. Teamstudio Adviser tracks the following activity streams:

- Domino.Notes.Database
- Domino.Notes.Session
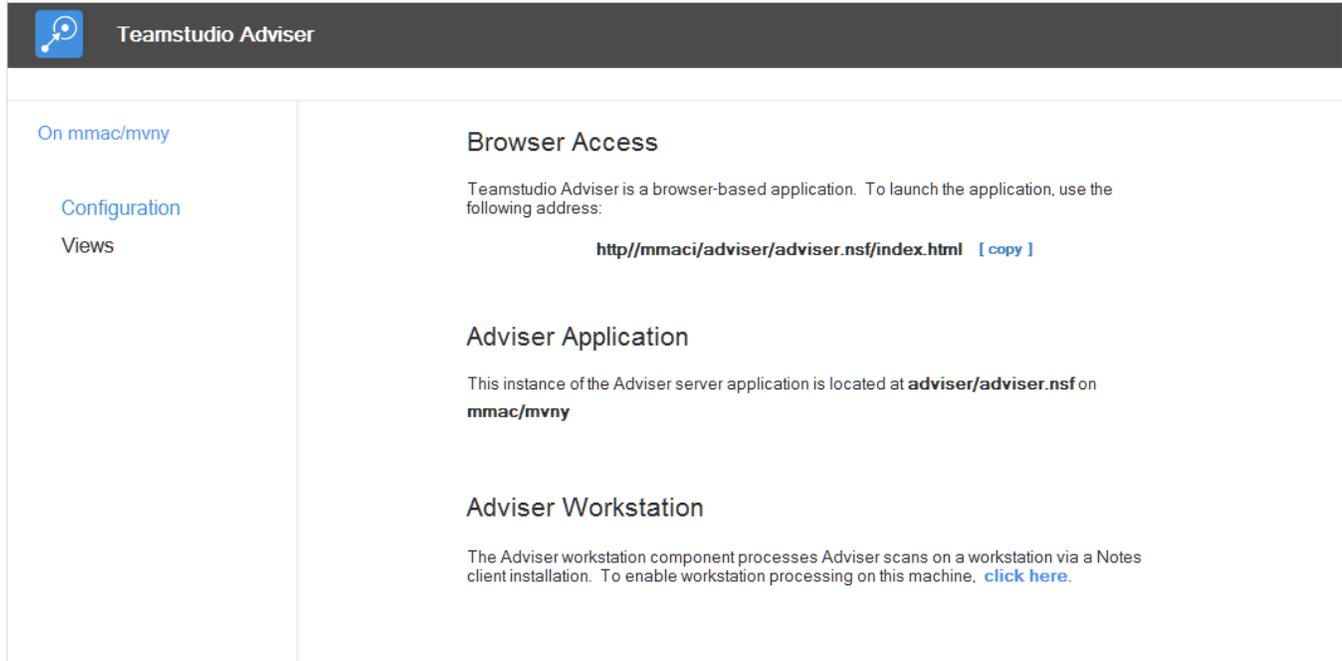- Domino.AGENT
- Domino.HTTP

By default, Activity is logged to the Log.nsf database on the server, and the retention period for Log.nsf applies to activity as well. By default, Teamstudio Adviser will collect usage data every night and will import any new data. If collection fails, no data will be lost as long as the problem is resolved within the retention period.

Installing and Configuring Teamstudio Adviser Server

Installation

To install the server component, sign the *TSAdviser.ntf* template with an ID appropriate to execute code and access servers to be scanned, and create an NSF from the template on the desired server.

To configure Teamstudio Adviser, connect to the application via web-browser, using an address in the form http(s)://<server>/<path>/index.html, where <server> is the host name or IP address of the Domino server, and <path> is the file path of the NSF. For convenience, the NSF displays this URL when opened in a Notes Client.

If installation is successful, you should see the application home screen.

ACL

By default, Teamstudio Adviser server requires that the ACL entry "anonymous" be defined as "No Access" and given the privilege "Read Public Documents" – this setting allows the Adviser workstation to trigger server-side job processing when client-side jobs have completed. Anonymous access cannot be used to create jobs or access data. Anonymous should not be set to a higher level of access, as authentication is required by the Adviser services that support the web browser application. Allowing anonymous higher levels of access will prevent the server from requiring authentication.

If the environment does not allow Anonymous access (for example, it is prohibited at the server level via the Directory's Server document), it is possible to configure Adviser to store and use an HTTP Username/Password combination for this access. For more information, contact Teamstudio support at techsupport@teamstudio.com.

In general, other ACL settings in Adviser are applied to the browser application in the same manor they are applied in traditional Notes applications.

The "-Default-" access setting can be used to assign any level of access desired in place of anonymous access.

Configuration

The final step in configuring the Teamstudio Adviser server is to select the servers to scan. You can do this from the *Settings* page in the web application, accessed via the gear icon on the right of the Adviser navigation bar. See Servers for more details.

Installing the Adviser data collection application on workstations

The Adviser Workstation application is a executable application that run scans from a client workstation. Scanning for and reporting on activity is a resource intensive activity that may access multiple servers and which works with file system files as part of the process.

The data collected during the Workstation scans is written to the server application, and available via the web browser interface.

Adviser Workstation is intended to run continuously, as it monitors the Adviser Server component, waiting for scans to be scheduled.

The application must be run by ID that has a least Reader access to the Log.nsf files on the servers to be scanned, as well as any applications for which Complexity data is desired. If the servers exist in multiple domains, the ID and local workstation must be properly cross-certified to all servers.

The ID must also have Editor level ACL access (with delete rights) to the Adviser Server application.

Installing the Adviser Workstation application

1. On the workstation where the Adviser workstation will run, log in to the IBM Notes client with the ID that will be used to collect data.
2. Ensure that the Notes client setting "Don't prompt for password from other Notes-based programs" is checked (File > Security > User Security). This step is required to allow the executable to run.
3. Open the Adviser server application in the Notes client, and click on the link to enable workstation processing in the section titled Adviser Workstation:

Adviser Workstation

The Adviser workstation component processes Adviser scans on a workstation via a Notes client installation. To enable workstation processing on this machine, **click here**.

4. The Adviser Workstation installer program will launch. Follow the prompts to install the program. During setup, a settings page will be shown which contains configuration information for the Workstation and it's connection to the server; verify the information is correct:

When the installation is complete, the installer will offer to launch the Workstation application.

For information on upgrading an existing Adviser install, see the Upgrading section below.

For more information and assistance upgrading a prior version of Usage Auditor, contact Teamstudio Support at http://support.teamstudio.com or by email at techsupport@teamstudio.com.

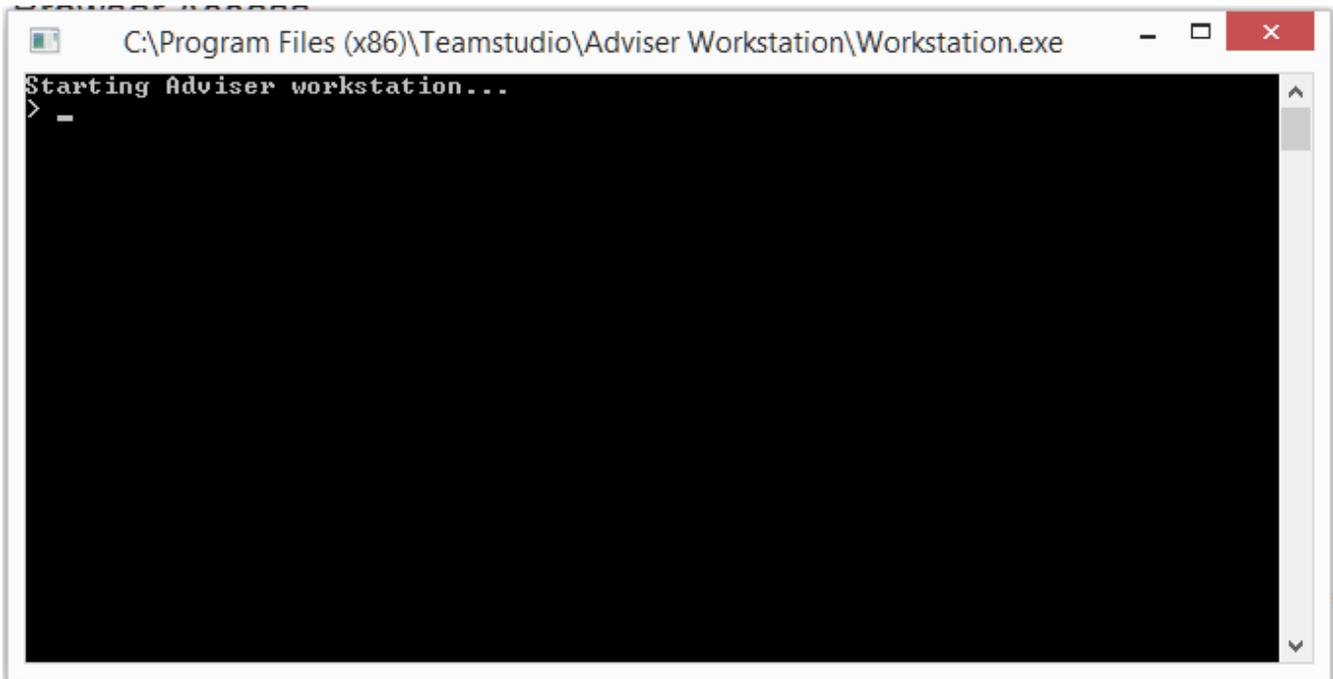**Launching the Adviser Workstation**

Once installed, the Adviser workstation can be launched by clicking the same link used to install it, found in the Configuration page of the Adviser server NSF when opened in the Notes client, in the section titled Adviser Workstation:

The workstation can also be launched by running the executable Workstation.exe, which is installed by default at <Program Files (x86)>\Teamstudio\Adviser Workstation\Workstation.exe

Once launched, the Workstation application window should open, and begin monitoring for pending scans:

Workstation - Server Connectivity

Adviser workstation requires connectivity to the Adviser server via HTTP.

Most workstation processing, including scanning servers and databases, and writing data to the Adviser server, is handled through the Notes client and NRPC.

In order to trigger server processing once client side jobs have completed, Adviser invokes a REST service endpoint via HTTP to ensure that the server application is running to process the updated data.

The default workstation configuration attempts to connect to the server based on the fully-qualified host name specified first in the server document in the server's address book. The connection is attempted without SSL on port 80.

For servers requiring SSL connections, or connectivity on an alternate port, the configuration can be modified by editing the HTTP Host Name field in the Workstation Configuration document in the workstation database. By default this field contains only the host name; a protocol and optional port name can be specified (for example, https://teamstudio.com:499 specifies SSL on port 499). The Notes client acting as the Adviser workstation must be exited completely and restarted for this setting to take effect. For help configuring these settings, contact Teamstudio support.

Due to limitations with the Java 6 JVM currently embedded in Notes, SSL that uses large key sizes may not work correctly.

Upgrading Adviser

To upgrade from a previous version of Adviser 6.0 or greater, follow the steps below.

Upgrade Adviser Server

1. Sign the new template with the appropriate ID to execute code on the target server.
2. Refresh the design of the server Adviser database from the new template.
3. Restart the HTTP task on the server using the command "restart task http" (this is equivalent to "quit http" followed by "load http" - note that "tell http restart" will not fully release the JVM and update the new code).

Upgrade Adviser Workstation

The Adviser Workstation install prior to 6.2 ran the workstation component as a locally scheduled agent in the Notes client, from the Notes application **TSA dviserWS.nsf** located in the root of Note's "data" directory.   To upgrade, follow these steps:

1. Exit the Notes client acting as the workstation completely (this can be confirmed using task manager).
2. Delete **TSAdviserWs.nsf** from the client's data directory.
3. Restart the Notes client, open the Adviser Server application.
4. Follow the instructions above for installing Adviser Workstation.
5. In the browser UI, schedule a new scan. This will update the data as needed for the new version, and enable any new features. It is safe to schedule a scan while waiting for the workstation to restart; the scan will begin once the workstation is active.

If you have been running a previous Beta version of Adviser Workstation which runs as a command-line application, exit the application and install the new Workstation application by following the instructions above (depending on the version, you may be prompted to uninstall Adviser Workstation via Windows' Programs and Features control panel prior to installing the new version).

Browsers and Saved Passwords

Adviser does not currently support using "Saved Passwords" in browsers. Previously saved passwords can be removed via the browser's settings page.

Scheduling Daily Scans

Since Adviser extracts activity data from the server's log.nsf, which typically keeps 7-10 days of data, it's important to run Usage Scans on a regular basis to insure the data is up-to-date and without gaps.

To enable nightly scanning, open the Adviser server application in Domino Designer, navigate to Agents, and enable the agent **Schedule Nightly Scan**. W hen prompted for the server to run on, choose the server on which the server application resides. Check that the agent is signed with an ID capable of running scheduled agents on that server.

By default, this agent will run once daily, at 1:00 AM. The run time can be modified to another time if desired.

The **Schedule Nightly Scan** agent initiates the same process as triggering a manual scan using the **Scan Now** button in the application. The scan will update Catalog information, import Usage since the last scan, and recalculate any affected metrics. Workstation processing must be enabled for the scan request to be processed.

Importing Usage data from Usage Auditor

Usage data from Teamstudio Usage Auditor can be imported if the setting **Save Supporting Data** was enabled during the period of usage collection. Click here for information on importing from Usage Auditor.