Aviator® Administrator Guide

Aviator Release 2.3

WELCOME TO AVIATOR

Thank You

Thank you for choosing Aviator. We are confident you will be pleased with Aviator's ease of setup, ease of use, and powerful advanced file management capabilities.

This Guide was developed to assist Aviator library administrator(s) with the installation, setup and deployment of Aviator. Please take your time and be sure to read the introduction to become familiar with Aviator's structure – this will help your understanding of the application and clarify the steps as you install and deploy Aviator.

While getting started with Aviator, any time you see the <u>Help</u> icon on your screen, click it to get on-line assistance.

Year 2000 Readiness

See our Web site at http://www.aviatorsoftware.com for Aviator Software, Inc.'s Year 2000 readiness statement.

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INTRODUCTION TO AVIATOR

What Is Aviator?

Aviator is the most advanced file management solution available for today's mobile and networked computing environments. Electronic files are critical to every organizational process, but they are increasingly difficult to store, share and manage. Today's files are received in a variety of ways (via shared drives, electronic faxes, email, from the Internet, etc.) and are subject to a variety of activities (duplicating, reviewing, editing, routing, and storing). Trying to perform the file management functions manually is time-consuming and expensive.

Aviator is designed to help people better manage electronic files in today's work place. Aviator manages any type of electronic file, from word processing files to scanned images to video files. The intuitive desktop metaphor of Library, cabinets, folders, categories, files, and documents makes Aviator extremely easy to use.

Aviator is built on a distributed, scalable architecture that leverages Lotus Notes' messaging, security, and replication technology. Aviator runs on the Lotus Domino server and allows access to files using a Web browser or Notes Workspace. Aviator also supports ODMA (Open Document Management API), which lets you create, retrieve and save into Aviator using ODMA-compliant office productivity applications (e.g., MS Word).

NOTE: Files are managed in Aviator as Aviator documents. One Aviator document can contain one or multiple electronic files. This guide uses reference to documents as Aviator documents.

Aviator Features Overview

Aviator surpasses today's traditional file management systems by incorporating powerful document management functionality such as:

- Workflow – files can be electronically routed for review and approval. Automatic email reminders ensure the files get the attention required without manual intervention;

- Multi-level security – access to information can be controlled at the document level, cabinet level or library level to ensure proprietary information is kept proprietary, and general information is shared with everybody;

- Version control – changes to files are tracked by revision numbers and activity logs which monitor document activity to ensure users always have access to the latest information;

- ODMA – files can be created, opened and saved into Aviator from standard office productivity applications, saving time and allowing users to stay in familiar work environments;

- Search – advanced keyword and attribute searches simplify access to files that would not be accessible with traditional file management systems.

Aviator Users

Aviator users vary from power users who are actively involved in Aviator's use throughout the organization to users who are only interested in reading and using a minimal number of documents.

Aviator makes use of your Notes/Domino Name and Address Book (NAB). In order to become an Aviator user, individuals must be registered in the NAB. In addition, use of groups is highly

recommended throughout Aviator, so it is important to remember that groups must be created and managed in the NAB.

Library Administrators

Library Administrators are Aviator 'power users'. They set up and configure Aviator's architecture and can perform virtually any action within the Library. Administrators monitor Library agents, administer the Notes Name and Address book, make sure the search is properly indexed, and configure and maintain database replication between servers.

Library Users

Library users are individuals with access to the Aviator Library. Individuals not listed as library users, as users or as part of a group, will not have access to any part of Aviator. Access to the library does not provide access to cabinets. This is defined separately, cabinet by cabinet.

Cabinet Administrators

Cabinet Administrators are Aviator 'power users' for one or more cabinets. They can perform virtually any action within the cabinets they are administering. Cabinet administrators maintain the integrity (e.g., replication, classification, access) of the documents in a cabinet.

Cabinet Users

Cabinet users are library users with access to one or more cabinets within the Library. Some cabinet users may have access to all the documents in the cabinet, while other users may only have access to a few documents.

Document Users

Document users vary from owners of documents who can create and delete its content, to readers who can only view a document's content.

- Authors are the originators of documents. They have no rights to the document if they are not also one of the following members.

- Managers own documents and oversee the documents' lifecycles. An individual automatically becomes a Manager of any document he or she creates. Managers edit attributes, assign editors and readers, delete documents, change profiles, and perform many other actions to documents. Managers also have all the rights given to Editors.

- Editors can check out and modify document content. They are granted editor access by the document Manager. Editors also have all the rights given to Readers.

- Readers can locate, view, and use completed documents. Readers have no impact on a document's content, but can provide comments to a document at any time.

Document Reviewers

Document reviewers are individuals assigned to a document's review and approval workflow process. Reviewers can edit, approve/reject, comment about, or rate a document, depending on the review action defined for them in the workflow process

Profile Creators and Editors:

Profiles control Aviator's settings and drive Aviator's functionality. Profiles can be created and edited by administrators and library users who have been given profile creation and edit rights:

- Cabinet Profiles define access to cabinets and control the size of cabinet databases.

- Document Profiles define default document attributes, version control functionality, document security, document logging, and many more settings.

- Review Profiles define template review and approval workflow processes.

Aviator's Advanced File Management Architecture

Aviator's architecture uses the common storage metaphor of files and documents, categorized or stored in folders, organized into cabinets that are managed in the Library. Additional items covered in the architecture are Search, Aviator Personal, which provides support for mobile users, and Aviator's on-line Help.

Aviator Documents

Electronic files are stored within Aviator as Aviator 'documents'. Individual documents can store multiple files, which can include data files like word processing documents, spreadsheets, OLE objects (for Notes clients only), scanned images, graphics, audio or video files, and Notes Rich Text.

Users access files by opening the content page of the document, launching a file directly into an ODMA-compliant application, or downloading files to a local directory.

Each document has attributes that facilitate document organization and retrieval. System attributes are associated with every document and may include the document author, creation date, date of last modification, document title, etc. Application attributes are specific to the individual application and may include the document ID, categories, or user-definable custom attributes.

Access to document content and attributes are limited to document Managers and authorized Readers and Editors. Access control can default from the document profile, or can be defined at the document level.

Documents are stored and managed in the Aviator cabinets.

The check out/check in feature of Aviator ensures that only one user can modify a document at a time. When the document is checked out, a copy of the document is created for editing. The document is locked in the database and only the editor can edit its content. All other readers and editors access the original read-only version. When the document is checked back in, the original document can be replaced or saved as a new version.

Aviator Cabinets

Aviator uses cabinets to organize and manage documents. Cabinets are created by and for users, so they must be used to logically group documents – cabinets can be for departments, groups of employees, projects, etc.

Cabinets organize documents in various ways for ease of retrieval. Documents are viewed within cabinets by document status, category, work in progress, or complete lists of all documents for quick searches. Aviator also provides the ability for users to create folders to store documents relevant to themselves.

Access to cabinets is defined in the cabinet profile, which can be defined at cabinet creation and updated as required by profile editors.

Cabinets are managed in the Aviator Library.

Aviator Library

The library is the entry point into Aviator. It is the "main view" or the "home page" from where the user navigates the storage system, performs searches, and accesses administrative functions.

You can perform many tasks from the library, including accessing your organization's web site, opening cabinets, and creating new documents.

From the Lotus Notes client, users can import files and Notes documents to simplify the creation of multiple documents. Files can be imported from one or more directory systems and can be scheduled for periodic importing. Notes documents can be cut and pasted from any notes database and automatically translated into the Aviator document format.

The library provides access to Aviator's profiles. Profiles contain settings for the library, individual cabinets, different types of documents, and different types of reviews. To create profiles users need special access rights granted by the library administrator in the library profile.

Aviator simplifies administration by providing easy-to-read logs of scheduled agents. The agents are managed in the library profile, and the logs are accessed from the Library navigator, providing one central location for administration.

The library provides advanced search capabilities as well as support for mobile users with Aviator Personal.

Aviator Search

Aviator Search is a powerful search engine that allows users to perform keyword or attribute searches in individual cabinets or across the entire library.

Keyword searches allow users to find a document using words or sentences that appear in document attributes or the document body (including file attachments). Advanced searches allow users to filter search results by cabinet, document status, release date, document name, id, or manager.

Search queries can be saved with their results for future reference and to refresh at a later date. Auto-refresh allows users to refresh saved search results at predetermined intervals.

Aviator Personal

Aviator Personal is a stand-alone database that resides on users' computers for individual document management purposes. Aviator Personal databases can also be shared.

Aviator Personal allows users to take documents on the road by downloading them from the Aviator Library. Users can then receive (synchronize) the latest updates to the documents in Aviator Personal when they re-connect to the server.

Users can also download checked out documents and update them while they are on the road. They can upload the modified documents to the library when they re-connect to the server.

In addition, Aviator Personal is a document management system for users' personal documents. With Aviator Personal, users can create and manage their personal files with features such as attributes, revision control, and access control.

Aviator Help

Aviator Help provides users with on-line assistance performing any task within Aviator. Help is location-specific to ensure users get help relevant to their situation – i.e. if a user is in a cabinet and accesses Help, Aviator provides information specific to cabinet functionality.

Aviator's Database Structure

Aviator is structured to maximize scalability while retaining fast performance in Lotus Notes. All the databases that make up a library must be stored in the same sub-directory of the Lotus Notes/Domino server's data directory.

Library
A central library database (aviator.nsf) contains the library settings (stored in profiles) and provides access to the cabinets. One library per organization is sufficient to manage several terabytes of information. Multiple libraries may improve file organization, but will add complexity and require additional administration.

Cabinets
Aviator cabinets are Notes database files that reside on the Domino server. Cabinet databases (xxxx.nsf) contain folders and document attributes (but not the body of the document, including file attachments). Up to 9,999 cabinet databases can be created for each library.

Cabinet Link databases (xxxxxxxx.nsf) contain the body of the documents, including file attachments. Users access documents through the cabinet database, but the link databases actually store the contents of each document. Up to 9,999 link databases can be created for each cabinet. The Auto Maintenance agent creates link databases automatically. Link databases are not relevant to Aviator users and can be moved to an unused Workspace Page.

The cabinet and link databases are created from the avicab.ntf and avilink.ntf database templates that must be stored in the same directory as the library database.

Search
A central search database (avisrch.nsf) contains the search settings (stored in configuration documents) and provides keyword and attribute search functions for the entire library.

Help
A central help database (avihelp.nsf) contains useful on-line information to assist users with all of Aviator's functionality.

Web Files
The Web files database (avifiles.nsf) contains the images and scripts used to create a rich user environment when users access Aviator using Web browsers.

Aviator Personal
The Aviator Personal database (avipers.nsf) is created on the server, but needs to be distributed to users wishing to take Aviator documents on the road, or manage personal files. It should be installed on a user's local machine so that they can take documents with them when they are disconnected from the library.

Aviator's Source Code
Aviator is open source code software. Aviator ships with all Notes design elements open for editing. In addition, the complete Aviator LotusScript API is available upon request.

Modification of the source code is encouraged if it makes Aviator easier to use and more suitable for specific applications. However, a careful log of changes must be maintained so that the customizations can be integrated into future releases of Aviator as well.

Aviator Performance

See the following appendices for evaluation and performance information:

- Appendix B - Lotus Notes and Aviator limitations

- Appendix C - Test evaluation results

AVIATOR INSTALLATION PLANNING

This section of the Administrator Guide addresses all the issues required to ensure a proper and efficient installation of Aviator.

System Requirements
Aviator supports all platforms supported by the Lotus/Domino server and the Lotus Notes and Web browser clients.

See Appendix D for detailed system requirements.

Installation Check List

Aviator integrates seamlessly with your existing Domino installation. There are minor modifications required to the Notes Public Name and Address Book that will be addressed during Aviator's installation. By answering the following questions and gathering the necessary information, your Aviator installation will proceed quickly and without incident.

Migrating to a new Aviator Library
If you are upgrading Aviator from a hidden code evaluation and wish to keep the cabinets and documents you have created, see Appendix E for information about creating the new open code library and migrating information from the evaluation library.

Considerations for Aviator Access
Do all potential Aviator users have Person documents in the server's Public Name and Address Book (NAB)?

- All Aviator users require a Person document in the NAB.

Will users be accessing Aviator with a Web browser?

- If yes, be sure that the Person records in the NAB for each of these users has an Internet password.

- Also make sure that you sign all the databases with the administrator or server id to avoid certificate authentication errors on the server.

Will there be Aviator users from outside your organization?

- If yes, be sure a Person document is added to the NAB for each user, that an Internet password is assigned, and that the user has access to the server (defined in the Restrictions section of the server document).

Who will be responsible for administering Aviator?

- Library Administrators should have permission to create databases on the server, and run restricted and unrestricted agents on the server. These permissions are granted in the Restrictions and Agent Manager sections of the server document. Aviator administrators are also responsible for troubleshooting so they should have a good grasp of the Lotus Notes architecture and topics such as replication, replication conflicts, scheduled agents, and database security.

Who will be responsible for administering cabinets?

- Cabinet Administrators have complete access to all the documents in a cabinet. They should have a good grasp of Lotus Notes database management and topics such as replication, replication conflicts, reader access, deleting documents, and database security.

Are databases allowed to be created on the server?

- Some organizations do not allow users to create databases on the server. If this is the case, special consideration will need to be taken during Aviator's installation. Aviator also comes with a scheduled Cabinet Creator agent that can create new cabinet databases using the server's id, even if a user creates the cabinet profile.

Considerations for Setting Up and Using Aviator
Do you have enough disk space to handle the expected volume of files?

- See Appendix D for System requirements and Appendix F to calculate additional hardware resources needed to accommodate file volume growth.

Who will be able to create Aviator cabinets?

- Assigned individuals can create cabinets. To prevent mass cabinet creation and administrative headaches, assign a controllable number of responsible accountable individuals to create cabinets. You may want to limit the cabinet creators to the library administrator(s) until users are more familiar with Aviator. Users will need to send the library administrator(s) a request for a new cabinet.

Who will be able to create Aviator document profiles?

- Aviator document profiles are settings and default attributes for the documents that will manage your users' files. For example, if your users are creating Quality Procedures, a user will need to create a Quality Procedures document profile to be used for all Quality Procedure files. You may want to limit the document profile creators to the library administrator(s) until users are more familiar with Aviator. Users will need to send the library administrator(s) a request for a new document profile.

Who will be able to create review profiles?

- Review profiles are pre-defined review and approval workflow processes. For example, Quality Procedures may need to be approved by three (3) specific individuals prior to release. A Quality Procedure review profile can be created with the three (3) approvers' names in the workflow, so that users who create Quality Procedures do not need to re-create the review workflow every time – they simply choose the pre-defined profile.

Will you be using ODMA-compliant applications with Aviator?

- See the Aviator ODMA Guide for a list of ODMA-compliant applications. With Aviator's ODMA client, users can open and save files from and to Aviator while using commonly used office productivity applications. Aviator's ODMA client requires installation of client software on each user's desktop/laptop. The Aviator ODMA client requires that the user have a working copy of Lotus Notes R4.6 or higher installed on their machine.

Will users need Aviator Personal?

- Aviator Personal is ideal for mobiles users who frequently disconnect from the server, but still require access to information from the Aviator library. Aviator Personal requires users to synchronize with the library when they are connected to the server in order to download the latest versions of the documents.

Using Groups

Aviator supports and highly recommends the use of groups. Groups provide a means to ease management and administration of Aviator.

The following locations support groups – begin writing down ideas for structuring group names and group members:

- Library Users

- Profile Creators (cabinets, documents and reviews)

- Cabinet Users

- Document Editors

- Document Readers

- Document Distribution Lists

The following locations DO NOT support groups:

- Servers on which Aviator runs (including all the servers to which Aviator is replicated)

- Library Administrators

- Cabinet Administrators

- Any user fields in review profiles and reviews

Gathering Information

The following information is helpful to speed up Aviator's installation:

- Library Name – what will you call the Library you will be setting up?

- Name of HTTP Host – you will need the Internet host name by which users access your Domino HTTP server if users will be accessing Aviator with Web browsers (this might be an IP address);

- Filepath of the Domino Address Book that will be used to lookup users and groups in Web browsers – this defaults to the names.nsf database but you might want to create a smaller Address Book for performance and convenience;

- Server(s) on which Aviator will run;

- Users' preferred Internet Search URL;

- Organization's Web site Home Page URL.

INSTALLING AND SETTING UP AVIATOR

You have two options to install Aviator:
1. Install Aviator directly on the server, or

2. Install Aviator locally on your desktop computer and copy the Library databases to the server.

The following instructions apply to the Aviator installation on a Windows system regardless of the install process chosen:
- Insert CD in CD-ROM drive

- From a Windows PC select Start – Run

- Enter [Path]\Aviator.exe ([Path] is location of installation file)

- Follow the installation instructions (you must install Aviator in a sub-directory of your server's or client's data directory)

- Open the Lotus Notes Workspace

- Open the Aviator Library database (aviator.nsf)

- Click Here to Start the Aviator Setup Procedure

Aviator Setup Procedure

The Aviator Setup Procedure guides you through setting up the Aviator library and the first cabinet. If at any time you decide to exit the setup, select Help – About this Database to restart the process.

Library Setup
- The screen shot below shows you what will appear on your screen

- Follow the instructions provided in the Setup Aviator Library form (you will be able to change the settings later):

  - Name the Library

  - Enter the server(s) on which Aviator will run (Groups are supported)

  - Enter the Library Administrator(s) - defaults to yourself for now (Groups are supported)

  - Enter the users of the Library (Groups are highly recommended)

  - DO NOT notify the users at this time unless they are aware of Aviator's installation. You will notify them when the library is ready to be used.

  - Enter the users' preferred Internet search URL – if applicable

  - Enter your organization's Web site address

  - Enter the maximum number of cabinets allowed in the library. You may want to limit the number of cabinets to control the library's expansion initially.

- You can populate the purpose and usage of the library now, or as you progress with Aviator's configuration.

Setup Aviator Library (Profile)   Help

The **Library Profile** contains the settings for the main library databases. Fill out this document with the information you have on hand. You can change the settings later if you need to.

✔ Setup Aviator   ⊘ Cancel

The **name** of your library	『Aviator Library 』
The Notes/Domino **server(s)** on which your library is installed	『Zephyr/Aviator 』▼
The library **administrator(s)** - you must be in this field (select users or groups)	『Steve Levine/Aviator 』▼
The **users** who will need to create or read documents in this library (select users or groups)	『AviatorUsers 』▼
You can optionally **notify** the users specified above about the new library	☐ Notify users of the new library Message: 『 』

The URL of the recommend **Internet** search site for the library users	『http://www.yahoo.com 』
The URL of your organization's own **web site**	『http://www.aviatorsoftware.com 』
The **maximum** number of cabinets allowed in this library (1 to 9,999)	『9,999 』

Describe the **purpose and usage** of this library for the users.
The description will be displayed to the users whenever they click About in the library navigator. The description field is a rich text field so you can use all the Notes text-editing features.
『

The library is a central place from which to open cabinets, find documents, create documents and administer the library settings. This should be your entry point to the Aviator document management system.

A library administrator is reponsible for creating and managing the library settings and optionally the cabinet settings. Users can be allowed to create cabinets and manage cabinet settings also. 』

- Click Setup Aviator to save your settings

- When prompted, you can choose to set up the first cabinet. If you choose not to set up the cabinet at this time, open the Library and select Help – About this Database to continue the setup.

Cabinet Setup
- The screen shot below shows you what will appear on your screen

- Follow the instructions provided in the Setup Aviator Cabinet form (you will be able to change the settings later):

  - Enter the name of your cabinet

  - Enter a brief description to inform users of the purpose of the cabinet

  - Enter a category for the cabinet. Classifying cabinets within the library database makes it easier for a user to find a cabinet (use a backslash [\] to create a sub-category; e.g., Western Europe\France\Services).

  - Enter the users of the cabinet (Groups are supported and highly recommended)

  - Again, DO NOT notify the users at this time, unless they are aware of Aviator's installation

- The purpose and usage of the library can be populated now, or as you progress with Aviator's configuration

- Click <u>Setup Aviator</u> again to save your settings

Congratulations!! You have set up your library and first cabinet. Escape out of the Cabinet view to complete the installation. The following administrative steps are required to activate all of Aviator's functionality.

Index Aviator Search

This is also an exercise in using Aviator's on-line Help.

You must index the Aviator Search and Aviator Help databases to give users access to keyword search functionality:

- Open the Aviator Search database (through the Library or the Notes workspace)

- Click <u>Help</u>

- Select "How do I index the library for searching?"

- Follow the instructions

- Create a Full Text Index of the Aviator Help database

Sign the Aviator Databases

Signing the databases with one of your organization's IDs prevents server-based certificate authentication errors when running the scheduled Reader Log agent and when users access Aviator from a Web browser, and prevents the Notes cross-certification dialog box from appearing when users access Aviator from a Notes client. When you sign a database you replace the name

of the last person to save a design element (e.g., Susan Ambercon/Aviator) with the current user's (or server's) name.

You must sign the Aviator databases with an ID that has Manager access to all the databases and is allowed to run restricted and unrestricted LotusScript agents on the server, and is allowed to create new databases on the server. **NOTE:** signing databases does not work correctly on Lotus Notes R4.6.1. (The following instructions are for Notes R4.6.)

- Select <u>File</u> - <u>Tools</u> - <u>Server Administration</u> from the Notes menu

- Select the server on which Aviator was installed

- Select <u>Database Tools</u> from the right-hand side icons

- Select the Aviator databases and templates from the database list

- Select <u>Sign a Database</u> from the available actions

- Select <u>Sign All Design Notes</u>

- Click <u>Sign</u> (the process may take a while).

Provide Sufficient Access to Library Administrators

Library administrators are responsible for maintaining the entire Aviator library. They have access to all the library settings and to all the documents (regardless of the cabinet's security). Library administrators also enable and disable the scheduled agents that run in the Aviator library database.

To enable the scheduled agents in Aviator, the library administrators must be allowed to run restricted and unrestricted LotusScript agents on the server on which the agents will run. If the administrators do not have this access, the agents will not run (even though they may appear as enabled). (The following instructions are for Notes R4.6.)

- Open the public address book

- Edit the appropriate server document (for the server on which the agents will run)

- Expand the <u>Agent Manager</u> section

- Enter the names (as users or as groups) of the library administrators in the "Run restricted LotusScript/Java agents" and "Run unrestricted LotusScript/Java agents" fields

- <u>Save and Close</u> the server document.

If the Cabinet Permissions in the library profile are set to create new cabinets immediately, the library administrators that will be responsible for creating cabinets must have permission to create new databases on the server on which Aviator is installed. The same rule applies to library users who have been granted rights to create cabinet profiles. (The following instructions are for Notes R4.6.)

- Open the public address book

- Edit the appropriate server document (for the server on which new databases will be created)

- Expand the <u>Restrictions</u> section

- Enter the names (as users or as groups) of the library administrators in the <u>Create New Databases</u> field - if the field is empty then all users can create new databases on the server

- <u>Save and Close</u> the server document

If administrators and users do not have permission to create databases on the server, you can set the Cabinet Permissions in the library profile to create cabinet databases using a scheduled agent (see below).

Define the access control list (ACL) of the Aviator Files and Aviator Help databases so that default access is Readers.

Enable the Scheduled Agents

Aviator has several scheduled agents that run in the background and automate tasks such as performing system checks, creating new link databases, escalating late reviews, running automated searches, creating new cabinet databases, and compiling document reader logs.

The library administrator should enable the scheduled agents as soon as possible (the Cabinet Creator agent is not required if cabinet permissions are set to create cabinet databases immediately in the Library Profile; the Reader Log agent is not required if no document profiles are set to log reader activity).

- Open the Aviator library database

- Click <u>All Profiles</u> in the navigator

- Open the library profile

- Click the <u>Manage Agents</u> action

- Enable the scheduled agents:

  - Required - Auto Maintenance scans all cabinet and link databases for size, number of documents, orphan documents and responses, missing profiles, and creates additional cabinet link databases if required. Auto Maintenance is scheduled to run at 2:00 AM daily.

  - Required - Auto Escalation escalates all review actions that have not been completed on time and any documents that have pending reviews. Auto Escalation is scheduled to run at 3:00 AM daily.

  - Optional - Auto Search updates saved search results scheduled for auto-refresh in the Aviator Search database. Auto Maintenance is scheduled to run at 4:00 AM daily.

  - Optional - Auto Import agent runs daily and imports the files in the directories specified by the Import Profiles listed in the All Profiles view of the library. Auto Maintenance is scheduled to run at 5:00 AM daily.

  - Optional - Cabinet Creator creates and updates the cabinet databases when a cabinet profile has been modified (if the cabinet permissions in the library profile are set to the scheduled agent).

  - Optional - Reader Log runs every 30 minutes and updates the reader log for documents that have the reader log enabled.

- Click OK

- Close the library profile

Auto Maintenance, Auto Escalation, Auto Search, and Auto Import agents create logs that can be reviewed in the <u>Agent Log</u> section of the library.

In addition to the scheduled agents listed above, the MailDocuments and PasteDocuments agents in the library database control the translation and importing of Notes documents that are respectively Emailed and pasted into the library database.

If it is needed, the MailDocuments agent should be enabled, and opened and saved so that it runs on the correct server.

Set up Aviator for use with Web browsers

Aviator runs on a Domino server and can be accessed by Lotus Notes clients or standard Web browsers.

To provide access to Aviator using a Web browser:

- Set up the Domino server document in the public name and address book for Internet access

- Load the http server on the Domino server by typing **load http** at the server console

- Enter the Internet host name of your Domino server in the library profile (this might be an IP address)

- Provide every user with an Internet password (defined in their Person document in the public name and address book)

- Sign the Aviator databases with a user or server id from your organization (see Sign the Databases above) - this prevents agent execution errors on the server

- Cross-certify the /Aviator organization on your server - this prevents cross-certification errors on the server (the easiest way to cross-certify /Aviator on the server is to open an Aviator database using a Notes client and the server id and click New Document).

Congratulations!! You have completely installed Aviator on your system, and it is ready for use! The next steps are to plan Aviator's architectural configuration.

CONFIGURATION PLANNING

This section of the Administrator Guide provides the information needed to thoroughly plan Aviator's configuration for use.

Aviator Profiles

Advanced profiling is a powerful feature of Aviator's advanced file management system. Aviator uses profiles to define its architecture as well as establish security settings. All profiles are stored in the library database. The creation and management of profiles is restricted to selected users.

Profiling provides control over the behavior of documents and reviews from a central place without modifying the settings in each document. It also allows document attributes to be populated by default settings to prevent accidental security breaches.

Open the Aviator library and select <u>All Profiles</u> from the navigator.

Library Profile
The library settings are defined in the library profile. Only the library administrator can edit these settings. Open the library profile to review the information you entered when installing Aviator. Cabinet permissions will be described in detail during the actual configuration.

Cabinet Profile
The cabinet settings are defined in the cabinet profile. Only the library administrators and select cabinet creators (defined in the library profile) can create new database profiles. Creating a database profile also causes the cabinet databases to be created. Double click on the cabinet profile you created to review its information. Link database settings and other details will be covered during the actual configuration.

Document Profile
Document profiles define the behavior of documents. It is a good idea to have a different document profile for each type of document created. The profile name should be descriptive, but it is not used to classify the document in any way, so a single profile could be used for several different types of documents (e.g., Process, Procedures and Policies could share the same document profile).

A document profile contains several default settings that are automatically copied to documents created from this profile. Once a document has been created, the document manager (the author by default) can modify these settings. When default settings are changed in the document profile, existing documents are not affected.

Default settings include:

- Default editors list - users who can check out a document for editing

- Default readers list – users who can see the document in the cabinet (the use of groups is recommended)

- Default distribution list – users who are notified by e-mail when a document is modified (the use of groups is recommended)

- Default launch file into application option – if the users have the Aviator ODMA client installed, they can automatically launch a file stored in a document into the appropriate application and then save any changes made to the file back into the document (requires a Notes client).

Because changes to default settings in the document profile are not automatically copied to documents already created, these settings should be defined carefully before creating any documents. However, administrators can use the Change Document Profile action to update the default settings on existing documents if necessary.

All other document profile settings immediately affect the behavior of documents created with this profile. These include:

- Keyword lists for editors, readers, distribution list, categories, and index entries,

- Maximum file size

- Allowable review profiles

- Revision control

- Distribution list notification

- Document history log

- Reader log

- Custom attributes

The Aviator installation provides two default document profiles:

- Controlled – a document created with this profile has rigid revision control features. The document is created as a draft and requires a review prior to release, and the document can not be checked out – it must be copied and re-reviewed prior to re-release.

- Uncontrolled – documents created with this profile have little to no control. The document is created as released and can be easily checked out and in for revisions.

Feel free to browse through these profiles. There is a lot of information here that will be covered in more detail during the actual configuration.

Review Profile

Aviator's electronic review and approval workflow is one of the features that makes Aviator a truly advanced file management system. Review profiles provide standard pre-defined workflow processes to simplify users' work when creating and reviewing documents.

A review profile describes the behavior of a review. Review profiles are used to route documents through a review and approval cycle that might include editing, commenting, rating and approving a document. The document manager initiates reviews. A document can use different review profiles to serve different review needs. The name of each review profile should describe its function.

Review profiles contain mainly default settings that are automatically copied into the document when a review is created. The document manager can edit these default settings, or they can be protected from editing if the review workflow can be accurately pre-defined. Review profile settings include:

- Required reviewers

- Required approvers

- Option to prevent default settings from being modified

- User assigned to each phase - enter multiple users for a parallel review

- Action required of the assigned user (e.g., edit, comment, rate, approve)

- Number or percentage of users required to accomplish the action

- Duration of the action (in days)

- Escalation action (including delegation) if the action is not completed by the due date

If necessary, document managers and administrators can change the document or review profile being used by the document.

The Aviator installation sets up one 'Ad Hoc' review profile. Double click on the profile to review its contents. This is a blank profile that can be used when users need a quick 'ad hoc' review - the reviewers are selected on the fly. You will create detailed profiles that contain reviewers and actions during the configuration of Aviator.

Planning Aviator's Configuration

Planning prior to configuring Aviator is critical for yourself and your users. The following information will help ensure a smooth deployment of Aviator to your users, and eliminate your need to re-configure profiles or other settings after many documents have been created.

Have a thorough understanding of how your users will use Aviator. Be sure to involve users in the planning phase. This will make sure the library you create satisfactorily meets their needs and, more importantly, gets the users involved and feeling like they are contributing – not being forced.

The Library

By now you probably have a pretty good handle on the library and its settings. The only major items to consider are servers, administrators, and which users will have the ability to create and edit profiles.

Due diligence should be given to deciding which users can create profiles. Too many individuals will cause a proliferation of profiles, however, too few profile creators will result in too few profiles and lack of flexibility and ease of use. Additionally, making the library administrators the only profile creators means more work for the administrators.

Segmenting the Library into Cabinets

Identify how the library will be logically divided into cabinets. Cabinets contain the documents and should represent a real-life, easily understandable grouping of documents.

Aviator cabinets have a size limit of about 250,000 documents or 5,000 GB, which provides plenty of space to work with. The cabinets provide added flexibility, allowing documents to be moved from one cabinet to another, should a document ever need to be reorganized or archived.

Use the following guidelines to help define cabinets:

- <u>Existing directory structures on shared drives used to organize common files.</u> Create a cabinet for the top-level directory only. Sub-directories can be translated into categories for classifying documents within the cabinet (with the advantage that a document can belong to more than one category).

- Databases that contain electronic files. For large databases, consider creating a cabinet for each category or type contained in the database.

- Classification structures used to organize paper folders, files and documents. Consider cabinets for these whether converting paper documents to electronic format or not.

- Geographical regions and organizational divisions. Consider classifying regions into logical groups.

- Departments, workgroups, and projects. Given the ease with which an Aviator cabinet can be created (users can be given access to create cabinets even if they don't have permission to create databases on the Domino server), smaller cabinets can be set for small groups of workers who need to share information regularly.

It is generally easier for users to deal with fewer cabinets, more documents per cabinet, and more categories per cabinet. As a rule of thumb, the same cabinet should be used for documents that:

- are accessed by the same group of people, and/or

- share a common classification, and/or

- need to be viewed or edited together.

Planning For Classification

Aviator leverages the power of Lotus Notes views to offer several ways to classify (or categorize, in Notes parlance) cabinets and documents.

Classifying cabinets within the library database makes it easier for a user to find a cabinet (use a backslash [\] to create a sub-category; e.g., Western Europe\France\Services). To classify a cabinet, open the cabinet profile, then enter or select a category. Typical cabinet classifications include:

- Geographical regions

- Organizational divisions

- Organizational functions

Documents can be classified in a cabinet database the same way (using a backslash to create sub-categories is also supported). A single cabinet might contain hundreds of categories and thousands of sub-categories, so it is important to carefully plan and pre-define document categories.

Users can find documents by browsing well-classified cabinets faster than performing a keyword search. Therefore, the classification schema will directly affect user productivity and satisfaction. Document categories can be pre-defined in document profiles.

Pre-defined categories are displayed in a pick list (or keyword list) in the document attributes. Users can select one or more categories from the list or enter their own. Users should be encouraged to use the pre-defined categories. In addition to pre-defining categories, all the categories currently used in the cabinet can be displayed in the categories pick list. This option should be used to allow users to build their own categories, but also be able to select categories used by other people.

Categories are only one way in which documents can be classified in a cabinet; documents can also be classified by index entries. These work in exactly the same way as categories.

It is recommended to use categories to describe groups of documents and index entries to list keywords in the document (these keywords are **not** used to create the search index). However, index entries can be used to classify documents in any manner - just be certain users know how categories and index lists differ and how they should be used.

Security Considerations

Document security is a primary function of the Aviator advanced file management system. Aviator makes use of the most powerful multi-level security implemented by Lotus Domino. Aviator's security features include:

- server access permissions and restrictions implemented through the standard Domino server document

- restricted library access implemented through the Notes database ACL (Access Control List) and automatically managed and maintained in the library profile document

- -Default- access is No access

- servers and library administrators get Manager access to all library and cabinet databases

- cabinet administrators get Manager access to the cabinets they are administering

- library users get Author access to the library and Aviator Search databases, but not necessarily to the cabinet databases

- restricted cabinet access implemented through the Notes database ACL and automatically managed and maintained in the cabinet profile document

Document security restrictions including:

- Manager - can edit the document attributes (including security settings) and check out the document

- Editors - can check out the document, but cannot edit the document attributes

- Readers - can read the document and its attributes (users who do not have reader access to a document will not even see the document in the cabinet views).

Importing files

If you plan to import existing files from your local system or shared drive, gather as much information as you can about the files, the location of the files, the structure of the files, how the files are used, etc. Aviator's import functionality allows you to import individual files or groups of files from system directories. You can even schedule daily imports to gather files from users who wish to store files in directories rather than in Aviator.

While batch file imports are a fast, easy way to create many Aviator documents from many existing files, there is some work required to make each document unique. Documents created from imported files inherit either the file name as the document name, or the same name entered upon import. Making each document unique (beyond the file attachment name) requires time to access and modify each document's attributes.

Importing Lotus Notes Documents

Aviator provides the ability to import Lotus Notes documents from Lotus Notes databases. This is a great way to get those out-of-control, non-searchable databases into a controlled environment. The Aviator document importing process can be performed by pasting Notes documents into the library, or by Emailing Notes documents to the library (a Mail-In Database document must be configured in the server's address book).

Begin planning the import of Lotus Notes documents by listing the databases requiring import, and gathering user feedback on how to structure the information in Aviator – this may require an entirely new way of thinking about your data.

You are now ready to begin configuring Aviator for use.

We hope the previous section has provided you with enough information to do a sufficient job planning for your Aviator setup. Again, we cannot emphasize enough the importance of planning prior to setting up and configuring Aviator – take your time reviewing the planning you have done, and gathering additional user input before proceeding.

Appendix G contains several profile worksheets to aid Aviator's setup and configuration. Use these worksheets to manually gather the required information prior to creating the profiles in Aviator.

NOTE: The order of this section may not be appropriate for all organizations. You may feel it is more useful to create document profiles before finalizing the library profile. It is important to use your own judgment about the configuration while using this guide.

Aviator Hierarchy

Appendix G-1 is a library organization chart. Use this chart to help conceive the library's hierarchical structure. Enter the library name, cabinets to be created, and types of documents to be used.

This information can be changed later. Use the chart to begin visualizing how your file management system will be constructed. Involve end users in brainstorming sessions to help develop the organizational chart. In addition, begin considering how the documents will be categorized within the cabinets.

Once you have a thorough understanding of the Aviator library structure, begin using the next worksheets to develop the actual library.

Aviator Library

Appendix G-2 is the library profile worksheet. You are already pretty familiar with this information, so some of this may be review. We will skip over some of the self-explanatory items.

Library Administrators
These users appear in the access control list (ACL) of all Aviator databases as Manager. If you are one of the library administrators, you can do anything in Aviator.

When working in Aviator, library administrators can:

- Change settings in the library profile

- Create and change cabinet settings

- Delete cabinets

- Create document and review profiles

- Administer all agent logs

- Perform all standard user functions

- View and edit all documents, regardless of document security settings

- Change any security settings

- Index the search site

- View the saved search results from all the users

Notification Message
An email message will be sent to all library users when this option is selected, and the profile is edited and saved. Be sure you are prepared to notify the users before utilizing this feature.

Maximum Cabinets
The number of maximum cabinets can be limited to control how quickly the server space is used. To increase the maximum number of cabinets later, simply edit the library profile.

Cabinet Permissions
Aviator cabinets are Notes databases created on the Domino server. Library administrators may want to let cabinet creators create cabinets, but the server access may not allow cabinet creators to create databases on the server.

There are three options to create cabinets on the server:

- Databases are created/updated immediately – cabinet creators have the ability to create databases on the server, so cabinet databases are created and edited immediately.

- Databases are created/updated by a scheduled agent – Aviator comes with an agent called 'Cabinet Creator'. If cabinet creators are not allowed to create databases on the server, when the user creates a cabinet, it submits a request to the server that the agent Cabinet Creator picks up. The agent will create the databases and notify the user that the cabinet has been created.

- Databases are created/updated by an external program – if your organization has already developed a program that creates databases on servers, this option allows you to integrate Aviator's cabinet creation process with your program. Aviator will submit a request to your program to process.

E-mail Options
Depending on the user's email application (Notes or Web/other) DocLinks and URLs can be omitted from e-mails generated in Aviator.

Who else can create these profiles?
You can assign non-administrator profile creators and editors. These users will have the ability to create, edit, and delete their own cabinet, document and review profiles. Great care should be taken to select these individuals.

Reset ACL
Aviator automates the updating process to the library's database access control list (ACL). By keeping the option selected, any time the library profile is modified, Aviator will automatically update the ACL.

About the Library
The text field at the bottom of the profile is used to provide information to the library users. Users access this field by selecting the About action in the library navigator.

Upon deploying Aviator to users, you can direct them to the About section to get all the information required to properly utilize the library.

Aviator Cabinets

Appendix G-3 is the cabinet profile worksheet. You may be familiar with this information, so some of this may be review. We will skip over some of the self-explanatory items.

Profile Editors
This field contains the user(s) that can edit this profile. The default editor is the individual that created the profile.

Name and Description
The name of the cabinet should be simple yet clear enough to alert users of its content. The description will be viewed in the cabinet list to provide additional information about the cabinet.

Status
Cabinets can have one of three statuses:

- Read/Write – all users with access to the cabinet can read and create documents in the cabinet.

- Read Only – users with access to the cabinet can only read documents in the cabinet. Library administrators can create documents in the cabinet, or move documents from other cabinets to a read only cabinet.

- No Access – Only library administrators can access the library. No access cabinets may be used for archiving.

Categorize As
Cabinets can be grouped, or categorized, within the library. Enter a category or categories in this field to help users find the cabinet among many other cabinets. Use Notes' standard backslash [\] to create sub-categories (i.e. Europe\France).

Filenames
Filenames are generated automatically by Aviator.

Cabinet Administrators
These users appear in the access control list (ACL) of specific cabinet databases as Manager. If you are one of the cabinet administrators, you can do anything within the cabinet.

When working in Aviator, cabinet administrators can:

- Create and change cabinet settings

- Delete cabinets

- Perform all standard user functions

- View and edit all documents, regardless of document security settings

- Change any security settings

Document Profiles

Cabinet usage can be restricted to only specific types of Aviator documents. Once you have created the document profiles, you can selectively allow documents of specific profiles to be created in the cabinet. You also have the option to allow all profiles to be used in a cabinet.

Show Cabinets in Library View

For users with no access to a cabinet, cabinets can be hidden or listed for viewing.

Update Cabinet Databases

Aviator automates the updating process to the cabinet's database access control list (ACL). By keeping the option selected, any time the cabinet profile is modified, Aviator will automatically update the ACL.

Create Replicas

Cabinet database replicas can be automatically created on all library servers.

Link Database Attributes

Aviator documents are created in two parts – attributes and content. The attributes are stored and managed in the cabinet database file, and the content is stored in link database files. The link databases are hidden from the users. You can control the allowable size of a cabinet's link databases, and the allowable number of link databases by setting limits:

- Maximum size – this setting limits the size of a link database by size of the database. Once the limit is reached, the daily Auto Maintenance agent will create a new link database.

- Maximum documents – this setting limits a link database by the number of documents created in the cabinet. Once the limit is reached, the daily Auto Maintenance agent will create a new link database.

- Maximum link databases – to control the size of the cabinet overall, you can set a limit of the number of allowable link databases allowed per cabinet. Once the limit is reached, the administrator can create a new cabinet, or increase the number of link databases.

About the Cabinet

The text field at the bottom of the profile is used to provide information to the cabinet users. Users access this field by selecting the 'About' action in the cabinet navigator.

Upon deploying Aviator to users, you can direct them to the About section to get all the information required to properly utilize the cabinet.

Aviator Documents

Appendix G-4 is the cabinet profile worksheet. You may be familiar with this information, so some of this may be review. We will skip over some of the self-explanatory items.

Profile Editors

This field contains the user(s) that can edit this profile. The default editor is the individual that created the profile.

Name and Description

The name of the document profile should be simple yet clear enough to alert users of its content. The description will appear in the document profile list to provide additional information about the

document, and in the New Document dialog to ensure users are using the correct profile when creating documents.

Instructions
Instructions appear in the document attributes to aid users in the use of the profile.

Maximum Size
A document's content size can be limited with this selection. This is helpful if you wish to prevent users from creating documents from inappropriately large video or sound files.

Review Profiles
Documents to be reviewed or approved utilizing Aviator's workflow capabilities can be forced into one pre-defined process by selecting the required review profile. Inversely, the option to use all review profiles is available to offer users a choice of pre-defined profiles.

Document Editors
When created, a document can inherit default editors from the profile, or editors can optionally select from an editors lookup list – the NAB or a pre-defined list created in the profile.

Editors can check out and edit documents.

Document Readers
When created, a document can inherit default readers from the profile, or users can optionally select from a readers lookup list – the NAB or a pre-defined list created in the profile.

Readers can only read documents – they cannot modify a document's content.

Distribution Lists
Distribution lists are used to notify users that a document with this profile has been created or modified. Use caution with distribution lists – some users may not be fond of receiving numbers of email notifications about non-relevant documents.

When created, a document can inherit a default distribution list from the profile, or users can optionally select from a distribution lookup list – the NAB or a pre-defined list created in the profile.

Categories Lookup List
Documents can be grouped, or categorized, within the cabinet. Documents created with this profile can be grouped in categories specified in the profile. In addition, users can choose from other categories used in the cabinet if the box is checked.

Enter a category or categories in this field to help users find the document among many other documents. Use Notes' standard backslash [\] to create sub-categories (i.e. Europe\France).

Index Lookup List
Indexes work just like categories. Documents can be grouped, or indexed, within the cabinet. Documents created with this profile can be indexed by groups specified in the profile. In addition, users can choose from other indices used in the cabinet if the box is checked.

Enter an index in this field to help users find the document among many other documents. Use Notes' standard backslash [\] to create sub-categories of indexes (i.e. Europe\France).

Document Control Functionality
The following profile items define the use characteristics of documents created with this profile.

Version Control:

- Never save changes as new revisions – any change to a document with this profile will replace the previous revision and optionally allow you to increment the revision number.

- Prompt user to save changes as new revisions – upon saving a change to a document, the user will have the option to save the previous revision.

- Always save changes as new revisions – any change to a document with this profile will require the document be saved as a new revision.

Distribution List Notification:

- Notify the distribution list when the document is checked in – any time the document is checked in, the distribution list will be notified.

- Notify the distribution list when the document is released – any time the document is released (upon creation or re-release of a copy) the distribution list will be notified.

- Notify the distribution list when the document is deleted – when a document with this profile is deleted, the distribution list will be notified.

Draft Revision History:

This option keeps revision histories from getting too long by allowing you to keep only a specified number of draft document revisions.

Released Revision History:

This option keeps revision histories from getting too long by allowing you to keep only a specified number of released document revisions.

Create documents as released:

For documents that do not require review or approval, or that do not need draft revisions (i.e. faxes, emails, etc.), but just need to be posted to the cabinet as released, select this option.

Require a copy and release for changes to released documents:

For documents that require a formal release process (i.e. policies or procedures), select this option. Users will be forced to copy the document, and re-release the new revision.

Require a copy/review and release for changes to released documents:

For documents that require a formal review process prior to release (i.e. corporate policies or procedures), select this option. Users will be forced to create a review prior to releasing the new revision.

Released documents can be deleted from the database:

Choose this option to provide document managers the ability to delete released documents from the database. If you do not select this option, the documents will be marked deleted, but remain in the cabinet for viewing.

Automatically launch the file attachments into an appropriate application (requires the Aviator ODMA client):

Choose this option if users have installed the Aviator ODMA client and you are storing files from ODMA-compliant applications in the documents. With this option set, users can automatically launch files into an application and save changes back to the Aviator document, without re-attaching the files in the content window (requires a Notes client).

Document Logs

Aviator provides audit history tracking by providing document logs, which track all actions taken on a document, and reader logs, which track all readers of a document.

Document log length:

In order to keep the document logs to a manageable length, enter a number of actions to keep. As new actions are performed on the document, an old action will be removed to accommodate the new action.

Reader log:

Choose the reader log option to track readers of documents created with this profile. The Reader Log Agent must be enabled. The reader log will list all readers of the document, the number of times each reader has read the document, the last time each reader read the document, and the total number of readers.

You can also define the amount of time a document needs to be open to be considered 'read'. This can be helpful to keep the log limited to people who have actually read the document, and keep out readers who are just clicking through.

You also have the ability to maintain the reader log for specific document revisions. You can never delete the log, to grow the list over the life of the document, or delete the log after specific actions taken on the document.

Custom Attributes

Aviator provides the ability to add attributes not found in Aviator's standard document attribute templates. You can specify the custom attribute, and require uses to enter the attribute or optionally provide a keyword list for users to choose from.

Aviator Reviews

Aviator's review and approval workflow is a very powerful feature. Documents created in Aviator can be electronically routed to multiple users for their review and approval. Review actions include Edit, Comment, Rate, or Approve, and review escalations can be used to remind reviewers they have missed their deadlines.

Appendix G-5 is the review profile worksheet. You may be familiar with this information, so some of this may be review. We will skip over some of the self-explanatory items.

Profile Editors

This field contains the user(s) that can edit this profile. The default editor is the individual that created the profile.

Name and Description
The name of the review profile should be simple yet clear enough to alert users of its content. The description will appear in the review profile list to provide additional information about the document, and in the New Review dialog to ensure users are using the correct profile when reviewing documents.

Required Reviewers
For this review profile, if there are users that must review the document, enter them in this field. They do not have to be entered in the workflow table of the review profile, but the users will have to add them to the workflow table before they can start the review.

Required Approvers
For this review profile, if there are users that must approve the document, enter them in this field. They do not have to be entered in the workflow table of the review profile, but the users will have to add them to the workflow table, with the Approval action, before they can start the review.

Rating Scale
If users are required to rate the document being reviewed with this profile, select the preferred rating scale.

Review Table Preferences
There are four preferences for the workflow table of the review profile:

- Protect the default review settings – with this option selected, users that use this profile will not be able to modify the review table.

- Notify the manager of review escalation – with this option selected, if any reviewer in the workflow table receives an email escalation reminder, the document manager will also receive an email notification of the reviewer's tardiness.

- Cancel review if document is rejected during review – if a reviewer is assigned to approve or reject the document, and this option is selected, the document's review will be canceled and the manager will receive the document with an incomplete review. This saves time for reviewers that come after the person who rejected the document.

- Prevent check out prior to release if review is closed – choose this option to prevent document managers from tampering with documents that have completed a review prior to release.

Document Review Workflow Table
The table can now be populated with users who will review documents prior to their release. Reviews can be series or parallel. For a parallel review, assign multiple users in an action, and specify the number of reviewers required to complete the assignment.

Now you can enter the information from the profile worksheets into Aviator. From the Aviator library profile, select the New Profile action, and select the profile you wish to create.

Once you have created your profiles, you are ready to begin using Aviator. The next section describes your deployment options as the library administrator, as well as tips and recommendations to assist your use of Aviator.

ADMINISTRATOR USAGE OF AVIATOR

This section of the Administrator guide provides additional information needed to ensure proper administration of Aviator. This information goes beyond the User Guide to include tasks specific to library administrators. At any time throughout your use of Aviator, access the on-line help or Aviator User Guide for additional information not provided here.

Deploying Aviator

This guide is not specifically designed to aid in the deployment of Aviator. This guide provides all the steps necessary to plan for, install, configure, and begin using Aviator. Deploying Aviator can be a long process of small group rollouts, training, larger rollouts, more training, etc. For purposes of this guide, deploying Aviator will be considered the rollout of Aviator to a small group of users (a pilot, department, team, etc.).

Before deploying Aviator to users, make sure the users' needs have been considered and addressed. The success of any new application resides in the speed with which the users adopt it. Aviator involves a change in work habits (i.e. saving files in a different application) and a change in culture (i.e. sharing information). It is worthwhile spending extra time in advance presenting, clarifying, fine-tuning and training to ensure that all the user requirements and concerns have been addressed. This additional time (and cost) will be handsomely repaid by the increase in productivity obtained from a well-integrated document management system.

Notifying Aviator Users
After completing Aviator's configuration, electronic notification can be sent to the Library Users that the library is available for use. To notify the users, edit the library profile to include a notification message to the users. Upon <u>Save and Close</u>, an electronic message will be sent to all the library users. The email message will contain your message content, a Notes DocLink to the library, and a URL with a path to the library.

Aviator Replication

Configuring and maintaining Aviator replicas
Aviator is a Domino application consisting of Notes databases, and as such benefits from Domino's robust replication functionality. To replicate Aviator to another server, follow the same steps as with any other Notes database:

- In the library profile, make sure all the servers are listed in the Servers field, which gives servers Manager access to all the databases in the library. However, read-only servers can be listed as a Library User instead, as long as they are also listed as Cabinet Users of the cabinets they are replicating.

- In the library profile, enable the option to notify library administrators when a new cabinet or link database is created on one of the library servers. This ensures that a replica a new cabinet database or link database can be immediately created on other servers.

- Create a replica of all the library databases that will be replicated. At a minimum this includes:

  - The library database (aviator.nsf)

  - Aviator Search database (avisrch.nsf)

  - Aviator Help database (avihelp.nsf)

- Web Files (avifiles.nsf) database

  - At least one cabinet that includes a cabinet database (xxxx.nsf), and one or more link databases (xxxxxxxx.nsf). Link databases are not displayed in the Lotus Notes Open Database dialog, so you must type in the link database file path (link database filenames are listed in the relevant cabinet profile documents). Whenever the Auto Maintenance agent creates a new link database, it must be replicated to the new server as well.

- Create a search configuration document for the new server(s) in the Aviator Search database to set up a local, full-text search index (the index settings will be replicated along with the database).

- Test the replication settings by forcing a replication between servers and monitoring the replication log events.

Replication Conflicts

Libraries that are replicated to multiple servers are subject to replication conflicts (this happens when the same document is checked out at the same time on two different servers). To minimize the occurrence of replication conflicts:

- Keep editors lists small and make sure that all editors will access the library on the same server.

- Use a review to assign editors sequentially (assign each editor to an edit action). Editors will be notified when the document is assigned to them and will only be able to check out the document at that time. No other editor, not even the document manager, can check out the document until the assigned editor completes the phase.

Deleting Aviator Cabinets

To delete cabinets:

- Open the Library

- Open the Cabinet Profile

- Make a note of the cabinet database filename and the link database filenames

- Click the Delete action

- Confirm the delete

- Close the Library

- Delete all the databases associated with the cabinet (all the documents will be lost). The link databases do not show up in the Notes Open Database dialog box. Enter the filepath and filename or use your operating system to perform the delete.

Always have a ready backup of your databases before deleting a cabinet.

Importing Files and Notes Documents

To speed up the deployment of Aviator, it is a good idea to populate cabinets with files imported from shared drives and Notes documents imported from other Notes databases.

All import functionality is available from the Import view of the Aviator library. Separate import profiles must be defined for importing files and Notes documents. File import profiles can be scheduled for periodic importing. Document import profiles can be set up to run when documents are pasted into the Import view and when documents are Emailed to the library database.

Follow these instructions to let users Email documents to the library:

- Enable the MailDocuments agent in the library database

- Open the Import section of the library

- Create one or more document import profiles to translate the imported Notes document into the Aviator document format: you can optionally enter @formulas that perform operations on one or more fields (the following @functions, which affect the user interface, do not work within an Evaluate statement: @Command, @DbManager, @DbName, @DbTitle, @DDEExecute, @DDEInitiate, @DDEPoke, @DDETerminate, @DialogBox, @PickList, @PostedCommand, @Prompt, and @ViewTitle)

- Enter the identifying criteria for the imported documents at the bottom of the import profile - this information is used to match the imported document to the import profile it should use

- Create a Mail-In Database document for the library database in the server's Address Book

- Distribute the Email address of the library database to users

Managing Agent Logs

Agent logs contain the logs for the automatic administration agents that run daily. The library administrator is responsible for enabling and disabling the agents from the library profile.

- The Auto Maintenance agent monitors all the cabinets for size, missing profiles and broken links (i.e., between a document and its attributes or comments).

- The Auto Escalation agent monitors all the cabinets for ongoing reviews and escalates review actions that are past due (i.e., sends a reminder or performs the action for the user).

- The Auto Refresh agent automatically refreshes saved search results.

- The Auto Import agent automatically imports files from server directories.

The agent log is designed to assist the library administrator. However, many users may find useful information in the logs as well.

The agent logs provide the library administrator one view with which to perform a 'health-check' of the Aviator library. The log documents all the actions taken by the agents, and will alert the administrator of problems.

Appendix A – Year 2000 Readiness Statement

Overview
Aviator Software has implemented a project to minimize the business and technology risks associated with the Year 2000. Software technology is an integral part of our business, and we are committed to delivering fully compliant products for the coming Millennium. Our Year 2000 readiness project entails analyzing the risks, identifying and prioritizing the work, addressing the most critical changes first, testing those changes, and communicating required and recommended changes to our customers.

Readiness Definition
Aviator Software considers a product to be Year 2000 ready if, when used per its appropriate documentation, it can accurately process date data within and between the 20th and 21st centuries. This implies all associated products (e.g., hardware, software, and operating systems) used with the product can exchange correct date data with the product and properly process such date data.

The Year 2000 Project
We have designated a Year 2000 Project team that will provide guidelines for the Year 2000 work. The team is responsible for certifying software programs and systems based around these guidelines. These include the Aviator Software application and the programs used in maintaining Aviator Software's online and internal systems.

Custom Notes Applications Software
Aviator ruins on the Notes and Domino platform, which stores the year portion of a date with 4 digits. Although only two digits are typically entered by the user and displayed in date fields on the screen, the year portion of the date is translated to the full four-digit year.

It is important to note that although the Notes APIs and infrastructures correctly handle dates, it is possible for custom Notes applications to incorrectly handle dates. In most cases, non-compliant Notes code is easily fixed once identified, and usually will have an impact only on usability of the application, and will not prevent the basic operation of the application.

Lotus Notes Versions
It has always been possible to input 4-digit years in all versions of the Notes and Domino products thereby avoiding any possible 2-digit year date interpretation problems. However, many applications developed for the Notes environment have been designed to accept only 2-digit year input.

In Notes R4.1 and prior, 2-digit year dates are interpreted as the 20th century. For example, if a user were to enter "16", Notes would interpret the entry to be "1916".

Beginning with release 4.5 of Notes and Domino products, additional logic for the interpretation of 2-digit year dates was added. A pivot date of 1950 is used to interpret 2-digit year entry based on the following assumptions. If the 2-digit year is 50 or greater, it is assumed to be in the 20th century (19xx). If the 2-digit year is 49 or less, it is assumed to be in the 21st century (20xx).

In addition, there is a recently identified server console and log date display issue in release 4.1 of Notes and earlier versions. This issue does not affect the current Notes and Domino releases 4.5 and 4.6. While this date display problem is not expected to result in the loss of any data or the loss

of Notes software functionality (e.g. replication, mail routing, etc.), it prevents these older releases from meeting the Lotus and IBM Year 2000 ready definitions.

Lotus is strongly recommending that all customers using Notes release 4.1 or any earlier release, upgrade to one of the current releases of Notes and Domino (releases 4.5 and 4.6). These releases have been determined to meet the Lotus and IBM definition of Year 2000 ready. For these reasons Lotus is strongly recommending that we recommend that all Notes customers complete the upgrade of their Notes infrastructures to release 4.5 or higher, during 1999. Upgrading to these versions is necessary to assure full Year 2000 readiness of Aviator.

Lotus is providing a one-time, free upgrade of release 4.5.5 for those customer using Lotus Notes release 4.1 or earlier versions This software can be obtained at the Lotus Notes & Domino 4.5.5 download site or by contacting a local customer service office worldwide.

The Method

Our method consists of the following phases:

Awareness: The first phase in our Year 2000 project involved appointing a Year 2000 project manager, and setting up the Year 2000 project initiative.

Assessment: We have surveyed Aviator, identified areas where date fields are used and where code changes are needed to ensure correct program functioning after December 31, 1999. We have prepared an inventory of internal systems, including hardware, commercially available software, operating systems, internally developed software, and services; and have identified all mission critical items. Those items requiring upgrades have been or are scheduled for modification.

Prioritization: The key factor for Year 2000 projects is an effective system of triage, or identifying the mission-critical tasks and moving them to the top of the list. We have prioritized our accounting systems, other internal applications, networks and telephone systems as mission critical. In addition, we are obtaining vendor statements and performing our own internal testing on all mission critical hardware and software systems.

Modification/Upgrade/Replacement: We have identified areas where systems must be upgraded, changed or replaced to achieve readiness. One important area is the upgrade of the applications and operating systems we use to support our business.

Testing: We achieved application-level readiness by the second quarter of 1999, but the test phase will continue to be used to identify necessary changes.

Conclusion

Aviator Software's Year 2000 project is an ongoing effort, and information regarding Millennium readiness is changing rapidly. The information provided in this statement is intended for informational purposes only, and does not constitute a guarantee or warranty, expressed or implied, (including, without limitation, any implied warranty of merchantability or for a particular purpose) of any kind. This statement may contain forward-looking statements. All forward-looking statements involve risks and uncertainties. There can be no assurance that actual results will not differ materially from the results discussed in the forward-looking statements.

Appendix B – Aviator Limitations

Aviator has a number of limits that are imposed by its profile settings. In addition, Aviator is a Lotus Notes application and has the same limits as Lotus Notes. The limits are listed below:

Aviator Limits	Windows, OS/2, UNIX	Macintosh
What is the maximum number of libraries?	Limited only by available disk	Limited only by available disk
What is the maximum number of cabinets in each library?	9,999 (3 in evaluation)	9,999 (3 in evaluation)
What is the maximum number of link databases for each cabinet?	9,999	9,999
What is the maximum size of a cabinet database?	4 GB (gigabyte)	4 GB (gigabyte)
What is the maximum size of a link database?	4 GB (500 MB for the active link database)	4 GB (500 MB for the active link database)
What is the maximum size of a document?	100 MB	100 MB
What is the maximum number of documents in a cabinet?	130 MB for a view index	130 MB for a view index
What is the maximum number of documents in a link database?	100,000	100,000
What is the maximum number of phases in a review?	10	10
What is the maximum number of search results returned?	500	500
Other Lotus Notes limits	Windows, OS/2, UNIX	Macintosh
What is the maximum size of a database?	4 GB (gigabyte)	4 GB (gigabyte)
What is the maximum size of plain text fields?	15KB (storage); 15KB displayed in a view's column	15KB (storage); 15KB displayed in a view's column
What is the maximum size of a single paragraph in a rich text field?	65 KB	64 KB
What is the maximum number of paragraph styles?	64,000 unique paragraph styles in a single document	64,000 unique paragraph styles in a single document
How many levels of responses in a hierarchical view: how many documents at each level?	31 levels; 300,000 documents	31 levels; 300,000 documents
What is the maximum number of windows you can have open simultaneously?	9	9
What is the maximum size for Mail recipient names?	2MB of recipient names (based on fully qualified names, for example, Les Kaplan @ Marketing)	2MB of recipient names (based on fully qualified names, for example, Les Kaplan @ Marketing)
How many views can be added to a database?	No limit; however, as the number of views increases, the length of time to display other views also increases	No limit; however, as the number of views increases, the length of time to display other views also increases
How many paragraphs in a document?	21,509 (19,004 for OS/2)	3,018 (with partition size set to 2,500)
What is the maximum size of a rich text field?	Limited only by available disk space up to 1GB	Limited only by available disk space up to 1GB
What is the maximum number of inserted page breaks?	Unlimited	4,650 (with 3,000K bytes memory reserved for Notes; 673 (with 2,000 bytes memory partition)
How many cascading views are allowed in a database?	200	200

How many copies of a document can be printed at once?	65,535	999
What is the maximum value allowed in "Start page numbers at" field?	65,535	32,767
What is the maximum value (in inches) you can enter for margin size?	46	46
What is the maximum value (in inches) you can enter for page size cropping?	46	46
What is the maximum point size you can select/print?	250 (except under UNIX X11R4/Motif, where it's the maximum display size for the font)	250
How many documents are allowed in one view?	Maximum of 130MB for a view index	Maximum of 130MB for a view index
What is the maximum number of documents that can be exported to Tabular Text?	Limited only by available disk space	Limited only by available disk space
How many levels of responses will display in a view?	31 responses to 1 main document	31 responses to 1 main document
What is the maximum number of entries in an Access Control List?	950 names	950 names
What is the maximum number of roles in an access control list?	75 Roles	75 Roles
What is the maximum size of a single paragraph you can cut or copy to the Clipboard?	Unlimited (64K for UNIX)	Unlimited

The purpose of the performance evaluation is to test Aviator's performance under extreme usage conditions.

Aviator is an advanced file management software application designed for the enterprise. Aviator's unique database structure supports hundreds of thousands of documents with little impact on performance.

However, the choice of server must be proportional to the number of users that will use Aviator. A separate server-sizing chart is available to use as a guideline. The server's processor, memory, disk space, and the network bandwidth can negatively impact Aviator's performance.

Description of Test Conditions:

General

Performed by:	Aviator Software, Inc.
Date:	2-Dec-1998 to 10-Dec-1998
Location:	Tucson, AZ
Software tested:	Aviator R2.0 Open Code version

Test Server

Total Drive (HD) Space:	4.0 GB on OS Drive
Free Space on Drive (HD):	1.0 GB on OS Drive
Memory (RAM):	64 MB
CPU:	Pentium 200 with MMX
Operating System (OS):	Windows NT Server 4.0, SP3
Lotus Domino Version:	R4.6.1

Test Client

Total Drive (HD) Space:	4.0 GB on OS Drive
Free Space on Drive (HD):	900 MB
Memory (RAM):	32 MB
CPU:	Pentium 166
Operating System (OS):	Windows 95
Lotus Notes Version:	R4.5.3a

Network Connection

Wiring:	10baseT
Protocol:	TCP/IP

Note: in order to take into account the indexing of Notes views that occurs when a view is accessed for the first time, all actions are performed twice and the times are only recorded the second time. (In some instances a stopwatch was used, so there is some error due to human reaction.)

Aviator Library Performance

Cabinets contain no documents.

Number of simultaneous users in the library database: 1

Criteria / Library contains…	1 cabinet	1,000 cabinets	5,000 cabinets
Time to open the library	1 sec.	1 sec.	1 sec.
Time to create a new cabinet	23 sec.	22 sec.	23 sec.
Time to open a cabinet	1 sec.	1 sec.	1 sec.

Aviator Search Performance
Cabinets contain 100 documents each 100K in size.
Search results return 20 documents.
Number of simultaneous users in the search database: 1

Criteria / Library contains…	1 cabinets	1,000 cabinets	5,000 cabinets
Time to perform keyword search	7 sec.	9 sec.	10 sec.
Time to perform attribute search (2 attribute settings)	7 sec.	10 sec.	11 sec.
Time to run Maintenance agent	1 min.	30 min.	40 min.
Time to run Escalation agent	5 sec.	90 sec.	120 sec.

Aviator Cabinet Performance
Library contains 1,000 cabinets.
Documents are each 100K in size.
Number of simultaneous users in the cabinet: 1

Criteria / Cabinet contains…	100 documents	500 documents	1,000 documents
Time to open a cabinet	2 sec.	2 sec.	2 sec.
Time to open a document	2 sec.	2 sec.	2 sec.

Aviator Document Performance
Cabinet contains 500 documents and at least 50MB of total data.
Number of simultaneous users in the cabinet: 1

Criteria / Document contains…	100K attachment	10MB attachment	25MB attachment
Time to open document	2 sec.	2 sec.	2 sec.
Time to check-in document	6 sec.	46 sec.	100 sec.
Time to release document (new)	3 sec.	3 sec.	3 sec.
Time to release document (revision)	3 sec.	12 sec.	24 sec.

Aviator Personal Performance
Documents are each 100K in size.
Number of simultaneous users in the library database: 1

Criteria / Number of documents:	10 documents	100 documents	500 documents	1,000 documents
Time to download from cabinet	12 sec.	1 min. 48 sec.	12 min. 26 sec.	31 min. 54 sec.
Time to synchronize with cabinet (none were updated)	3 sec.	20 sec.	1 min. 38 sec.	4 min. 6 sec.
Time to synchronize with cabinet (all were updated)	10 sec.	1 min. 40 sec.	13 min. 20 sec.	36 min. 37 sec.
Time to upload to cabinet	5 sec.	32 sec.	2 min. 48 sec.	6 min. 50 sec.

Aviator Server

- Aviator supports all the platforms supported by the Lotus/Domino server, including IBM OS/2 version 2.1 and higher, IBM AIX, Microsoft Windows 95/98, Microsoft Windows NT (Intel or Alpha), Novell Netware, Sun Solaris (SPARC and x86), UNIX (HP/UX, OS, SCO), and AS/400.

- Lotus Domino 4.5 and higher (R4.6 and higher for Aviator R2.2 and higher)

- Memory: 64MB

- Hard disk space: 500 MB

- Additional disk space required for increased file storage. See Appendix F for server sizing.

Aviator Client

- Aviator supports all platforms supported by the Lotus Notes and Web browser clients, including Apple Macintosh OS (68k and PowerPC), IBM AIX, Sun Solaris (SPARC and x86), HP-UX and AS/400, Windows 95/98/NT (Intel and Alpha)

- Lotus Notes Desktop client – Notes 4.5 and higher (R4.6 and higher for Aviator R2.2 and higher)

- Memory: 32 MB

- Hard disk space: 150 MB

- 256 color display with minimum 800 x 600 resolution

- Web browser – Microsoft Internet Explorer 4.01 and higher, or Netscape 4.04 and higher

Appendix E – Migrating to a new Library

If you are upgrading Aviator from the hidden code evaluation to the new open code version, the following will help ensure a smooth transition.

- Install the New Library from the CD – you can install the new library on the same server as the original library, but it must be in a different directory;

- DO NOT run the setup process;

- Copy all of the profiles from the old library to the new library EXCEPT the cabinet profiles;

  - In the old library, select the library profile and all the document and review profiles you wish to copy. Select Action – Aviator – Copy Profiles;

  - Copy the profiles to the new library;

- In the new library, edit the library profile, then select Save and Close. This will initiate the new library profile and the ACL settings;

- Create new cabinet profiles for every cabinet in the old library;

- Go to each old cabinet and move your documents to the new cabinets;

- Delete the old library databases;

- Refer to the Administrator Guide for all the steps required to set up and configure the new library.

Do not attempt to install more than one library using the Aviator installation file (aviator.exe). The libraries created from this file will have the same Replica IDs and will attempt to replicate with each other. Always use the Notes database copy command instead (see the instructions above).

When there are multiple copies of the Aviator Cabinet and Aviator Link database templates, the Domino server will display a warning about multiple copies of the same template being present on the server during design refresh activities. You can ignore this error as long as all libraries share the same version of Aviator. When upgrading, make sure you replace all the Aviator Cabinet and Aviator Link database templates at the same time (use the Notes copy command to avoid creating replicas of the database templates).

Appendix F – Sizing Server Hardware

The following information will help assess the server necessary to manage your organization's documents. The final results are only suggestive, and should be used in the context of your organization's technology needs.

1. Divide all users into 'usage' groups. 'Usage' is the number of documents generated per month. You may have low users (i.e. 10 new documents / month), medium users (i.e. 20 / month), or high users (i.e. 50 / month).

2. Determine the average document size generated by each group (in Mb).

3. Calculate the number of Mb generated per month by each group.

4. Total all of the Mb / month from all usage groups.

5. Select the recommended Processor and Memory based on your score (see chart).

6. To calculate the disk space necessary, multiply your final score by the number of months you are planning for (i.e. for 3 years, multiply the total by 36).

Server Usage Calculation

Level of Usage	Number of users	Number of new documents created per month	Average document size (MB)	Total MB per month (Example: 275 users creating ten 0.5 MB documents per month = 1,375 MB per month)
Low Usage				
Medium Usage				
High Usage				
Other usage				
Total Usage (Score): Total MB per month (low + medium + high + other):				

Server Processor and Memory Required

Level / Criteria	Score (MB per month)	Processor	Memory
A	100 – 1,000	300+ MHz	128 Mb – 256 Mb
B	1,001 – 10,000	2 x 300+ MHz	256 Mb – 1,024 Mb
C	10,001 – 100,000	4 x 300+ MHz	1,024 Mb – 2,048 Mb
D	100,001 – 1,000,000	8 x 300+ MHz	2,048 Mb – 4,096 Mb

Server Disk Space Required

How many years do you want to plan for your server's disk space? _____

[Months = _____]

Multiply your score (MB per month) by the number of months above for your server disk space:

_____

```
                        ┌─────────────────┐
                        │     Library     │
                        └────────┬────────┘
          ┌──────────────────────┼──────────────────────┐
    ┌───────────┐          ┌───────────┐          ┌───────────┐
    │ Cabinet 1 │          │ Cabinet 2 │          │ Cabinet 3 │
    └─────┬─────┘          └─────┬─────┘          └─────┬─────┘
          │  ┌──────────────┐    │  ┌──────────────┐    │  ┌──────────────┐
          ├──│  Document 1  │    ├──│  Document A  │    ├──│  Document X  │
          │  └──────────────┘    │  └──────────────┘    │  └──────────────┘
          │  ┌──────────────┐    │  ┌──────────────┐    │  ┌──────────────┐
          ├──│  Document 2  │    └──│  Document B  │    ├──│  Document Y  │
          │  └──────────────┘       └──────────────┘    │  └──────────────┘
          │  ┌──────────────┐                           │  ┌──────────────┐
          └──│  Document 3  │                           └──│  Document Z  │
             └──────────────┘                              └──────────────┘
```
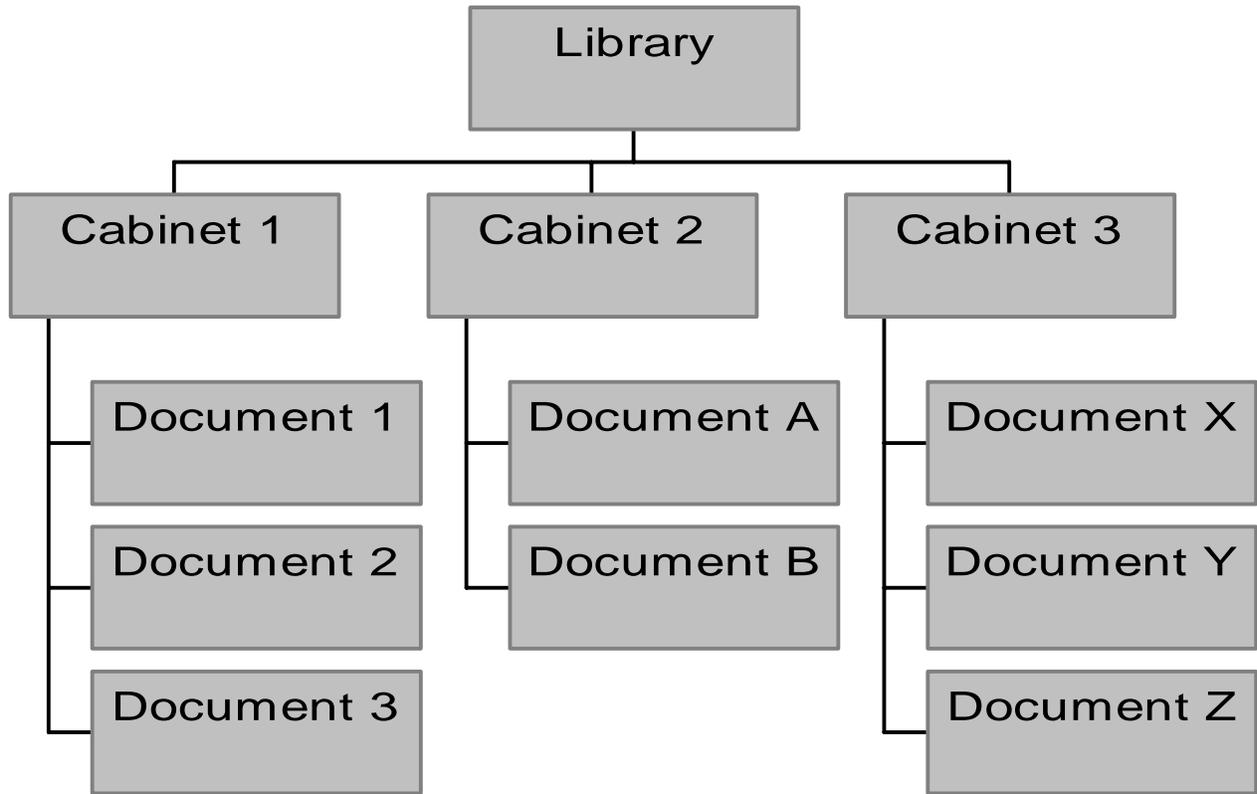
Cabinets (profiles):   Documents (profiles):

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

_____   _____

General Library Profile

Library Name *Enter name of library.*	
Host Name *Enter host name for access to server(s).*	
Address Book Filepath *Enter filepath to NAB used by Web browsers.*	
Library Servers *Enter names of server(s)*	
Library Administrators *Select names of library administrator(s).*	
Library Users *Select users or group(s) of users – groups are highly recommended.*	
Notification Message *Automatic message generated.*	Notify library users when settings are implemented? Yes No

Internet Search URL *Enter default URL for Internet searches.*	
Home Page URL *Enter address of home page.*	
Max. Cabinets *Enter maximum number of cabinets.*	
Cabinet Permissions *Check appropriate box.*	Databases are created/updated immediately. *(Default)* Databases are created/updated by a scheduled agent. Databases are created/updated by an external program.
E-mail Options	Include or exclude DocLinks and URLs from Aviator-generated e-mails.

Non-Administrator Profile Creators & Editors

Cabinet Profiles *Enter name or group of user(s) allowed to create and edit cabinet profiles.*	
Document Profiles *Enter name or group of user(s) allowed to create and edit document profiles.*	
Review Profiles *Enter name or group of user(s) allowed to create and edit review profiles.*	
ACL Maintenance *"Yes" is suggested for most applications.*	Reset Access Control List in all library databases during initialization and Scheduled maintenance? Yes No
Administrator Notification	Check box in order to be notified when a new cabinet or link database is created. This is important for libraries and cabinets that are replicated across multiple servers.

About the Library

Library Purpose and Usage *Enter any message for users entering library for first time.*	List contact names, administrators, procedures, etc.

General Cabinet Profile

Profile Editors *Enter name(s) of administrators allowed to edit these settings – defaults to profile creator.*	
Name *Enter name of cabinet.*	
Description *Enter a description of the cabinet to be shown in the cabinet list of the library view.*	
Status *Options are Read/Write, Read Only, or No Access (Library Administrators only)*	
Categorize As *Select or create a category for the cabinet.*	
Cabinet Administrators *Select names of cabinet administrators*	
Cabinet Users *Select all cabinet users from Address Book – groups are highly recommended.*	
Notification Message[1] *Enter an appropriate message notifying cabinet users when settings are implemented and changed. (Optional)*	
Document Profiles *Select all document profiles that are appropriate for this cabinet.*	
Show the Cabinet in the Library View?	For users without access to the cabinet.
Update Databases *"Yes" is suggested for most applications.*	Update the cabinet and link databases during initialization and scheduled maintenance? Yes No
Automatically Create Replicas?	For cabinets replicated to all library servers.

Link Database Attributes

Maximum Size: *Options (in MB): 10, 25, 100, 250, 500, 1GB*	
Maximum Documents: *Options: 100, 1000, 10 000, 100 000*	
Maximum Link Databases: *Default 9,999*	

About the Cabinet

Enter purpose and usage of this cabinet for the users. *This message describes the basic cabinet purpose.*	List cabinet administrator, procedures, etc.

1. This message will be distributed to users of the cabinet each time the profile is changed. It is recommended that any message be added after the initial implementation of the system when the profile is less likely to change.

General Document Profile

Profile Editors *Enter name(s) of administrators allowed to edit these settings – defaults to profile creator.*	
Name *Enter name of document profile.*	
Description *Enter a description to be shown in the profiles list of the library view, and when this profile is selected for use.*	
Instructions *Enter any appropriate instructions for users.*	
Maximum Size *Options: 10K, 100K, 1MB (default), 10MB, 100MB*	
Review Profiles *Select all applicable review profiles for document.*	

Document Profile

Default Editors *Default is "No one," meaning only the document manager can edit the document once it is created.*	
Editors Lookup List *Check box to allow authors/editors to lookup another editor from the address book, or list individuals.*	
Default Readers *Default is "Everyone", meaning everyone listed in the cabinet containing this document type.*	
Readers Lookup List *Check box to allow authors/editors to lookup another editor from the address book, or list individuals. Users must be listed in the cabinet profile.*	
Default Distribution *List all users who are part of the distribution list.*	
Distribution Lookup List *Check box to allow authors/editors to lookup users in address book or others already used in cabinet.*	
Categories Lookup List *Check box to allow authors/editors to lookup other categories previously used in cabinet. Add other relevant categories.*	
Index Lookup List[1] *Check box to allow authors/editors to lookup other index types previously used in cabinet. Add other relevant index lists*	

Document Control Preferences

Saving *Select an option.*	Never save changes as new revisions Prompt user to save changes as new revisions. Always save changes as new revisions.
Numeric or Alphanumeric	Choose a version tracking scheme.
Distribution List *Select an option. (optional)*	Notify the distribution list when the document is checked in. Notify the distribution list when the document is released. Notify the distribution list when the document is deleted.
Draft Revision History*	Only keep the last _____ revisions for draft documents.
Released Revision History*	Only keep the last _____ revisions for released documents.
Release Upon Creation	Create documents as released? Yes No
Released Document Updates	Require a copy and release for changes to released documents? Yes No
New Release Reviews	Require a copy/review and release for changes to released documents? Yes No
Document Deletion	Released documents can be deleted from database? Yes No
File Launch Requires the Aviator ODMA client	Automatically launch the file attachments into an appropriate application? Yes No
Document Log*	Only save the last _____ actions in the document log.
Reader Log*	Log reader names when document is opened? Yes No
Reader Log	Log is created if document is open for more than _____ seconds.
Delete Reader Log	Never delete reader log. Only delete the reader log when the document is released. Delete reader log when the document is released or checked in.
Custom Attribute 1 *Enter additional fields required in document profile. For drop-down lists, separate values with commas)*	
Custom Attribute 2	
Custom Attribute 3	
Custom Attribute 4	

*Note that if space is limited you should keep revision histories and reader logs to a minimum.

General Review Profile

Profile Editors *Enter name(s) of administrators allowed to edit these settings – defaults to profile creator.*	
Name *Enter name of review profile.*	
Description *Enter a description to be shown in the profiles list of the library view, and when this review is selected for use.*	
Required Reviewers *Any individuals required to be in the review process.*	
Required Approvers *Any reviewers required to perform approval or rejection of the document.*	
Rating Scale *Optional.*	

Review Table Preferences

Default Review *If yes, no additional reviewers are allowed in the assignment table.*	Protect these default review settings? Yes No
Manager Notification *Manager receives email upon an escalation action as explained below.*	Notify the cabinet manager of review escalation? Yes No
Document Rejection *If a controlled document, answer "yes".*	Rejecting the document cancels the review? Yes No
Check out Prevention *Prevents document managers editing the document after a successful review.*	Prevent check out prior to release if review is closed? Yes No

Assigned Reviewer	# or % Required?	Action	Duration	Escalation
Enter user name(s) (groups not supported here)[1]	Specify the number or percentage of reviewers required per assigned action. Default = 100%	Choose from: Edit Comment Approve Rate	Enter number of days allotted for review.	Choose from:[2] Nothing Remind Pass

1. Assigned reviewer rows may be left blank to provide added flexibility to the review process. If a row is blank, the previous reviewer is given the ability to select the next reviewer and actions to be taken.

2. "Nothing" allows user unlimited amount of time to review document (manager receives notification of "No action"). "Remind" sends a daily email to the reviewer beginning the first day past the allotted duration. "Pass" sends the document to the next reviewer thereby skipping the current reviewer. Note that selecting "Pass" is not appropriate for controlled documents.