

## Student Lotus Notes to UDMail Transition Timeline & Tasks

NOTE: Migration (copying) of student data from Lotus Notes to UDMail will occur *only by request*.  
 Email [helpdesk@udayton.edu](mailto:helpdesk@udayton.edu) for more information.

<b>Phase 0</b>	<b>Tuesday, Nov. 1 – Friday, Nov. 25</b>	<p>Set aside time to complete the Post-Transition Checklist (below) after your first login to UDMail.</p> <p>Join the Google Group in Porches and learn about UDMail and UDcalendar</p> <ol style="list-style-type: none"> <li>1. Login at <a href="http://porches.udayton.edu">http://porches.udayton.edu</a></li> <li>2. Click the “Groups” icon at the top of the page</li> <li>3. Click the “Groups Index” tab</li> <li>4. Search for “Google Apps”</li> <li>5. Select the “Google Apps” group and click the “Join Group” button</li> <li>6. Check the “Required Information” box; click “Join”</li> </ol>
<b>Phase 1</b>	<b>Friday, Nov. 25 9:00 a.m. – 11:59 a.m.</b>	<p>Incoming email (all email sent to you after 9:00 a.m.) will be routed to UDMail instead of Lotus Notes</p> <p><b>NOTE: All existing Lotus Notes mail forwarding settings will be unhooked at this time</b></p>
<b>Phase 2</b>	<b>Friday, Nov. 25 12:00 p.m. (noon)</b>	<p><b>Access NEW mail in your UDMail account</b> in the <i>UDmail</i> channel at <a href="http://porches.udayton.edu">http://porches.udayton.edu</a>.</p> <p>On your first visit, accept the Google Terms of Service:</p> <ol style="list-style-type: none"> <li>1. In the <i>UDmail</i> channel in the middle column, follow the link to the Google Terms of Service</li> <li>2. Type the characters from the green word image into the text box at the bottom of the page</li> <li>3. Click the “I accept. Continue to my account.” button</li> </ol> <p><b>Get Started with UDMail</b> by completing the Post Transition tasks outlined below.</p> <p>OR, if desired, <b>forward UDMail</b> to an alternate email application:  <a href="http://mail.google.com/support/bin/answer.py?answer=10957">http://mail.google.com/support/bin/answer.py?answer=10957</a></p>
<b>Phase 3</b>	<b>Monday, Dec. 19 – Friday, Dec. 23</b>	<p>“By request” mail migration (copying) of emails from Lotus Notes to UDMail for those students who have opted-in.</p>


## POST Transition Checklist for STUDENT UDmail Users



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


1.	<input type="checkbox"/> <b>Set UDmail as your default mail program</b>
2.	<b>UDmail Configuration</b> <input type="checkbox"/> A. Enter your signature information (appended to each outgoing email) <input type="checkbox"/> B. Review email labeled as "Spam"
3.	<b>UDmail Contacts (Address Book) Configuration</b> <input type="checkbox"/> A. Recreate personal email groups as needed <input type="checkbox"/> B. Enter contacts from your Lotus Notes Contacts list as needed
4.	<b>UDcalendar Configuration</b> <input type="checkbox"/> A. Set working hours as needed <input type="checkbox"/> B. Recreate upcoming calendar events from your Lotus Notes account
5.	<b>Mail and Calendar Delegation</b> (if applicable) <input type="checkbox"/> A. Assign mail delegation <input type="checkbox"/> B. Assign calendar delegation
6.	<b>Translate Lotus Notes features to UDmail</b> <input type="checkbox"/> A. IF you used RULES in Lotus Notes, create UDmail FILTERS <input type="checkbox"/> B. IF you used STATIONERY in Lotus Notes, create UDmail CANNED RESPONSES <input type="checkbox"/> C. IF you used TO-DOS in Lotus Notes, create UDmail TASKS

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

## POST Transition Checklist for STUDENT UDmail Users Detailed Instructions

1.	<input type="checkbox"/> <b>Set UDmail as your default mail program</b> Visit <a href="http://go.udayton.edu/setdefaultmail">http://go.udayton.edu/setdefaultmail</a> for directions
2.	<p><b>UDmail Configuration</b></p> <input type="checkbox"/> <b>A. Enter your signature information (appended to each outgoing email)</b> <ol style="list-style-type: none"> <li>1) Click the gear icon  at the top right-hand corner of your UDmail screen</li> <li>2) Select “Mail Settings”</li> <li>3) Go to the “General” tab</li> <li>4) Create your signature (or copy/paste it from your Lotus Notes mail settings)</li> <li>5) Click the “Save Changes” button at the bottom of the page</li> </ol> <input type="checkbox"/> <b>B. Review email labeled as “Spam”</b> <ol style="list-style-type: none"> <li>1) Look for the “Spam” label in the left-hand list of UDmail labels (if you had numerous folders – which translated as “labels” – you may need to select the “[#] more” drop-down option at the bottom of the list</li> <li>2) Click the “Spam” label to open the list of messages identified as Spam</li> <li>3) Select desired messages and click the “Not spam” button to remove the Spam label and move them to your inbox</li> <li>4) <u>Repeat regularly to ensure no new desired mail has been marked as spam!</u></li> </ol>
3.	<p><b>UDmail Contacts (Address Book) Configuration</b></p> <input type="checkbox"/> <b>A. Recreate personal email groups as needed</b> <ol style="list-style-type: none"> <li>1) Within your UDmail, click the “Contacts” folder in the left-hand panel</li> <li>2) Click the “New Group...” link to create a new personal mailing list</li> <li>3) Enter the group name and click “OK”</li> <li>4) The group name will appear in the left-hand panel; click the group name</li> <li>5) Click the “Add to “[group name]” button and enter the email addresses OR</li> <li>6) Click the “My Contacts” list entry, select existing contact(s) by checking the selection box to the left of each name</li> <li>7) Click “Groups” and select the group to which these contacts should be added</li> <li>8) Click “Apply”</li> </ol> <input type="checkbox"/> <b>B. Enter contacts from your Lotus Notes Contacts list as needed</b> <ol style="list-style-type: none"> <li>1) Within your UDmail, click the “Contacts” folder in the left-hand panel</li> <li>2) Click the “New Contact” button and complete the form</li> <li>3) Click “Add to My Contacts” to save the entry</li> </ol>

4.	<p><b>UDcalendar Configuration</b></p> <p><input type="checkbox"/> <b>A. Set working hours as needed</b></p> <ol style="list-style-type: none"> <li>1) In your UDcalendar, click the gear icon  at the top right-hand corner of your UDcalendar screen</li> <li>2) Select “Calendar settings”</li> <li>3) In the “Working Hours” section, check the days you work and enter the hours of your normal work day</li> <li>4) Click the “Save” button at the bottom of the screen to save your changes</li> </ol> <p><input type="checkbox"/> <b>B. Recreate upcoming calendar events from your Lotus Notes account</b></p>
5.	<p><b>Mail and Calendar Delegation</b> (if applicable)</p> <p><input type="checkbox"/> <b>A. Assign mail delegation</b></p> <ol style="list-style-type: none"> <li>1) Click the gear icon  in the upper-right, select “Mail settings” and select the “Accounts and Import” tab</li> <li>2) Under “Grant access to your account,” click the “Add another account” link</li> <li>3) Enter the email address of the person you'd like to access your account and click <b>Next Step</b>. Remember you can only enter a UDmail address</li> <li>4) You'll see a confirmation message. Click <b>Send email to grant access</b> if you're sure.</li> <li>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 <b>Accounts</b> tab in <b>Settings</b> <ol style="list-style-type: none"> <li>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).”</li> <li>b. Access email delegated to you by clicking the down-arrow next to your email address in the upper-right corner. Click <b>Switch account</b> and choose your delegator’s email address</li> </ol> </li> </ol> <p><input type="checkbox"/> <b>B. Assign calendar delegation</b></p> <ol style="list-style-type: none"> <li>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</li> <li>2) Select “Share this calendar”</li> <li>3) Enter the UDmail address (e.g. <a href="mailto:rflyer1@udayton.edu">rflyer1@udayton.edu</a>) of the person with whom the calendar should be shared</li> <li>4) Under “Permission Settings” use the drop-down menu to select a level of access</li> <li>5) Click the “Add Person” button (the delegate will receive an email invitation to view your calendar)</li> <li>6) Click the “Save” button to save your changes</li> </ol>
6.	<p><b>Translate Lotus Notes features to UDmail</b></p> <p><input type="checkbox"/> <b>A. IF you used RULES in Lotus Notes, create UDmail FILTERS</b></p>

- 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