

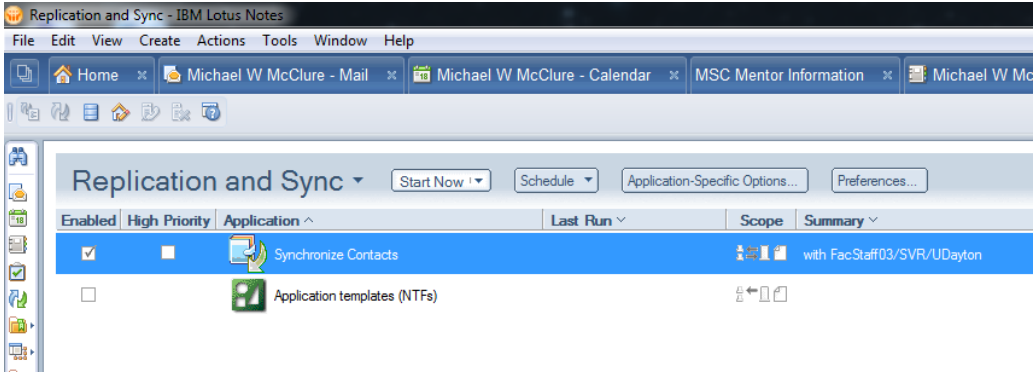
PRE Transition Checklist for FACSTAFF Using Lotus Notes

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

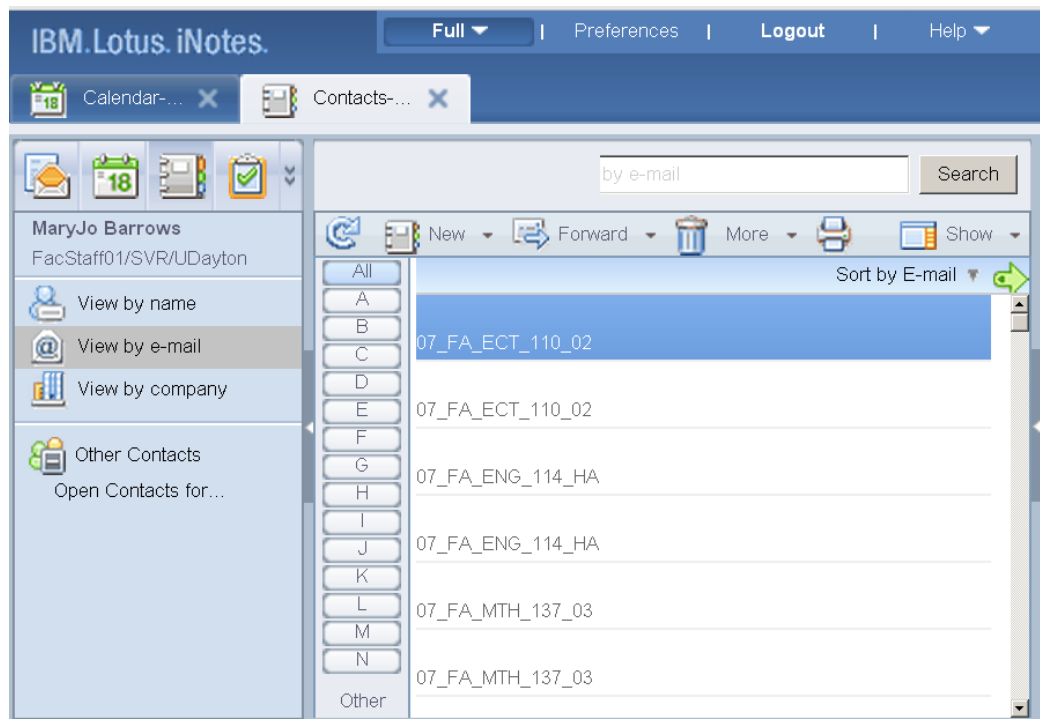
1.	<input type="checkbox"/> Set aside time (~2 hours) in your calendar to complete the "Post-Transition Checklist" on November 28 (or your first day back to work after the Thanksgiving holiday)
2.	<p><u>Prepare your Lotus Notes Contacts list (Address Book) for migration</u></p> <p>NOTE: Only contacts residing in your iNotes Contacts list (those visible at http://notes.udayton.edu) will be migrated (copied) to UDMail</p> <p><input type="checkbox"/> A. Synchronize Contacts lists between Lotus Notes client and iNotes</p> <p>Complete steps B-D in iNotes (http://notes.udayton.edu)</p> <p><input type="checkbox"/> B. Delete unnecessary addresses, personal groups, rosters, etc.</p> <p>NOTE: Group members from Lotus Notes mailing groups will also be broken out as individual contacts in your UDMail contacts list</p> <p><input type="checkbox"/> C. Delete or edit Lotus Notes "hierarchy" addresses (e.g. change Michael W McClure/UDit/FacStaff/UDayton to Michael.McClure@notes.udayton.edu)</p> <p><input type="checkbox"/> D. Add a First and Last name to all Contacts with only a Company field specified</p>
3.	<p><u>(On or before November 25th) Final "check-out" for Lotus Notes:</u></p> <p><input type="checkbox"/> A. Turn off your Out of Office message</p> <p><input type="checkbox"/> B. Turn off scheduled archives</p> <p><input type="checkbox"/> C. Empty Lotus Notes "Trash" folder</p> <p><input type="checkbox"/> D. Log out of Lotus Notes</p>
4.	<p><input type="checkbox"/> Over Thanksgiving weekend: eat turkey, spend time with your family and <u>stay out of your Lotus Notes client software as much as possible!</u></p> <p>If absolutely necessary, login at http://notes.udayton.edu for brief access to your old email (NEW mail will be routed to your UDMail account as of 9:00 a.m. on Nov. 25). Our system administrator may need to log you out of the system to complete data migration.</p> <p>Data loss associated with activities you complete in Lotus Notes over Thanksgiving weekend is possible.</p>

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

PRE Transition Checklist for FACSTAFF Using Lotus Notes Detailed Instructions

1.	<input type="checkbox"/> Set aside time (~2 hours) in your calendar to complete the “Post-Transition Checklist on November 28 (or your first day back to work after the Thanksgiving holiday)
2.	<p><u>Prepare your Lotus Notes Contacts list (Address Book) for migration</u></p> <p>NOTE: Only contacts residing in your iNotes Contacts list (those visible at http://notes.udayton.edu) will be migrated (copied) to UDmail</p> <p><input type="checkbox"/> A. Synchronize Contacts lists between Lotus Notes software program and iNotes</p> <p><u>PC Users:</u></p> <ol style="list-style-type: none">1) Open the Lotus Notes Client2) Click on the “File” menu and select “Preferences”3) Click the “Contacts” selection on the left side of the window4) Select the “Enable ‘Synchronized Contacts’ on the Replicator” check box5) Click “OK”6) Click the “Tools” menu and select “Replicate and Sync All” <p>If you see the screen pictured below:</p> <ol style="list-style-type: none">7) Click the “Enabled” checkbox for the “Synchronize Contacts” application8) Click the “Start Now” button  <p><u>Mac Users:</u></p> <p>http://minerva.stkate.edu/internal/docroom_helpguide.nsf/files/ln8_contact_sync_mac/\$file/ln_contact_sync_mac.pdf</p> <p>Complete steps B-D in iNotes (http://notes.udayton.edu)</p> <p><input type="checkbox"/> B. Delete unnecessary addresses, personal groups, rosters, etc.</p> <p>NOTE: Group members from Lotus Notes mailing groups will also be broken out as individual contacts in your UDmail contacts list</p> <ol style="list-style-type: none">1) After logging in at http://notes.udayton.edu, open your Contacts list2) Select either “View by name” or “View by e-mail”3) Remove any contacts you no longer need by right-clicking on an entry and

selecting "Delete"



- C. Delete or edit Lotus Notes "hierarchy" addresses** (e.g. change Michael W McClure/UDit/FacStaff/UDayton to Michael.McClure@notes.udayton.edu)
 - 1) Look for contacts with a "hierarchy" address listed rather than an internet email address (e.g. Michael W McClure/UDit/FacStaff/UDayton vs. Michael.McClure@notes.udayton.edu)
 - 2) Double-click the entry to open the contact file, delete the hierarchy address from the "Default E-mail" field and type in the appropriate internet email address
 - 3) Click "Save & Close" to save your changes

- D. Add a First and Last name to all Contacts with only a Company field specified**

NOTE: Contacts with only a company name specified will not migrate to UDMail

 - 1) Look down the "Company" column in your Contacts list. If the company listed is other than "UDayton," check that a name is listed in the "Name" column
NOTE: You should see the format "[name], [name]" in the Name column if these fields have been specified (e.g. "Helpdesk, UDMail")
 - 2) Double-click the entry and enter both a "First name" and "Last name"
 - 3) Click "Save & Close" to save your changes

3. **(On or before November 25th) Final "check-out" for Lotus Notes:**

- A. Turn off your Out of Office message (if enabled)**
 - 1) Within your mail view, select "More" (between the trash and print icons to the right side of the action bar) and "Out of Office..."
 - 2) Confirm that "Enable the Out of Office agent" checkbox is NOT selected
- B. Turn off scheduled archives from your Lotus Notes software program**

	<ol style="list-style-type: none"> 1) Select the “Actions” menu, “Archive”, and “Settings...” 2) Select the “Schedule” tab 3) Uncheck the “Schedule archiving” checkbox 4) Click “OK” to save your changes <p><input type="checkbox"/> C. Empty Lotus Notes “Trash” folder</p> <ol style="list-style-type: none"> 1) From iNotes OR your Lotus Notes software program, select the email “Trash” folder 2) Click the “Empty Trash” button in the action bar <p><input type="checkbox"/> D. Log out of Lotus Notes</p> <ol style="list-style-type: none"> 1) <u>iNotes</u>: Click “Logout” in the top right corner of the screen 2) <u>Lotus Notes software program</u>: select “File” and “Exit” (or click the “X” in the top right-hand corner of your screen)
4.	<p><input type="checkbox"/> Over Thanksgiving weekend: eat turkey, spend time with your family and <u>stay out of your Lotus Notes client software as much as possible!</u></p> <p>If absolutely necessary, login at http://notes.udayton.edu for brief access to your old email (NEW mail will be routed to your UDmail account as of 9:00 a.m. on Nov. 25). Our system administrator may need to log you out of the system to complete data migration.</p> <p>Data loss associated with activities you complete in Lotus Notes over Thanksgiving weekend is possible.</p>