POST Transition Checklist for FACSTAFF Using Lotus Notes

See "Detailed Instructions" below for step-by-step directions

30 days of email, iNotes Contacts and calendar entries (from Jan. 1, 2010 forward) will be present in your UDmail account on Monday, Nov. 28. The remainder of your email will be copied over the following two weeks.

1.	☐	Accept the "Google Terms of Service" at http://porches.udayton.edu
2.	**UDmail Configuration**	
	☐	A. Enter your signature information (appended to each outgoing email)
	☐	B. Review email labeled as "Spam"
	☐	C. Delete the "Junk" label
	☐	D. If you have mailing rights to announce/stu-announce, contact the help desk to request your outgoing email address be updated to **[UDusername]@udayton.edu**
3.	**UDmail Contacts (Address Book) Configuration**	
	☐	A. Correct duplicate contacts
	☐	B. Recreate personal email groups as needed
	☐	C. Enter contacts from your Lotus Notes software program Contacts list as needed (Have numerous entries to move? Contact the Help Desk for assistance.)
4.	**UDcalendar Configuration**	
	☐	A. Set working hours
	☐	B. Double-check that upcoming calendar entries are reflected in your UDcalendar
	☐	C. If you update/reschedule existing meetings, update attendees' contact information to UDmail address (e.g. rflyer1@udayton.edu)
5.	**Mail and Calendar Delegation** (if applicable)	
	☐	A. Assign mail delegation
	☐	B. Assign calendar delegation
6.	**Translate Lotus Notes features to UDmail**	
	☐	A. IF you used RULES in Lotus Notes, create UDmail FILTERS
	☐	B. IF you used STATIONERY in Lotus Notes create UDmail CANNED RESPONSES
	☐	C. IF you used TO-DOS in Lotus Notes, create UDmail TASKS
7.	☐	Set UDmail as your default mail program

Around Dec. 9, you'll receive an email notifying you that remaining email data has been copied from Lotus Notes to UDmail. Once you receive this message, complete step 8 below.

NOTE: Only calendar entries from Jan. 1, 2010 forward will be copied to your UDcalendar

8.	**Confirm Migration Status** (not visible from mobile devices)	
	☐	A. Check the "Migration Status" in your Lotus Notes client software or iNotes to **ensure all data has been copied successfully**.
	☐	B. Locate and address any non-migrated mail messages

Problems? Questions? Call the UDit Help Desk at 937-229-3888

POST Transition Checklist for FACSTAFF Using Lotus Notes
Detailed Instructions

30 days of email, iNotes Contacts and calendar entries (from Jan. 1, 2010 forward) will be present in your UDmail account on Monday, Nov. 28. The remainder of your email will be copied over the following two weeks.

1.		☐ **Accept the "Google Terms of Service"**
		1) Login at http://porches.udayton.edu
		2) Look for the *UDmail* channel in the middle column and follow the link to the Google Terms of Service
		3) Type the characters from the green word image into the text box at the bottom of the page
		4) Click the "I accept. Continue to my account." button
		NOTE: pressing "Enter" on your keyboard will **not** accept the Terms of Service
2.	**UDmail Configuration**	
	☐ **A. Enter your signature information (appended to each outgoing email)**	
		1) Click the gear icon ⚙ at the top right-hand corner of your UDmail screen
		2) Select "Mail Settings"
		3) Go to the "General" tab
		4) Create your signature (or copy/paste it from your Lotus Notes mail settings)
		5) Click the "Save Changes" button at the bottom of the page
	☐ **B. Review email labeled as "Spam"**	
		1) Look for the "Spam" label in the left-hand list of UDmail labels (if you had numerous folders – which translated as UDmail "labels" – you may need to select the "[#] more" drop-down option at the bottom of the labels list)
		2) Click the "Spam" label to open the list of messages identified as Spam
		3) Select desired messages and click the "Not spam" button to remove the Spam label and move them to your inbox
		4) <u>Repeat regularly to ensure no new desired mail has been marked as spam!</u>
	☐ **C. Delete the "Junk" label (migrates automatically from Lotus Notes)**	
		1) In your UDmail, select the "Labels" menu and choose "Manage labels"
		2) Scroll down the list until you see the "Junk" label and click "remove"
	☐ **D. If you have mailing rights to announce/stu-announce, contact the help desk to request your outgoing email address be updated to [UDusername]@udayton.edu**	
		1) Send an email to helpdesk@udayton.edu to request your address be updated
		2) You will receive an email confirmation when your mailing access is again functional
3.	**UDmail Contacts (Address Book) Configuration**	
	☐ **A. Correct duplicate contacts if needed**	
		1) Within UDmail, select the blue "Contacts" link at the top of the page
		2) In the "My Contacts" info screen to the right, click the button marked "Find Duplicates"
		3) If duplicates are located, click the "Merge" button to consolidate them

		☐ **B. Recreate personal email groups as needed**

☐ **B. Recreate personal email groups as needed**

1) Within your UDmail, click the "Contacts" folder in the left-hand panel

2) Click the "New Group…" link to create a new personal mailing list

3) Enter the group name and click "OK"

4) The group name will appear in the left-hand panel; click the group name

5) Click the "Add to "[group name]" button and enter the email addresses OR

6) Click the "My Contacts" list entry, select existing contact(s) by checking the selection box to the left of each name

7) Click "Groups" and select the group to which these contacts should be added

8) Click "Apply"

☐ **C. Enter contacts from your Lotus Notes software program Contacts list as needed** (Have numerous entries to move? Contact the Help Desk for assistance)

1) Within your UDmail, click the "Contacts" folder in the left-hand panel

2) Click the "New Contact" button and complete the form

3) Click "Add to My Contacts" to save the entry

4. **UDcalendar Configuration**

☐ **A. Set working hours**

1) In your UDcalendar, click the gear icon ⚙ at the top right-hand corner of your UDcalendar screen

2) Select "Calendar settings"

3) In the "Working Hours" section, check the days you work and enter the hours of your normal work day

4) Click the "Save" button at the bottom of the screen to save your changes

☐ **B. Double-check that upcoming calendar entries are reflected in your UDcalendar** by opening Lotus Notes and completing a side-by-side comparison of the next several days/weeks

☐ **C. If you update/reschedule existing meetings, update attendees' contact information to UDmail address (e.g. rflyer1@udayton.edu)**

Users on UDmail will only receive actionable meeting updates (updates which automatically change their existing calendar entries) if their UDmail address is specified.

As you look at your list of attendees for existing meetings, consider replacing their Lotus Notes address (e.g. Rudy.Flyer@notes.udayton.edu) with their UDmail address (e.g. rflyer1@udayton.edu).

Either way, invitees will still receive your update emails; using their UDmail address will simplify calendar management for invitees

5. **Mail and Calendar Delegation** (if applicable)

☐ **A. Assign mail delegation**

1) Click the gear icon ⚙ in the upper-right, select "Mail settings" and select the "Accounts and Import" tab

2) Under "Grant access to your account," click the "Add another account" link

3) Enter the email address of the person you'd like to access your account and click **Next Step**. Remember you can only enter a UDmail address

		4) You'll see a confirmation message. Click **Send email to grant access**
		5) The delegate will receive an email explaining that you've granted them access. After the delegate confirms this request, it may take up to 30 minutes for the verification process to be completed. To see if the delegate has confirmed access to your account, check the **Accounts** tab in **Settings**
		a. Messages sent from your account by a designated user will display both your name and the other person's name – e.g. "Rudy Flyer (sent by John Smith)."
		b. Access email delegated to you by clicking the down-arrow next to your email address in the upper-right corner. Click **Switch account** and choose your delegator's email address
		☐ **B. Assign calendar delegation**
		1) In the "My Calendars" list on the left side of your UDcalendar page, click the down-arrow button next to the calendar you wish to delegate
		2) Select "Share this calendar"
		3) Enter the UDmail address (e.g. rflyer1@udayton.edu) of the specific person with whom the calendar should be shared
		4) Under "Permission Settings" use the drop-down menu to select a level of access
		5) Click the "Add Person" button (the delegate will receive an email invitation to view your calendar)
		6) Click the "Save" button to save your changes
	6.	**Translate Lotus Notes features to UDmail**
		☐ **A. IF you used RULES in Lotus Notes, create UDMail FILTERS**
		1) In UDmail, select an email you wish to filter by clicking the checkbox to the left of the entry
		2) Select the "More" menu from the action bar
		3) Click "Filter messages like these"
		4) Enter additional identification criteria if desired and click "Next Step"
		5) Choose the desired action and click "Create Filter"
		6) Access existing filters or create a filter from scratch by selecting the gear icon ⚙, selecting "Mail settings" and visiting the "Filters" tab
		☐ **B. IF you used STATIONERY in Lotus Notes, create UDmail CANNED RESPONSES**
		Existing Lotus Notes Stationery should migrate with a UDmail "Drafts" label.
		1) Enable the "Canned Responses" lab:
		a. Click the gear icon and select "Mail settings"
		b. Click the "Labs" tab
		c. Look for the "Canned Responses" tab and click the "Enable" button
		d. Click the "Save Changes" button (at the top or bottom of the screen)
		2) Open the "Draft" (or other email) you wish to save as a Canned Response
		3) Click the "Canned responses" link under the subject line and choose "*New canned response…*"
		4) Type a descriptive name and click "OK"
		5) Use a Canned Response:

		a. Click "Compose Mail"
		b. Click the "Canned responses" link beneath the subject line.
		c. Under the "Insert" heading, select the desired Canned Response
	☐	**C. IF you used TO-DOS in Lotus Notes, create UDmail TASKS**
		NOTE: Existing Lotus Notes To-Dos must be recreated as UDcalendar tasks
		1) Open your UDcalendar
		2) In the left-hand panel under the heading "My Calendars" select "Tasks"
		3) A "Tasks" window will open to the right of the screen; use the "+" icon to add a new task and the "Actions" link to move/edit existing tasks
7.	☐	**Set UDmail as your default mail program**
		Visit http://go.udayton.edu/setdefaultmail for directions

Around Dec. 9, you'll receive an email notifying you that remaining email data has been copied from Lotus Notes to UDmail. Once you receive this message, complete step 8 below.

NOTE: Only calendar entries from Jan. 1, 2010 forward will be copied to your UDcalendar

8.	**Confirm Migration Status** (not visible from mobile devices)
	☐ **A. Check the "Migration Status" in your Lotus Notes client software or iNotes to ensure all data has been copied successfully.**
	1) Open Lotus Notes mail and click the "Views" folder
	2) Click "Migration Status" and select Calendar, Contacts or Mail to view unprocessed and migrated items in each category
	NOTE: If you don't see the category headings (e.g. "unprocessed", "migrated"), your data may be sorted by one of the columns – if a column heading is highlighted, click that heading to "unsort" the column.
	3) If a desired email is listed as "unprocessed", click to highlight it and click "Migrate Again" (see B. below for exceptions). Re-migration of selected items will begin around Dec. 19, 2011.
	4) If a desired contact or calendar entry is listed as "unprocessed," recreate the entry in your UDmail account
	☐ **B. Locate and address non-migrating mail messages:**
	1) Encrypted mail messages: Encrypted mail will not migrate to UDmail.
	a. Select encrypted messages from the "unprocessed" view
	b. Click "Decrypt Email"
	c. Click "Migrate Again"
	2) Mail messages larger than 25 MB AND/OR
	3) Mail messages with executable file attachments
	Messages larger than 25 MB and those with executable file attachments will not migrate to UDmail. You have several options for these remaining messages:
	a. Delete the entire message OR
	b. Save the attachment to your computer and deleting it from the email message (right click the attachment and select "Save & Delete"; click "Save & Close" to save your changes) OR
	c. Delete the attachment from the email message (right click the attachment and select "Delete"; click "Save and Close" to save your changes) and select "Migrate Again" to send the email text to your UDmail account

Problems? Questions? Call the UDit Help Desk at 937-229-3888