Installing the Document Properties Plugin
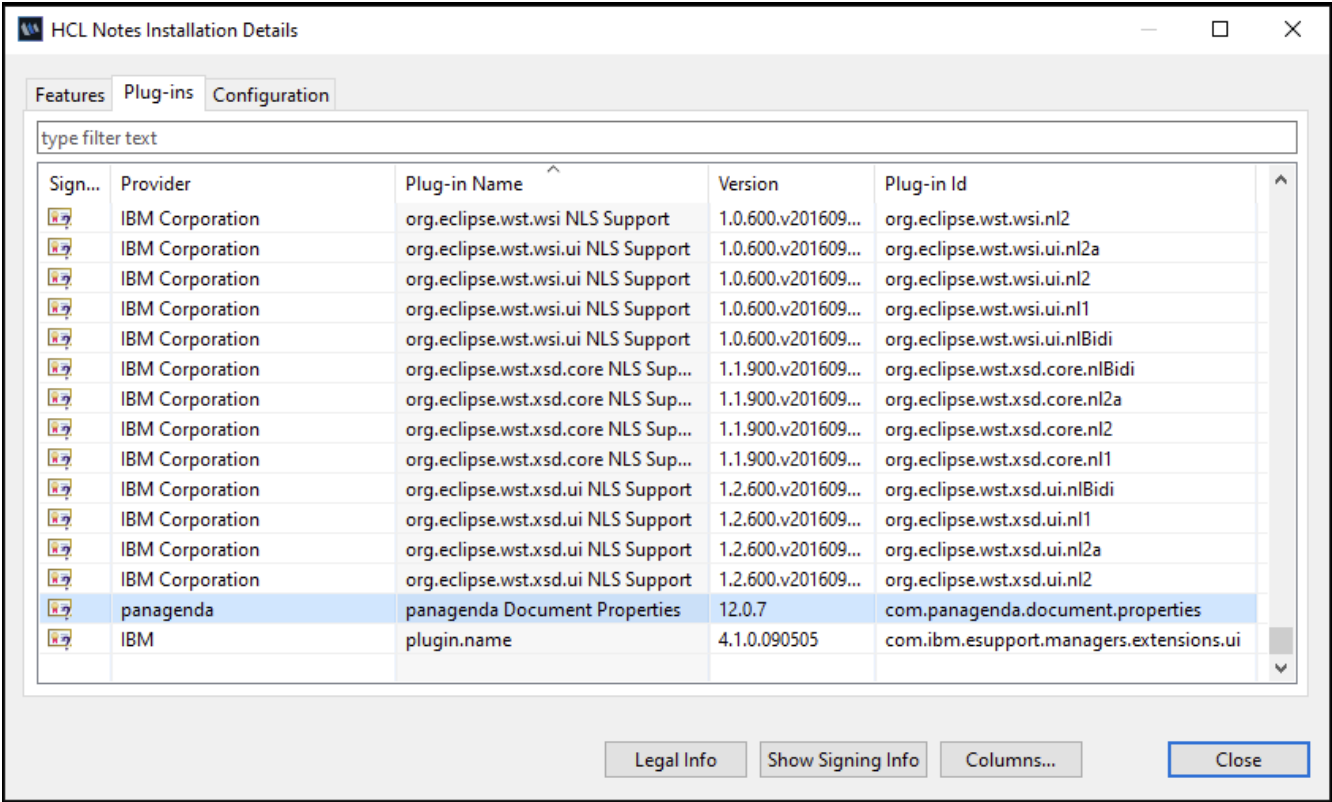
After you've downloaded the Document Properties Installer plugin, there are three different options for installing it on your Notes client.

How do I know if this plugin is already installed?

Choose the top-level menu item **Help - About HCL Notes** (or HCL Notes - About HCL Notes on Mac), and from the help dialog click the **Installation Details** button. From here, you can go to the **Plug-ins** tab. If the plugin is installed, it will be listed as "panagenda Document Properties" – if you don't want to scroll through the entire list of plugins, you can type "panagenda" in the "type filter text" box to search. This is also the easiest way to determine which version of the plugin you have.

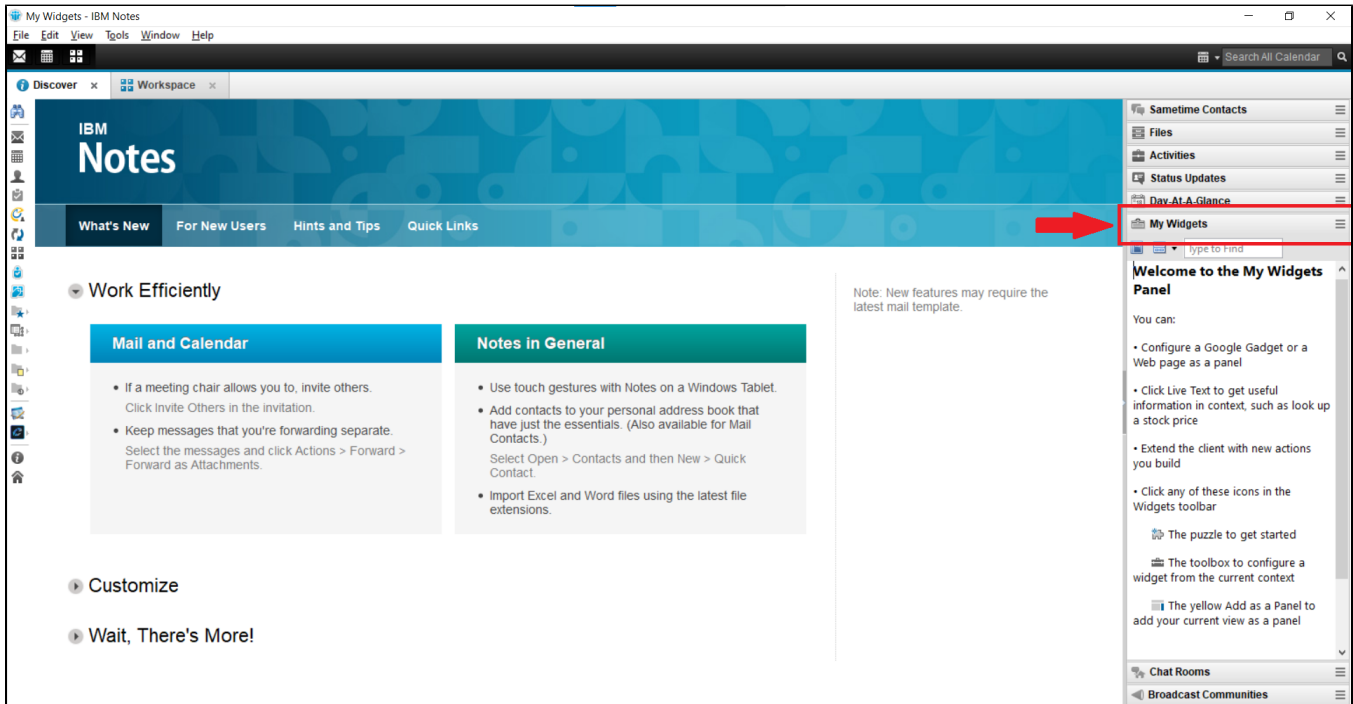## For End Users

> **(i) NOTE**
>
> These instructions work for new installations as well as updates (i.e. installing a new version over an older version). An update will replace the old version with a new one. However, you will need to restart your Notes client after the update.
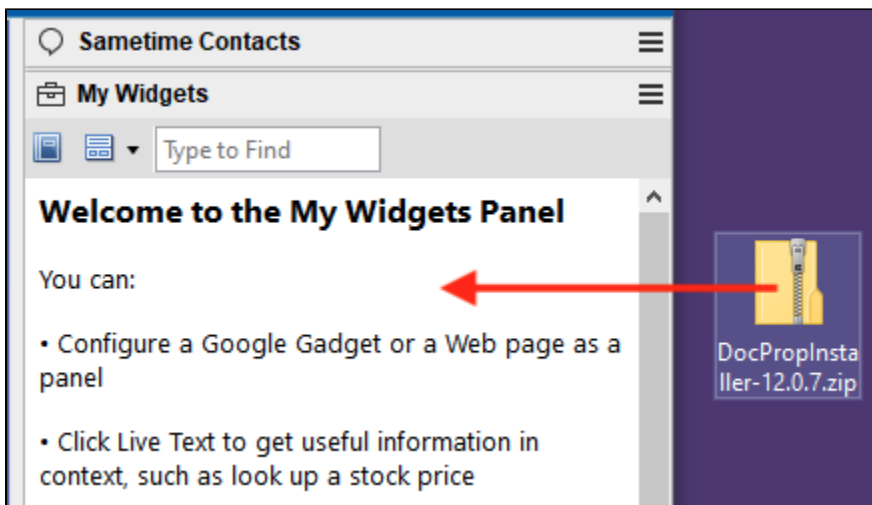
Installing and Updating

As an end user, if you're installing/updating the plugin for testing, or just for one or two users, you can just drag and drop the zip file to the **My Widgets** panel in your Notes client.

First, **copy the Document Properties Installer zip file to your desktop**. Some people have had problems installing when dragging-and-dropping from a network share or a folder with non-ASCII characters. Installing from the desktop folder can help avoid such problems.

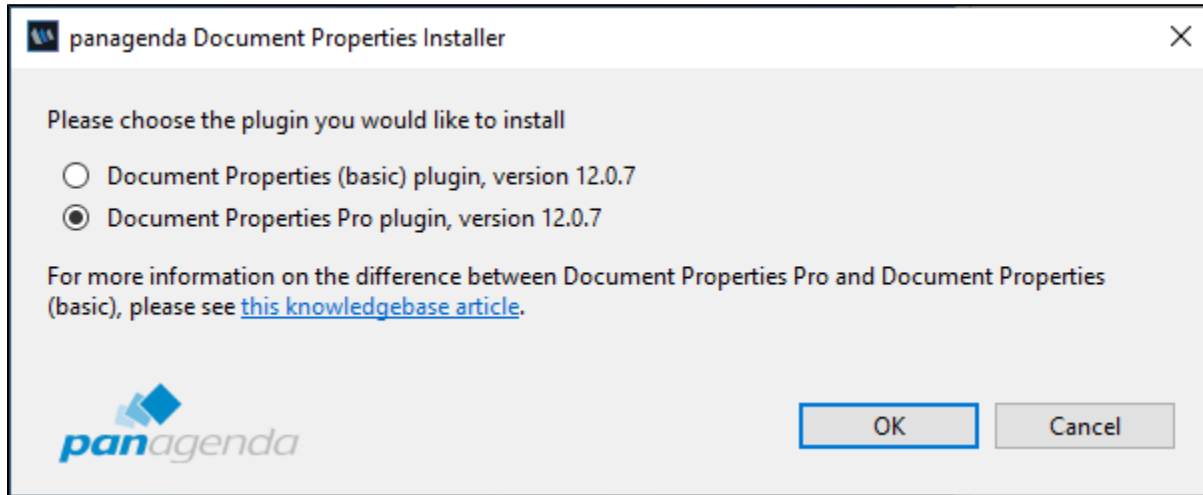On the right-hand sidebar of your Notes client, you will see an icon for **My Widgets**:

Click this icon to make the **My Widgets** panel visible, then drag-and-drop the Document Properties Installer zip file onto the panel:
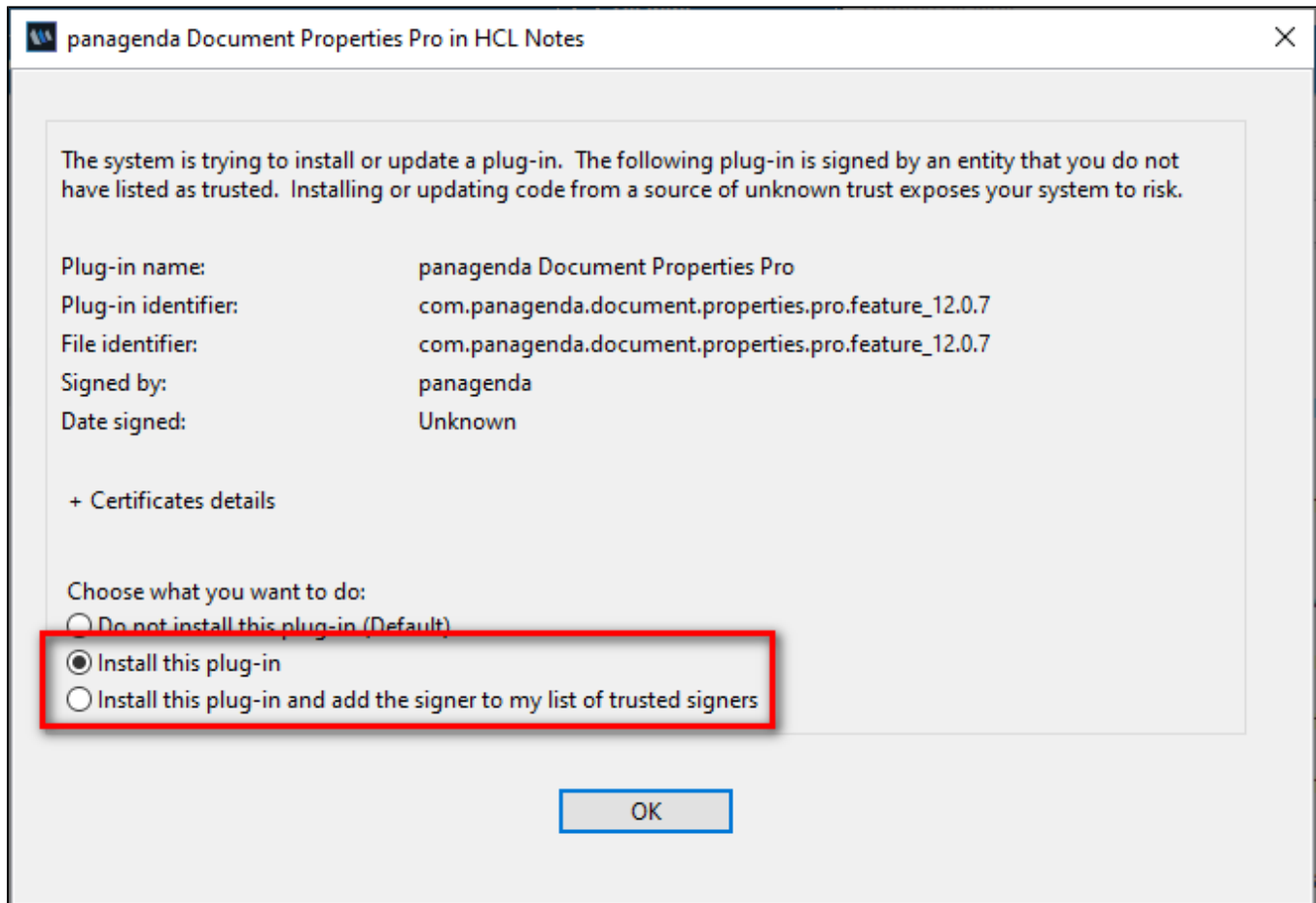

After a few seconds, you will see the Document Properties Installer dialog.

- **If you do not see the dialog and nothing happens,** your administrator has probably locked down your Notes client using Domino Policies – in this case, you will need to discuss alternate install methods with your admin.
- If you get an error **"The Item below is not a valid widget file"**, copy the Installer zip to your Desktop and try again (sometimes the Notes client doesn't like paths with spaces or non-ASCII characters in this case)

Choose the version of Document Properties you want to install: basic or Pro. If one of these plugins is already installed, the installer dialog will tell you which version you currently have.

After you make your selection and click OK, you will be prompted to confirm the installation:

Choose either "Install this plug-in" or "Install this plug-in and add the signer to my list of trusted signers" and click OK. Once the installation is complete, you will be prompted to restart the Notes client. After the client is restarted, the Document Properties plugin will be active and running.

ⓘ   If your administrator has locked down your Notes client, this type of widget installation will be impossible. If this is the case, please contact your administrator or try one of the other installation methods below.
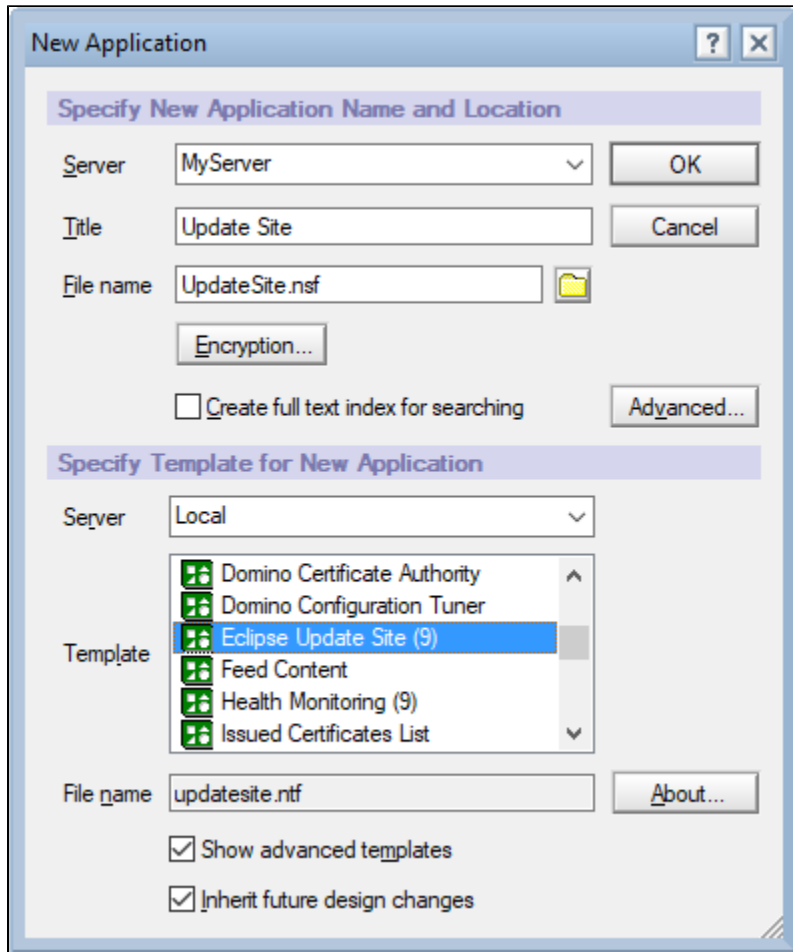
Uninstalling

If you've installed Document Properties via drag and drop, right-click the entry in the **My Widgets** panel and select **Remove**.

For Administrators
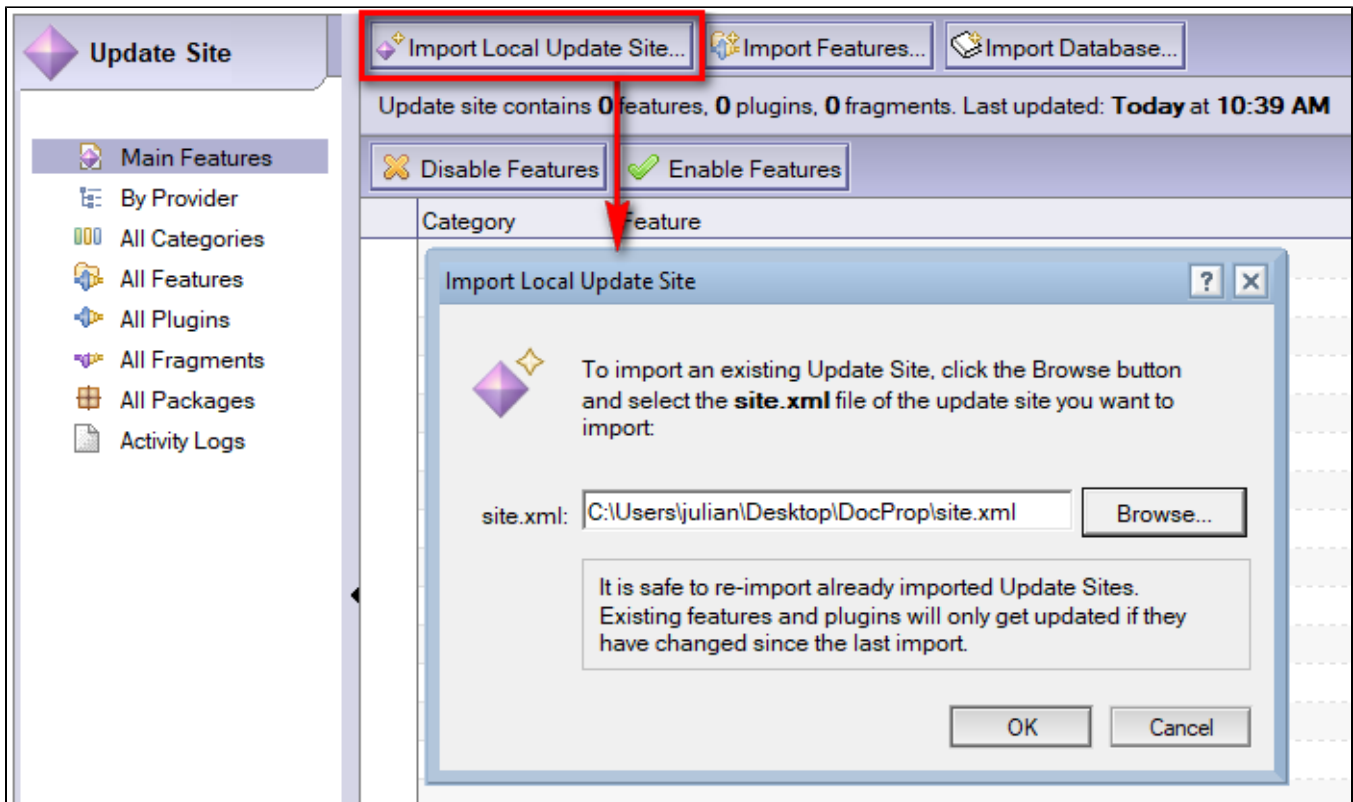
Adding to an Update Site Database

If you're planning to install the plugin for multiple people in your organization, it's often best to use an Update Site database on a central Domino server.

If you don't already have an Update Site database, you can create one by making a new database and choosing "Eclipse Update Site" as a template (the "Show advanced templates" box must be checked for this template to be displayed):

Unzip the Document Properties Installer zip file on your hard drive. In your Update Site database:

1. Click the **Import Local Update Site** button
2. Browse to the site.xml file in the folder where you unzipped the files
3. Click OK

You will also need the URL of your Update Site database for the steps below. With the Update Site database open, choose the menu item **Actions - Show URLs...** to get the URL. This will show you two URLs:

- HTTP URL, which can be used to access the Update Site database via HTTP
- NRPC URL, which can be used to access the Update Site database using the native Notes client protocol

If you use the HTTP URL, you need to make sure that the Domino HTTP task is running on your server.

Installing Using MarvelClient

Once the Document Properties plugin is in an Update Site database, you can easily install it using **panagenda MarvelClient**.

> ⚠ You must have a MarvelClient license that includes Eclipse plugin install functionality.

Create a new Eclipse Plugin Install Action with the following field values (non-default values are in **bold green text**):

Install type:	Expeditor Provisioning
Show progress:	unchecked
Check signature:	unchecked
Allow restart prompt:	unchecked
Enable immediately:	**checked**
Update site:	**the URL from your Update Site database in the previous step**
Which feature(s):	A single feature
Feature ID:	for Document Properties basic: **com.panagenda.document.properties.basic.feature**
	for Document Properties Pro: **com.panagenda.document.properties.pro.feature**
Feature Version:	Get feature version from update site

Widget Name:	Use name of first installed feature
Certificate?	**checked**
Widget?	unchecked

> **(i) NOTE**
>
> The update site files imported from the Document Properties Installer zip file contain 3 different features: the Installer, Document Properties basic, and Document Properties Pro. You only need to install either the basic or the Pro feature.
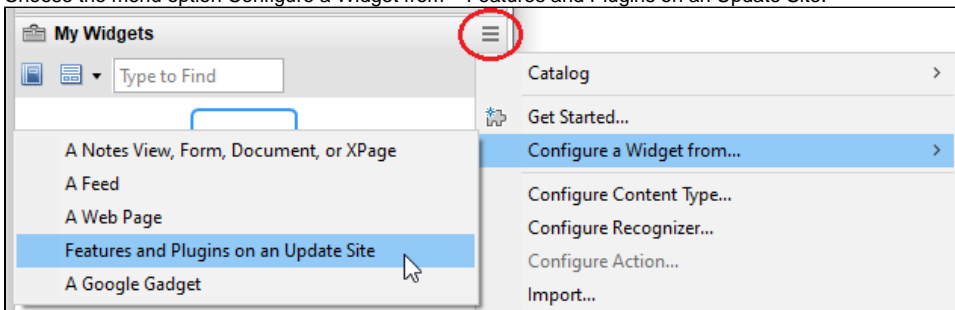
Installing Using a Widget Catalog

The easiest way to add this plugin to a Widget Catalog is to install it as a widget to your Notes client first, and then add your local widget to the Widget Catalog. **However**, you need to make sure you add it from the Update Site database on a server using the instructions below, **not** from drag-n-drop of the zip file.

> (i) If the Document Properties plugin is already in the **My Widgets** sidebar panel, right-click it, choose "Remove", and restart your Notes client before proceeding.

To add the widget:

1. Open the **My Widgets** panel in your Notes client sidebar.
2. Click the small "hamburger menu" at the top right of the **My Widgets** title bar.
3. Choose the menu option Configure a Widget from – Features and Plugins on an Update Site.

4. Enter the URL for the Update Site database from the earlier steps and click **Load**.

5. Check the box next to the **com.panagenda.document.properties.pro.feature** entry and click **Next**.

6. Keep clicking **Next** until you can't click it anymore.

> ⚠️ If you click **Finish** right away, it's possible the widget won't install properly.

7. Click **OK** when you see the install dialog, and restart the Notes client when prompted to do so.
8. After the Notes client is restarted, go back to your **My Widgets** panel. There should now be an entry for the panagenda Document Properties Pro plugin.
9. Right-click the new entry and choose **Publish to Catalog**.

> ℹ️ If you don't see any right-click options, try switching to the thumbnail view of **My Widgets** instead of using the list view.

10. Fill out the fields on the new Notes Widget document and save it.

> ℹ️ **OPTIONAL**
>
> If you also want to publish the Document Properties basic plugin to your catalog, you will need to uninstall the Document Properties Pro plugin from your **My Widgets** sidebar and repeat the steps above, choosing **com.panagenda.document.properties.basic.feature** in step 5.

Depending on how your widget catalog and Domino infrastructure is set up, there might be additional things you need to do (approval, signing, deploying certificates, etc.) before the widget can be deployed properly. You can find the documentation on how to use the Widget Catalog at:

https://help.hcltechsw.com/domino/11.0.1/admin/inst_deployingclientpluginswithwidgetsandthewidgetcat_c.html

https://help.hcltechsw.com/domino/11.0.1/admin/conf_catalogoptionsandaccess_c.html

Visit panagenda Document Properties Plugin on our website!