

# **Agent Monitor for Domino**

Release 4.02

## **Upgrade Guide**



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## INTRODUCTION

This guide provides information on upgrading your existing installation of the Agent Monitor for Domino (formerly IBM Lotus Domino) to the latest release.

## BEFORE BEGINNING THE UPGRADE

Before you begin the upgrade it is recommended no users are accessing the application and that no scheduled agent scans are running while the upgrade is being performed. If users (or servers) are currently accessing the application while the upgrade is performed some design elements could be locked therefore preventing a successful upgrade.

It is strongly recommended you read the '*Appendix A – Notes Security*' section of this guide. It contains important information on security features of the Notes client you may encounter during the upgrade and what you should do when you encounter them. Failure to understand the security features or selecting incorrect security alert responses during the upgrade process will cause the upgrade to fail.

If your upgrade fails to complete successfully or you encounter any problems you can simply re-run the upgrade procedures again.

## UPGRADING THE AGENT MONITOR APPLICATION

After downloading the latest release of the application please follow the steps in the order outlined below to upgrade your existing application.

### UPGRADE PRE-REQUISITES

Before beginning an upgrade the following recommendations should be noted:

1. The Notes ID file used for the upgrade should have a high level of access to your Domino domain and be a trusted id for performing secure operations. This is to ensure when users are using the upgraded application they are not consistently prompted with Security Execution alerts (for more information refer to the Execution Control List (ECL) in the Domino Administration help database).
2. A backup copy of your production application should be made before performing the upgrade. If you experience problems with the upgrade you will be able to restore the backup.
3. The Notes ID file used for the upgrade must have Manager access to the database being upgraded and be included in all roles in the Access Control List (ACL). Delete access must also be enabled. When performing an upgrade your access will be checked and the upgrade cannot be performed without proper access.
4. The ACL of the installer file should not be changed unless you require it be changed for example if putting it on a Domino server. If you do change the ACL ensure the Notes ID you are using to perform the upgrade is included in all Roles in the installer file ACL.

### BACKUP YOUR PRODUCTION DATABASE

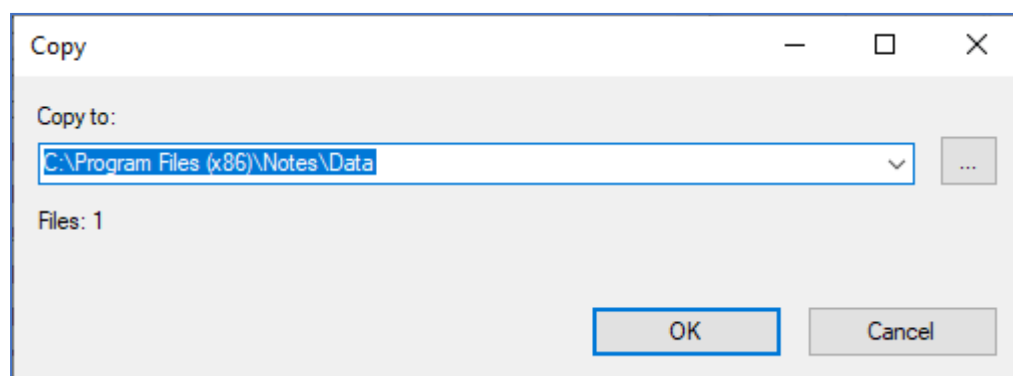
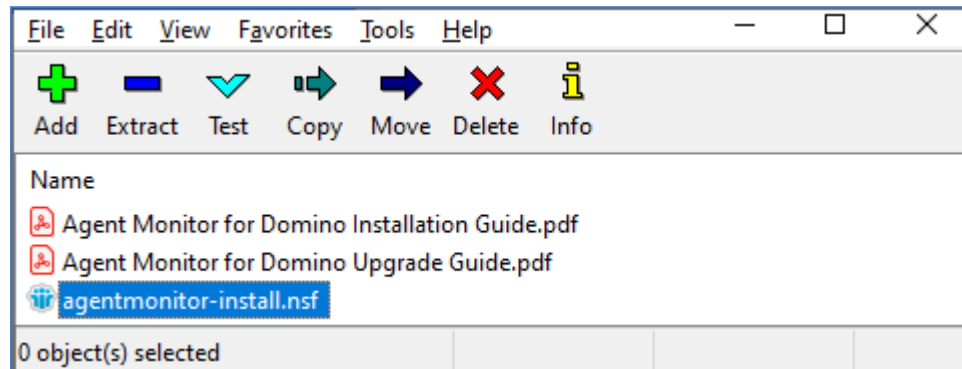
Before applying the update to your production copy of the Agent Monitor we recommend you make a backup of it. In the case of any problems being experienced you will then be able to revert to the backed-up copy.

## EXTRACT THE APPLICATION INSTALLER

Select and extract the application installer file from the zip file downloaded from the AGECOM website.

The file may be extracted to any folder on your local workstation. If you choose to extract it to your Notes data folder it is strongly recommended you shutdown your Notes client first.

**DO NOT launch the Installer NSF directly from the zip file otherwise the upgrade will fail.**



## PERFORMING THE UPGRADE

The automated upgrade process will perform the following tasks:

- Upgrade design elements.
- Copy new help documents.
- Perform any necessary data conversion of documents to the new release.
- Sign all design elements.
- Re-enable scheduled agents.

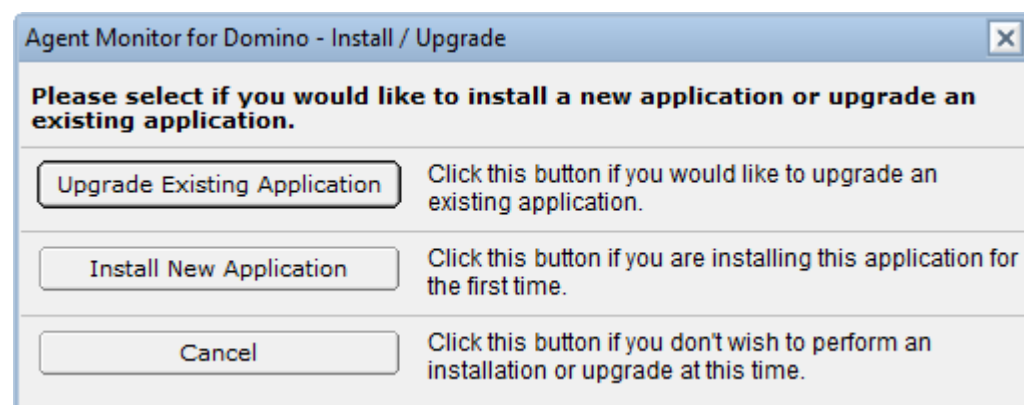
After you have downloaded and extracted the installer file it should now be opened. Select the following menu item applicable to the version of Notes you are using:

- Notes 9x: File -> Open -> IBM Notes Application
- Notes 8x: File -> Application -> Open
- Notes 7x: File -> Database -> Open

If you extracted the installer to your Notes data folder scroll down the list of local databases and locate the 'Agent Monitor for Domino Installer' file. If it doesn't appear in the list enter the filename of the installer file: agentmonitor-install.nsf.

If you extracted the installer to another folder then click the Browse button in the 'Open Application' dialog box and locate the installer file.

After locating or entering the installer filename click the 'Open' button. The following box should now be displayed:



Click on the 'Upgrade Existing Application' button.

If the above box doesn't display then select the 'Upgrade Existing Application' option from the left-hand navigation pane of the installer file as shown below.



The following screen should now be displayed:

**Application Upgrade**

The following upgrade tasks will be performed:

- ☒ The design of your existing production application will be updated
- ☒ Any necessary data conversion for the new release will be performed
- ☒ Scheduled agents will be checked and re-enabled
- ☒ All design elements will be signed with your ID
- ☒ Help documents will be updated
- ☐ All database views will be refreshed

The upgrade should be performed using a Notes ID file with a high level of access to your Domino environment and is trusted to perform secure operations. The ID you are currently using is: **AGECOM Development/AGE Computer Consultancy**. Before continuing it is strongly recommended you have a backup copy of your application. [Click here to select the application you would like to upgrade](#)

The following application will be upgraded to release 4.00:

Server:	
Title:	
Filename:	
Current Version:	
Open application:	<input checked="" type="checkbox"/> Open the application after the upgrade has completed

Please ensure no-one is using the application during the upgrade process otherwise it may fail to complete successfully.  
You should also ensure there are no scheduled agent scans running while the upgrade is being performed.

Ensure the displayed release / version number is the expected number.

The application to be upgraded must be selected. If you have previously performed an upgrade of your application the information for it should normally be filled out for you based on your previous selection. To select or change the application to be upgraded click the application selection link. When selecting the application your access will be checked and if it doesn't match the required settings as advised in the upgrade pre-requisites section an error message will be displayed. The upgrade will not proceed if the required access conditions are not met.

None of the displayed upgrade tasks should be deselected unless directed to do so by support personnel. Deselecting any of the upgrade options may cause the upgrade to fail. You may, however, deselect the 'Refresh Views' option if the views in your application are quite large. The views will be automatically rebuilt later when you open them.

If you would like to open the application after it has been upgraded click the checkbox next to the 'Open Application' option.

After you have completed the upgrade selections click the 'Proceed with Upgrade' button.

The upgrade process will perform all the necessary processes of upgrading the design, copying new help documents, performing any necessary data conversion and any other required tasks. When the upgrade has completed your production application will be immediately ready for use.

Any scheduled agents that were enabled before the upgrade are automatically re-enabled after the upgrade completes. If the agents were previously enabled using a Notes ID different to that used during the upgrade process you should re-sign or re-enable the agents using the appropriate Notes ID.

A summary of the upgrade tasks & application checks is displayed when completed. If any problems are found they are normally fixed, or you'll be advised of what corrective action to take, and you may need to perform the upgrade tasks again.

## READ THE HELP - ABOUT DOCUMENT

Now that the upgrade process has been completed we recommend you read the 'Help - About' document in the application. There you will find a complete list of the enhancements and fixes in the latest release.

## TROUBLESHOOTING

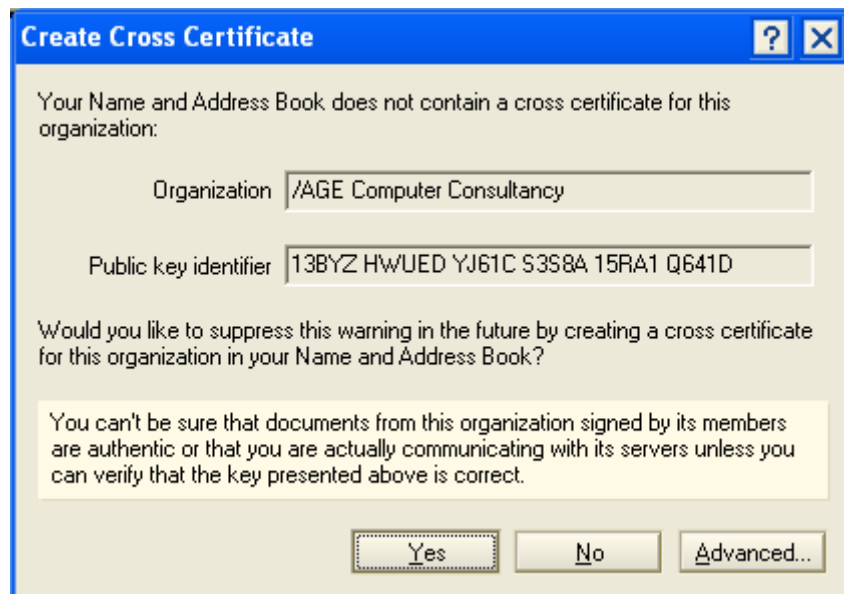
If you experience problems using this application after performing the upgrade please refer to the Troubleshooting section of the Installation Guide for this application where you'll find lots of information and references to assist you with resolving the problem.

If you've misplaced the Installation Guide locate the installer file downloaded from the AGEKOM website that contained this update and you'll find it included. Alternatively you can download a new copy of the application from the AGEKOM website and you'll find the Installation Guide included with the downloaded file.



## APPENDIX A – NOTES SECURITY

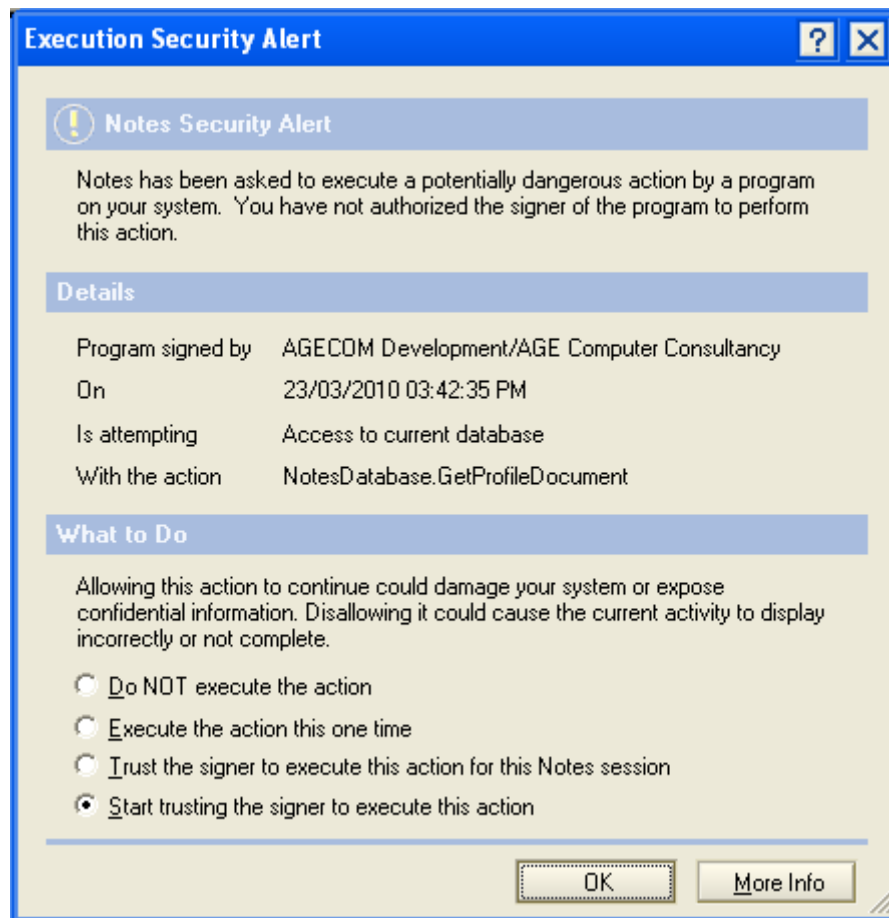
During the upgrade process you may be prompted to *Create a Cross Certificate* as per the following image:



This is a normal part of the Notes client security features. It indicates you are accessing a digitally signed document or application design element for which you don't have a cross certificate in your Personal Address Book.

It is recommended you click the 'Yes' button to automatically create the cross certificate in your Personal Address book. This will indicate the certificate is trusted and will prevent further displays of this prompt. If you click the 'No' button it will not prevent the upgrade from completing successfully but you will be continually prompted to create the cross certificate.

You may also receive Execution Security Alerts as per the following image during the upgrade process:



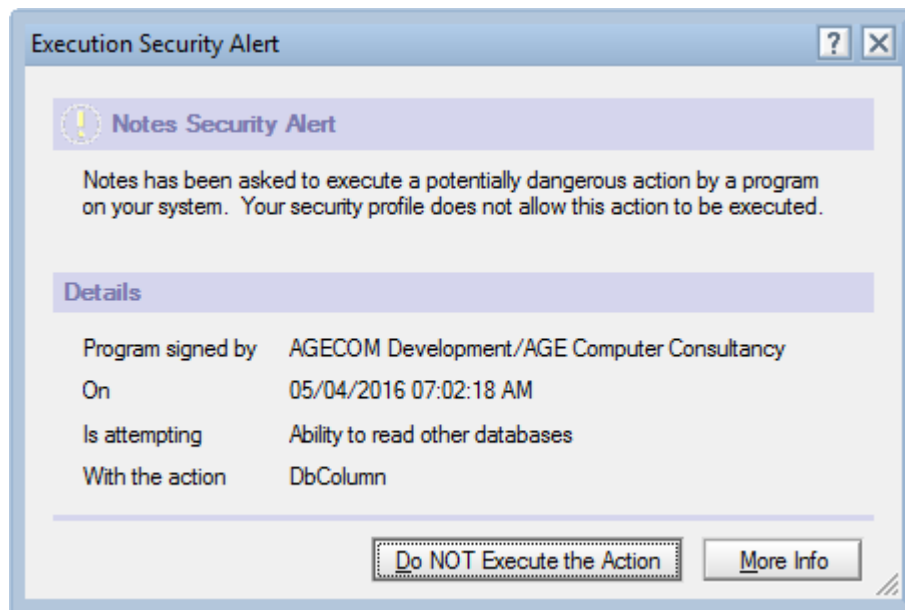
Execution security alerts are also a standard part of the Notes client security features. An execution security alert is displayed when a restricted action is performed by a Notes ID you have not previously given authorization to perform. In the above example the Notes ID 'AGECOM Development/AGE Computer Consultancy' is attempting to get a profile document in the current database.

Whenever you see the above alerts it is recommended you select the 'Start trusting the signer to execute this action' option and click the ok button. You will then no longer be prompted when the Notes ID attempts to get a profile document. You may be prompted, however, when the Notes ID attempts to perform other restricted actions for the first time.

You may also select the 'Execute the action this one time' or 'Trust the signer to execute this action for this Notes session' to enable the restricted operation to be performed once only. At a later time if the same Notes ID attempts to perform the same operation you will receive the Execution Security Alert again.

If you select the 'Do NOT execute the action' the restricted operation will not be performed and will cause the upgrade to fail.

If your Domino Administrator has restricted the option to allow actions to be executed by unknown signers you may see the following dialog box instead:



In this instance you won't be able to perform the upgrade.

You will need to request your Domino Administrator to perform one of the following actions:

- Sign the Agent Monitor Installer file with an appropriate Notes ID that will allow you to run the upgrade.
- Add 'AGECOM Development/AGE Computer Consultancy' to the Admin ECL in your Domino domain's Security Settings policy document.

Once this has been done you should be able to continue with the upgrade.