



**Instant Buddy List Administrator
User Guide**

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Welcome to the Buddy list Administrator User Guide

Instant Buddy List Administrator is designed to enable Sametime administrators, or possibly department managers, to configure and centrally deploy updates to the buddy lists of Sametime users. These updates may be applied to a collection of Sametime users and will include activities such as:

- Adding a public Sametime group
- Adding a private Sametime group with a preselected list of Sametime users

Buddy List Administrator is managed via a Notes database. The Notes database provides both the user interface, as well as the underlying application code, to create and manage buddy list updates.

Buddy List Administrator interacts with the Sametime server via a collection of application programming interfaces (APIs) provided by both the Lotus Notes/Domino platform as well as the Sametime platform. In order to remotely administer the Sametime storage resources for Sametime users, Buddy List Administrator interacts with the Sametime server using a set of interfaces provided by the Sametime Community Services.

There are several basic steps that should be performed in order to perform an activity where a user, or group of users, receive updates to their buddy list:

1. Create and specify an active configuration document
2. Define a buddy list profile that represents the buddy list items that may be applied when an activity is executed
3. Create an activity document that define the type of activity to execute, which buddy list profile will be applied, and the collection of users who should be updated.
4. Start the activity and view the logs to confirm the updates

Installing Buddy List Administrator

Instant Buddy List Administrator is supplied as Lotus Notes database template. This database template should be used to create a standard Lotus Notes database. All components necessary for the execution of the application are contained within the supplied template. These components include:

- Configuration forms to specify the default, or target, Sametime server
- Activity forms to define buddy list update activities
- LotusScript based agents to start the activity processing
- Java based agents, which will run on the server, to interact with the Instant Buddy List Processing Engine
- Java libraries which will perform the necessary updates to the Sametime storage system

At a technical level, the Instant Buddy List Processing Engine communicates with the Sametime server as a server 'addin' task. This enables the manipulation and modification of any storage element (or buddy list) in the Sametime system. The Instant Buddy List Processing Engine does not communicate directly with the vpsuserinof.nsf and instead proxies all requests through the standard Sametime application programming interfaces (APIs)

Installing the database on the Sametime server

If the Buddy List Administrator database is located on the same server as the Sametime server, then the ability for the Instant application to communicate with the Sametime server at a 'server' level will be enabled by default.

Installing the database on another Lotus Notes server:

It is possible to install the Buddy List Administrator database on a standard Lotus Notes/Domino server. However, when an activity is initiated, the server based Java libraries will attempt to connect with the specified Lotus Sametime server as a server addin. By default, Sametime servers do not enable external computers to connect as a server addin.

To enable Buddy List Administrator to communicate effectively with the Sametime server, the Sametime server will need to recognize the Buddy List Administrator's Notes server as a trusted IP address.

Please refer to parts of this article for information on configuring Sametime to accept trusted IP access:

<http://www-1.ibm.com/support/docview.wss?rs=0&uid=swg21163790>

If the Sametime server is within a test environment, you may add the following section to the Sametime.ini. This will enable any machine to connect to the Sametime server as a trusted entity:

```
[Debug]
VPS_BYPASS_TRUSTED_IPS=1
```

If this is a production environment, then you may limit the access to only selected machines.

```
[Config]
VPS_TRUSTED_IPS=trusted IP address, trusted IP address
```

Additionally, because you installed the Buddy List Administrator database on a different machine than the Sametime server, the ACL of the vuserinfo on the Sametime server will need to be modified. Because we sign the Buddy List Administrator database with the Active Server ID, the vuserinfo will need an entry for that server with rights.

Accessing the database from a Notes client not on the Domino Server

When you are using a Notes client to access the Buddy List Administrator database, if that Notes client is not on the machine that physically holds the Buddy List Administrator database, then ports need to be opened. Port 1506 must be open on the Domino Server containing the Buddy List Administrator database. Port 1506 must also be open on the machine with the Notes client you are accessing the Buddy List Administrator database from.

Create Configuration Databases from Supplied Templates

The application consists of 2 databases, both of which are supplied as Lotus Notes based templates. (Please see the previous section for information on what server to install databases on.)

The following lists the two databases and their associated template names:

Database 1: Primary database to define activities

A Lotus Notes database which maintains a list of activities, settings, and other options that may be used to update person's buddy lists

By default, this database is named: ITBuddy.nsf

It is created using the following template: ITBuddy.ntf

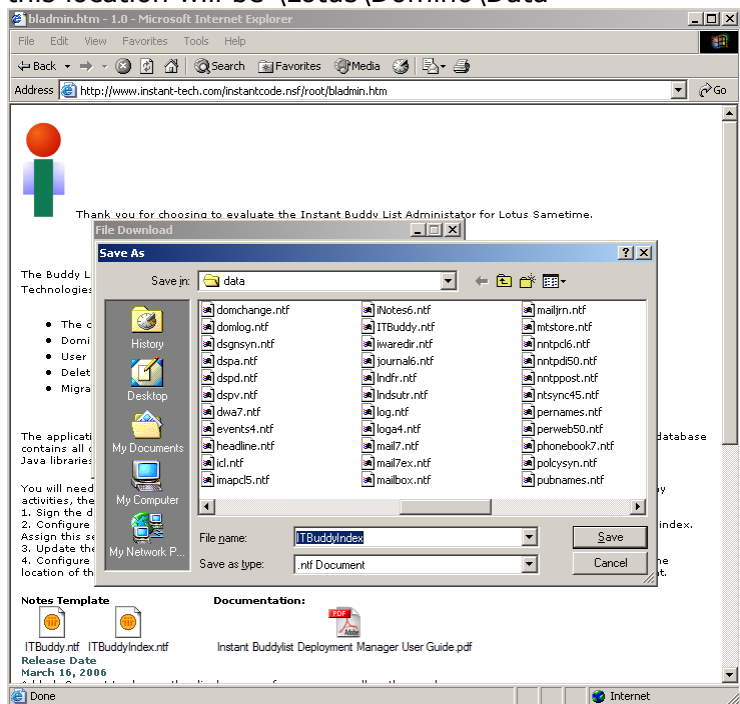
Database 2: Indexing database

A Lotus Notes database which maintains a searchable index of person's buddy lists. This index database is essentially a copy of vuserinfo.nsf with the text of the buddy list stored in a field that may be displayed and searched.

By default, this database is named: ITBuddyI.nsf

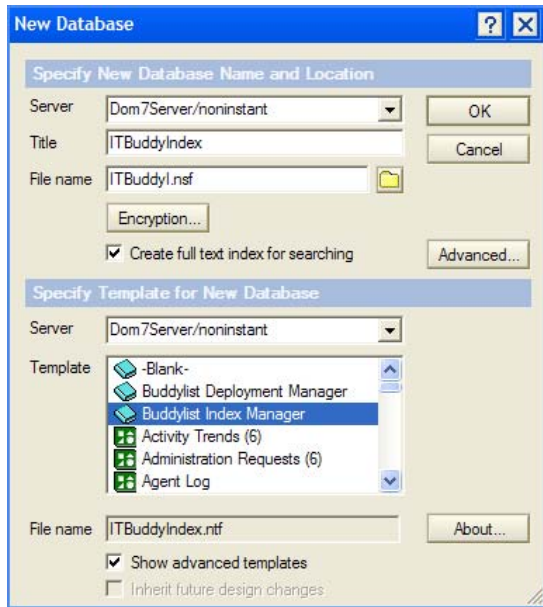
It is created using the following template: ITBuddyIndex.ntf

Save the templates to the appropriate directory on the target Sametime server. Usually, this location will be \Lotus\Domino\Data



Create the Buddy Lists Index Manager Database

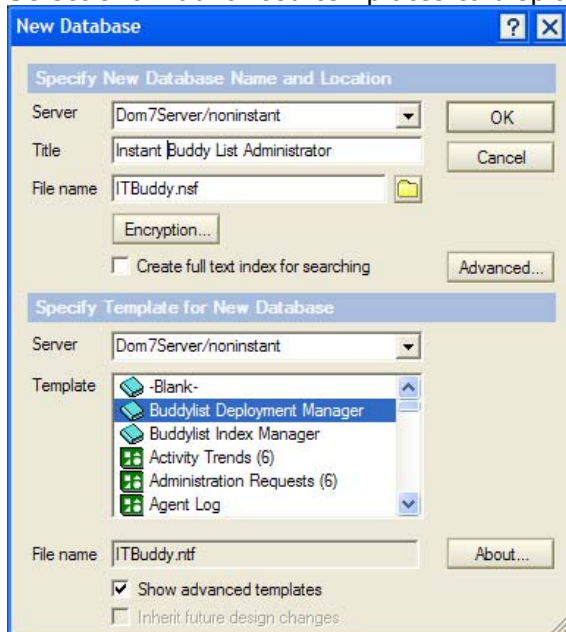
Create the database which will maintain the buddy list index. This step is performed using a Lotus Notes client. Select show advanced templates to display the 2 templates that comprise the application. Be sure to check 'Create full text index for searching'



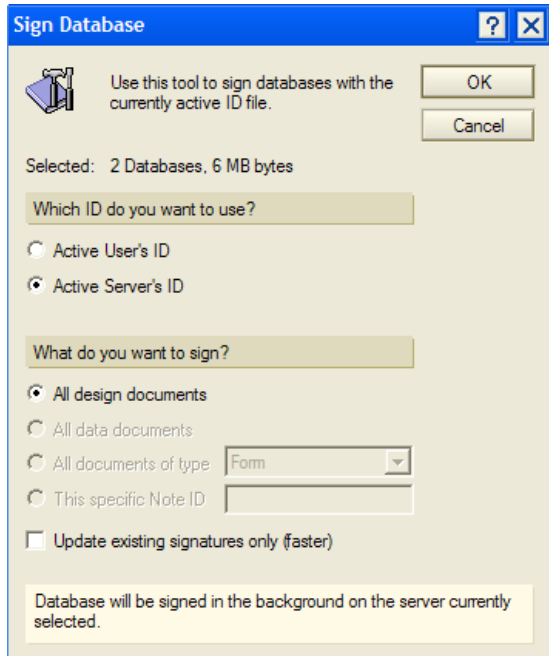
Create the Buddy List Administrator Database

Create the database which will maintain the configuration and activity settings. This step is performed using a Lotus Notes client.

Select show advanced templates to display the 2 templates that comprise the application.



Sign Both Databases with the Server ID



Update License Key

To update a license:

- Step1 – Navigate to the Setting view.
- Step2 – Click on 'Update License' in the action pane
- Step3 – Enter the License Key
- Step4 – Select UpdateLicense button to update the License.
- Step5 – License has been updated. Now you have access.

Configure the Buddy List Index Database

Prior to creating an indexed copy of the server based buddy lists, the Buddy List Index database needs information about the Sametime server (vpuserinfo.nsf) that should be queried for buddy lists.

The server configurations are accessed by navigating to the Settings view.

Create a new configuration document


Step 1 – Navigate to the settings view

Step 2 – Click on "New Configuration..." in the action pane

Step 3 – Specify the name of the Sametime server that you would like to access.



Step 4 – Select java, if you want to use java agent otherwise select Lotuscript (note, if you select Java you must have the Java servlets installed, see the section on Java Servlets in this doc for that information).

Step 5 – Complete the rest of the form and save the configuration document

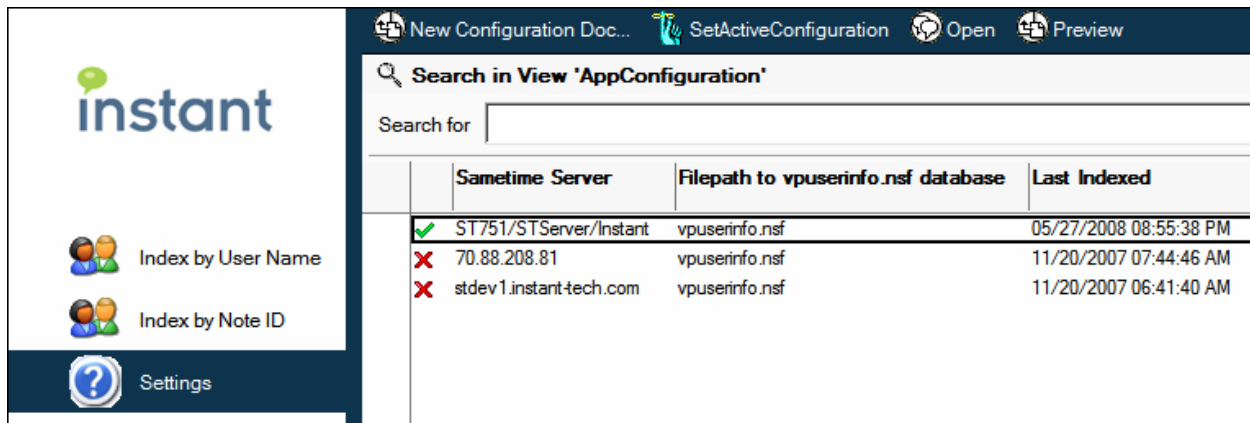
 Close

Buddy List Index Database Configuration Document

The configuration document defines the basic global settings that should be used to index a copy of a specific VPuserinfo.NSF into this database.

 Server maintaining the VPuserinfo.nsf (i.e. stdev1.instant.com)	<input type="text" value="ST751/STServer/Instant"/>
 Name and filepath to the vpuserinfo.nsf (generally this is: vpuserinfo.nsf)	<input type="text" value="vpuserinfo.nsf"/>
Date and time that the buddy list index was updated:	05/27/2008 08:55:38 PM
Use this as the active application configuration?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Type of Agent to execute for updating Index?	<input checked="" type="radio"/> Java <input type="radio"/> Lotus Script

After specifying the configuration information, the settings view should resemble the following image:

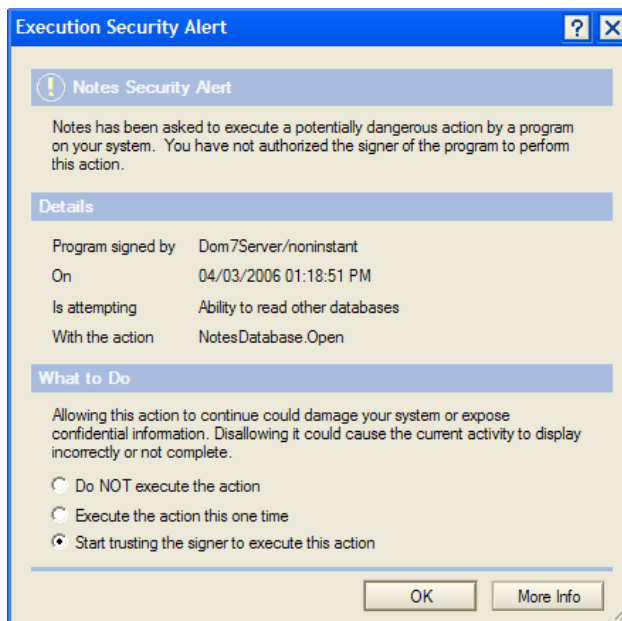


Update the Buddy List Index Database

After specifying the server and vuserinfo.nsf to index, the database is now ready to create a copy of the vuserinfo records in a searchable format.

1. Select the Index by User Name view
2. Click the Update Index button

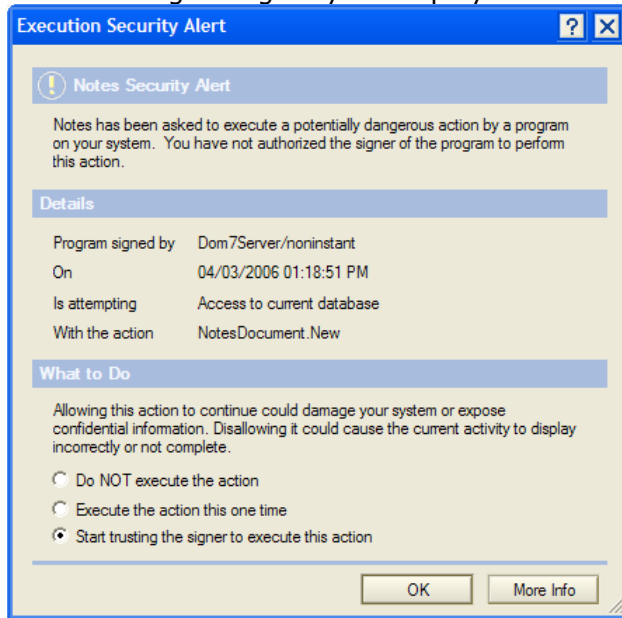
The Update Index button will invoke an agent to read the records from the specified vuserinfo.nsf and create similar entries in the Index database. You may see the following dialog issued from the Notes client.



1. Select 'Start trusting the signer to execute this action'
2. Click OK

The agent will attempt to access the specified `vpuserinfo.nsf` and then write the new records to the current database.

The following dialog may be displayed as these records are written.



1. Select 'Start trusting the signer to execute this action'
2. Click OK

Depending on the number of entries in the specified `vpuserinfo.nsf`, the agent may take several seconds, or several minutes, to complete. After the agent completes the updates, refresh the view to see a list of person entries from `vpuserinfo.nsf` who have existing server based buddy lists.

The view should now resemble:

The screenshot shows the Instant Buddy List Administrator interface. On the left is a navigation sidebar with the 'instant' logo and three menu items: 'Index by User Name', 'Index by Note ID', and 'Settings'. The main area has a top toolbar with 'Update Index', 'Update Index_Java', 'Open', 'Preview', 'Expand', and 'Collapse'. Below the toolbar is a search bar labeled 'Search in View 'BuddyIndex'' with a search input field. The main content is a table with the following columns: 'User Name', 'Index Doc Last Modified', 'VP NoteID', and 'Date Source Doc Modified'. The table contains 15 rows of user data.

User Name	Index Doc Last Modified	VP NoteID	Date Source Doc Modified
CN=Steve Adman/OU=ACME/O=Instant	05/16/2008 02:25:22 AM	982	04/25/2008 04:45:38 AM
CN=Steve Adman/OU=ACME/O=Instant	05/16/2008 02:25:34 AM	BEA	09/25/2007 08:36:44 PM
CN=Suzy Sparks/OU=ACME/O=Instant	05/16/2008 02:25:48 AM	95A	12/07/2007 08:47:39 AM
CN=Terry Braun/O=Instant	05/16/2008 02:25:55 AM	F6E	12/20/2007 08:36:36 PM
CN=Tim Fountain/OU=US/O=Instant	05/16/2008 02:26:07 AM	B5A	09/25/2007 08:36:44 PM
CN=Tim Fountain/OU=US/O=Instant	05/16/2008 02:26:11 AM	C0A	09/25/2007 08:36:44 PM
CN=Vivek Garg/OU=India/O=Instant	05/28/2008 08:44:59 AM	D46	05/28/2008 08:11:21 AM
Colgate Support	05/16/2008 02:26:25 AM	C0E	09/25/2007 08:36:44 PM
CTTest User1	05/16/2008 02:26:35 AM	DE2	05/13/2008 08:48:51 AM
CTTest User2	05/16/2008 02:26:46 AM	B96	04/25/2008 04:43:27 AM
CTTest User3	05/16/2008 02:26:50 AM	B1E	04/25/2008 04:43:24 AM
CTTest User4	05/16/2008 02:26:56 AM	AF6	04/25/2008 04:43:21 AM
CTTest User5	05/28/2008 08:45:14 AM	AF2	05/20/2008 11:52:36 PM
CTTest User6	05/16/2008 02:27:07 AM	DFA	04/25/2008 04:47:40 AM
CTTest User7	05/28/2008 08:45:18 AM	C76	05/20/2008 11:52:36 PM
CTTest User8	05/16/2008 02:27:17 AM	C62	11/21/2007 12:33:58 AM
CTTest User9	05/28/2008 08:45:23 AM	9F6	05/20/2008 11:52:36 PM

A person's entry contains their buddy list, it should resemble:

The screenshot shows a detailed view of a user's entry in the Instant Buddy List Administrator. The 'instant' logo is at the top. Below it, the user's information is displayed in a key-value format:

- User name: CN=Terry Braun/O=Instant
- Source VPUserInfo database name: vpuserinfo.nsf
- Source VPUserInfo server name: ST751/STServer/Instant
- NoteID of the vpuserinfo.nsf entry for this person - in case there are multiple entries for one person in vpuserinfo.nsf, this will enable us to index all of them: F6E
- Last modified date for this person from the record in vpuserinfo: 12/20/2007 08:36 PM

Below this information is a section titled 'Text representation of buddy list' with a magnifying glass icon. The text shows the user's name and a list of buddies:

```
G Work2 Work O
U CN=Terry;Braun/O=Instant 1:: Terry;Braun/Instant,
U CN=Peyton;McManus/OU=US/O=Instant 1:: Peyton;McManus/US/Instant,
U CN=keith;carbonneau/OU=US/O=Instant 1:: keith;carbonneau/US/Instant,
U CN=Monique;Leyda/OU=US/O=Instant 1:: Monique;Leyda/US/Instant,
U Gaurav;Dubey 1:: Gaurav;Dubey,
U PlaceLogger4011:: PlaceLogger401,
U CN=Andrew;Brousseau/OU=US/O=Instant 1:: Andrew;Brousseau/US/Instant,
U CN=Paul;Senn/OU=US/O=Instant 1:: Paul;Senn/US/Instant,
U Trish;Truitt 1:: Trish;Truitt,
```

Schedule Updates to the Index Database

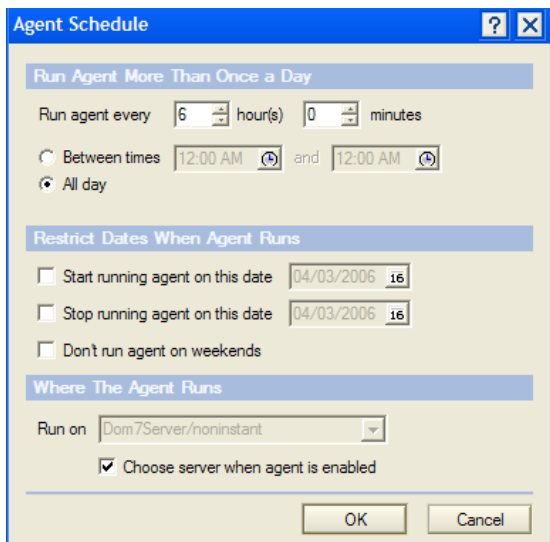
The Buddy Lists Index database may be scheduled to periodically update the index. This includes adding new people to the list of indexed users as well as updating any buddy lists that may have changed since the last index update.

The agent 'sched_UpdateIndex' is available to run as a scheduled agent. This agent will perform index updates at the scheduled interval.

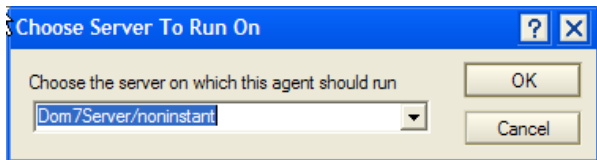
To modify the interval, select View\Agents

Name/Comment	Alias	Trigger	Private	Last Modified	Last Modified By
sched_UpdateIndex		Scheduled		04/03/2006 01:18:53 PM	Dom7Server/noninstant
SetActiveConfigurationDoc		Menu		04/03/2006 01:18:51 PM	Dom7Server/noninstant
UpdateBuddyListIndex		Menu		04/03/2006 01:18:53 PM	Dom7Server/noninstant

By default the agent is set to run every six hours. This value may be changed in the agent properties.



Select the server on which the agent should run:



Configuring Buddy List Administrator Database

Prior to configuring any updates to a collection of users, Buddy List Administrator needs information about the Sametime server that should be updated.

The Sametime server configurations are accessed by navigating to the Settings view.

Create a new configuration document:

Step 1 – Navigate to the settings view

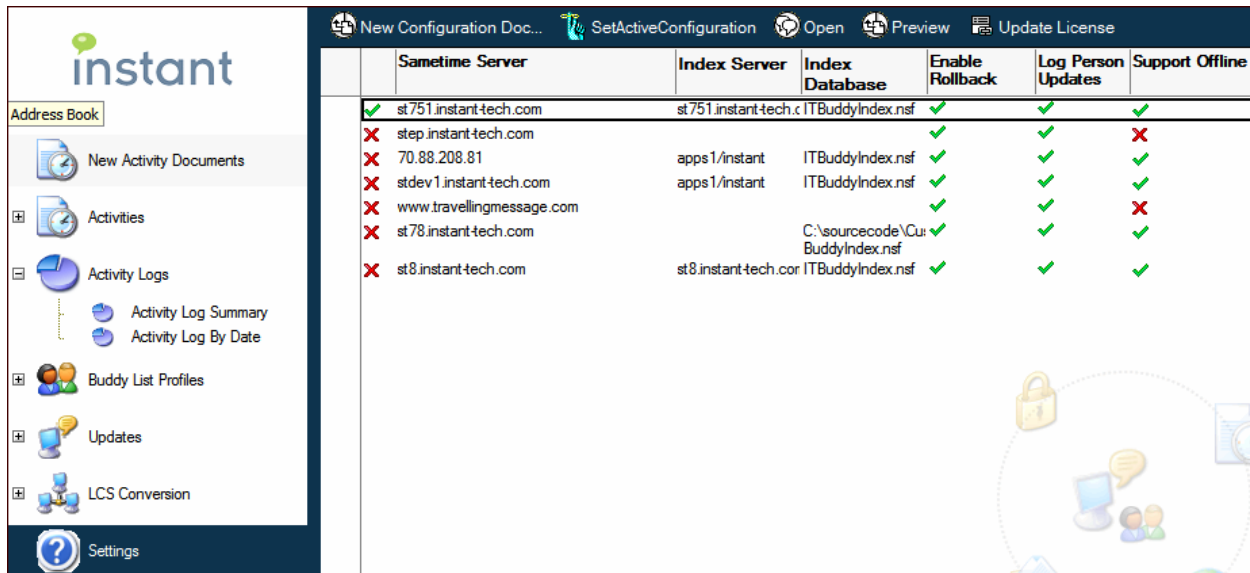
Step 2 – Click on 'New Configuration...' in the action pane

Step 3 – Specify the name of the Sametime server that you would like to access. This should be in dot form, not slash form (i.e. myserver.servercommunity.com not myserver/servercommunity)

Step 4 – Complete the rest of the form and save the configuration document

Important: To define the configuration document as the 'active configuration', you must select the document in the settings view and click 'SetActiveConfiguration' from the action pane.

Multiple configuration documents may be created. However, only one configuration document may be specified as the active configuration.



The screenshot shows the 'Settings' view in the Instant Buddy List Administrator application. The interface includes a sidebar with navigation options like 'New Activity Documents', 'Activities', 'Activity Logs', 'Buddy List Profiles', 'Updates', 'LCS Conversion', and 'Settings'. The main area displays a table of configurations with columns for 'Sametime Server', 'Index Server', 'Index Database', 'Enable Rollback', 'Log Person Updates', and 'Support Offline'. The first row is selected and marked as active with a green checkmark.

	Sametime Server	Index Server	Index Database	Enable Rollback	Log Person Updates	Support Offline
✓	st751.instant-tech.com	st751.instant-tech.c	ITBuddyIndex.nsf	✓	✓	✓
✗	step.instant-tech.com			✓	✓	✗
✗	70.88.208.81	apps1/instant	ITBuddyIndex.nsf	✓	✓	✓
✗	stdev1.instant-tech.com	apps1/instant	ITBuddyIndex.nsf	✓	✓	✓
✗	www.travellingmessage.com			✓	✓	✗
✗	st78.instant-tech.com		C:\sourcecode\Cu: BuddyIndex.nsf	✓	✓	✓
✗	st8.instant-tech.com	st8.instant-tech.cor	ITBuddyIndex.nsf	✓	✓	✓

Creating the Configuration Document


The configuration document provides the basic settings that Buddy List Administrator will use during the execution of an activity. The most important field in the configuration document is the field that is defined to specify the name of the target Sametime server.

✕ Close

Buddy List Administrator

Application Configuration Document

The configuration document defines the basic global settings that should be used when an activity is processed. The most important property is the name of the target Sametime server. The Sametime server will be accessed by the activity processing engine for all updates.



Name of your Sametime Server st751.instant-tech.com


Support offline updates.
If offline updates are enabled, then if the user is offline during a rename event, the update will take place directly against the vuserinfo.nsf

The following 2 options are only used if offline updates are enabled:
Domino server name containing the vuserinfo.nsf database
Name (and optional path) of the vuserinfo.nsf. This will generally just be: vuserinfo.nsf

For rename activities, run a pre processing step and automatically attempt to create a new user entry in vuserinfo.nsf and then force a reindex of the indexing database. This may negatively impact rename performance.

Yes
 No

Yes
 No



Use this as the active application configuration?

Type of Agent to execute for processing Activities?


Base url for the Servlet

Server maintaining indexing database

Database maintaining indexing database

Yes (is default)
 No

Java Servlet
 InLine Agent



During the updating of a user, convert the / character to a . before the name is submitted to the Sametime resolver?

Yes
 No

Field	Description
Sametime Server	Enter the name of the Lotus Sametime server that you would like to use during the update. This is the server which will be accessed during the activity. (Note this must be in dot format, not slash format)
Use this as the active configuration document	If this value is 1 (yes), then this document will be used as the active configuration document. When an activity is started, the first information that is retrieved is the active configuration document.

Field	Description
Server maintaining indexing database	The name of the server that maintains the database containing the buddy list index.
Database maintaining indexing database	The name of the database which maintains the searchable index of the buddy lists.
Support offline Updates	If offline updates are enabled, then during the rename event if the user is offline, the updates would take place directly against the vuserinfo.nsf (Note, without this option, updates can still happen to offline users. This option makes those updates faster for offline people)
Server containing vuserinfo.nsf database	The name of the server that contains the vuserinfo.nsf database. (Note, this must be in dot format, not slash format)
Name of the vuserinfo.nsf	The path of the database where vuserinfo.nsf resides.
For rename activities, run preprocessing step...	Click yes, if you want to create a new user entry in vuserinfo.nsf and then force a re index of the indexing database during rename activities. (Note, see the section on Special Activities 'Create new vuserinfo entry with Rename Activity' for more information)
Type of Agent to execute for processing activities	Specify the type of used you want to use to execute processing activities. You can either use java servlet or inline agent. See the section on installing the Java servlets for more information on this.
During updates, convert slash character to a comma	This is an internal setting used by Instant Technologies. We recommend that you leave this set as No.






Setting the Active Configuration

It may be useful to maintain several configuration documents that each supply settings for a different Sametime server. For instance, one configuration document may provide the information necessary to connect to an internal test server, while another configuration document may supply the information for the production Sametime server.

By default, one configuration must be selected as the active configuration document in order to successfully run an activity.

To set the active configuration:

1. Click on the settings view
2. Select a configuration document from the settings view
3. With the document selected, click the 'Set Active Configuration' action button in the action pane
4. A green check mark should appear next to the active configuration document

    						
	Sametime Server	Index Server	Index Database	Enable Rollback	Log Person Updates	Support Offline
✓	st751.instant-tech.com	st751.instant-tech.c	ITBuddyIndex.nsf	✓	✓	✓
✗	step.instant-tech.com			✓	✓	✗
✗	70.88.208.81	apps1/instant	ITBuddyIndex.nsf	✓	✓	✓
✗	stdev1.instant-tech.com	apps1/instant	ITBuddyIndex.nsf	✓	✓	✓
✗	www.travellingmessage.com			✓	✓	✗
✗	st78.instant-tech.com		C:\sourcecode\Cu: BuddyIndex.nsf	✓	✓	✓
✗	st8.instant-tech.com	st8.instant-tech.cor	ITBuddyIndex.nsf	✓	✓	✓

Installing the Java Servlets

The Java servlets are provided to create an alternative way to run activities. The servlets should run faster than the inline agents. You do not need to install these Java servlets, though; you can run all activities from the InLine Agent. First, you must install the servlets on your Domino server. Second, you must make the change in the active Configuration Document of the Buddy List Administrator to run the Java servlets.

Installing the servlets on the Domino server.

1. The classes contained in the Java Servlet zip file need to be placed in a new folder called 'bdmservlets' in 'domino\data\domino\servlet'
2. Next, following settings need to be added to the server servlets.properties file located in 'domino\data' directory.
servlet.bdmservlets.code=*bdmservlets.Activities*
servlet.bdmservlets.initArgs=DB_SERVER=<Server_Name>,DB_PATHS<BLA_database.nsf>,DB_PASSWORD=
Where <Server_Name> should be the name of the Domino server the BLA database is on. <BLA_database.nsf> is the name of the BLA database.
3. After specifying the settings the HTTP server needs to be restarted using the command: tell http restart

Setting Buddy List Administrator to Find the Servlets

Now you will want to set Buddy List Administrator's active Configuration Document to know where the servlets are located. Open the document for editing and select Java Servlet. Then enter the base url for the servlets as shown below.

Type of Agent to execute for processing Activities?

- Java Servlet
 InLine Agent

Base url for the Servlet

Using Buddy List Administrator

Create an Activity Document

The creation of activity documents is the basic framework around which buddy list updates will be delivered to users.

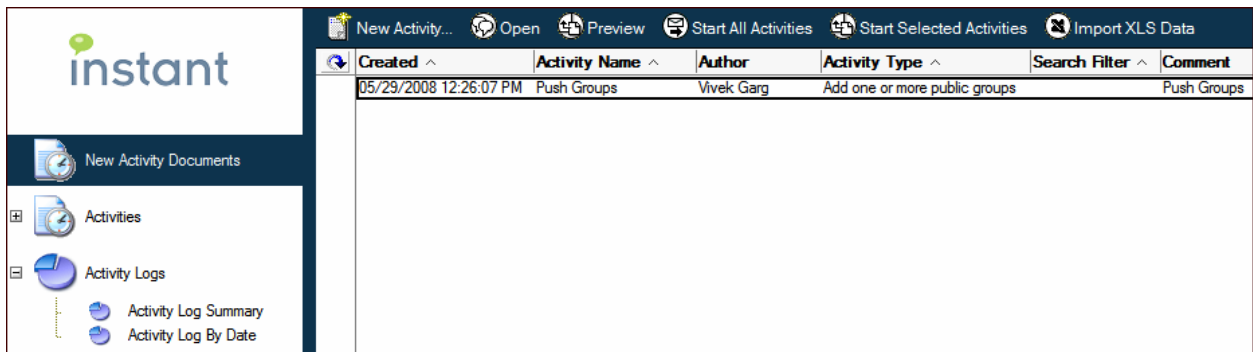
An activity document is responsible for defining 3 main components (each of these steps is outlined in the following sections):

1. The type of update that should be performed (for instance, one activity type is defined as the ability to push a public group to a user)
2. Enter specifics about the particular activity type you choose
3. Associate a list of users who will be updated when this activity is executed

After an activity document has been created, it will appear in the 'New Activity Documents' view until it is executed. Multiple activity documents may appear in this view.

To create an activity document:

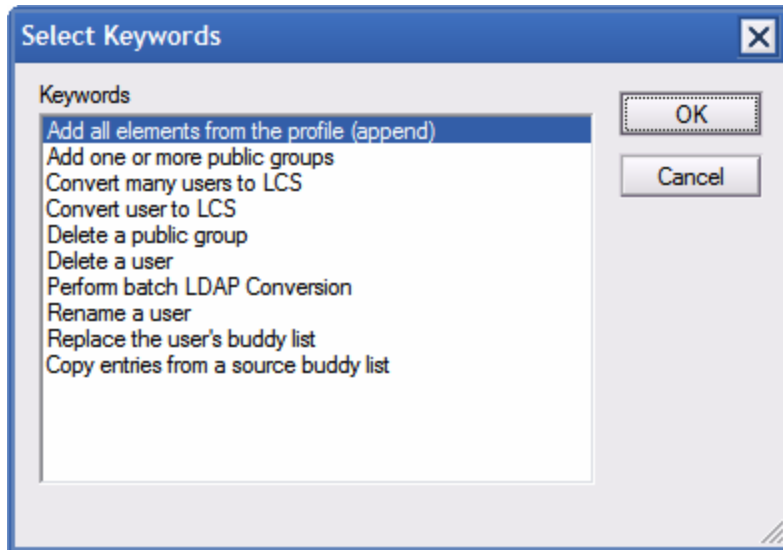
1. Navigate to the 'New Activity Documents' view
2. Select 'New Activity...' from the action bar
3. Define the activity
4. Save the activity



Batch Import of Activity Documents

It is possible to import batches of activity documents using the 'Import XLS Data' button at the top right of the New Activity Documents view. Template Excel spreadsheets are provided which can be used as a guide. The 'Examples' section of this doc describes a walkthrough of a batch import of rename activities.

Types of Activities




Activity Type	Description
Add all elements from the profile (append)	<p>Append multiple items (both public and private groups) at once from a buddy list profile document.</p> <p>For this activity, you will define a buddy list profile document. Buddy List Administrator will append all public and private groups to the buddy lists's of the target users. Private groups with the same name in the buddy list profile document and the target users buddy list will be merged</p>
Add one or more public group(s)	<p>This will add whichever public groups have been included in a buddy list profile document to the selected users.</p> <p>You will define a buddy list profile document for this activity. Buddy List Administrator will then append all public groups in that profile document to the end of the target user's buddy lists.</p>
Delete a public group	<p>This will inspect the selected user's buddy list and delete all public groups that match the public groups specified in a buddy list profile document.</p> <p>You will define a buddy list profile document for this activity. Buddy List Administrator will search the profile document for all public groups. It will then search the target user's buddy lists and delete any instance of those public groups.</p>
Delete a user	This will inspect the selected user's buddy list and delete any occurrences of the specified user from the buddy list.
Perform batch LDAP conversion	This is an activity used internally by Instant Technologies employees.
Convert users to LCS	Please see the section on LCS conversions in 'Special Activities' for more information.

Activity Type	Description
Rename a user	<p>This activity will search through target user's buddy lists and find one user and replace that name with a new name.</p> <p>There are three fields for this activity. The first field is 'Find a User', this is where you input the name of the user you would like to rename. The second field is 'Rename the user id', this is where you input the new name you want to appear in people's buddy lists. In general, in these two fields, the two names should appear as they do in the vuserinfo. See the example section of this doc for a walkthrough.</p> <p>The third field is to input a display name for the new user id. So if you don't want full canonical names displayed on people's buddy lists (i.e. CN=Steve Adman/OU=Corp/O=US) then you can enter a display name such as 'Steve Adman'.</p> <p>The next option is whether you want the user marked as internal (Sametime user) or external. In general, you will leave this as internal. See the section on LCS conversion, under Special Activities in this doc for more information.</p> <p>The final option is only if you are running the preprocess step for rename activities. See the section on Creating new Vuserinfo entries, under Special Activities in this doc for more information.</p>
Replace the user's buddy list	<p>Replace a user's entire buddy list.</p> <p>This activity will replace the target user's buddy list with the buddy list profile that you have defined.</p>
Copy entries from a source buddy list	<p>This activity is essentially the same as the activity 'Add all elements from the profile (append)' except that instead of getting the buddy list from a buddy list profile document, this activity will use an existing user's buddy list as a template.</p> <p>Buddy List Administrator will append all public and private groups to the buddy lists of the target users. Private groups with the same name in the source buddy list and the target users buddy list will be merged</p>

Selecting the Users to Affect

After choosing the activity type and specifics for that activity, you must decide who you want the activity to affect. You have two options.

Select Which Sametime Users to Modify:

 Search the buddylist index database for name (this is the default)
 Selected Users Notes Directory

Specify the custom search filter that should be used to perform a full text search on the indexing database

Preview of the list of users

The first option will search the Indexing database for users to affect. You can use the preview button (to the right of the search filter field) to see what users will be affected by this activity. This activity will do a search of the entries in the Indexer database. Any entries which are found to have the search filter in their buddy list will be selected.

This is particularly useful if you are doing a Rename activity or a Delete user activity as it will only target buddy lists that have that user. Note, the Indexer must be recently indexed so it contains the most up to date buddy lists; see the section on 'Configuring the Buddy List Indexer database.'

The second option allows you to choose specific users from the directory.

Create a Buddy List Profile Document

The buddy list profile document maintains the source text for the buddy list that may be applied during an activity.

To create a buddy list profile document:

1. Navigate to the buddy list Profiles view
2. Select the New Buddy List Profile Document... button
3. Enter an name and description for this profile
4. Specify a category to help organize this profile
5. Specify Sametime server, if specified buddy list is valid for certain Sametime server; otherwise leave it blank
6. Paste the contents of a Lotus Sametime .DAT file into the contents of the Buddy List Definition Field



Buddy List Name ^	Description ^	Category ^	Editors ^	Created ^
Sales US	Default profile for sales group	Sales	Peyton McManus	04/15/2008 09:24:43 PM
BLATest Profile for Add Public Groups	Used for the test to add public groups		Andrew Brousseau	05/16/2008 01:33:59 AM
BLATest Profile for Delete public groups	Used for the test to delete public groups		Andrew Brousseau	05/16/2008 01:33:59 AM
VG Test	VG Test	Testing Purposes	Vivek Garg	05/19/2008 11:09:53 AM
Marketing Managers		Marketing	Peyton McManus	03/04/2008 12:07:14 AM
Operations Managers		Operations	Peyton McManus	04/15/2008 09:23:42 PM
Public Group Instant Employees		Public Group	Peyton McManus	04/15/2008 10:36:54 PM
Vivek Test		Sales	Vivek Garg	04/28/2008 11:21:35 AM
Test12		Testing Purposes	Vivek Garg	05/09/2008 04:17:09 PM
Test123			Vivek Garg	05/09/2008 05:18:33 PM
BLATester1 profile			Andrew Brousseau	05/16/2008 01:33:59 AM

The contents of the Buddy list Profile document specify the basic buddy list that will be applied when this profile document is associated with a collection of users.

Three different views named as 'By Profile Name', 'By Category', and 'By Author' have been specified under Buddy list Profiles.

Special Activites

Creating New vuserinfo Entry with Rename Activities

It is possible to create new vuserinfo entries with rename activities. You may want to do this if someone in your company has a name change (this could be a change in their actual first name/last name, or in their organizational unit, or in their organization). You first changed their name in the Domino directory, but now they need a new entry in vuserinfo. And it will not matter if that person has already logged into Sametime with their new username (thus already creating a vuserinfo entry automatically albeit with a blank buddy list).

Additionally, because this preprocessing step is linked with the Rename activity, you can change buddy lists company-wide to now point to the new username (you can also choose for the rename activity to not affect anyone, thus preventing the rename activity from running, but still creating the new vuserinfo entry).

This is all accomplished by setting Buddy List Administrator to run a preprocessing step before all rename activities. The second step will be to create the rename activity.

First go into the Settings view of Buddy List Administrator and open up the active configuration document. There will be a setting that looks like this:

For rename activities, run a pre processing step and automatically attempt to create a new user entry in vuserinfo.nsf and then force a reindex of the indexing database. This may negatively impact rename performance.

Yes
 No

Select 'Yes'. (Note: However, be aware that as long as this is selected as 'Yes', the preprocessing step will be run for every Rename activity so you will want to change it back when you are done. However, there should not be any irreversable adverse affects to your vuserinfo if you leave this selected as Yes, because if the new user already has an entry in the vuserinfo then no action will be taken.)

Second, you will want to create an activity document for the rename. Create a new activity document and select 'Rename a User' as the activity type. You will then be presented with these fields to fill out:

Find this user * Generally, you should use canonical format. For example: "CN=Bill Bolts/OU=US/O=Instant"	<input type="text" value="CN=Bill Bolts/OU=US/O=Instant"/>
Rename the user id, and reassociate all references, to this user (new Sametime User ID):	<input type="text" value="CN=Bill Bolts/OU=Europe/O=Instant"/>
Optionally update the person's display name	<input type="text" value="Bill Bolts/Europe/Instant"/>

In 'Find this user' this will be the name on the person's current vuserinfo entry. For 'Rename the user id' this will be the name attached to the new vuserinfo entry; It should

also be the same as the new Domino entry you created in names.nsf. Finally, the display name field should be filled out. (This is only related to the actual Rename activity, not the preprocessing step which creates the new vuserinfo entry.)

Finally, the last step is to set this checkbox in the activity document:

Copy-append buddylist from old vuserinfo entry to the new name's entry even if new name already exists in vuserinfo Yes

**If this option is selected then you have to use 'Start All Activities' action and not 'Start Selected Activities'*

When selected, while Buddy List Administrator is doing the preprocess step, if it sees that a new vuserinfo entry has already been created for the new username, then it will copy/append the buddy list from the old vuserinfo entry to the new entry.

This is for the situation where you have created the new Domino entry for the user, and that user has logged into Sametime with their new username before you were able to run the preprocess rename activity. So without that checked, the preprocess step would see that the new vuserinfo entry is already created and would just move on, leaving the new entry with its default/blank buddy list. This can be helpful if you are creating many new Domino directory entries (see the Examples section of this doc for guidelines for how to do many preprocessing rename activities at once)

Now when you run the rename activity, the preprocess step will run first (and create the new vuserinfo entry), then the rename activity will run and change the pointer from the old name to the new name on the activities target user's buddy lists. (If you only want the new vuserinfo entry created, and you don't want anyone's buddy lists to be touched by the rename activity, then you can select for nobody to be the target of the Rename activity.)

LCS Conversions

The LCS Conversion process will help you convert and push a Sametime user to an LCS server. Also, it will point any Sametime buddy list entries of that newly converted user to the new LCS name. So everyone on Sametime will be able to see the user on LCS (if you are using a gateway).

This process uses the 'Convert a user to LCS' activity. These activities are run from a separate tool called the Buddy list Migration tool. Please contact Instant Technologies at support@instant-tech.com for more information.

LDAP Conversions

Conversions of an LDAP directory to a Domino directory are possible and vice versa. However, these are typically done by Instant Technologies staff internally. We will take your vuserinfo, run the conversion, then supply you with the updated version. We then ensure that the conversion is done properly. Please contact support@instant-tech.com for more information.

Starting an Activity

To start a selected activity, select the activity from the New Activity Documents view and then select Start Selected Activity from the action bar.

To start all activities present in New Activity Documents view, select Start All Activities button from the action bar.

After the activity completes, the documents will be removed from the New Activity Documents view and will appear in the Activities which have many different views of Completed Activities.

To inspect the status of a completed activity, use the Activity Logs view. The Activity Logs view displays summary information for each activity and provides information that may assist with understanding who was modified by each activity.

After an Activity is Completed

After an activity has run, you can look at the Activity logs for status. Alternatively, you can look at the Update section to see the status of individual users (which can also be viewed from the activity log). You can also choose to duplicate the completed activity as a new activity to run again.

Activity Logs

Activity logs provide a mechanism to view the results of a completed activity. The activity log displays information on the activity such as when the activity was executed, how many people were updated by the activity, a view containing the people updated, as well as any internal messages displayed by the application. Activity logs includes two views named as 'Activity Log Summary' and 'Activity Log By Date'.


To view and activity log:

1. Navigate to the 'Activity Logs' view
2. Select an activity log document from the view
3. Open the activity log

Activity Name ^	Date ^	Success	Fail	No Match	Searched	Duplicates	Online Attempted	Offline Attempted	Offline Updated	Offline No Match
Test Group Length Fix	Tue Apr 29 11:35:11 EI	1	0	1	1	0	1	0	0	0
Test Group Length Fix	Tue Apr 29 11:39:08 EI	1	0	1	1	0	1	0	0	0
Test Group Length Fix	Tue Apr 29 12:05:45 EI	1	0	1	1	0	1	0	0	0
Test Group Length Fix	Tue Apr 29 12:07:20 EI	1	0	1	1	0	1	0	0	0
Test Group Length Fix	Tue Apr 29 15:32:21 EI	0	1	1	1	0	1	0	0	0
Test Push Buddylist To Abtu10	Thu Apr 24 13:59:12 EI	1	0	1	1	0	1	0	0	0
Test Rename On Ablest User11	Thu Apr 24 18:03:32 EI	0	0	2	1	0	1	0	0	0
Test Sending Shroter Groupname In BI Profile	Thu Apr 24 14:22:23 EI	1	0	1	1	0	1	0	0	0
Test Sending Shroter Groupname In BI Profile	Thu Apr 24 14:26:54 EI	1	0	1	1	0	1	0	0	0
Test1	Tue Apr 29 09:04:25 IS	2	0	0	2	0	0	2	2	0
Test10	Tue Apr 29 10:04:09 IS	1	1	1	15	1	1	13	1	12
Test3	Tue Apr 29 09:04:37 IS	3	0	0	3	0	0	3	3	0
Test5	Fri May 09 13:15:57 IST	2	0	2	2	0	2	0	0	0
Test5	Tue Apr 29 09:16:49 IS	3	1	1	15	1	1	13	3	10

The activity log document displays specific information on the execution of the activity.


Summary Information
Advanced Log Output



Summary Information

Activity Name: **Test Sending Shroter Groupname In BI Profile**


Comments:
UNID of the activity document: **19668E8D409731E0852574350064CF3F**



Date and time the update started: **Thu Apr 24 14:22:23 EDT 2008**

Date and time the updated completed: **Thu Apr 24 14:22:25 EDT 2008**

Were there any critical errors:



Number of people successfully updated: **1**

Number of people who were not updated: **0**

Number of people who were returned during the initial search: **1**

Number of duplicates that were removed from the search list (generally a result of multiple vuser entries for the same person): **0**

Number of online updates that were evaluated: **1**


Online people who did not have a match when evaluated: **1**

People who were evaluated for offline updates: **0**

People who were updated in offline mode: **0**

Offline updates where a match could not be determined after inspecting the buddylist: **0**

Status of updates by person:

#	Person	Date	Status Text
108.1	 ABTest user10	04/24/2008 11:52:25 PM	OK

- The activity log document provides two main areas for inspecting the results of an activity:
1. The top portion of the document contains summary information on the activity as well as advanced output which may assist with debugging
 2. The lower portion of the activity log document contains a list of the users impacted by the activity and the status of the activity for each user

Advanced Log Output:

The internal application debug logs are available on the advanced log output tab. These internal messages may help Instant Technologies inspect the activity and understand application issues and application flow.

Summary Information:

Activity Name	The name of the activity.
Comments	Comments specific to this activity.
UNID	Reserved for future use.
Date and time	The date and time when activity was initially executed.
Number of people successfully updated	When a buddy list update is performed against a person, a return code supplied for each update. If the return code indicates that the update was successful, then this summary information will be updated
Number of people who were not updated	This indicates the number of people who failed to have a successful update. The reason for the failure will be supplied in the person's update record. The person's update record is available via the embedded view contained at the bottom of the activity log document.
UNID of the activity document	This tells the UNID of the activity document.
Number of people who were returned during the initial search	This indicates the number of people who were successfully returned during the initial search.
Number of duplicates that were removed from the search list	This tells the number of duplicates users who were successfully removed from the search list.
Number of online updates that were evaluated	This shows the number of online updates that were successfully updated.
Online people who did not have a match when evaluated	The number of people who were not having a match during evaluation.
People who were evaluated for offline updates	This indicates the number of people who were evaluated for offline updates.
People who were updated in offline mode	This shows the number of people who were successfully updated in offline mode.
Offline updates where a match could not be determined after inspecting the buddy list	This tells the number of people whose match could not be found after inspecting the whole buddy list.

Updates

An update represents the changes made to a person's buddy list during an activity update. The user log maintains a link to the activity that updated the person's buddy list as well as a copy of the person's buddy list before and after the update.

To view a user log:

1. Navigate to the Updates which contains three different views named 'All Updates by Person', 'Updates by Date' and 'Person updates grouped by activity'
2. Select a person log document from the view
3. Open the person log

Create a Duplicate Activity Document

To create a duplicate document from completed activities:

1. Navigate to Activities
2. Select any view except New Activities By Type
3. Select the activity from the completed document
4. Select Duplicate As New Activity from the action bar
5. Now you will notice a newly created activity in New Activity Documents view

Examples

Pushing a Predefined Buddy List to Users

In this example, we want to replace a user's current buddy list with a predefined buddy list. First we will need to make the buddy list profile; then we will create and run the activity.

Step 1: Create the buddy list profile.

Just like you see below, browse to Buddy List Profiles and select a view. Then click New Buddy List Profile.

The screenshot shows the Instant Buddy List Administrator interface. On the left is a navigation pane with the following items:

- New Activity Documents
- Activities
- Activity Logs
 - Activity Log Summary
 - Activity Log By Date
- Buddy List Profiles
 - By Profile Name
 - By Category (highlighted)
 - By Author
- Help

The main window displays a table of Buddy List Profiles:

Buddy List Name	Description
<ul style="list-style-type: none"> Marketing <ul style="list-style-type: none"> Marketing Managers Operations <ul style="list-style-type: none"> Operations Managers Public Group <ul style="list-style-type: none"> Public Group Instant Employees Sales <ul style="list-style-type: none"> Sales US Vivek Test Testing Purposes <ul style="list-style-type: none"> Test12 VG Test 	Default profile for sales group
(Not Categorized)	

The interface also includes a top menu bar with options: New Buddy List Profile..., Open, Edit Document, and Prev.

You will then see a screen like you see below. Fill in the profile name and the buddy list definition. You can get this buddy list definition from two different sources: One way is to export a buddy list as a .dat from a Sametime client. You then open the .dat file and copy the entire contents (even the `Version=...`). The other way is to use the Buddy List Indexing database you already created. You can browse to the person who has the desired buddy list, open their entry, and copy the contents of their buddy list.

You may wish to create a buddy list profile for different types of Sametime users and then quickly apply these settings to the different users during a deployment or periodic maintenance.

Profile Configuration Information

Profile Name:	<input type="text" value="Marketing"/>
Description	<input type="text"/>
Category	<input type="text" value=""/>
Sametime Server (if this buddy list is only valid for certain Sametime servers)	<input type="text"/>

Buddy List Definition:

Please supply a buddy list that you would like to apply when this profile is used as part of an activity. The buddy list will be applied to the selected users when the activity is executed.

To configure this buddy list use the standard Sametime Connect Client to create a buddy list and then paste the contents of the .dat file into the field below.

```
Version=3.1.3
G Work2 Work 0
U VGTTest;User1231:: VGTTest;User123,
U VGTTest;User1181:: VGTTest;User118,
U VGTTest;User111:: VGTTest;User11,
U CN=Steve;Adman/OU=ACME/O=Instant1:: CN=Steve;Adman/OU=ACME/O=Instant,
U ARTTest;User111:: ARTTest;User11
```

Step 2: Create the activity.

Go to the New Activity Documents view, and click the button on the top which says New Activity. A new window will open where you define the new activity. First give it a name. Next, select the activity type. In this case, we are using 'Replace the user's buddy list'. Next select the profile document that we created. Finally, we want to choose who are the targets of this activity. By using the second option 'Selected User Notes Directory' we can select the people who the activity will act on. In this case below, Bill, Peter, and Penny will all have their buddy lists replaced with the buddy list defined in the Marketing profile document. You then save the activity and then run it.

Activity name :	<input type="text" value="Push Marketing buddylist to Marketing"/>
Comments	<input type="text"/>
Creation Date:	<input type="text" value="06/18/2008"/>
Activity Type	<input type="text" value="Replace the user's buddy list"/>

Select the Buddy List to Apply:

Select the buddy list profile document (or template) that will be applied to the specified users.

Note: If you are adding or deleting public groups, only the public groups specified in the buddy list profile will be added or removed.

Select the buddy list profile document:

Select Which Sametime Users to Modify:

- Search the buddylist index database for name (this is the default)
- Selected Users Notes Directory

Select users from Domino Directory:

** Generally, you should use canonical format.
For example: "CN=Bill Bolts/OU=US/O=Instant"*


You can then check the Activity Log view from the main Buddy List Administrator for status on its completion. It looks like the activity was successful for two users and failed for the third. You can open the activity log to see the reason for the failure.


Activity Name	Date	Success	Fail
Ab - Test	Mon Jun 16 13:54:39 EDT 2008	0	0
Ab - Test	Mon Jun 16 13:56:27 EDT 2008	0	0
Ab - Test 2	Mon Jun 16 13:57:29 EDT 2008	0	0
Ab - Test 2	Mon Jun 16 14:04:49 EDT 2008	0	0
Append Vgtest User220	Tue Jun 17 09:14:25 IST 2008	1	0
Append Vgtest User221	Tue Jun 17 09:17:35 IST 2008	1	0
Append Vgtest User222	Tue Jun 17 09:19:40 IST 2008	1	0
06/17/2008			
Test1	Tue Jun 17 00:01:02 EDT 2008	1	0
Vgcopy	Tue Jun 17 00:30:47 EDT 2008	1	0
06/18/2008			
Ab - Test 2	Wed Jun 18 13:09:58 EDT 2008	0	0
Ab - Test 2	Wed Jun 18 13:11:45 EDT 2008	0	0
Ab - Test P Group Merge On Age	Wed Jun 18 13:14:05 EDT 2008	1	0
Push Marketing Buddylist To Mail	Wed Jun 18 16:29:17 EDT 2008	2	1

Renaming a User

In this example we will look at running a rename activity. Let's say that Bill Bolts has moved from the US office to the Europe office. His Domino and Sametime name used to be Bill Bolts/US/Instant. Now it is going to be Bill Bolts/Europe/Instant. You have already made the change in the Domino names.nsf, but the problem is everyone in your company's buddy list still points to Bill's old name (Bill Bolts/US/Instant). So we want everyone's buddy lists to point to his new name (Bill Bolts/Europe/Instant).


We will fix this with a rename activity. The first half of the activity document will look like the screenshot below. Notice two things: First, we used Bill's fully canonical name to find and replace him. This is because that is how he is represented in people's buddy lists. Second, we added a display name. This is the name which will show on the people's buddy list, and it can be anything you choose.

Basic Activity Information	
	Please provide provide the name of this activity as well as the activity type. The comment is optional.
Activity name :	<input type="text" value="Rename Bill Bolts From Us To Europe"/>
Comments	<input type="text"/>
Creation Date:	<input type="text" value="06/18/2008"/>
Activity Type	<input type="text" value="Rename a user"/>

Rename A User	
	Specify the name of the user that you would like to rename.
Find this user <i>* Generally, you should use canonical format. For example: "CN=Bill Bolts/OU=US/O=Instant"</i>	<input type="text" value="CN=Bill Bolts/OU=US/O=Instant"/>
Rename the user id, and reassociate all references, to this user (new Sametime User ID):	<input type="text" value="CN=Bill Bolts/OU=Europe/O=Instant"/>
Optionally update the person's display name	<input type="text" value="Bill Bolts/Europe/Instant"/>
Mark this user as an external user. For example, make yes if they will now exist in LCS and should be maked as external.	<input type="radio"/> Yes (External User) <input checked="" type="radio"/> No (Sametime User)
Copy-append buddylist from old vuserinfo entry to the new name's entry even if new name already exists in vuserinfo	<input type="checkbox"/> Yes

The second half of the activity document is shown in the screenshot below. If we choose the first option, the Indexer database will find all users in your company who have the name CN=Bill Bolts/OU=US/O=Instant in their buddy lists. We can then click the small button on the right to generate a preview list. These are all the people who have Bill Bolts in their buddy list, so these are the people who this activity will act on.

Select Which Sametime Users to Modify:

 Search the buddylist index database for name (this is the default)
 Selected Users Notes Directory

Specify the custom search filter that should be used to perform a full text search on the indexing database

Preview of the list of users

- Trish Truitt
- CN=Penny Pincher/OU=ACME/O=Instant
- Sunil
- Naresh
- CN=keith carbonneau/OU=US/O=Instant
- CN=Bill Bolts/OU=ACME/O=Instant

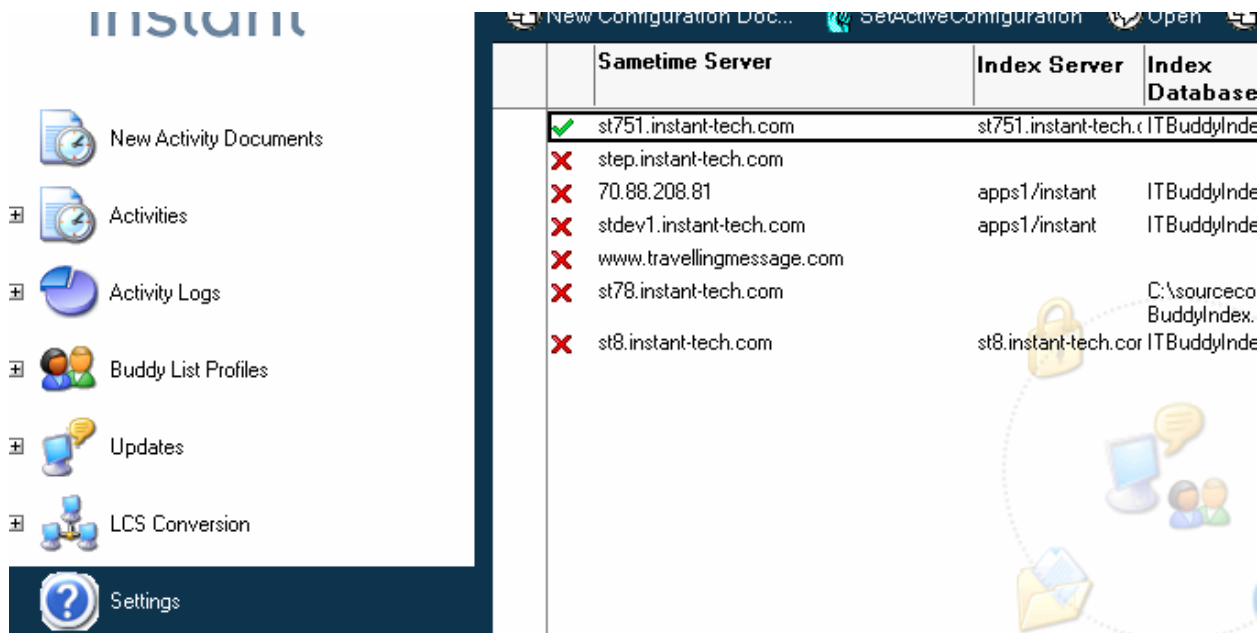
Save the activity and run it. You can view the results in the Activity Logs view of the main Buddy List Administrator.

Creating Many New vuserinfo Entries Using the Rename Activity

In this example, we are converting a number of users from an old OU to a new OU. We have made the appropriate changes in the names.nsf database so that the users can now log into Sametime using their new names. However, we have not created vuserinfo entries for them; additionally, we want those new vuserinfo entries to contain their old buddy lists.

As well, this will make changes to all buddy lists in the company that reference the old username. It will change the old username in all buddy lists to the new username so that everyone in the company will now see the users with their new OU.

To do this, we will use an Excel spreadsheet to import the activity documents. But first, we must change a setting. Select the settings view from the main Buddy List Administrator. Then select and open the active Configuration Document (the one with the green check is the active one).



In it you will find the setting below. Change it to Yes and save the Configuration Document. This setting causes Buddy List Administrator to run a preprocessing step which creates the new vuserinfo entry. This is done before all rename activities are run. Note: When you are done with your OU conversion, it is advisable to set this back to No.

For rename activities, run a pre processing step and automatically attempt to create a new user entry in vuserinfo.nsf and then force a reindex of the indexing database. This may negatively impact rename performance.

Yes
 No

We next want to create the Excel spreadsheet which contains the information for creating the activities. The screenshot below shows the format. The Excel templates provided can be used to enter this information.

One thing to notice is the column Mapping_CopyAppend_OldBuddy list. This column maps to a field in the activity document. This particular field gives you this option: If the user has already logged into Sametime under their new username (i.e. Bill Bolts/Europe/Instant), then Sametime automatically creates a new vuserinfo entry for them. By selecting Yes for this option, though, Buddy List Administrator will copy the buddy list from the old vuserinfo entry and put it in the new.

	A	B	C	D	E	F	G
1	Form	Mapping_ SelectedT emplate	mapping_ ActivityTy pe	mapping_ userType Selection	mapping_Documen tName	mapping_Acti vityAsString	Mapping_CopyApp end_OldBuddylist
2	ConversionMapping		6	6	June 08 Batch rename	Rename a user	Yes
3	ConversionMapping		6	6	June 08 Batch rename	Rename a user	Yes
4	ConversionMapping		6	6	June 08 Batch rename	Rename a user	Yes
5	ConversionMapping		6	6	June 08 Batch rename	Rename a user	Yes

H	I	J
Mapping_rename_OldName	Mapping_rename_NewName	Mapping_SearchFilter_Cust
CN=Bill Bolts/OU=US/O=Instant	CN=Bill Bolts/OU=Europe/O=Instant	CN=Bill Bolts/OU=US/O=Instant
CN=Penny Pincher/OU=US/O=Instant	CN=Penny Pincher/OU=Europe/O=Inst	CN=Penny Pincher/OU=US/O=In
CN=Peter Packer/OU=US/O=Instant	CN=Peter Packer/OU=Europe/O=Instar	CN=Peter Packer/OU=US/O=Inst
CN=Sarah L/OU=US/O=Instant	CN=Sarah L/OU=Europe/O=Instant	CN=Sarah L/OU=US/O=Instant

Import the Excel spreadsheet and run the activities. Afterwards, be sure to set the preprocessing option back to No in Buddy List Administrator’s active Configuration Document.

So what have we accomplished? The vuserinfo will now contain entries for the 4 new names with OU=Europe. Those entries will contain the buddy lists from their OU=US vuserinfo entry. Additionally, anyone in the company whose buddy list used to reference the OU=US name will now reference the OU=Europe name.

Storing and Deploying Backups of Sametime Buddy Lists

It is possible to create a backup of the Sametime buddy lists contained in your vuserinfo. One way is to make a copy of the vuserinfo. However, if you would like to be able to re-deploy those backups with Buddy list Administrator into your active vuserinfo, then you will want to make a backup using the Indexer database.

Basically, the process is that you create an Indexer database from the supplied template. You then configure it to look at the vuserinfo you wish to backup. After that, you click the Update Index button in the Indexer to retrieve the latest copies of everyone's buddy lists. Now the Indexer database contains a copy of the buddy lists. You will want to disable the agent in the Indexer which is scheduled to update the Indexer every six hours (see the section in this doc about configuring Indexing database). Also, you will not want this Indexer database to be the one referenced by the main Buddy list Administrator database; so you will want to create and configure a new Indexer database for that purpose.

Now, if you want to apply a buddy list saved in this backup Indexer database here is what you need to do:

First, you will have to create a Buddy List Profile document (see the above sections on this) for the user you would like to restore their buddy list for. When creating the profile document, you will copy the buddy list from the person's entry in the Indexer database and paste it into the profile document.

Now, you will create an activity to Replace the Users buddy list. You will select the buddy list profile you just created. You will then select for this activity to only affect that one user. Then run the activity, and their buddy list will be restored.

FAQ

Question: When I try to run an activity, I see in the Activity Logs that I cannot log into Sametime.

Answer: Generally, there are two possible issues causing this. The first, is that in Buddy List Administrator Settings, the Sametime server name you defined in the active Configuration Document is in the slash format rather than the dot format. It should be listed as myserver.mycompany.com NOT myserver/mycompany.

The second, is that you are accessing the Buddy List Administrator database from a Notes client which is not on the Domino server. If this is your situation, you need to have port 1506 open on both the Domino server and the machine running the Notes client (see the first section of this doc for more information).