Technical Guidance - INTO*GRATE* NAV

Lotus Notes Integration Kit

Version 1.8

INTO*INT

1. Lotus Notes mail database identification help

1.1 Lotus Notes Mail server and database

The following procedure can be used to get information about the user's mail server and mail database:

1. Start your Lotus Notes Client.
2. Press <CTRL>+<M> to open a new e-mail
3. Go to the 'File' menu and select 'Database\Properties'. The following dialog box will appear:
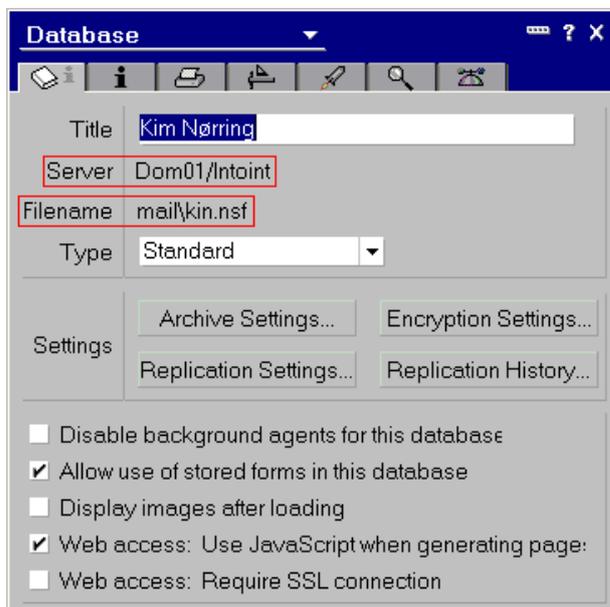
4. Fill in the 'Mail server' field in NAV with the text listed after 'Server" (in this case "Dom01/Intoint").
5. Fill in the 'Mail database' field in NAV with the text listed after 'Filename' (in this case "mail\johndoe.nsf").

The above procedure can also be used to find the server and file names of the contact person database. In this case you must open your address book in stead of your mail box. To do that, however, you select it in the Lotus Notes Workspace (i.e. <CTRL>+<M> cannot be used).

2. Manual installation

It is possible to install the Integration Kit without using the installation program. This may be advantageous if the Kit is to be installed in a large environment and the files are to be distributed to multiple workstations or where advanced installation is involved, e.g. on a Citrix-based network.

2.1 Unpacking files

If the installation is packed in a single file, this must first be unpacked. To do this double click the downloaded EXE-file and select the drive where you want the files unpacked. The file destination must be a local drive or a network drive.

2.2 Copying files

When the files are unpacked, they must be distributed to the relevant directories.

The following files must be copied to e.g. "C:\Program Files\INTOGRATE NAV - CRM" (the files can be found on the installation CD):

- ERP2LN.DLL
- ERP2LN_ADDON.DLL
- ERP2LN_COM.DLL
- ERP2LN.INI

2.3 Registering components

The component ERP2LN_COM.DLL must be registered in the Windows registry database. This can be done in the following way:

1. Click the Windows Start button and select 'Run…'.
2. Enter the following in the entry field and click the [OK] button:

   regsvr32.exe "C:\Program Files\INTOGRATE NAV\ERP2LN_COM.DLL"

3. A message saying "DLLRegisterServer in x:\...... succeeded" will appear. This indicates that the component has been correctly installed.

It is possible to run this part of the installation without user interaction. Use the parameter "/s" in regsvr32.exe. E.g.:

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regsvr32.exe "C:\Program Files\INTOGRATE NAV\ERP2LN_COM.DLL" /s
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When this step is completed the integration kit can be used from NAV.

3. General troubleshooting

Check list

1. Check that you can send e-mails from your Lotus Notes client: start your Lotus Notes client and press <CTRL>+<M> to create a new memo. If this does not work, check the settings in your location document (check that a mail server and a mail file have been specified).
2. Check that an individual notes.ini file exists for all users. The Integration Kit reads information about the user's mail settings in notes.ini. This requires the presence of one notes.ini for each user in e.g. a Citrix environment.
3. After installation of a new version of Lotus Notes, the dll 'nlsxbe.dll' may have to be re-registered. To do this, click the Windows Start menu, select Run and enter the following:

   'regsvr32 c:\lotus\notes\nlsxbe.dll'

   where 'c:\lotus\notes' is the path to your Lotus Notes client.

4. If two versions of Lotus Notes are installed, it may cause problems. The Integration Kit uses a COM object which is registered by Lotus Notes on installation. If a new version of Lotus Notes is installed afterwards, it will overwrite parts of the previous version Notes' registration. As a rule of thumb, the Notes client installed last must be used for the Integration Kit.

4. Terminal/Citrix server setup

To install INTOGRATE in a Terminal/Citrix environment the following software must be installed on the server:

- Lotus Notes client (R5 or later)
- NAV client

A common setup for NAV would be to install a local NAV client on the Terminal/Citrix-server (to optimize for speed).

The usual way of deploying Lotus Notes client on Terminal/Citrix is described in the following Redpaper from IBM (see chapter 5.4.3 or 5.4.4 depending on your version of Lotus Notes):

http://www.redbooks.ibm.com/abstracts/redp3629.html

More specific details about installing Lotus Notes on a Terminal/Citrix server should be obtained from your Lotus Notes vendor.

In this scenario the Lotus Notes client is installed in "C:\Program Files\Lotus\Notes" and each user's data-directory is "H:\Notes\Data" (containing both the data files and the notes.ini file).

When NAV and Lotus Notes are ready for use, INTOGRATE can be installed.

The procedure is as follows:

1. Install INTOGRATE either by running the installation program or by using the manual procedure described in section 2.
2. Configure the system environment PATH to include "H:\Notes\Data".
3. Install INTOGRATE in NAV by importing the FOB-files.

When running INTOGRATE on Terminal/Citrix, make sure the following settings are enabled in erp2ln.ini (located in "C:\Program Files\INTOGRATE NAV - CRM", e.g. the same directory that contains the ERP2LN.DLL file):

DisableNotesSetupDialog=1
DisableRegistryCheck=1
DisableRegistryAutoFix=1

These settings will prohibit INTOGRATE from modifying the Windows registry on the server.

A few hints:

- Make sure there is only one notes.ini for each user (sometimes there is a notes.ini elsewhere in the system/user environment path)
- Make sure you have the latest version of INTOGRATE (at the time of writing the current version is 1.9.2.399).
- Try to add the Lotus Notes binary directory to the system PATH (e.g. "C:\Program Files\Lotus\Notes"). This might solve some issues with the Lotus Notes setup.
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5. Configuration - ERP2LN.INI

5.1 Logging system

INTOGRATE has the option to write detailed error messages, warnings and information to a log file, helping to identify most issues.

This is configured using INTOGRATE's configuration file "ERP2LN.INI".

"ERP2LN.INI" is located in the same directory as "ERP2LN.DLL". The exact location depends on the installed INTOGRATE product (typically "C:\Program Files\INTOGRATE NAV").

It is possible to select the level of detail to write to the log file. This is controlled by the "FileLogLevel" setting. Possible values are as follows:

0   Nothing is logged

1   Errors

2   Information

4   Debug

8   Trace/Debug (will cause a severe reduction of performance)

To enable several levels simply add the numbers together. For instance to enable "Errors" and "Information", FileLogLevel must be set to 3 (1 + 2). To enable full logging use the value 15.

Procedure to change "ERP2LN.INI" (lines beginning with semicolon are considered comments and will not be processed by INTOGRATE):

1. Open "ERP2LN.INI" in Windows Notepad (or similar text editor).
2. Search for the word FileLogLevel (this will locate the section where the file log level is set, showing examples of use etc.).
3. Add a new line

    FileLogLevel=XX

    where XX is the level of details to log (use 15 to enable full logging).
4. Save and close the file.
5. Restart NAV to activate the changes.

The log file has a default location of "C:\Documents and Settings\<username>\Local Settings\Temp\ERP2LN" where "<username>" is the currently logged on Windows user.

This can be changed in "ERP2LN.INI" by setting the LogDirectory to an alternative location (using the same procedure as with FileLogLevel).