IQJam

Installation and Setup

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Introduction

Getting IQJam up and running is an easy process. By following these instructions you should have your system up and running in no time. If you run into problems please let us know as we want to ensure that our software meets and exceeds your expectations.

Before you get started with your IQJam installation

Prior to installing and configuring IQJam there are few things you will need to have:

1. First and foremost a licensed copy of IQJam.
2. An IQJam license key(s) for your server(s).
3. A server running Lotus Domino server V8.5.2 or greater.
4. Access to these installation instructions.

Installation

Here is a summary of the steps that you will need to follow in order to install and setup IQJam:

1. Select a Domino Server for the installation.
2. Place the IQJam template on the Lotus Domino server you identified in Step 1.
3. Sign the database template.
4. Create the IQJam database from the template.
5. Enable full text index on the IQJam database.
6. Configure the database Access Control List.
7. Configure the IQJam database using the Control Panel.
8. Setup IQSpaces and Sub IQSpaces.
9. Verify your IQJam configuration.

Selecting a Lotus Domino server to run IQJam on

Identify the Lotus Domino Server that you will be installing IQJam on. This server should be running Domino 8.5.2 or higher.

Place the IQJam template on the Lotus Domino server

Copy the IQJam database templates to the Domino server. We encourage you to work with your Domino administration staff to ensure that the template gets placed into the proper location.

Sign the database template

Sign the database template with the appropriate Notes ID. Elguji encourages you to work with your Domino administration staff to ensure that the template gets placed into the proper location and is signed with the proper Notes ID.

Create the IQJam database

Create a new IQJam database from the template on the Domino Server using File > Application > New.

Enable full text search on the IQJam database

IQJam has a search feature that requires that the database be full text indexed. Be sure and enable full text searching in the database properties dialog box.

Configure the database Access Control List (ACL)

Add the "DenyNotesAccess" role to users for whom you don't want to access the IQJam database from the Lotus Notes client. This will typically be everybody except for the IQJam administrator.

The IQJam database Access Control List

Anonymous Browsing

This setup would be for a public internet/intranet site where anonymous users can browse the IQJam but not post, vote or answer questions.

In the IQJam database ACL set:

- **Default** - Reader / Read / Write Public Documents.
- **Anonymous** - Reader / Read / Write Public Documents.
- **User Group** (e.g. IQJam Users) - Author (Create Documents) / Read / Write Public Documents.
- **Admin Group** (e.g. IQJam Administrators) - Manager (Delete Documents).

No Anonymous Browsing

This setup would be for a private internet/intranet site where a username and password are required to participate in the IQJam.

In the IQJam database ACL set:

- **Default** - Reader / Read / Write Public Documents.
- **Anonymous** - No Access / Read / Write Public Documents.
- **User Group** (e.g. IQJam Users) - Author (Create Documents) / Read / Write Public Documents.
- **Admin Group** (e.g. IQJam Administrators) - Manager (Delete Documents).

Setting up the IQJam database ACL Roles

To prevent access of the IQJam database from Lotus Notes users, typically for users who are not IQJam administrators, add the "DenyNotesAccess" role to all groups and users. Be sure that this role is not set for IQJam administrators.

There are also three other access control roles:

- Admin
- AskQuestions
- GiveAnswers

The Admin Role

Use the Admin to control who can administer the IQJam database. Enabling this role on a person/group will allow them to:

- Administer IQJam from a web browser. The "Administration" link will appear in the footer of all pages on IQJam.
- Allows for the deletion of questions and answers from the web browser. Additional buttons will appear when this role is enabled.
- Allows for the resetting of a questions answer to be "unanswered".

The AskQuestions Role

Use the AskQuestions role to control which people/groups can create new questions in IQJam. When this role is enabled users will see the "Ask a Question" button.

The GiveAnswers Role

Use the GiveAnswers role to control which people/groups can add answers for a question.

Configuring the IQJam database

Next you will need to configure IQJam using the IQJam Control Panel. You can access the IQJam Administration from the web by logging into the IQJam database you created from a web browser and then clicking on the "Administration" link at the bottom lower right of the page. Alternatively you can configure IQJam from the Lotus Notes client by clicking on "Configuration > Control Panel" in the navigator. Either way should just work fine.

NOTE: When you edit Control Panel information from the Lotus Notes client you may need to refresh the IQJam "scope variables" due to XPages caching issues. Please see the section titled "View Scoped Variables".

The Control Panel has several tabs/sections that contain configuration information that IQJam needs in order to function properly. The "General Settings" tab is the one that is the most important and contains the settings for the core IQJam functionality. The settings on the other tabs are optional.

Start by filling out the fields in the General Settings tab and work your way through each tab.

From the web:

- General Settings
- Emails

From the Lotus Notes client:

- General Settings
- Emails
- Static Text Content

After these fields are filled out you will need to create IQSpaces and Sub IQSpaces.

General Settings from the web

The General Settings can be found in the "Administration > Control Panel". In the Lotus Notes client they are located under the "Configuration > Control Panel" in the left hand navigator. This manual describes the fields in the web Control Panel. The fields in the Lotus Notes Client Control Panel are very similar.

Always take great care when configuring the Control Panel. This tab can be used to control the following settings:

System Name

By default this is "IQJam" and it will appear on all page headers, and pretty much anywhere that the system is referenced such as section headings, RSS feeds, emails etc. You can change this to be whatever you want.

License Key(s)

License key(s) are required to run IQJam. Enter the license key(s) provided to you by Elguji Software. One or more keys can be placed in the License Key(s) field. Keys are tied to the fully qualified Domino Server name. The ()'s are part of the license key.

Skin

Select an IQJam skin that you want to use for your IQJam. By default this is default.css. If you create your own skins you can select them here.

OpenLog Database Path

The system will log errors to an OpenNTF OpenLog database if any problems occur. If this field is left blank no logs will be written. Elguji Software, LLC highly encourages its customers to use OpenLog. See http://www.opennlf.org/projects/pmt.nsf/ProjectLookup/OpenLog for more information about OpenLog. OpenLog is open source and is free to use.

File Extract Path

This is the file system path used by the "ProcessNewMail" agent. This path needs to already exist on the Domino server. An example would be d:\iqjamextract\

Enable Registration

If you are running your IQJam site on the internet then you might want to allow your users to self register rather than an administrator doing it for them. If the site is run on an intranet where users are already registered you will not need the registration option. This field allows you to enable or disable the registration link in the header menu and the login section at the top of IQJam.

Enable Server Console Commands

If you are using the Registration feature of IQJam you can force the Domino server to immediately update the user cache so users can log in immediately after registration. Set this option to "No" if you do not want to force update of the cache.

Main NAB Database Path

This is the path to your main Domino Name and Address Book better known as names.nsf.

Names Database Path

If IQJam self registration is enabled, this is the database where new person documents will be created. This is typically a secondary Name and Address Book. Additionally your administrator will configure this using Domino Directory Assistance. We suggest you consult with your Domino administrator for assistance setting this option up.

Group Name for New Users

If IQJam registration is enabled, this is the Group Name that will be used to add new user names into.

Host Name

This setting is used mainly by the system generated emails to build URLs. The hostname should be entered without any prefix or suffix (don't use http:// or https://), so for the public IQJam.net site the value would be "IQJam.net". This setting is also used to ensure that no cross-site scripting occurs on your site.

Welcome Message Title

This is the title of the block of text which will appear on the right hand side of the screen for unauthenticated users.

Welcome Message

This is a block of text which will appear on the right hand side of the screen for unauthenticated users. You can enter whatever HTML formatted text you would like here.

Create Question Help Title

This is the title block of text which will appear on the right hand side of the screen for users when they post new questions.

Create Question Help

This is a block of text which will appear on the right hand side of the screen for users when they post new questions. You can enter whatever HTML formatted text you would like here.

Error Title

This is the title block of text which will appear when a user gets an unexpected error in IQJam.

Error Help

This is a block of text which will appear when a user gets an unexpected error in IQJam. You can enter whatever HTML formatted text you would like here.

Header Custom HTML

If you need to display a custom HTML header on all IQJam pages enter the HTML in this section. Leave the field blank if you do not want display a custom HTML header.

Footer Custom HTML

If you need to display a custom HTML footer on all IQJam pages enter the HTML in this section. Leave the field blank if you do not want display a custom HTML header.

Enable Feedback link in Page Footer

Set this option to "Yes" to show the Feedback link in the footer of all IQJam pages. Set the option to "No" to hide this option.

Enable Developers link in Page Footer

Set this option to "Yes" to show the Developers link in the footer of all IQJam pages. Set the option to "No" to hide this option.

Help Text

This field contains the text used on the IQJam Help page and can contain HTML.

Question Voting Help

This is the text that appears when a user hovers their mouse over the Voting label when reading a question.

Answer Voting Help

This is the text that appears when a user hovers their mouse over the Voting label when reading an answer.

Leader Board Help

This is the text that appears in the right navigator when on the Leader Board page. It can contain HTML.

Feedback Email

This is the email address used to send user feedback to. The Feedback link is located at the bottom of each page in IQJam.

Emails Tab

The fields on this tab allow you to configure the various emails that IQJam sends.

Registration Email Subject

This field contains the subject of the email sent out when new users register on IQJam. Leave this field blank if you do not plan to use the IQJam Registration system.

Registration Email From

This field contains the sender of the email sent out when new users register on IQJam. Leave this field blank if you do not plan to use the IQJam Registration system. The format of this field should be Display Address, email address, Domino Domain. An example of this would be: IQJam Support,iqjam@elguji.com,myDominoDomain.

Registration Email BCC To

This field contains the address to send BCC's to when new users register on IQJam. Leave this field blank if you do not plan to use the IQJam Registration system.

Registration Email Body

This field contains the HTML formatted body text of the email sent out when new users register on IQJam. Leave this field blank if you do not plan to use the IQJam Registration system.

This field uses several reserved keywords that you can use to pre-fill information:

- @FirstName@
- @UserAddress@

Answer Email Subject

This field contains the subject of the email sent out when a new answer is added to a question.

Answer Email From

This field contains the sender of the email sent out when a new answer is added to a question. The format of this field should be Display Address, email address, Domino Domain. An example of this would be: IQJam Support,iqjam@elguji.com,myDominoDomain.

Answer Email BCC To

This field contains the address to send BCC's of the email sent out when a new answer is added to a question.

Answer Email Body

This email is sent to the Question Author when a new answer is added.

This field contains the HTML formatted body of the email sent out when a new answer is added to a question.

This field uses several reserved keywords that you can use to pre-fill information:

- @FirstName@
- @QuestionTitle@
- @QuestionURL@
- @AnswerBody@
- @AnswerTitle@

New Answer Email Body

This email is sent to other people who have answered the same question.

This field contains the HTML formatted body of the email sent out when a new answer is added to a question.

This field uses several reserved keywords that you can use to pre-filled information:

- @FirstName@
- @QuestionTitle@
- @QuestionURL@
- @AnswerBody@
- @AnswerTitle@

Daily Summary Subject

This field contains the subject of the email sent out to IQJam users who elect to follow an IQSpace and/or Sub IQSpace. Leave this field blank if you do not plan to use this feature.

Daily Summary From

This field contains the sender of the email sent out to IQJam users who elect to follow an IQSpace and/or Sub IQSpace. The format of this field should be Display Address, email address, Domino Domain. An example of this would be: IQJam Support,iqjam@elguji.com,myDominoDomain.

Daily Summary BCC To

This field contains the address to send BCC's to IQJam users who elect to follow an IQSpace and/or Sub IQSpace.

Daily Summary Body

This field contains the HTML formatted body text of the email sent out so users who elect to follow an IQSpace and/or Sub IQSpace.

This field has one reserved keyword that you can use to pre-fill information:

- @Summary@

IQSpace Followers Subject

This field contains the subject of the email sent out to IQJam users who elect to follow an IQSpace and/or Sub IQSpace.

IQSpace Followers From

This field contains the sender of the email sent out to IQJam users who elect to follow an IQSpace and/or Sub IQSpace. The format of this field should be Display Address, email address, Domino Domain. An example of this would be: IQJam Support,iqjam@elguji.com,myDominoDomain.

IQSpace Followers BCC To

This field contains the address to send BCC's to IQJam users who elect to follow an IQSpace and/or Sub IQSpace.

IQSpace Followers Body

This field contains the HTML formatted body text of the email sent out so users who elect to follow an IQSpace and/or Sub IQSpace.

This field has two reserved keywords that you can use to pre-fill information:

- @IQSpace@
- @Summary@

Tag Followers Subject

This field contains the subject of the email sent out to IQJam users who elect to follow a tag.

Tag Followers From

This field contains the sender of the email sent out to IQJam users who elect to follow a tag. The format of this field should be Display Address, email address, Domino Domain. An example of this would be: IQJam Support,iqjam@elguji.com,myDominoDomain.

Tag Followers BCC To

This field contains the address to send BCC's to IQJam users who elect to follow a tag.

Tag Followers Body

This field contains the HTML formatted body text of the email sent out so users who elect to follow a tag.

This field has two reserved keywords that you can use to pre-fill information:

- @tag@
- @Summary@

Reminder Email Subject

This field contains the subject of the email sent out to a Question Author letting them know that there is an answer that has been posted for their question that hasn't been marked as correct.

Reminder Email From

This field contains the sender of the email sent out to a Question Author letting them know that there is an answer that has been posted for their question that hasn't been marked as correct. The format of this field should be Display Address, email address, Domino Domain. An example of this would be: IQJam Support,iqjam@elguji.com,myDominoDomain.

Reminder Email Body

This field contains the HTML formatted body of the email sent out to a Question Author letting them know that there is an answer that has been posted for their question that hasn't been marked as correct.

This field has two reserved keywords that you can use to pre-fill information:

- @FirstName@
- @QuestionTitle@
- @QuestionURL@

Setting Up IQSpaces and Sub IQSpaces

IQJam uses IQSpaces and Sub IQSpaces to categorize and/or group questions. You can think of these as categories and sub-categories which help place questions into discrete groups.

You can setup IQSpaces by in the Administration > IQSpaces. Here you can manage the IQSpaces and Sub IQSpace for your IQJam.

Creating New IQSpaces and Sub IQSpaces

Click on the "New IQSpace" button to create a new IQSpace. Fill in:

- Category (IQSpace)
- Sub-Category (Sub IQSpace)
- Administrators (Enter one or more names, each on a new line)

IQSpace Administrators are people who can:

- Edit questions entered by others
- Mark an answer as being the correct answer
- Reset a question to unanswered

Click the Save button to save your new IQSpace and Sub IQSpace.

Setting up Messages

IQJam allows you to post one or more messages that app at the top of all pages. You can setup messages in Administration > Messages. Click on the "New Message" button to create a message.

Enter a message in the Message field and then click on the Save button. To delete messages select the message(s) you want to delete using the checkboxes from the view and then click on the "Delete Selected" button.

Setting up IQJam Skins

IQJam makes it simple to change the way your IQJam looks. You can select colors, fonts and the logo to be used. Use the Administration > Skins option to create a new skin or edit an existing one.

To create a new skin, click on the "New Skin" button. Once you have defined all of the information for your new skin click on the "Submit" button to save your new skin.

To edit an existing skin, click on the skin name from the list. Once you are finished editing your skin click on the "Submit" button.

You can use the IQJam Control Panel to select the active skin.

Adding Images

You can use this section to store and manage graphical assets used in IQJam. To access the Images feature use the Administration > Images option.

Click on the "New Image" button to add an image. Attach an image and then click the "Submit" button to save.

To delete an image, click on the image to open the record storing the image. To remove the image click on the "Trash" can to the right and then the "Submit" button. This will remove the image from IQJam.

IQSpace Followers

The IQSpace Followers view provides the IQJam Administrator with a list of IQSpaces and the people following each IQSpace and Sub IQSpace.

View Scoped Variables

The Scoped Variables feature is intended to assist IQJam Administrators and Elguji Support when troubleshooting any IQJam operational issues that may occur. It is not recommended that this feature be used without contacting Elguji Support.

Agent Configuration

IQJam uses several agents that need to be configured. The agents need to be configured from the Lotus Notes client.

In the IQJam database, select "Configuration > Scheduled Agents". This will open up a form where you can set options for the agents.

Make sure the following agents are enabled, the schedule can be changed to meet requirements, but the default settings are recommended. Also be sure to set the Domino server that these agents will run on:

- Consolidate Read Marks
- Maintain User Stats
- Send Reminder Emails
- Send Daily Summary Emails
- Send IQSpace Followers Updates
- ProcessNewMail
- Send Tag Followers Updates

The "Consolidate Read Marks" agent runs on a scheduled basis to build the read mark counts displayed on a question. This agent is scheduled to run once an hour by default.

The "Maintain Users Stats" agent runs on a scheduled basis to build the statistics used on the IQJam Leader Board. This agent is scheduled to run once an hour by default.

The "Send Reminder Emails" agent runs on a scheduled basis to send emails to question authors whose question(s) have received answers that they have not marked as being correct. This helps ensure that questions get marked with a correct answer should the question author forget. This agent is scheduled to run every six hours by default.

The "Send Daily Summary Emails" agent runs on a scheduled basis to send users who have subscribed in their Profile to receive a daily summary of new questions posted to IQJam. This agent is scheduled to run once a day at 1AM by default.

The "Send IQSpace Followers Updates" agent runs on a scheduled basis to send users who have elected to "follow" an IQSpace and/or a Sub IQSpace a summary of new questions posted. This agent is scheduled to every hour by default.
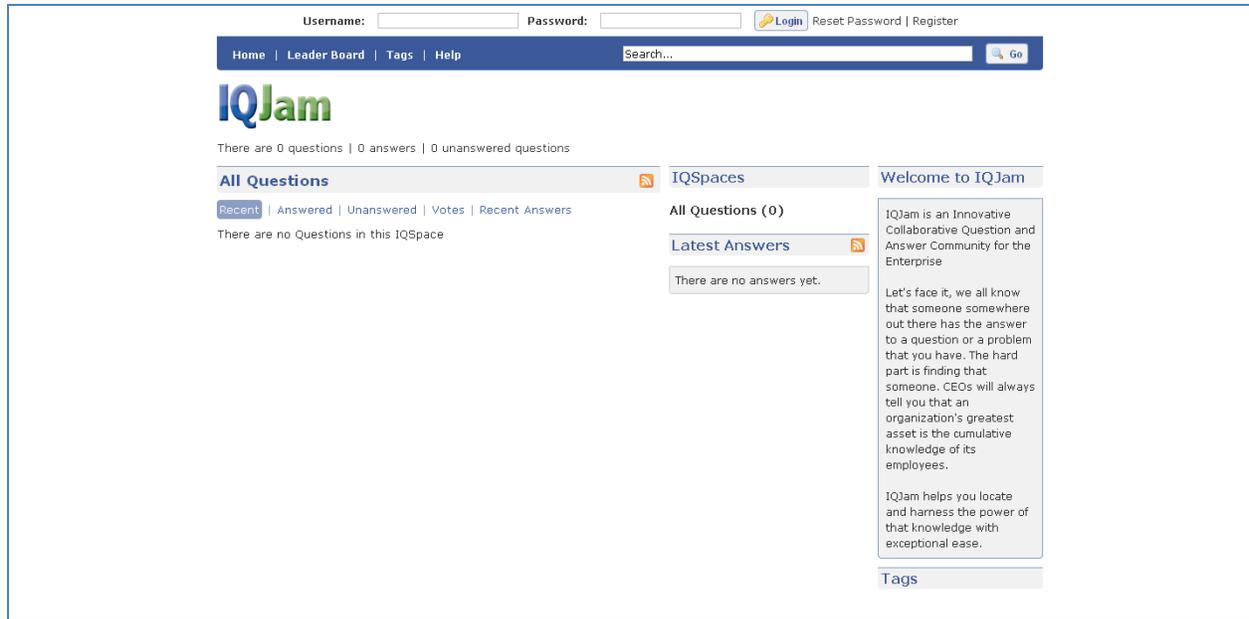
The "ProcessNewMail" agent runs after new answers are received via email. In order to use this feature you will need to setup a Mail-In Database record in the "Messaging" section of your Domino Directory.

The "Send Tag Followers Updates" agent runs on a scheduled basis to send users who have elected to "follow" a tag, a summary of new questions posted. This agent is scheduled to run every hour by default.
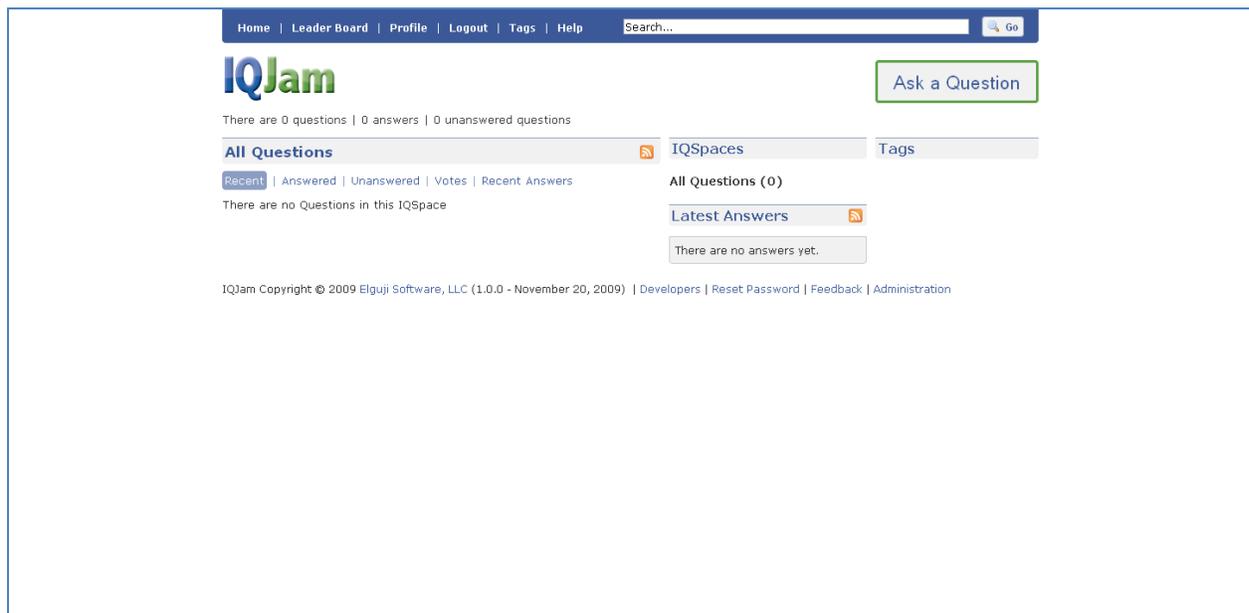
Verifying that your IQJam system is running correctly

Once you have completed installing IQJam you can verify that the system is operating correctly. To verify your configuration, follow these steps:

- Launch IQJam in your browser and login if necessary.
- If the site is configured correctly you should see something like this:

And after logging in you should see this (note that you will need to first grant the AskQuestions role in order to see the "Ask a Question" button):

- Click on the "Ask a Question" button and add and save a new question.
- Now try and add an answer to the question that you just posted. The "GiveAnswers" role should be enabled in order to test this feature.

Troubleshooting

If your IQJam isn't working quite right here are a few things you can try.

Registration

- If you are unable to register a new user verify that the information entered in the "General Settings" tab of the IQJam Control Panel is correct. Ensure that the address books specified are correct.

Agents

- If you are seeing error messages on the Lotus Domino console you should check that the agents are setup correctly. From the Lotus Notes IQJam client access the "Configuration > Scheduled Agents" section and check each agent to ensure that they are enabled and set to run on the appropriate server.

Developers API

IQJam has two API's that developers can use to extend IQJam to work with other products. The two API's are:

- Web Services API
- JSON (unit test page is provided with IQJam)

The API's can be found by clicking on the "Developers" link at the bottom of any IQJam page.

Web Services API

The Web Services API has a WSDL and has the following methods available:

- addQuestion
- addAnswer
- findQuestionById
- searchQuestions
- getRecentAnswers
- getRecentQuestions
- getRecentQuestionsByTag
- getRecentQuestionsByAuthor
- getUserProfile
- getIQSpaces
- getExperts

addQuestion

Parameters:

- Question
- Security Key

Response:

- Question ID

addAnswer

Parameters:

- Question ID
- Created By
- Answer
- Security Key

Response:

- Success (Boolean)

findQuestionById

Parameters:

- Question ID
- Security Key

Response:

- Question

searchQuestions

Parameters:

- Search String
- Security Key

Response:

- Question(s)

getRecentAnswers

Parameters:

- IQSpace (optional)
- Start
- Security Key

getRecentQuestions
Parameters:

- IQSpace (optional)
- Start
- Security Key

Response:

- Question(s)

getRecentQuestionsByTag
Parameters:

- Tag
- Start
- Security Key

Response:

- Question(s)

getRecentQuestionsByAuthor
Parameters:

- Name (in CN format e.g. Fred Bloggs)
- Start
- Security Key

Response:

- Question(s)

getUserProfile
Parameters:

- Name (in CN format e.g. Fred Bloggs)
- Security Key

Response:

- Company / Division – Description – Question(s) – Answer(s)

getIQSpaces
Parameters:

- Security Key

Response:

- IQ Space(s)

getExperts
Parameters:

- Security Key
- IQSpace

Response:

- Experts(s)

JSON API

The JSON API has the following methods available:

- addQuestion
- addAnswer
- findQuestionById
- searchQuestions
- getRecentAnswers
- getRecentQuestions
- getRecentQuestionsByTag
- getRecentQuestionsByAuthor
- getUserProfile
- getIQSpaces
- getExperts

addQuestion

To create a post, send a POST request to .../jsonAddQuestion with the following parameters:

Request Parameters:

- iqspace - A valid IQSpace for the new Question.
- iqsubspace - A valid IQ Sub Space for the new Question.
- title - The title of the question.
- tags - A comma separated list of tags.
- body - The main body of the question.addAnswer

Response:

- A JSON Object containing the ID of the new Question.

findQuestionById

To create a post, send a POST request to .../jsonAddAnswer with the following parameters:

Request Parameters:

- questionid - The ID of the question the answer is being added to.
- answer - The body of the answer to be added.

Response:

- A JSON Object containing the result of the operation.

searchQuestions

To create a post, send a GET request to .../jsonFindQuestionById with the following parameters:

Request Parameters:

- questionid - The question you want the details for.

Response:

- A JSON Object containing the Question.

getRecentAnswers

To create a post, send a GET request to .../jsonSearchQuestions with the following parameters:

Request Parameters

- search - The search string you want to use.

getRecentQuestions

To create a post, send a GET request to .../jsonSearchQuestions with the following parameters:

Request Parameters

- search - The search string you want to use.

Response:

- A JSON Object containing any matching questions (up to a maximum of 25).

getRecentQuestionsByTag

To create a post, send a GET request to .../jsonGetRecentQuestionsByTag with the following parameters:

Request Parameters:

- tag - The tag you want to filter by.
- start - (Optional) The starting position in the list (up to ten objects are returned per request).

Response:

- A JSON Object containing the matching Questions.

GetRecentQuestionsByAuthor

To create a post, send a GET request to
.../jsonGetRecentQuestionsByAuthor with the following parameters:

Request Parameters:

- author - The name of the person you want to filter by (e.g. Fred Bloggs).
- start - (Optional) The starting position in the list (up to ten objects are returned per request).

Response:

- A JSON Object containing the matching Questions.

getUserProfile

To create a post, send a GET request to .../jsonGetUserProfile with the following parameters:

Request Parameters:

- username - The name of the person you want to view the profile of.

Response:

- A JSON Object containing the user profile, questions asked by and answers given by that person.

getIQSpaces

To create a post, send a POST request to .../jsonGetIQSpaces with the following parameters:

Request Parameters:

- None

Response:

- A JSON Object containing a list of IQSpaces and their IQSubSpaces.

Contacting Support

Elguji offers email support for all of their products. Please email iqjamsupport@elguji.com with your support question. Please include as much information about your problem as possible. You can also call support at +1 (360) 450-5022.