Open Referent Quick Installation And Initial Configuration Guide

Open Referent Installation

The Open Referent system has a client-server based architecture. The server-based part of the system is installed on Lotus Domino 8.0 on Red Hat Enterprise Linux 5.0. At the current moment a proper work with other versions of Lotus Domino and on other operating systems is not guaranteed. The clients' access to the system is performed by means of Lotus Notes or browser.

The Open Referent installation is carried out on the server. This manual presupposes that Red Hat Enterprise Linux and Lotus Domino are already installed on the server. Consult necessary documentation if you have any questions on the installation of Linux or Lotus.

Preparing for Setup

It's required to create a cross-certificate before installing Open Referent. In order to perform that operation the user is required to have an access to the certifier ID. If the user lacks an access to the certifier ID, the operation of cross-certificate creation may be substituted by the bases' signing performed by the server administrator.

The cross-certificate is to be created for an account indicated in the provided "safe.id" file. The created certificate should be kept in the server's directory.

Such notions as 'the Lotus Domino/Notes Application user' and 'the Open Referent user' should be distinguished. The Lotus Domino/Notes user is not necessary a user of Open Referent. If provided with the access to the system by web-interface the Open Referent user also may not be a Lotus Domino/Notes user.

The Administrator registers the Lotus Domino/Notes users in the server's directory prior to the Open Referent installation start and creates a mailbox for each of them if required.

Setup

It is recommended to install Open Referent using the special installation database.

1. Copy the database file named "install.nsf" to workstation.
2. Launch Lotus Notes Client and open the copied base.
3. The Open Referent installation program will be launched in the interactive mode.

Directory Infill

It's required to fill-in the system wide directories before starting the work in the system:

1. The information about organization's structure and employees is entered into the 'Organization Reference Book'.
2. The lists of key-values (notions) required to fill-in the entry-fields in other system's databases are formed in the 'Glossary'.
3. 'External Addressees' contains information about outer organizations – contractors, their branches and representatives.

System Modules

From the user point of view there are three main modules in the system.

Organization Reference Book

This directory allows describing and keeping up to date the information about the organization's structure, the departments and branches it consists of and the way they subordinate. It also contains information about the company's employees, including that on positions overlapping, authority delegation and roles in documents' processing.

Module's possibilities:

1. Keeping the personal and business (employment-related) information on each employee (full names, ranks, phone numbers, etc.).
2. Mailing lists creation.
3. Execution of dual jobholding, employee's transfer to another department, discharge and reinstatement.
4. Assigning the roles in document processing.
5. Regulation of authority delegation process: delegation of authority to work in the system to other employees if necessary, separately for main and overlapped position (project).

The database completion consists of entering the information about the following:

1. The organization's card fill-in.
2. Company's departments (divisions).
3. List of the employees according to their departments.
4. Departments' chiefs and the organization's director and accountant info.
5. Business-roles assigned to the employees.
6. Positions overlapping.
7. Authority delegation.

Open Referent may also represent the activity of those employees, who are not the users of the system. The information about such employees is entered in the Organization Reference Book same as usually, it's only necessary to indicate that the employee is not the system's user. For such employees it's required to specify the surrounding, the agents and the care-taker to receive notifications about the necessity to perform peculiar actions addressed to the employee.

The care-taker receives a notification instead of the employee he's acting for, and is responsible for the completion of the task indicated in the notification. However, the employee who has a care-taker does not lose the possibility to perform the task unassisted, also receiving the notifications in the Cabinet.

The agents also receive the notifications about the necessity to perform a certain task instead of the employees they represent. The user assigned as the agent may compose instructions and adopt resolutions on behalf of the employee he represents.

The care-taker and the agent may be assigned both for the employee's primary and secondary position. They are not obliged to coincide however. The information about the delegation of authority is entered in the Organization Reference Book either in the 'Employee' or in 'Overlapping' field depending on the position delegated.

The delegation of authority may be both termless and validity period indicated:

1. The termless delegation of authority is convenient if the employee is not the application user, but nevertheless takes part in the company's administrative document circulation.
2. If the user plans to be absent at the working place for some time due to certain reasons (illness, vacation, business trip) he may indicate the delegation period.

Assignments

The Assignment Module helps to regulate the company's executive discipline. The managers of all levels may assign the tasks to their employees with the help of this module, and monitor their accomplishment in the organization's scale, look through reports and evaluate the work of the responsible parties.

If you need to complete an administrative task – apportion it among your employees by creating appropriate instructions.

Modules' possibilities:

1. Allows to prepare the instruction project.
2. Task's completion status reflection.
3. Automatic notification about the deadline (fixed time expiration).
4. Automatic notification about the task's completion.
5. Reassigning the time for performance.
6. Reassigning the executive manager.
7. Return for additional work.
8. The completion results approval.

The author of the instruction is to:

1. Create the instruction by filling in the 'Instruction' field and send it to the executives.
2. Control the process of the task's completion and approve (or not) the reports of it. This function may be assigned to the task's author himself or another employee.

The executive is to:

1. Perform the required actions and report the activity.

External Addressees

The External Addressees database is used as the reference on external organizations available for the company's employees. The database documentation may contain various information: everything from the organization's bank data to its representative's cell phone number.

Possibilities:

1. Allows to enter, store and search data on organizations (title, contact and bank information, etc). It is possible to create a separate card for each office for the organizations which have branches.
2. Allows to enter, store and search data on contractors
3. Allows to store information on contractors in the process of document circulation
4. Allows combining duplicate records on contracting organizations and their branches.

Interface and work with the system

To open the database click on its icon or open it by the ‘Open Database’ link on the main page. To cancel the database use [Esc] key or the ‘Exit’ link in the navigation area.

When entering the system the user automatically goes to the main page. The main page is the common access point to the system, providing the user with possibility to work with the whole functional of the system available to him. The main page gives user the access to the system’s functional and service modules, notifications and personal Lotus Notes mailbox.

To set the main page as a home page:

1. Left click on the database switchboard icon in the Lotus Notes working area.
2. Drag the icon to the tab panel (a vertical panel located in the left part of the Lotus Notes working area).
3. Right click on the icon which appears on the panel and choose the command ‘Make tab a home page’ out of the context menu.

From then on each time you launch Lotus Notes the main page will be started automatically.

After the system installation the functional databases are not displayed at the main page by default. In order to choose the databases to be available from the main page:

1. Click ‘My Settings’ link in the ‘Supplement’ block.
2. ‘My settings’ dialogue is displayed. Define the amount of blocks to be displayed on the main page. To do that, pick an appropriate number in the ‘Startup page’ list. You may indicate a various amount of blocks. You may also choose a way of mapping – with documents or without. In case you choose mapping with documents, a list of documents to be handled and keys to operate these documents according to their current status will be displayed for every database.
3. For each block indicate a database to be displayed. To do that, click on the block and then pick an appropriate database out of the list.