

Database Attender®

Version 6.4x

White Paper



S H E R P A
S O F T W A R E

Database Attender is a member of the Attender Utilities family

Copyright

Under the copyright laws, neither the documentation nor the software can be copied, photocopied, reproduced, translated, or reduced to any electronic medium of machine-readable form, in whole or in part, without the written consent of SHERPA SOFTWARE GROUP, INC.

Copyright 2000-2007 Sherpa Software Group, Inc.

All rights reserved. Printed in the United States.

Database Attender is a registered trademark, and Attender Utilities is a trademark of Sherpa Software Group, Inc.

cc:Mail, Domino, Lotus, Lotus Notes and LotusScript are either trademarks or registered trademarks of the Lotus Development Corporation.

Microsoft, Microsoft Exchange and Exchange are either trademarks or registered trademarks of the Microsoft Corporation.

- 1. Introduction..... 1-1**
- 2. Benefits 2-1**
 - Reduce your exposure.....2-1
 - Return on investment.....2-2
- 3. Product summary..... 3-1**
 - Release information/schedule.....3-2
 - Supported versions/platforms3-3
 - Server impact.....3-4
 - Frequently asked questions3-5
 - Architecture.....3-5
 - What version of Domino must my servers be running?3-5
 - What files are placed on my Domino server?3-5
 - How does Database Attender work?.....3-5
 - Does Database Attender update the Public Name and Address Book?.....3-5
 - Does Database Attender update my server notes.ini?.....3-5
 - How does Database Attender work with clustered servers?.....3-5
 - Does Database Attender work on partitioned servers?.....3-5
 - How many versions of Database Attender do I need if my servers/users have different platforms? ...3-5
 - Permissions.....3-5
 - What access does Database Attender require to the mail databases?3-5
 - Whose permissions is Database Attender using to access the mail databases?3-5
 - Can I sign the Database Attender agent with my server ID?3-5
 - Migration3-5
 - What must I do when I migrate my servers' operating systems?.....3-5
 - Installation.....3-6
 - How do I install Database Attender?.....3-6
 - Do I need to physically visit every server?3-6
 - Do I need to bring my server down/up after installing Database Attender?.....3-6
 - How do I uninstall Database Attender?.....3-6
 - Upgrade3-6
 - How do I upgrade Database Attender?3-6
 - Must I upgrade every server (replica) of Database Attender?3-6
 - What happens to the Database Attender data when I upgrade?3-6
 - Will I need to re-sign the agents after upgrading?3-6
 - What must I do to 'activate' the evaluation version?.....3-6
 - Do I lose my evaluation configuration data when I upgrade?3-6
 - Configuration.....3-6
 - Can I centrally administer Database Attender?.....3-6
- 4. Product features 4-1**
 - ACL Management.....4-2
 - ACL Alerts.....4-2
 - Example4-2
 - ACL Changes.....4-3

ACL Properties.....4-3

Design Audit & Agent Monitoring4-4

 Example4-4

Names Management.....4-5

 Example4-5

Properties & Usage.....4-6

 Example4-6

Document Retention & Archiving4-7

 Example4-7

Reporting4-8

5. Summary5-1

6. Contact information6-1

1. Introduction

Database Attender is a Domino-based database management product that manages a variety of database issues, including ACL, design, properties and content management.

The administrator can easily configure Database Attender to manage as little or as much of the functionality that Database Attender offers. Since Database Attender has a wide spectrum of features, the administrator can decide to only leverage a subset of the functionality by simply creating Database Restrictions that are either applicable to only a subset of functionality and/or a subset of databases to be managed.

One of more compelling features that Database Attender offers is to address compliance issues within your Domino databases. There is no doubt that in an environment of increasing compliance regulations such as Sarbanes Oxley, maintaining an effective and consistent document retention policy is absolutely essential. However, the reasons for archiving data go beyond reducing potential legal exposure. Applications themselves may be current, but the documents within them may be out of date and may not need to be immediately available. Huge production applications can experience poor performance, require increased hardware capacity, and necessitate extensive backup/recovery times.

2. Benefits

Reduce your exposure

In organizations with widespread, unrestricted database development, managing the Notes infrastructure is becoming more and more complex each day. Database Attender automates many facets of Notes Administration that are often overlooked because of more pressing issues or time and budget constraints. Database Attender routinely scans for exception conditions, including:

- Users granted inappropriate or inadequate access to database design or content
- Unauthorized changes in database Access Control Lists
- Applications accessible by Invalid or Terminated Users
- Databases no longer accessed that are potential candidates for removal
- Database agents scheduled by inappropriate personnel
- Applications larger than a specified physical size or experiencing unusual growth
- Applications exceeding a maximum document threshold
- Documents containing sensitive or business inappropriate content

By providing a single, centralized place from which to oversee the Notes infrastructure, Database Attender streamlines the administration process, thereby reducing total cost of ownership.

Return on investment

Even across small organizations, Database Attender reduces unacceptable amounts of wasted man hours spent resolving issues that would have been entirely preventable had the proper policies – along with the tools to enforce them - been in place. Benefits include:

- Reducing legal exposure by managing database content and document retention
- Minimizing hardware expenditures
- Reducing exposure by identifying potential lapses in database or document security
- Refocusing administrators work load for more efficient personnel usage

While qualitative savings realized through the deployment of Database Attender will vary from organization to organization, the benefits of establishing full control over the Notes environment are quite tangible and provide extensive savings quickly realized beyond the initial investment.

3. Product summary

Database Attender enforces database infrastructure policy through the enforcement of rules, or Database Restrictions, configurable by your organization's Lotus Notes Administrators. Restrictions can be applied to all databases, a subset, or a single database. A scheduled agent periodically examines your Notes infrastructure, gathering summary information about each database, and determining which Restrictions need to be applied. To allow for maximum flexibility, Database Restrictions are categorized into five aspects of database management:

- ACL Management
- Design Audit & Agent Monitoring
- Document Security
- Properties & Usage
- Document Retention & Archival

The advantage of this methodology is that, once set in place, Database Restrictions are constantly monitored and enforced, regardless of any actions or changes made by users. Multiple Restrictions of each type can be created, depending upon the requirements and complexity of your organization.

Release information/schedule

The first release of Database Attender was in June 2000. The initial version of the product mostly contained the ability to manage ACLs.

A new version of Database Attender is released at least annually. Each version will contain new features and address confirmed issues. In addition, interim quarterly versions of Database Attender will address confirmed issues that require immediate updates.

Supported versions/platforms

Database Attender 6.4x leverages the functionality found within Domino 6.x, 7.x and 8.x. This means that Database Attender 6.4x will function on Domino 6.x/7.x/8.x servers, but is not supported on Domino 4.x and Domino 5.x servers. Within the release of Database Attender 6.4x, the version of Database Attender will always reflect the minimum version of Domino that can support it.

Database Attender has been successfully tested on all Domino platforms. Since Database Attender is written in LotusScript, it is platform-independent. There is only one Database Attender code-stream, meaning that a platform-specific Database Attender does not need to be installed. This means that if a server's and/or user's platform is changed, the version of Database Attender that resided on the server prior to the platform change can also be used on the new platform, regardless of what it is.

Server impact

By design, Database Attender is very non-intrusive to your Lotus Notes infrastructure. Server I/O is dependent on the processes being performed, each of which can be scheduled independently to further minimize server impact. The ACL and Design processes can cause Database Attender to perform checks against the Name and Address Book, which can result in some I/O activity, but nothing of major significance. Other than intensive Content searches, there are no processes within Database Attender that should be avoided due to server impact. The only impact of scheduling multiple Database Attender processes will be that the Database Attender agent takes longer to execute.

Frequently asked questions

Architecture

What version of Domino must my servers be running?

Database Attender requires that your servers are running 6.x, 7.x or 8.x.

What files are placed on my Domino server?

Database Attender is self-contained within a Lotus Notes database. There are no other files to be placed on the servers.

How does Database Attender work?

Database Attender uses scheduled LotusScript agents to perform all of the server/user processing.

Does Database Attender update the Public Name and Address Book?

No. All Name and Address Book accesses are references (read) only.

Does Database Attender update my server notes.ini?

No. There are no .ini settings required.

How does Database Attender work with clustered servers?

Clustering does not affect Database Attender. The home server's agent processes each mail database.

Does Database Attender work on partitioned servers?

Yes. Partitioning has no affect on Database Attender.

How many versions of Database Attender do I need if my servers/users have different platforms?

One. There are no platform-specific versions of Database Attender.

Permissions

What access does Database Attender require to the mail databases?

Database Attender requires 'Manager' access.

Whose permissions is Database Attender using to access the mail databases?

Whatever ID (Server/user) signed the Database Attender agent, is the ID being used to process the mail databases.

Can I sign the Database Attender agent with my server ID?

Yes. This is a very common practice. Some companies also choose to use a 'generic' administration ID to sign the agents.

Migration

What must I do when I migrate my servers' operating systems?

Nothing. There is only one code-stream for Database Attender.

Installation

How do I install Database Attender?

An installation database is provided that will perform all of the installation steps.

Do I need to physically visit every server?

No. All server installations can be performed from your Lotus Notes client.

Do I need to bring my server down/up after installing Database Attender?

No. This is not required or needed.

How do I uninstall Database Attender?

Simply delete the Database Attender databases and the product is uninstalled.

Upgrade

How do I upgrade Database Attender?

Within the installation database there is an upgrade procedure that will guide you through the upgrade steps.

Must I upgrade every server (replica) of Database Attender?

No. The upgrade only needs to be performed on one server, providing that the Database Attender database can properly replicate to all other replicas.

What happens to the Database Attender data when I upgrade?

Nothing. All of the data remains intact.

Will I need to re-sign the agents after upgrading?

No. When the Database Attender agents were originally created, they were protected so that design refresh/replace would not affect them.

What must I do to 'activate' the evaluation version?

If you were using an evaluation version of Database Attender and have purchased the product, you would be provided with a key to 'activate' the license.

Do I lose my evaluation configuration data when I upgrade?

No. All of the data remains intact.

Configuration

Can I centrally administer Database Attender?

Yes, providing that Database Attender is properly replicating to all servers that contain a replica.

4. Product features

Within Database Attender, administrators create Database Restrictions for the databases that they want to manage. When the server agent runs, the databases will be updated according to the Database Restriction configuration specified.

The administrators can specify that certain restrictions are only applicable to a subset of databases, via folder/database specification. The same can also be done at the server level. Or, the administrators can create a global restriction for all databases.

ACL Management

Database Attender has three methods for managing database ACL's.

ACL Alerts

The ACL Alerts type examines the ACL of the database being processed for three possible conditions. The first option is to look for any changes that have been made to the ACL since the last agent execution. Additional options look for the presence of Invalid Entries or Terminated Users, with an option to have them automatically removed. If any of these conditions are met, an email alert is sent to the administrator.

Example

DATABASE RESTRICTION

Navigation: Basics | **ACL** | Options | Servers | Databases | Chronology

Type: Alerts | Changes | Properties

Options: Recurring | Duplication | Replacement

Maintain current settings for existing ACL entries

Buttons: [Add](#) | [Modify](#) | [Remove](#)

Entry name	Type	Access	C	D	P	P	S	C	R	W	R
			D	D	A	F	V	A	A	P	C
-Default-	Person Group	Manager	X		X	X	X	X	X	X	X
ACME Administrators	Person Group	Remove									
ACME Employees	Person Group	Reader							X		
LocalDomainServers	Unspecified	No Access									
OtherDomainServers	Server Group	Manager	X		X	X	X	X	X	X	X

This ACL 'Changes' Restriction will ensure that the specified ACL entries are present within the specified databases, and that the access level and rights are also correct.

ACL Changes

The ACL Changes type allows administrators to specify entries that should always be present within the Access Control List, including their user type, access level, rights and roles. This process can also be used to remove entries from the database(s) being processed. Since this Restriction is applied every time Database Attender executes, it searches for, and if necessary reapplies, the appropriate settings regardless of any unauthorized changes that may have been made since its prior execution. This Restriction type also allows ACL entries to be duplicated or replaced across ACL's. This is useful for making global changes when new employees are hired or when individuals' job duties change.

ACL Properties

The ACL Properties type allows administrators to manage additional properties of the database(s), including defining the Administration Server, setting the maximum Internet Access Level, and specifying Uniform ACL.

Design Audit & Agent Monitoring

Database Attender provides the ability to manage the Design elements within your applications. This can be very beneficial when needing to locate potential problems, and to correct current ones. Database Attender can perform many functions with one Design Restriction. For instance, in the example below, the Design Restriction has been configured to manage the design element template inheritance, remove all refresh/replace protection and alert the administrators regarding invalid agents and incorrect folder/form/view security. This effort would be nearly impossible to do manually, but Database Attender can do it easily and quickly. Another potential use of the Design Restriction would be to help identify all databases that contain scheduled agents, or identify all agents that have run within on a given date.

Example

Design elements

- Agents
- Applets
- Folders
- Forms
- Framesets
- Images
- Navigators
- Outlines
- Pages
- Script Libraries
- Shared Fields
- Subforms
- Views
- Remove refresh/replace protection
- Template inheritance

Options

- Alerts
- Disable scheduled agents

Alerts

- Invalid Owners
- Invalid Servers

Options

- All
- Exclude
- Include

This Design Restriction will manage every aspect of the database design.

Names Management

Database Attender provides a mechanism for policing Readers, Authors, and Names fields, identifying and optionally deleting Invalid Entries or Terminated Users. Entries can be added, duplicated, or replaced across these field types as well.

Example

Field types Authors Names Readers

Method Add/duplicate/replace names Invalid/terminated users

Invalid/terminated users

Invalid entries Ignore Identify Remove

Terminated users Ignore Identify Remove

Method All Exclude Include

Options Do not process \$UpdatedBy fields

This Names Restriction will identify any Invalid Entries or Terminated Users listed in Readers, Authors, or Names fields.

Properties & Usage

Database Attender provides a very comprehensive methodology for managing specific properties of the databases. These properties include, but are not limited to, replication/save conflicts existence, document count growth/thresholds, full-text index existence, last access date, percent used thresholds, quota thresholds, replication settings, database size growth/thresholds and template inheritance. This will allow the administrators to create a Properties Restriction that will alert them when any of these conditions occur. For instance, if 'Conflicts' is selected as an option, the administrators will be alerted regarding any database that contains at least one replication/save conflict. The Properties Restriction can even be configured to provide information regarding databases that are idle and may be candidates for deletion.

Example

DATABASE RESTRICTION

Basics | Properties | Options | Servers | Databases | Chronology

Properties

- Advanced
- Full-text index
- Quota
- Template
- Conflicts
- Last access
- Replication
- Documents
- Percent used
- Size

Advanced | Documents | Last access | Percent used | Quota | Replication | Size

Options

- Growth
- Threshold

Growth | Threshold

Options

- Daily
- Weekly
- Monthly
- Yearly

Daily | Weekly | Monthly | Yearly

Decrease % 20.00

Increase % 20.00

This Properties Restriction will manage every aspect of the database properties.

Document Retention & Archiving

Database Attender can be used to enforce Document Retention policies, by identifying, deleting, or archiving documents based on their creation, last modified, or last accessed date. Document selection can be further refined by view, the size of the database they reside in or who the documents' last modifier was. A Document Archive Definition document allows for the creation of archive database templates, which define the location of characteristic of the archive databases. Database Attender can create archives as required.

Example



Basics	Retention	Options	Servers	Databases	Chronology
Selection	<input type="radio"/> All databases <input checked="" type="radio"/> Databases exceeding size limit				
Size limit	<input type="text" value="20"/> mb				
Action	<input type="radio"/> Analyze <input checked="" type="radio"/> Archive <input type="radio"/> Delete				
Definition	<input type="text" value="Monthly"/>				
Retention method	<input type="radio"/> Creation <input type="radio"/> Last access <input checked="" type="radio"/> Modification				
Retention type	<input checked="" type="radio"/> # of Days <input type="radio"/> Date range				
Document retention	<input type="text" value="90"/> days				
Ignore documents before	<input type="text" value="16"/>				
Document selection	<input checked="" type="radio"/> All documents <input type="radio"/> Specific view				
Updated by	<input checked="" type="radio"/> Anyone <input type="radio"/> Specified user				
Response inclusion	<input checked="" type="checkbox"/> Delete/archive all responses regardless of age				
Content	<input type="checkbox"/> Refine by content				

The Retention Restriction affords a variety of criteria for selecting documents for archival or deletion.

Reporting

In addition to the numerous views within Database Attender, which sort databases by almost every conceivable characteristic, Database Attender also allows for customizable reporting. A separate Notes database, Database Attender Reporter, works in conjunction with Database Attender to provide the user with the ability to create customized reports displaying database information in almost any means imaginable.

5. Summary

Database Attender is a product that can help reduce your exposure today. Legal implications regarding content can be a serious problem within any company. Regardless of what database content is concerning you, Database Attender can address your issues!

6. Contact information

If you need additional information regarding Database Attender, please contact the following:

Sales contact

Theresa Zajacs

800-255-5155 x208

412-206-0005 x208

412-206-0018 (FAX)

tzajacs@sherpasoftware.com

Technical contact

Jeff Tujetsch

800-255-5155 x206

412-206-0005 x206

412-206-0018 (FAX)

jtujetsch@sherpasoftware.com