Q!Connections Admin Documentation

Version 1.50 Spring 19¶

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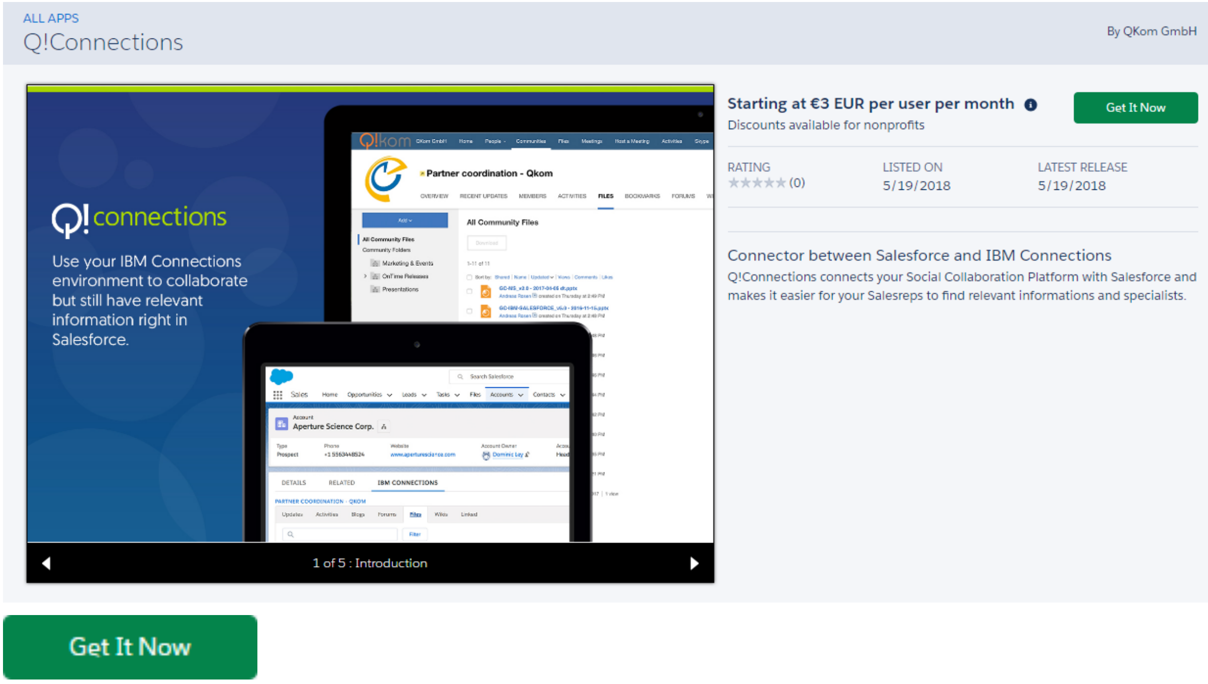
1. Installation

At first you'll need to login to the Salesforce org on which you're about to install Q!Connections. For the next step go to the Q!Connections page on AppExchange:

Q!Connections @ AppExchange



Click on "Get It Now" and choose whether you want to install it into a production or sandbox environment. A confirmation window will pop up. Make sure you are installing to the right org. You also have to agree to the terms and conditions on this page. At this point we recommend installing the package for Admins only and then assign the user licenses in a later step. It should take less than a minute to install the package and you're good to go.

Notice:
The trial expires after 30 days. Please contact Qkom to extend this time.
To see the Expiration Date go to: Setup > Installed Packages.

2. Configuration Backend

2.1 Licenses

After the successful installation you'll land on the "Installed Packages" page from the Salesforce Setup. From there you want to click "Manage Licenses" on the Q!Connections entry and assign the licenses to your users.

2.2 Permission Sets

You are probably the person with the assigned task to install and roll out the Q!Connections app, but in case you are only the Salesforce Admin and want the Q!Connections Admin to be another user, you will have to assign them the proper Permission Set. This will enable the "IBM Settings" tab.

In Setup enter "Permission Sets" in the Quick Find Box and click on "Permission Sets". You will see a list of Permission Sets used in your organization. The Q!Connections app comes with two Permission Sets:

Q!Connections Administration	Administrative Permissions for Q!Connections
Q!Connections User	Default User Permissions for Q!Connections

"Q!Connections Administration": Permission Set for the administrator to give access to the backend configuration.

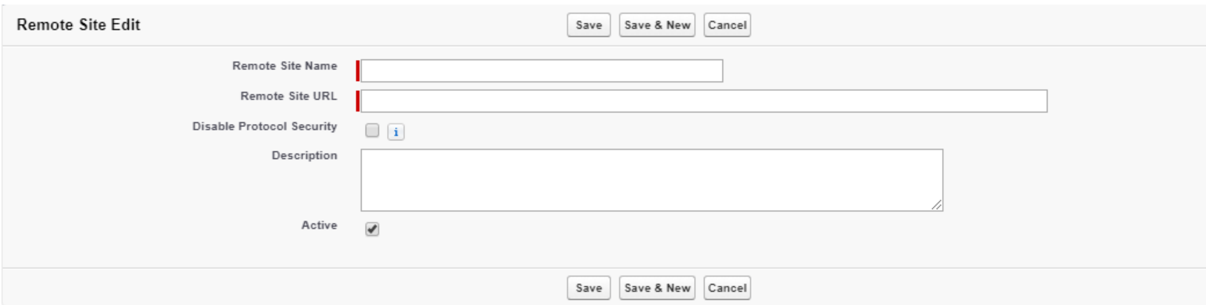
"Q!Connections User": Permission Set for every user to give access to the Lightning Components provided by Q!Connections.

2.3 Remote Site Settings

In order to grant Salesforce access to the IBM Connections endpoint we need to create a new Remote Site Setting. From the Setup enter “Remote Site Settings” in the Quick Find Box and click “Remote Site Settings”.

Click “New Remote Site”.

Enter a Name you find fitting. For the URI enter your IBM Connections URI. Click save. You are now done with the Remote Site Settings.



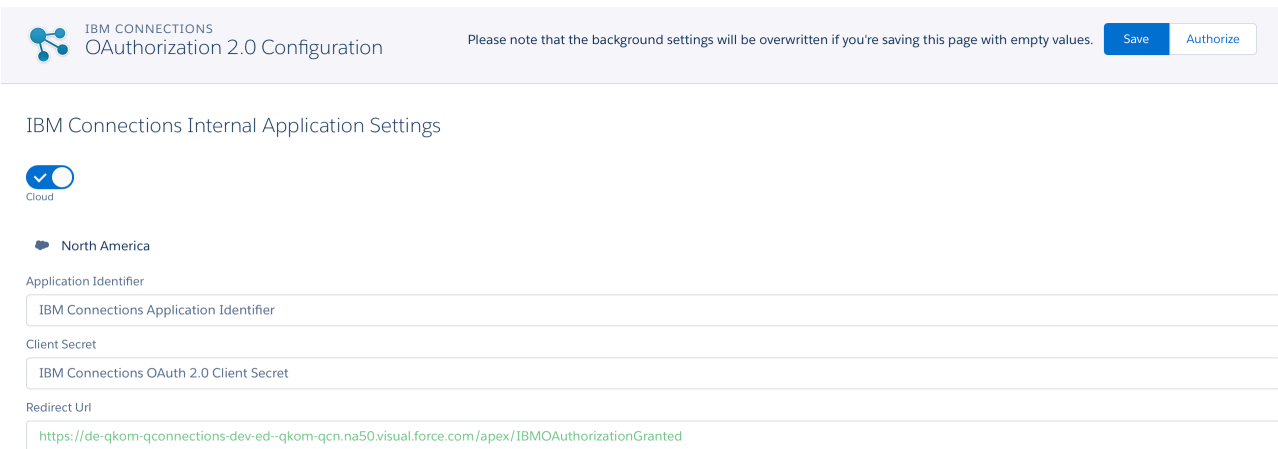
Notice:
The IBM Connections Cloud Endpoints are as following:

North America :	https://apps.na.collabserv.com
Europe :	https://apps.ce.collabserv.com
Asia :	https://apps.ap.collabserv.com

2.4 Q!Connections OAuth Settings

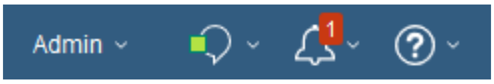
Navigate to “IBM Settings” tab from the App Launcher 

You’ll be prompted with a page asking for the connection details depending on the “On Premise”/”Cloud”-Checkbox. Let's assume you choose to install the “Cloud” solution. The first thing you'll need is to choose the region for the cloud (North America, Europe or Asia) and copy the “Redirect URI” at the bottom of the list to your clipboard.

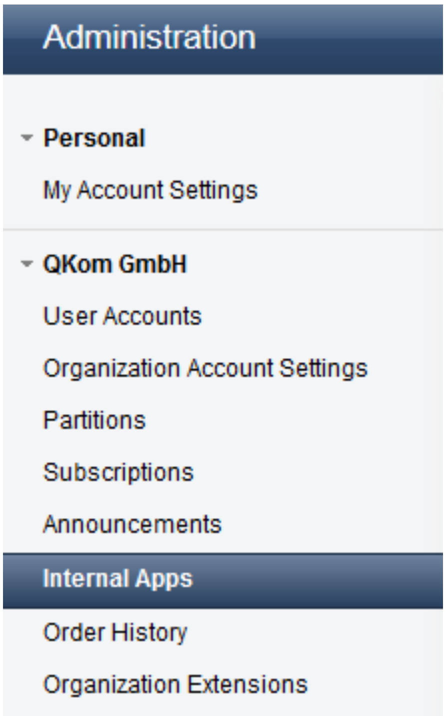


2.4.1 IBM Connections Internal App

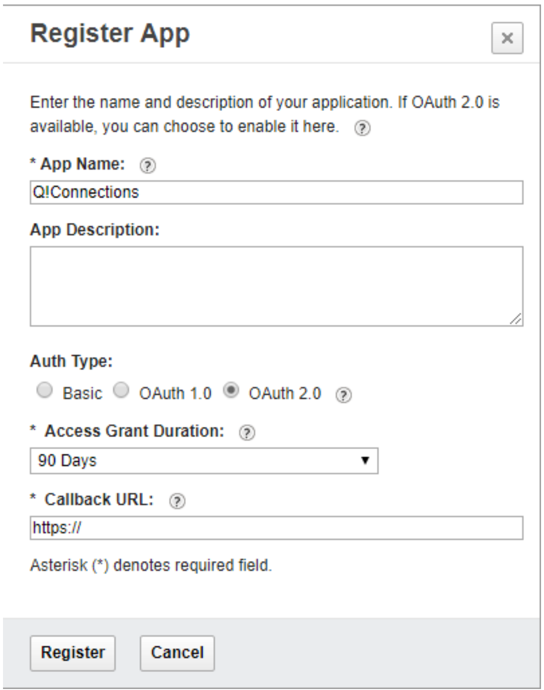
Now you need to switch over to IBM Connections and log in with your Account.



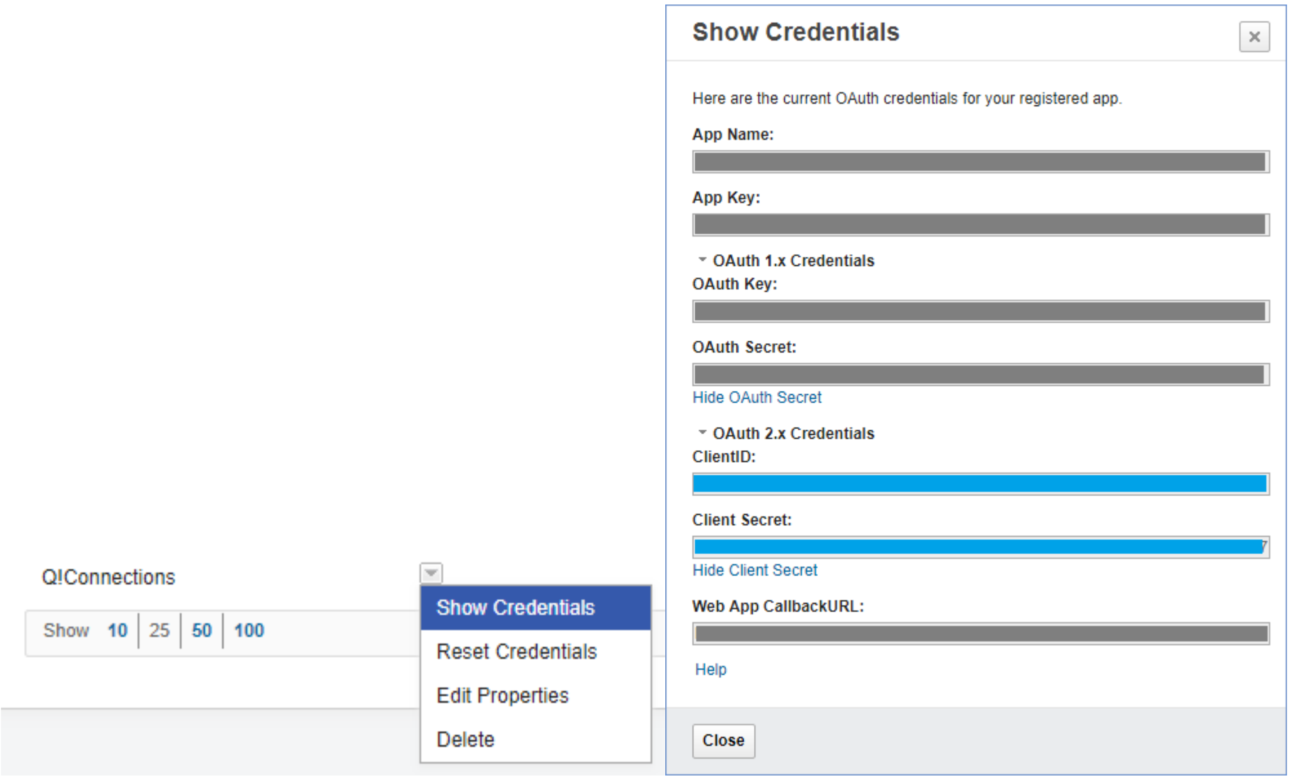
Via the admin tab in the top right corner, navigate to the admin UI and click on "Internal Apps" in the left side.



Click on “Register App”, give your app a name (e.g. Q!Connections), a description and check the “OAuth 2.0” checkbox. Give “Access Grant Duration” for a time fitting your company.

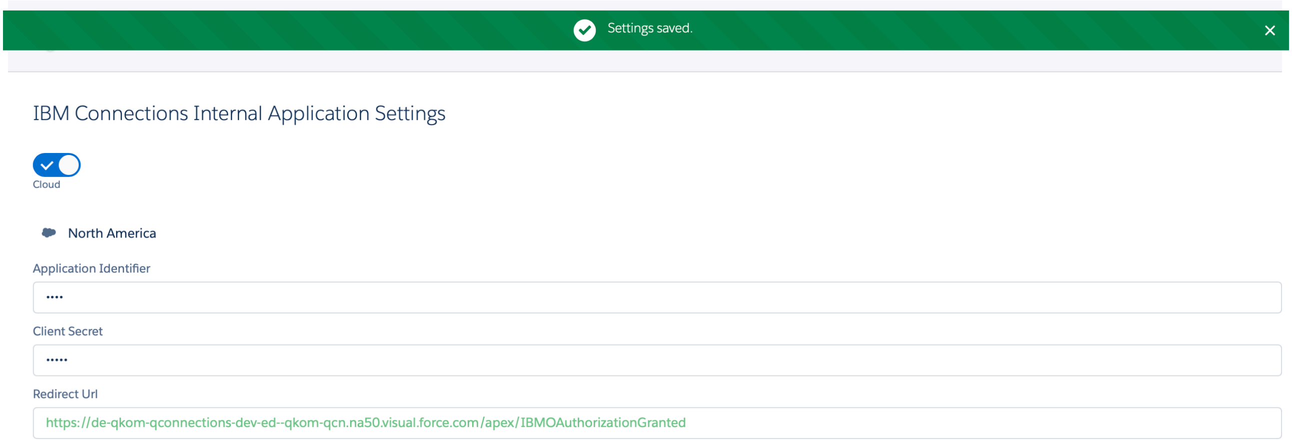


For Callback URI paste the URI you copied in Salesforce and click “Register”. Search for the newly registered app in the list and click on “Show Credentials” from the drop-down menu.



Leave the tab open in order to transfer the Application Identifier and Client Secret. Since you have chosen OAuth 2.0 you will need the second credentials in the overview.

Back in the Salesforce IBM Settings tab take note of the two fields missing solid information. Copy and paste both the Application Id and Client Secret you got from IBM Connections and click "Save".



The backend configuration is now done. You may now click on "Authorize" in order to set up your own user authorization to IBM Connections and test your configuration.

Notice:
If you are using IBM Connections on Premise you'll need to enter both the authorization endpoints and your home URI.

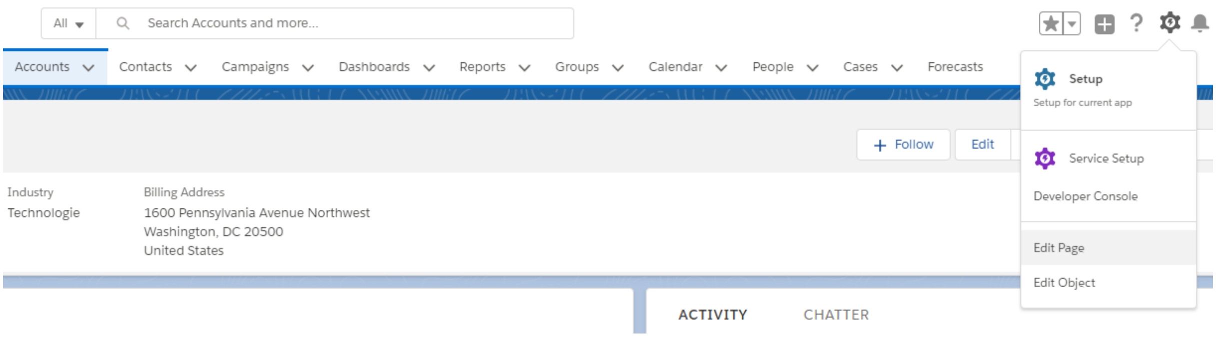
Notice:
Note that the background settings will be overwritten if you're saving this page with empty values.

3. Configuration User Interface

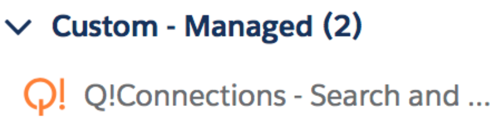
3.1 Page Layouts

To make Q!Connections accessible for everyone you'll need to add and configure the Lightning Component provided by the application to the designated Salesforce Standard and/or Custom Objects.

One way to access the Lightning App builder is by clicking the small Gear in the top right corner and then on "Edit Page"

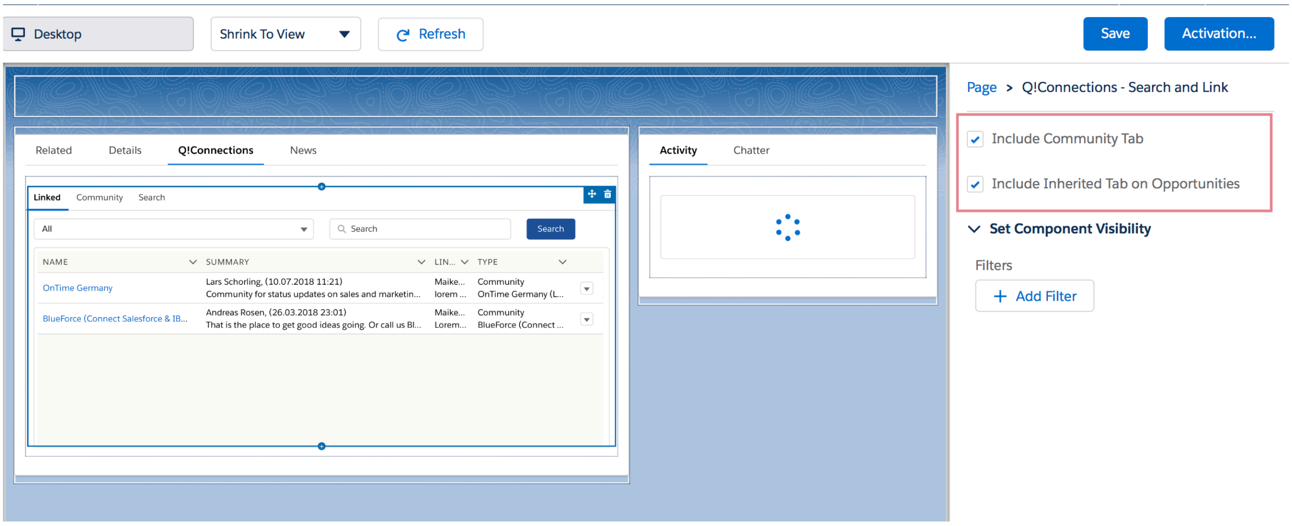


In the Lightning App Builder you find the Q!Connections Lightning Component you will use soon. It's on the left side at the "Custom – Managed" Components and is called "Q!Connections - Search and Link".



Before we actually Drag&Drop the component to our Page Layout we recommend to create a new tab which'll serve as our component container. Click on an existing tab like "Related" or "Details". You'll note the tab configuration popping up on the right side. Click on "Add new Tab" and change it's type from e.g. Details to "Custom". Give it a proper name like "Q!Connections" and click on it. Now Drag&Drop the Lightning Component into your new tab.

Note the two options coming up to the right side of the Lightning App Builder:



"Include Community Tab": Enables the community tab when there is at least one existing relation to a community or sub-community.

Notice:
After creating a new community relation you'll need to refresh the record page in order to enable the community tab.

"Include Inherited Tab on Opportunities": On Opportunities, when there's a relation to a Salesforce Product, it'll enable the tab "Inherited" which shows you existing Q!Connections relation entries coming from each Product.

To finish the configuration click on Save and then hit Back.

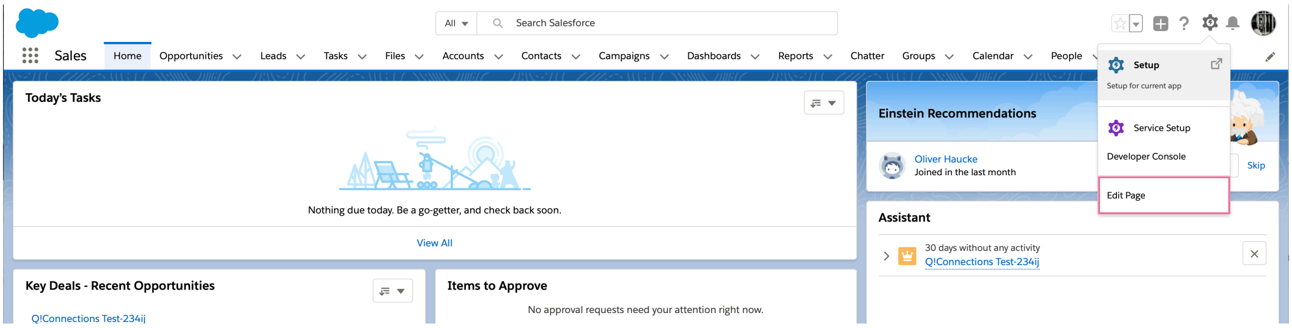
Notice:
If this is the first edit of a Page Layout of this specific Object you'll be prompted to activate the changes. Just follow the on screen instructions and you'll be good to go.

3.2 Home Widgets

Q!Connections provide a number of Homepage Widgets designed for quick access of different personal contents from IBM Connections

3.2.1 Configuration

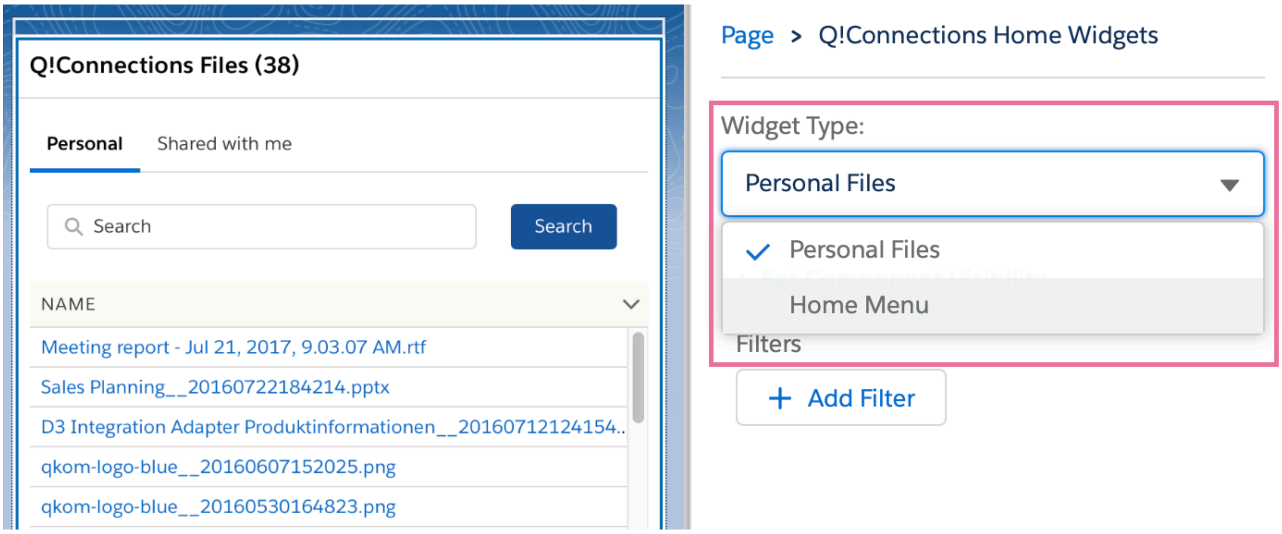
Navigate to your Home Tab in Salesforce. You want to access the Lightning App builder is by clicking the small Gear in the top right corner and then hit “Edit Page”.



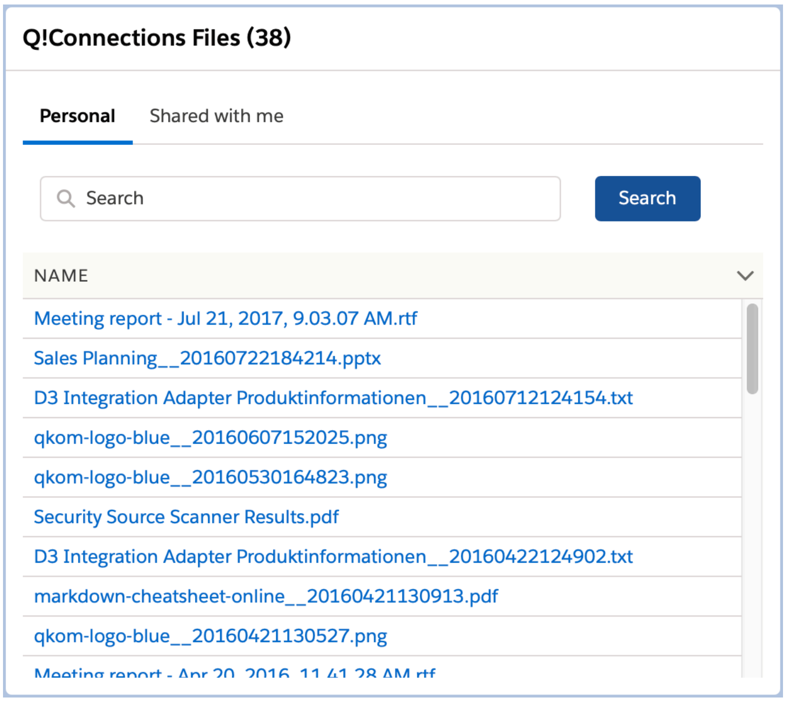
In the Lightning App Builder you find the Q!Connections Lightning Component we want to use. It's on the left side at the “Custom – Managed” Components and is called “Q!Connections Home Widgets”.

Just Drag&Drop the component to a designated area on your home page.

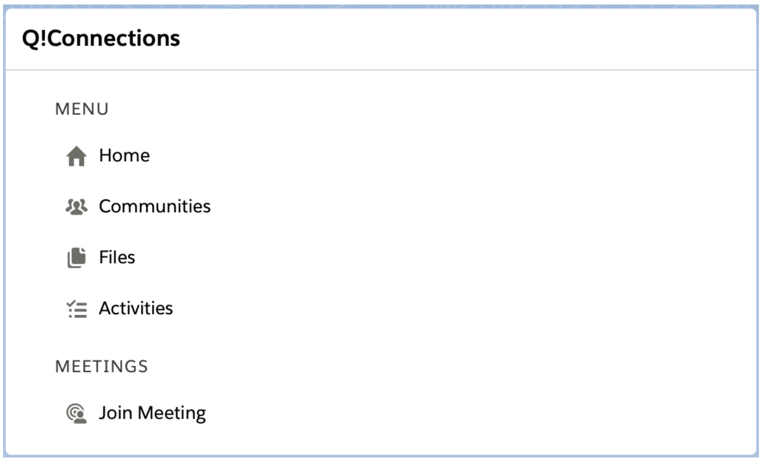
Note the pick list options which come up to the right side of the Lightning App Builder:



"Personal Files": Quick access both your personal files and those which are shared with you.



”Home Menu”: Quick Links to IBM Connections contents like Wikis, Join a Meeting, Files, etc.

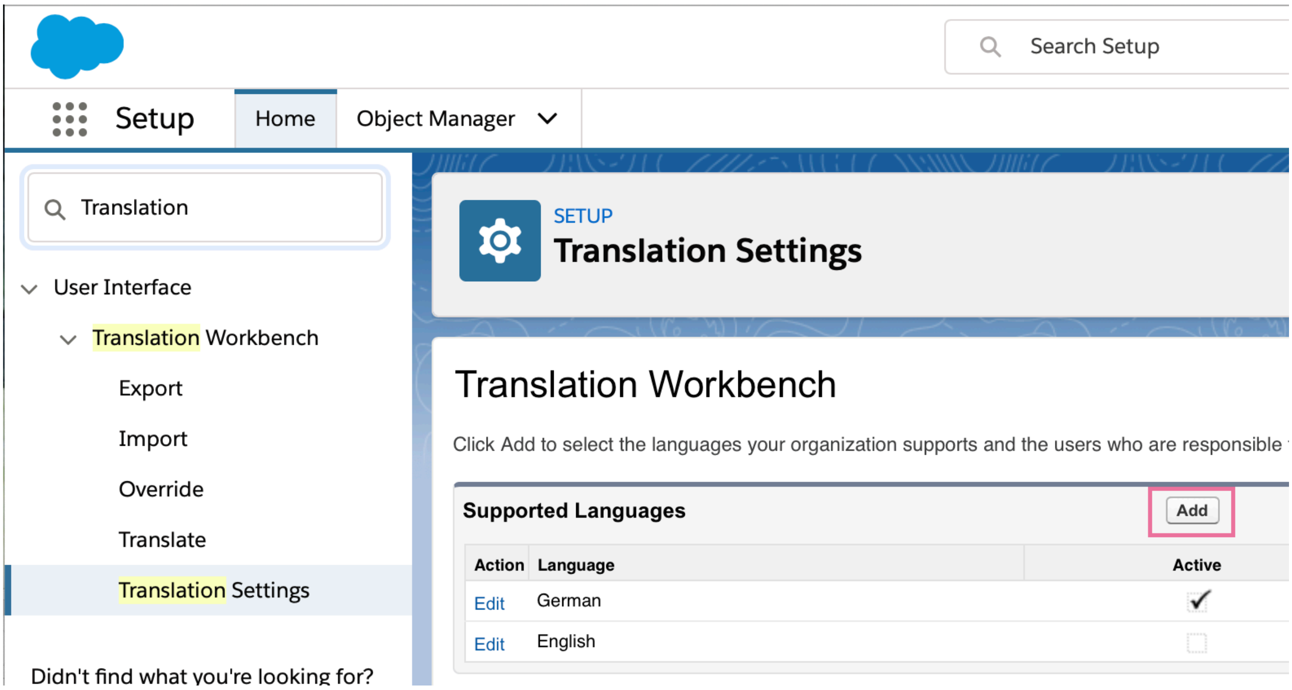


4. Translations

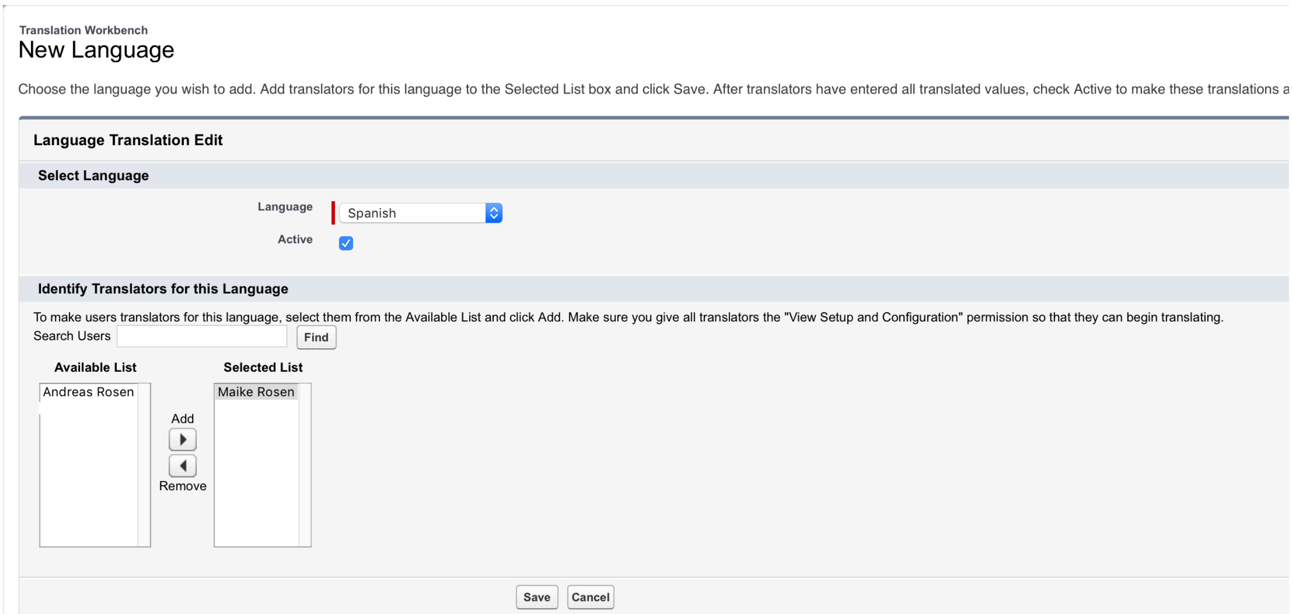
By default Q!Connections comes with English, German, French, Italian and Spanish translations. However you're free to add a new translation.

4.1 Adding new translations

From the Salesforce Setup navigate to: Translation Workbench > Translation Settings
Click Add on the Supported Languages section.

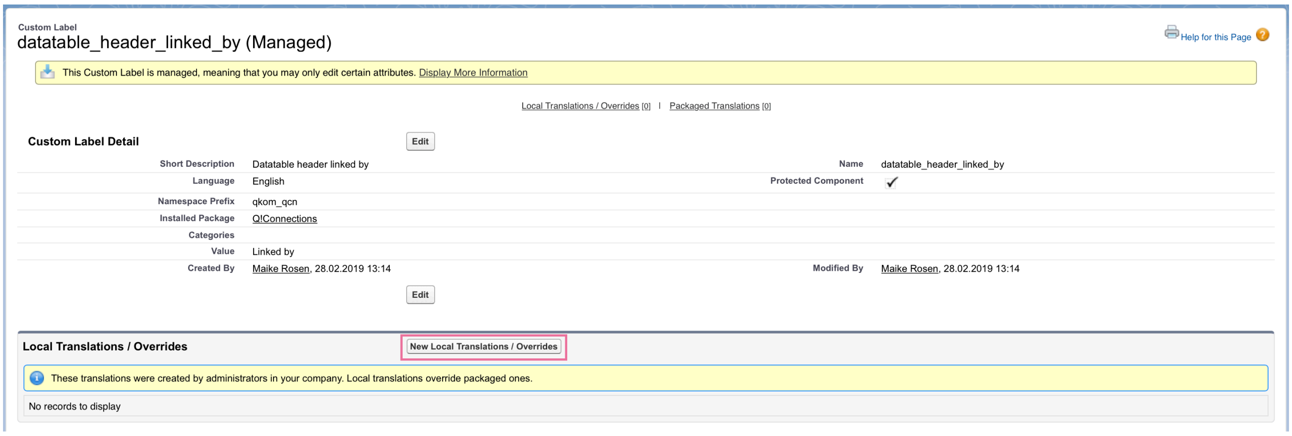


Select the new Language you want to add and assign a Translator and click Save. You are now done in the Translation Settings section.



Now, still from the Salesforce Setup, navigate to "Custom Labels".

Pick a label from Q!Connections by clicking on its name. In the next screen click on "New Local Translations / Overrides".



In here you can easily add the new Label Translation by selecting the newly added language.

Click Save and you've successfully added the new Label Translation.

Notice:
You may also override existing translations in case there's a naming scheme more fitting to your company. For further information please reference the Salesforce documentation on translations:

[Add Translated Languages and Translators]
[Translate Custom Labels]

5. Known Issues

Error	Reason	Solution
Read timed out	You will run into this issue from time to time. This is caused by the IBM Connections Search API and therefore not under our control.	Just search again. Refresh the record page if the error persists.
Infinite Loading	This is very likely caused by corrupted settings.	Check your settings. Fill in the Internal App credentials again.