

Survival Guide for Lotus Notes and Domino Administrators

Mark Elliott



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Introduction

About This Book

Written by a Lotus Notes® expert, this book presents easy-to-understand and ready-to-use procedures. It includes answers to dozens of common support problems based on first-hand accounts from actual IBM® field support representatives. This practical book could be considered a bible, or survival guide, designed to steer software users and support professionals in all facets of Lotus Notes support. Outstanding features of the publication include an overview of Lotus Notes Release 8, unique content for actual field support engineers, and straightforward presentation of information and experience.

New Features

This book provides an overview of the Lotus Notes Release 8 client application. Novice users will learn what features are included in the release while Notes-savvy users can review at a glance the improvements and enhancements to the product. New users will benefit from learning how to fix issues and become a power user. Support staff will have access to a wealth of instructions and a myriad of resolutions to quickly address any problems in a Notes implementation.

Content

This book is set up into three main sections—Client Setup, Technical Support, and Software Management. With more than 300,000 employees worldwide, IBM has one of the largest implementations of Lotus Notes in the world. On a daily basis, IBM field support engineers encounter, manage, and resolve support issues—and store information in a global database.

This book will leverage these proven techniques and solutions as the foundation for its content. The most frequently occurring issues and solutions will be documented for easy reference.

This will enable small businesses to large corporations optimize support through the experience and leadership of IBM. Readers will be able to rapidly and concisely respond to issues, and avoid the pitfalls that stand in the way.

Second, the book includes procedures that you can use to manage a Domino® infrastructure. Some of the key topics include how to deploy Lotus Notes across an organization, manage release upgrades, and streamline maintenance for the client. Given the unique nature of the content, this book will immediately gain support across the Domino technical support community.

Presentation

This book is presented in a simple, straightforward manner, enabling users and support staff alike to quickly locate and thumb to the topic of interest without having to read the entire book. You will find being able to jump to a particular problem resolution or topic as a significant benefit. This “read-as-you-go” approach enables you to gradually build skills as issues or situations arise.

Experience

As a Lotus Notes support technician, I have supported several Lotus Notes implementations, including one account with more than 250 users. In this particular case, I managed the entire spectrum of activities from Domino Server setup, to software installations, to configuration, and finally steady-state support.

As any technician will tell you, supporting an account of any size will net all sorts of questions and problems—some as simple as addressing how to use a particular feature, to resolving actual problems with the application. However, whether it’s fielding a problem with using the software or managing an actual problem with the software, all the user wants is for the issue to “go away.” This book is intended to address such a situation by presenting information from an experienced professional who has fielded such questions. The information is based on first-hand experiences and includes both instructions and best practices to resolve common support issues. Its strength comes from a combination of unique elements designed to grab the attention of support technicians. Such elements include

- Resolutions to common problems
- Streamlined processes for infrastructure support
- Targeted point of view
- Knowledge sharing from experienced experts
- Release of independent information
- Information based on the most current release

Who Should Read This Book

Field support representatives will learn how to plan software deployments, manage release upgrades, address common problems, configure settings based on corporate policies (or directives), and optimize support. This book is a “must read” for anyone who provides desk-side or infrastructure support in the Domino arena. The reader should have practical experience working with computers and a general exposure to the Lotus Notes Client® and Administrator applications.

Although a portion of the book relates to the most current release, there is a continuum of information that can be used independent of the software release level. No other publication on the market provides information in this manner or includes resolutions to common Lotus Notes challenges in the workplace. Readers will have an encyclopedia of information for managing the Lotus Notes client infrastructure and for supporting their customers—the end users. Being able to quickly, efficiently, and effectively respond to issues will reduce overhead support costs and increase customer satisfaction through prompt resolutions.

It’s also important to understand that the images presented in this book are based on the Standard Lotus Notes client in a Microsoft® Windows® environment. Users running the Basic version or running on an alternate operating system will observe slight variances in the images and instructions shown in this book.

Lotus Notes

Welcome to IBM Lotus Notes and Domino, leading the way in collaborative software. This chapter is focused specifically on client setup. It provides an introduction to the version 8 client along with a description of new features and enhancements.

If you are new to the Notes application, this book is a good starting point to learn about the features. For readers already experienced with Lotus Notes, this book is a good place to quickly review changes to the interface.

The remainder of the chapter is dedicated to the setup and management of the Notes client. The chapter provides detailed instructions for how to configure the client, address common user activities (such as how to change their password), manage the desktop, and work with user data. As you read through this chapter, some of the instructions relate specifically to the version 8 client. These sections are denoted with an “(8)” in the section heading.

What's New with Lotus Notes Version 8?

Lotus Notes version 8 contains a wealth of new features and enhancements, including a completely redesigned user interface (UI), as shown in Figure 1.1. For users already familiar with the Lotus Notes product, you will find the new interface to be a significant change and welcomed improvement.

There are sweeping changes across the board including enhancements to the navigation, graphics, mail, calendar, and help. While some users will find the new interface and navigational changes to be a bit overwhelming and unforeseen, most will quickly adapt and feel “at home” with the technological advancements.

Most users will find the enhanced graphics clean and refreshing. Numerous new features have been added to messaging—including enhanced calendar management, inbox management, and the ability to retrieve (or recall) mail messages. Improvements also include the ability for

users to optionally keep deleted or declined calendar entries on the calendar for reference purposes.

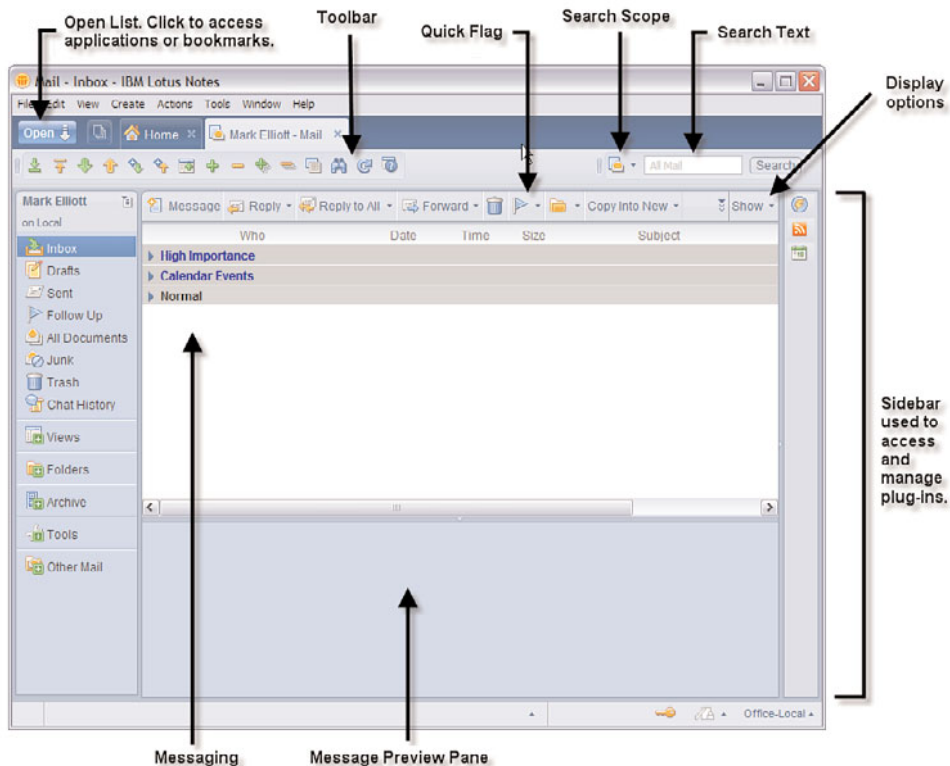


Figure 1.1 Key navigation elements of the Lotus Notes client.

In addition to the mail and calendar functions, many new and innovative features for information management have been incorporated into the release. Some of these features include enhanced search capabilities, activity-centric computing, composite applications, RSS and Atom feeds, filters, and support for plug-ins, which are designed to help increase personal productivity.

NOTE

A dedicated Activity server must be set up and implemented in order to utilize the activity-centric computing feature.

General Enhancements

The following section briefly outlines some of the changes integrated into release 8. For users already experienced with Lotus Notes, this section is intended to give you a brief overview of the updates to the tool. At a glance you'll be able to review the changes, enhancements, and new features as you start using release 8. For new and novice users, this section is intended to help you become acclimated to the application terminology and some of the key features being introduced.

- **User interface.** Right from the start, you will notice there have been major improvements to the graphics for the Lotus Notes interface. Images have been redesigned and enhanced to provide a softer look to the user interface. You'll notice the graphic database icons in the Lotus Notes workspace have changed slightly to include a shadow and selector color when the mouse passes over a database icon in the workspace.
- **Navigation.** There are numerous improvements to the layout of the user interface and application menu items. First the workspace navigation buttons, also called the "bookmark bar" in release 7, have been rolled up into an "open" list and displayed at the top of the UI screen. These buttons were previously displayed as icons along the left side of the workspace. These items, along with updated graphic icons, are now contained within the Open button at the top of the screen (see "Open List" further down this bulleted list for additional information pertaining to this function).

Next, some of the familiar menu item names have been replaced. For example, **File > Database** has been changed to **File > Application**. So, if you frequently use the **Properties**, **Access Control...**, **Copy as Link**, or **Bookmark** functions, you'll need to look for these menu options in the Application submenu.

- **Preferences.** All user preferences have been consolidated into a single dialog and can be directly accessed by selecting the **File > Preferences** menu option. In earlier releases several separate menu options and preference dialogs are used to set various Lotus Notes configuration options. The one-click access and consolidated list of preferences is a terrific improvement and simplification to the user interface. You'll find new settings throughout the Preferences dialog. Some of the new preferences include
 - **Activities section.** Users can configure an "activities server" and set various display options. This section is new to release 8.
 - **Contacts section.** Users can select a default address format and specify the format for the contact's name where the surname is displayed either first or last in sequence.
 - **Log Settings section.** Users can enable and disable logging. This section is new to release 8. This feature is used to log operational messages and errors to a text file for problem determination. If you find your Notes client is crashing, you might need to enable logging to capture the various Lotus messages to be reviewed by an administrator or to be sent to Lotus for review. If the logging is enabled and the Notes client

crashes, the text file will automatically be sent to the user's inbox after the application is restarted.

While the log file is helpful for capturing messages during a system crash, this file can also be helpful in the diagnosis of non-crash-related problems. To enable or disable this feature, locate the **Log Settings** section and toggle the **Enable Logging** check box to change the selected value.

- **Location section.** Location documents can now be managed from within the Preferences dialog. With prior releases, you had to navigate to the Notes Address Book to create, manage, or update your location settings. Now you can perform these functions from the Preferences dialog as well as from the pop-up menu located in the lower-right corner of the Lotus Notes client.

A **Locations** menu item has also been incorporated into the **File** menu. With this menu item, you can Switch to Location or Manage Location. This provides a fast-path navigation to the location configuration settings that were previously managed through the address book. You can also manage these settings through the Preferences dialog, which is discussed later in this section.

- **Mail section.** Several new features have been incorporated into the Mail section, including enhancements to the Attention Indicators. Users can set Recipient Indicator icon flags to display when you're the only recipient, one of many recipients, or simply listed in the Carbon Copy (CC) list. Users can also specify a list of shortcuts to others' mail and set preferences for sending and receiving mail messages.

With release 8, mail messages are automatically refreshed in your inbox, thus eliminating the need to click the refresh button or press the F9 key. While this feature is a welcomed change, you might find it to be a challenge to break the habit of pressing the F9 key. So, if you'd like to revert back to this way of refreshing, you can disable the feature in the Receiving section (see Figure 1.2).

- **Productivity Tools section.** This section is new to release 8. Users can configure and set preferences for a significant number of features and tools, including Accessibility, Auto Recognizer, Color Scheme, Color, File Supervision, File type association, Fonts, Help Agent, Language Settings, Macro Security, Memory, Presentation Editor, Print, Regional Settings, View, Warning Messages, and Word Processing Edits.

Access to the productivity tools can be set to automatically launch when the operating system loads, when the client starts, or not at all. Changing the preference to automatically launch in the background will expedite access to these tools and settings. Using productivity tools, such as Lotus Symphony™, you can also create and edit documents, presentations, or spreadsheets from the Notes interface. The Lotus Symphony application is available at no charge from the Lotus Web site.

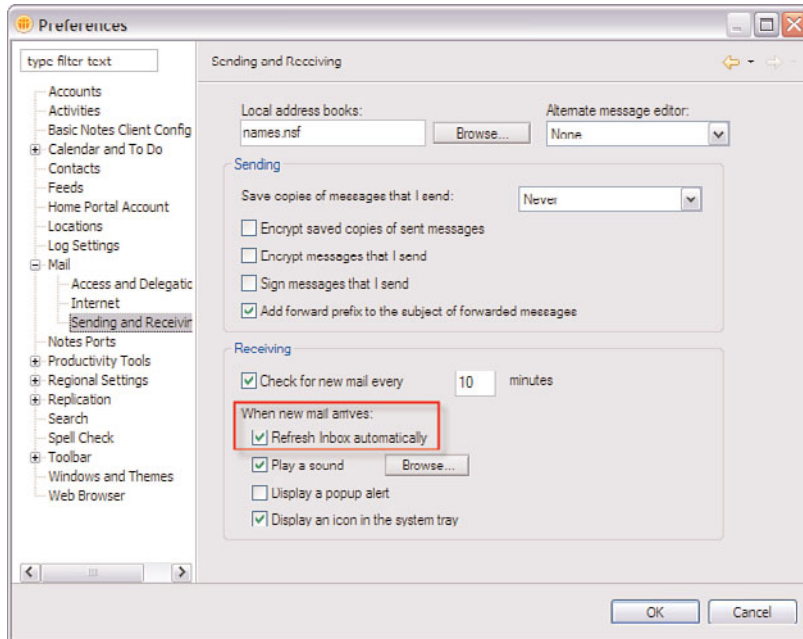


Figure 1.2 The automatic refresh option can be set in the Mail, Receiving section of the Preferences dialog.

- **Toolbar section.** In prior releases you accessed the toolbar settings by selecting a separate menu item, and configuration settings were displayed in a separate dialog. These settings have been consolidated and integrated into the general Preferences dialog (see Figure 1.3).

WARNING

A word of caution: Some users may find toolbar preferences are lost when upgrading from an older version to release 8. As a result, users may have to reconfigure or recreate the toolbar customizations after the installation. If you have any custom buttons or preferences, you may want to make a list of buttons with the actions, formula language, or LotusScript® code before installing release 8.

- **Windows and Themes section.** This section, which is new to release 8, allows users to customize the color scheme for your Lotus Notes client interface.

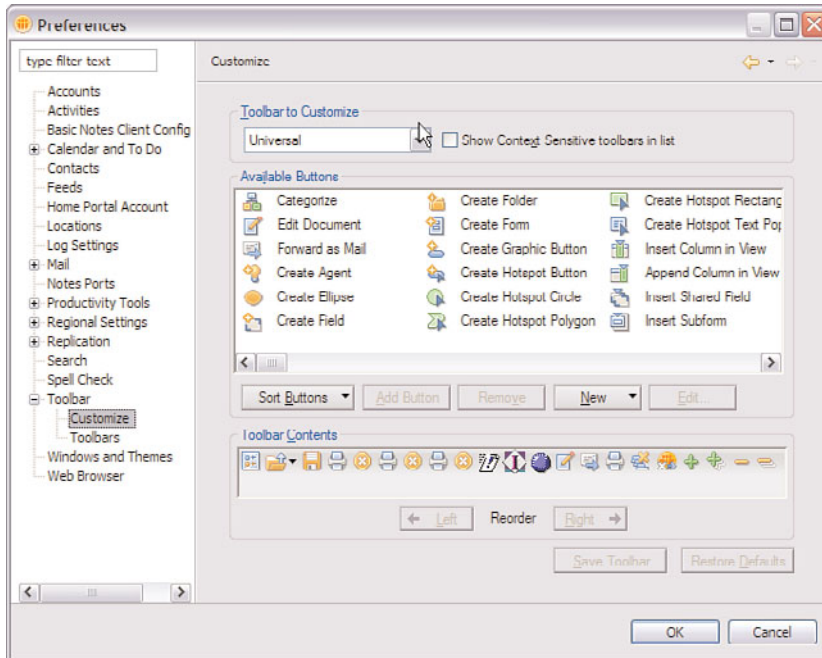


Figure 1.3 Toolbar settings are now included in the Preferences settings.

- Open List.** The Open List replaces workspace hotlink icons previously displayed on the left side of the user interface screen. These icons have been rolled up, grouped into a button called **Open**, and displayed at the top-left corner of the workspace (see Figure 1.4). When you click the button, a drop-down list of the hotlinks appears and can be selected. By default, the list is collapsed and only expands to display the icons when you click on the button. Alternatively, if you would prefer to have the list displayed, you can right-click on the **Open** button and select the **Dock the Open List** option. This parks the icons on the left side of the UI. To switch back to the default, repeat the process and uncheck the **Dock the Open List** option.

It's also important to recognize all references to the Address Book have been replaced with **Contacts**, which is the Lotus Notes terminology. To access the Address Book, select the **Open > Contacts** menu option (or click on the **Contacts** hotlink icon).

- Contacts.** Multiple contact changes have been incorporated into the Address Book. Several new views have been added to the interface, including one to display recent contacts, one to display contacts by company name, and another to display information in business card format. The contact display format has also been enhanced and now permits pictures to be added to the contact record.

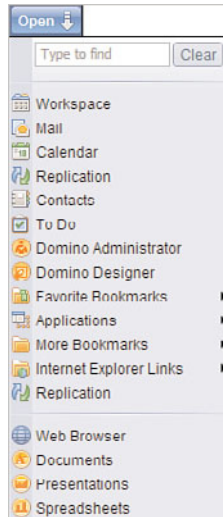


Figure 1.4 The new Open List feature replaces the hotlink navigation icons.

- **Enhanced Undo.** The Undo function has been greatly improved. When editing a document, users can now reverse multiple edits, including changes made to tables—another long overdue feature, frequently discussed and requested on discussion forums. At the same time, it's equally important to mention there are still quirks in the “undo” process when working with tables. Hopefully Lotus will smooth out the remaining wrinkles with the version 8.5 upgrade.
- **Printing.** The print function has been enhanced to support a special type of table called **tabbed tables**. A tabbed table allows users to group information together in a series of tabs (as opposed to the traditional row and column table). Using the new print options users can print this special type of table “as displayed,” print a single tab, or print all rows in a table. The new function also prints the labels for tabbed tables.
- **Product Help.** The help section for the Lotus product suite has been completely redesigned and enhanced. Users can now choose between **Help Contents**, which displays in a separate window and **Dynamic Help**, which displays in a window pane on the right-side of the interface screen. The help topics are sorted and displayed in **Books** with the continued support to search for any help topic.
- **Search.** Starting with release 8, a search interface has been permanently incorporated at the top of the Notes UI. This newly designed search function allows you to initiate a search from anywhere within the Lotus Notes client. You can also click on the search parameter icon to refine the search criteria. Here you select to search All mail, calendar entries, contacts, or expand the search to Yahoo! or Google.

The Notes client now also tracks and allows you to view recent conducted searches. While this new search interface has been integrated into the client interface, you can still access and utilize the previous “advanced” search functionality. To display or hide the traditional search interface, select **View > Search This View** to toggle the setting.

- **Sidebar.** The Sidebar is new to Lotus Notes release 8. Similar to the Bookmark bar (now called the Open List), the sidebar displays a list of installed Lotus Notes plug-ins for quick access in a toolbar along the right side of the user interface. You access the sidebar by dragging open the pane on the right side of the client or, alternatively, by selecting a display option from the **View > Sidebar** menu.

Typical plug-ins may include access to Activities, day-at-a-glance, or data feeds. Depending on the implementation at your company, installation and configuration may be required to utilize one or more of these features. For additional information on plug-ins, see the “Sidebar Plug-ins” section later in this chapter for more on Activities, feeds, day-at-a-glance, My Widgets, Lotus Symphony, and Sametime Contacts.

- **Spell checking.** Type as you go spell checking has automatically been enabled with the most current release. The functionality is a nice improvement over the prior implementation. The checker appears to be much better at identifying misspelled or unknown words.

Mail Enhancements

While there have been changes to the navigation, many of the features introduced in prior releases continue to be implemented. Users can continue to utilize the message preview pane and sort by clicking on the column headers.

Overall, the layout remains very similar to prior releases although the graphics have been enhanced and new features have been incorporated into the release. With this release, Lotus has renamed “message threads” to “conversations” and has grouped related messages for quick reference. Users can simply click on the graphic triangle (also known as a **Twistie**) to view the trail of messages. You can then hover the mouse over the message to display the contents for a particular message.

The most exciting news about the release is the long-awaited ability to recall or retrieve sent messages. This feature has been available in other products and, as a support person, was a question frequently asked. In the past you could “catch” a sent e-mail by implementing mail replication and setting a minimum threshold to transfer outgoing mail to, say, three or four messages. This would, in most cases, give you the chance to change your mind and delete the outgoing message before replication started. With release 8, you now can actually retrieve the sent message—with one caveat. The recipient can optionally enable or disable the ability to recall the message in their local preferences settings.

- **Automatic Refresh.** With this release, inbound mail messages are automatically displayed in the Lotus Notes UI. This eliminates the need to click the refresh button or F9 key.

- **Collaboration History.** The Collaboration history feature, which is new to release 8, enables users to display a list of recent transactions, such as messages, calendar events, or instant message chats, for a specific person (see Figure 1.5). This feature can be particularly handy for locating a previously sent message or when looking for a scheduled meeting. All transactions are displayed in a scrollable list. Click on a particular item to display the item, where you can read or perform other normal actions such as reply to the message.

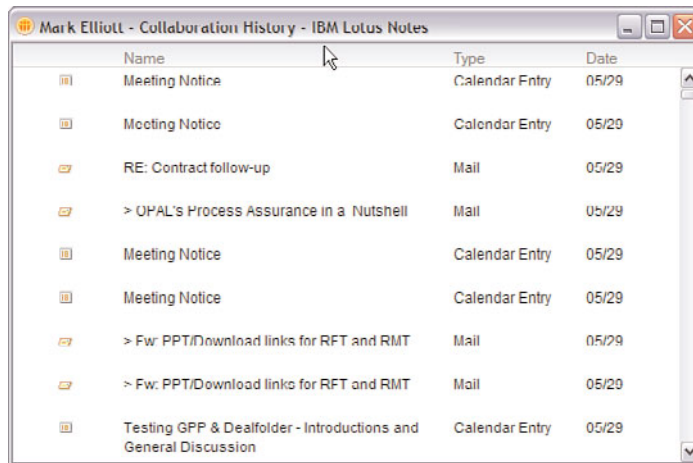


Figure 1.5 The new Collaboration History feature displays all recent communications for a particular person.

- **Conversations.** Lotus Notes has long included the ability to view a group of related messages (see Figure 1.6). While this capability continues to be supported in release 8, the terminology has changed from “message threads” to “conversations” and the functionality has been improved. From the inbox view, you can now use the mouse to hover over a message to view its content; also, conversations can be expanded or collapsed from all mail folders and views. You can optionally display the conversation in the top of a particular message through the use of the Display button (described next) to show either the entire conversation or the original message when reading a particular mail item.
- **Display button.** This feature is new to release 8 and allows you to select certain elements of the mail message to be displayed or hidden. The button displays at the top of the mail message and allows you to show the **Expiration**, **Conversation**, or **Original Message** (see Figure 1.7). This feature works in concert with conversations. Using the Display feature you can selectively see a conversation trail or simply the original message. When selected, the appropriate message or messages appear in a highlighted box at the top of the message.

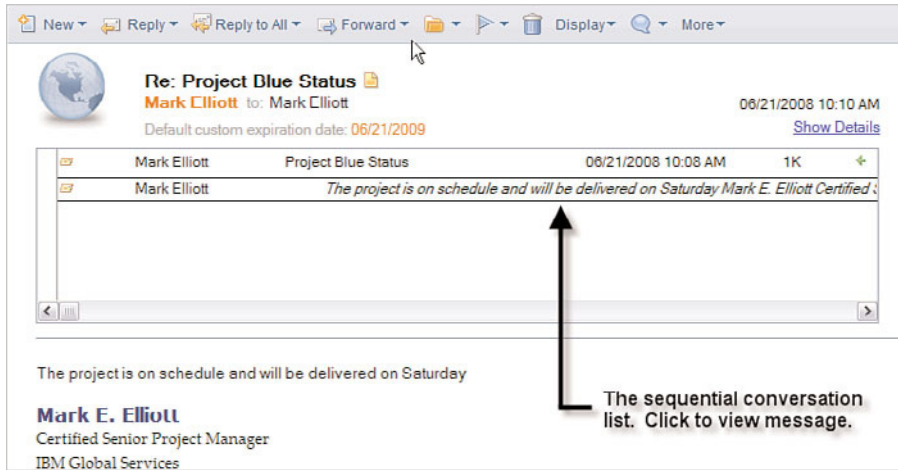


Figure 1.6 Related messages are grouped together in the inbox.

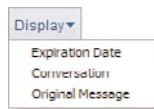


Figure 1.7 The Display menu button allows users to toggle between display settings.

- Follow-up flag.** The follow-up flag is a graphic icon, a green flag, that can be set to display for any mail message (see Figure 1.8). The intent is to display or highlight a particular message that needs some sort of action or is an important item you may want to track. While the follow-up flag has been available in past releases, you may have found it cumbersome to set the flag through the right-click menu or one of the other navigation paths. However, with release 8, a follow-up flag button has been added to the top of the mail interface, which enables quick and easy access to this feature.

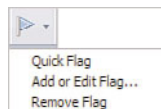


Figure 1.8 A new Flag button has been added to the user interface for quick access to actions.

- Message layout.** The message layout has been redesigned with new letterhead graphics and repositioned fields. To manage recipient content, Lotus has included buttons to **Show Details** and **Hide Details**. You can also sort the recipient list to more readily locate an address.

- **Message Recall.** This feature is new to Lotus Notes 8. Using this feature, you can retrieve a sent message even if the recipient has read the mail. However, the recipient can optionally manage the ability to recall messages through user preferences.
- **Out of Office.** The underlying architecture for the Out of Office function has been redesigned. Previously this feature utilized a pop-up window to manage the out of office configuration settings. With release 8, a dedicated window is utilized, which allows users to perform other operations while the feature is being configured. Lotus has also replaced the button names to make the interface more user-friendly and intuitive. Otherwise, the general settings remain the same as in prior releases. (Technical note: The Out of Office functions are now managed by a router task on the server for better scalability and performance. Previously, this function was managed by a mail database agent.)
- **Show button.** This feature is new to release 8 and allows you to control what's displayed in the mail views. Using this button you can select to view only unread messages, set the preview pane position, or display messages as conversations. This button is located in the upper-right corner of the mail user interface screen.
- **Suppress Remote Images.** This preference option allows you to suppress remote images from being displayed in messages. This option only applies to Internet messages that were received external from your mail domain. This can be a handy feature to prevent potentially obscene or offensive images from being displayed in the message. However, you can optionally display the image as the message is being read.
- **Type-ahead addressing.** To varying degrees, the Lotus Notes interface has included smart addressing where the user interface attempts to automatically identify recipient addresses as you type. This functionality is called **type-ahead addressing**. In past releases, the function worked pretty well most of the time, although you often had to press the comma key (“,”) to trigger the lookup and occasionally there would be a delayed response or no response whatsoever. However, with release 8, Lotus has finally gotten it right. The type-ahead feature works flawlessly with incredibly fast response. Its implementation is identical to the URL type-ahead function in Microsoft Internet Explorer where a drop-down list of addresses is displayed and refined as you type. Users can then select from the list, or in many cases, Lotus is smart enough to select the correct address automatically. The list displays the most recently used addresses at the top of the type-ahead results list. For those of you frustrated with this feature in prior releases, you'll find this to be a slick improvement for this release.

Calendar Enhancements

The following list provides an overview of enhancements, changes, and new features to the Calendar interface.

- **Calendar layout.** The graphics and layout for the calendar have been completely redesigned. The new calendar design includes eye-popping graphics that clearly show the start and end times for meetings. Overlapping meetings are clearly represented and

implemented with a new color scheme that makes scanning and identifying calendar entries easy. Reminders, appointments, meetings, anniversaries, and events each have unique color schemes and can easily be identified at a glance.

Lotus has also changed the layout for locating free meeting times for attendees. The **Find Available Times** function now appears at the bottom of the invitation in a separate tab. Finally, users can schedule meetings in another time zone. The changes made to the calendar interface offer greater flexibility in management of scheduled tasks and visibility to events, such as the **Two Day** and **One Work Week** views. Users can customize the calendar to best match their needs.

- **Cleanup.** To help manage your mail database size, Lotus has included a new feature that enables you to manage old, obsolete calendar entries. The slick implementation will clean up all calendar entries, including recurring events, based on a duration or date. In prior releases, there was no easy way to remove recurring calendar entries without adversely impacting future entries. Now you can run **Calendar Cleanup** to automatically clear old entries.
- **Ghost Entries.** Starting with release 8, unprocessed invitations can appear on the calendar as a “ghost” or grayed-out. This display option can be set in the Calendar section of the user preferences.
- **Meeting Cancellations.** Similar to the calendar’s ability to automatically process meeting invitations, you can now have meeting cancellations automatically processed and removed from your calendar.
- **Retain Deleted Entries.** In addition to automatic processing of cancelled meetings you can optionally select **Remove from Calendar** (which, as its name implies, removes the cancelled meeting from your calendar) or **Show as Cancellation in Calendar**, which allows you to view in your calendar that a meeting has been automatically cancelled and keeps you from having to search for a meeting you thought was going to happen but that you cannot seem to locate.

Sidebar Plug-ins

This newest version of Lotus Notes has been enhanced to include a function called the **Sidebar** (see Figure 1.9). The Sidebar is a window pane that can be collapsed or expanded to show various plug-in features. Each plug-in can subsequently be expanded to show even more information. A **plug-in** is a stand-alone feature that contains functions and information designed to facilitate collaboration or communicate information.

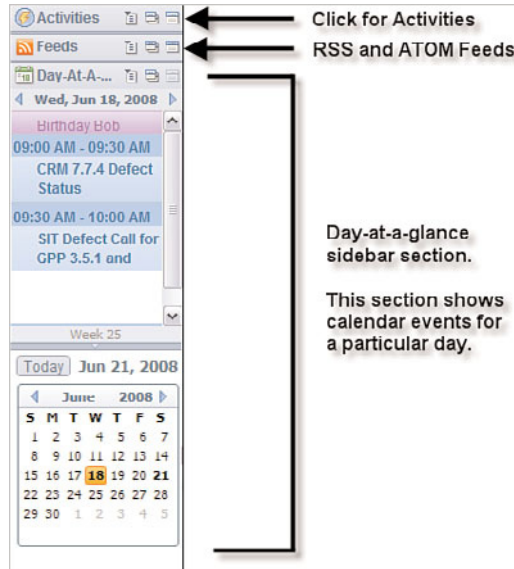


Figure 1.9 The new Sidebar feature displays plug-in features and calendar at a glance.

The following are a subset of the functions that may be installed and configured. Implementation will vary based on your installation or corporate implementation. Several of these can be added to the client as part of the Lotus Notes release 8 installation procedures. Sidebar functions, when expanded, are always visible from the client (as opposed to just the mail application).

- **Activities.** Activities, new to release 8, are groupings of work elements, such as conversation threads, to do's, files, links, or instant message chat logs. Related elements are listed or grouped together in the Sidebar based on a specific task or project. Activities are intended to be a collaborative tool used to communicate, track, and share with peers or other project team members. To utilize this function a server must be set up and configured to support it; the Activities function is not supported as part of the default client setup. You will need to work with an administrator to establish a Domino server and to configure this functionality.
- **Feeds.** This feature enables you to manage information feeds using the Really Simple Syndication (RSS) and Atom Publishing Protocol (APP) distribution mechanisms. Using either communiqué type, you can subscribe to, receive, and manage Web-based content of interest to you. When this option is enabled, you access the information via the Feeds section of the Sidebar.

- **Day-at-a-Glance.** This feature, new to release 8, enables a quick view of scheduled calendar events to be displayed along the right side of the client window. This feature is part of the **Sidebar** feature, which is also new to the release.
- **Lotus Symphony.** Lotus Symphony is a suite of three application editors—Lotus Symphony Documents, Lotus Symphony Presentations, and Lotus Symphony Spreadsheets—that enable you to create and edit documents, presentations, and spreadsheets from within the Lotus Notes client. The application supports the Open Document Format (ODF), which enables you to seamlessly manage documents in either the Microsoft Office® or Lotus SmartSuite® file formats.
- **My Widgets.** My Widgets is a new feature that enables you to create custom tools to perform tasks to manage Notes data. This add-on tool allows you to create custom Lotus Notes functions that are typically displayed in the right-click pop-up menu. For example, you could create a function to search Yahoo!. After you create it, you could highlight a text string and select the function from the right-click menu. The My Widgets function works in concert with Lotus Live Text. You will need to install and configure this function because it is not part of the default configuration.

TIP

To learn more about the Live Text and My Widgets features, visit the IBM Lotus Web site on collaboration and productivity tools. Here you can obtain additional information, view online demos, and download product information. You can find this information at www.ibm.com/software/lotus/products/notes/productivitytools.html

- **Integrated Sametime®.** Sametime, the Lotus implementation of instant messaging, can be optionally installed as an integrated application within the Notes client. The features and functionality of Sametime remain unchanged; the application itself is embedded into Lotus Notes and displayed in the Sidebar.

WARNING

Be careful installing Lotus Notes release 8 with the integrated Sametime option if you already have Sametime installed on your system. You might encounter quirky behaviors, including multiple icons displayed in the Windows tray and the inability to launch the application by clicking on the tray icon. (See Chapter 2, “User Support and Problem Management,” for additional information.)

Configuring Lotus Notes

The Configuring Lotus Notes section offers common setup and management activities essential to all Lotus Notes users. This section lists topics in logical order from the perspective of a new user or installation. As an individual user or support person, you'll probably want to step through each of these items as part of the normal setup.

These items are intended to both help set up the environment from a usability perspective and to implement a fundamental layer of security to protect data stored on the client workstation. Most of these items are one-time procedures that, once set up, do not need any additional modification or tweaking.

Setting Up Mail Replication

What is replication? **Replication** is the process in which a copy of your mail database is created on your local workstation. Replication will improve system performance because information is local and it does not have to travel over the network to be processed. Replication also enables you to continue working when your mail server is down or when you are working remotely.

Replication works by initially creating a complete copy of the mailbox on your local computer. Once the copy is established, incoming and outgoing messages are transmitted (or replicated) back to the server at a set interval for processing.

Beginning with Lotus Notes 8 there are two ways to create a replica: a new method called Make Available Offline or the traditional method called New Replica. You can use this latter method regardless of the Notes client version being used. Users running version 8, however, will have an alternate method available. The new Make Available Offline option consolidates the replication setup process. This feature is available by opening the database and selecting the **File > Application > Make Available Offline** menu option.

TIP

When working remotely you should switch locations to Island mode. Using Island mode allows you to queue outgoing messages and to process calendar events already posted to your inbox. Once you are able to reconnect to the network, simply switch back to the original location setting, such as Office (Network), to resume normal processing. Otherwise, you might encounter errors if you work remotely but don't change the location. To change the location setting, simply click on the location setting at the bottom right corner of the Lotus Notes client.

The following outlines the steps for the traditional method and illustrates to set up replication for your mail database. As part of the process to create a replica, you will need to compare the size of your mailbox with the available space on the workstation. Lotus Notes automatically displays both database size and space available on the destination device. While this process is geared towards your mail, you can apply this same procedure to most Lotus Notes applications.

- Step 1.** Navigate and open your mail application.
- Step 2.** Select the **File > Replication > New Replica** menu option. The Create New Replica for Application dialog box appears, as shown in Figure 1.10.

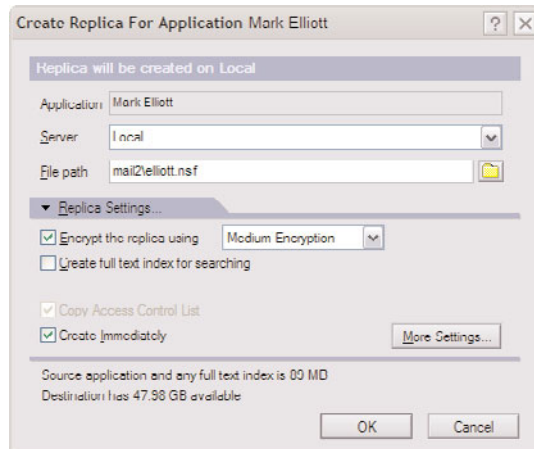


Figure 1.10 The Create New Replica dialog box.

Ensure the **Server** field is set to **Local** and optionally set the **File path** field. Best practices state that you should create replicated databases within the **\Notes\data** folder or directory for the application. (Note: The exact path to this folder will depend on the value you specified during the application installation procedure.) This folder is the default setting when creating replicas. By default, it is the implied top-level folder and is not displayed in the dialog. For example, based on the information in Figure 1.10, a new replica will be created in the **\Notes\data\mail2elliott.nsf** directory. However, from a configuration and reference perspective, Notes automatically assumes the file is stored in the **\data** directory and does not need to be specified.

Lastly, check the source application size and destination space available to ensure ample space is available before starting the replication. These values will display at the bottom of the dialog. In this example, the mail replica will require 191.1MB of space and there is 51.51GB of space available.

- Step 3.** Click **OK** to continue. Lotus Notes opens the replication window and begins copying the database onto the local workstation. Depending on the size of the database, this process could be as short as a few minutes or could take an hour or more to be created. The database has been created once the progress indicator has completed and a message appears next to the database in the replication workspace. The message should show the number of documents received and sent.

Step 4. Now that a replica of the database has been created, you need to define replication preferences such as the frequency in which messages are transferred between the workstation and the server. Select the **File > Preferences** menu option and navigate to the **Replication** section. You should see a dialog similar to that in Figure 1.11.

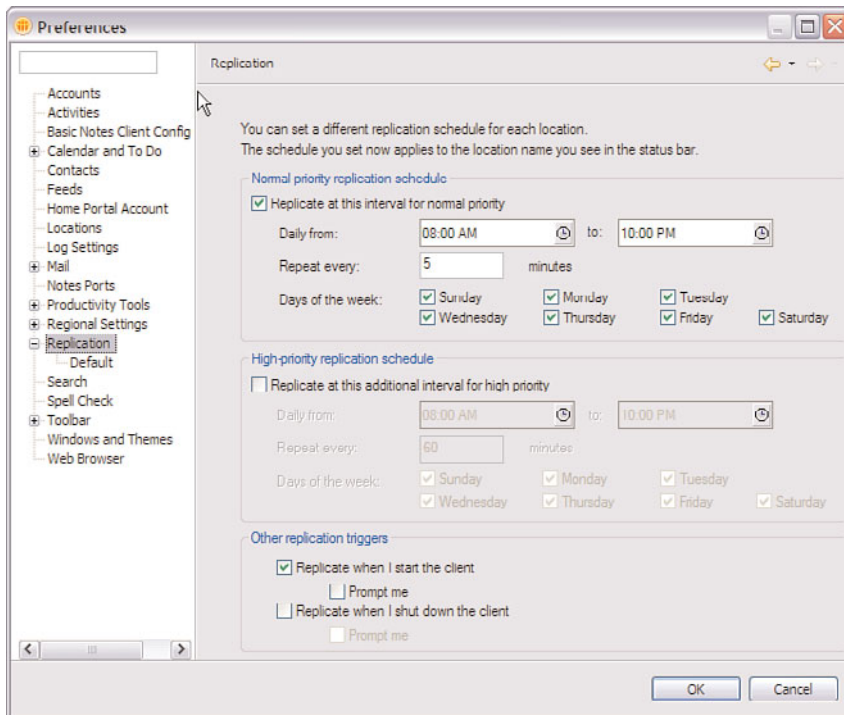


Figure 1.11 Access replication settings via the Preferences dialog.

Step 5. In the **Normal-priority replication schedule** section, specify the time frame in which replication should occur. At a minimum, you want this window of time to match your normal work hours and days. You might want to extend the duration in case you arrive early or potentially work late. Optionally, you can enable the high-priority replication settings and whether to replicate at startup and shutdown.

Step 6. Click **OK** to complete the replication process. A copy of your mail now resides on your local workstation. Changes will be transmitted and received based on the frequency specified in the preferences (for example, every 5 minutes).

With the replication setup complete, you will want to encrypt the database to prevent unauthorized access to the database. You can find more information regarding encryption in the next section, “Encrypting Your Mail Database.”

Encrypting Your Mail Database

When implemented, database encryption can prevent unauthorized access to databases stored on the local workstation. Encryption provides an additional layer of security for local databases or replica databases. Without encryption, it is possible for a Notes-savvy person to copy and access data on your workstation.

Encryption works by associating a random public key with a specific user ID and appending the resulting value to the database. Only the user whose ID is encrypted will be able to access the database. Database encryption has no effect on other replicas of the database. This process is ideal for computers that are shared with other users or for laptops that are taken out of the office environment.

Although encryption sounds technically complex, the implementation and subsequent usage is simple. After the database is encrypted, the decryption occurs seamlessly on the local workstation. For example, if mail is replicated to a local database, you should encrypt that mail database to prevent unauthorized users from accessing your mail. After the database is encrypted, however, you will still be able to open and access mail with no additional steps required.

Three levels of encryption can be implemented: Simple, Medium, and Strong. In most cases, Simple or Medium encryption is sufficient. It's important to note that the higher the encryption level, the longer it will take to open the database.

Starting with Lotus Notes release 8, a new section has been added to the Preferences dialog and, by default, replicated applications are automatically encrypted—a welcomed enhancement for all Notes administrators. Follow these steps to check or manage these settings in release 8. If you're working with an older release or need to encrypt a database created in a prior release, you can skip forward to the next set of instructions to learn how to manually encrypt a database.

- Step 1.** Select the **File > Preferences** menu option to display the global Lotus Notes preference settings.
- Step 2.** Navigate to the **Replication** section and select the **Default** preference setting view (see Figure 1.12).
- Step 3.** Verify the **Encrypt locally using** field is enabled. The default should be **Medium Encryption**. This will ensure all replications are automatically encrypted as they are being created. If you want the newly created replication requests to be generated instantaneously, select the **Create immediately (instead of at the next scheduled replication)** option. Alternatively, the replica will be generated at the next scheduled replication interval as described in the earlier section, "Setting Up Mail Replication."
- Step 4.** Click **OK** to complete the configuration.

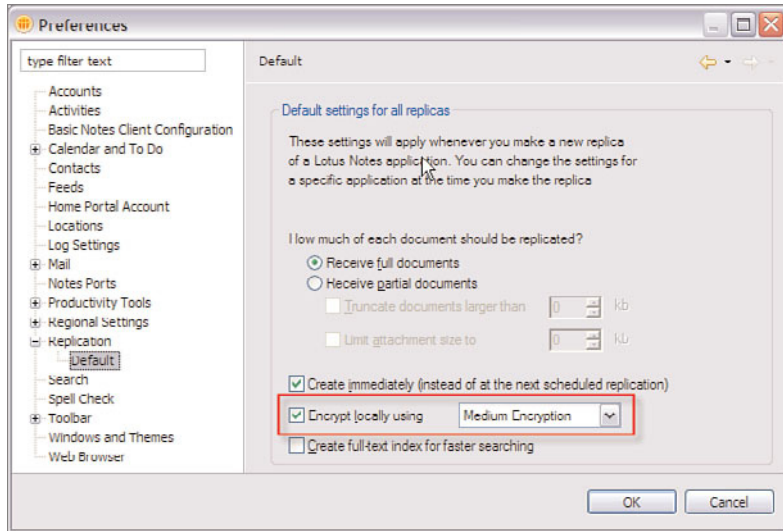


Figure 1.12 As a best practice, users should always encrypt local database replicas.

TIP

Until recently, many users had small hard drives and had to constantly monitor files stored on the workstation. Many of us also had to connect using modems to access the company network or Internet. For most folks, these issues are no longer of concern because hard drives now allow for gigabytes of storage and high-speed network connectivity is readily available. However, if you have a need to reduce the data being replicated to address concerns with storage, network traffic, or both, then you can define what information is replicated to the local database. This feature may also be desired when the documents are very large in size or possibly contain large attachments. By default, replication is set up to **Receive full documents**. To manage the data being sent you could change this setting to **Receive partial documents** and a truncated document will be transmitted to the local replica. To access the complete document, you will need to access the document on the server instance of the database.

Follow these steps to manually encrypt the mail or other local database replica. You might need to manually encrypt your mail (and other local databases) if a replica was created using an older release.

Step 1. Locate and open the database.

Step 2. Select **File > Application > Properties** to display the database Properties dialog for the local database.

Step 3. Click the **Encryption Settings** button to configure the encryption for the database (see Figure 1.13).

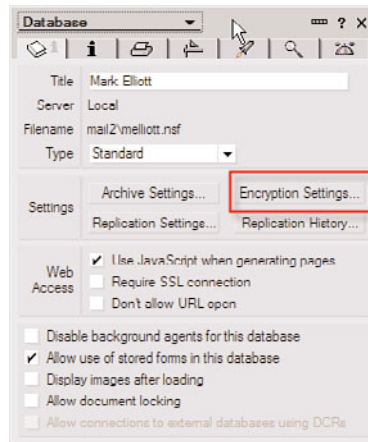


Figure 1.13 You can also access encryption settings via the database Properties dialog.

Step 4. To enable encryption, select the option to **Locally encrypt this database using** and pick an encryption level: Simple, Medium, or Strong (see Figure 1.14).

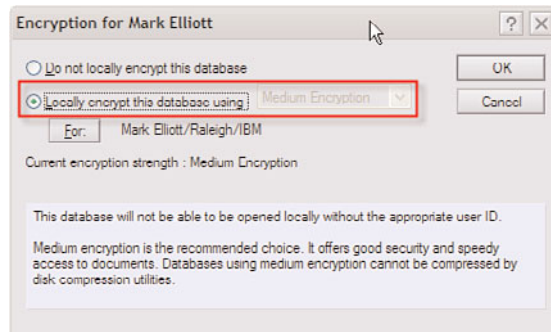


Figure 1.14 The three types of encryption are Simple, Medium, or Strong.

Step 5. Click **OK** to complete the configuration.

Depending on the size of the database, it will take anywhere from a few seconds to a couple minutes to initially encrypt the database. This is a one-time pass. All future encryption will be applied as documents are created and updated.

User Support and Problem Management

As with any software package, users are bound to encounter “quirks” when using the application. In some cases, these quirks will be general usability issues that are not really problems. In other cases, there might actually be a problem with the workstation or client software. This chapter focuses on user support issues and common Lotus Notes problems. Some of the topics include

- How to optimize Lotus Notes
- Managing your mail database
- Calendar cleanup
- Troubleshooting issues

The chapter includes a comprehensive list of issues and resolutions that will be beneficial to field support technicians working to address user issues and software quirks.

Optimizing Lotus Notes

An optimized system will reduce general user frustration and improve overall performance of the system. This section outlines a few strategies to help users with performance-related issues. These procedures are simple to run and most complete within a few seconds or minutes. Users should be encouraged to learn and perform these procedures on a routine basis. Similar to changing the oil in your car every 3,000 to 5,000 miles, users should get into the habit of routinely cleaning the application: perhaps once a month or every couple months.

Most of these procedures are specific to the Lotus Notes client, such as compacting the workspace and emptying the trash folder in your mail client. A couple procedures are operating

system-specific, such as defragmenting the hard drive, which helps the entire workstation run more efficiently.

In general, the procedures outlined in this section should improve the user's overall workstation performance. The results, however, will vary depending on the individual workstation. First and foremost, it's important to recognize the minimum hardware requirements for the Lotus Notes client. The client needs to be installed on hardware that meets the minimum requirements for the client. If the client is installed on a substandard workstation, a high likelihood exists for performance-related problems. To use an analogy, it would be hard for a motorcycle to pull a train. So be sure to match the hardware to the Lotus Notes software requirements.

For example, Lotus recommends Windows XP users have 1GB of memory as the absolute minimum, 1.5GB of memory for "acceptable" performance, and 2GB or higher for optimum performance. If the workstation does not meet the hardware requirements established for the Notes client, these steps will have a minimal effect on the overall performance. In other words, performance of the Notes client is directly affected by the workstation hardware. If the workstation does not meet the minimum hardware requirements, then there is a much more important and bigger issue that first needs to be addressed.

It's also important to recognize that other installed applications, spyware, adware, or shareware programs can potentially impact or reduce the overall performance of the workstation. While these programs most likely do not directly affect the Lotus Notes client, they most definitely can slow down the workstation by consuming both precious memory and workstation CPU cycles.

Users might want to consider running a workstation tool to check the overall system on a regular basis. Plenty of tools are available to help remove unused files, clean up the Windows registry and generally clear the system of "junk."

TIP

CCleaner is a freeware tool that can check and optimize workstations running Microsoft Windows. It removes unused files, clears cache files, cleans up the Windows registry, and much more. The application is small and easy to use. The tool has been reviewed by numerous technical Web sites and magazines such as CNET, *Web User Magazine*, *Downloads.com*, *ZDNet*, *Clarín*, and *ViePrivée* among others. The reviews highly recommend the tool, which is completely free and does not require any type of registration. The tool is easy to install and contains absolutely no spyware or adware.

For additional information, visit www.ccleaner.com. Be sure to check corporate software license policies before installing this or any other software product.

Finally, before proceeding, users should be encouraged to create and work from a local replica of their mail. This one step will improve access and response times while working with mail memos and calendar events. See the "Setting Up Mail Replication" section in Chapter 1, "Lotus Notes," for step-by-step setup instructions.

Checking Your Database Size and Compacting the Database

Compacting a database helps to recover unused and fragmented storage space. It enables the client to run more efficiently and reduces the size of the database. Any locally replicated database should be compacted on a regular basis—whether it's your mail application or another application.

How do you know when to compact the database? Lotus recommends any database that drops below the 90% used threshold be compacted. The process is simple: Click one button to check the percent used and a second button to compact the application (if needed). For many, the hardest part of the process will be to remember to check the application(s) on a periodic basis. The compact process typically takes a few seconds or minutes to run and will vary depending on the usage and size of the database.

What happens during the compact process? The Lotus Notes client makes a temporary copy of the database on the workstation, compresses the information, and then restores the optimized database back to the user. This happens behind the scenes. It is for this reason that users cannot use the database while the compact process is running. Throughout the process, informational messages appear in the message bar for the client.

To compact a database on a server, you need to have sufficient permissions in the Access Control List (ACL) in order to trigger the compact. Generally speaking, users have this authority by default for all local replicas.

Finally, the compact process will not affect the documents, memos, calendar entries, or other information stored in the application. It simply removes the unused space allocated to the database and compresses the application. The following steps outline the process for checking and compacting an application. While the instructions specifically reference the mail application, you can apply them to most any local replica.

- Step 1.** Open your mail.
- Step 2.** Select **File > Application > Properties**. Once selected the Database properties window will appear and contains multiple property values associated with the database application (see Figure 2.1).
- Step 3.** Click on the second tab to display information pertaining to the database.
- Step 4.** Click the **%used** button to show the percent of used space. If the value returned is less than 90%, you should compact the database. To the left of this number is the total space used.
- Step 5.** Click the **Compact** button to compact the database. Lotus displays the status in the message bar (located at the bottom-left side of the client window). After compacting you should see the **%used** value increase and the Disk Space used decrease.

After the compact completes, you should also see a decrease in the overall Disk Space used. If you click the **%used** button a second time, this value should increase to show the new optimized value. Be sure to check all replicated applications on a regular basis to optimize performance and reduce space requirements.

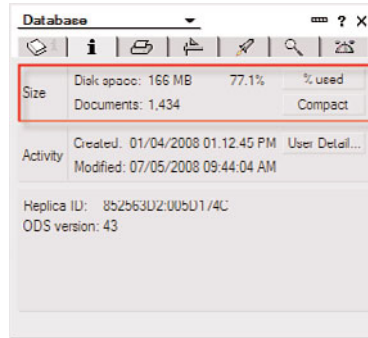


Figure 2.1 The application properties dialog allows users to view the fragmented storage space and to compact the database.

Compacting Your Workspace

The process for compacting the workspace is very similar to that used to compact an application. However, instead of optimizing a particular application, the process compresses the Lotus Notes desktop environment. This process reduces storage space by removing unreferenced files no longer being used by the workspace. Lotus recommends the user compact the workspace when the **%used** is under 85%. Users should compact the Lotus Notes desktop workspace on a regular basis. Complete the following steps to check the usage and to compact the workspace.

- Step 1.** Double-click on any workspace tab to display the Workspace Properties dialog (see Figure 2.2). You can also access the dialog by right-clicking on the workspace background and selecting the **Workspace Properties** option from the pop-up menu.
- Step 2.** Switch to the second tab to display the workspace size information.

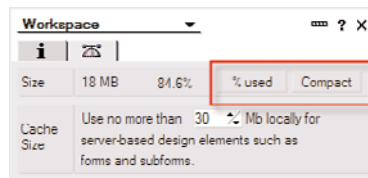


Figure 2.2 The workspace properties dialog also allows users to view and compact their Notes client workspace space allocation.

- Step 3.** Click on the **%used** button to display the current workspace usage, shown in Figure 2.3. If the percent used is lower than 85%, click the **Compact** button to compact the workspace environment. A progress meter appears as the Lotus Notes

client performs the action. Additional messages appear in the message bar at the bottom of the client throughout the process. When the process is complete, the dialog displays the updated information in the second tab.

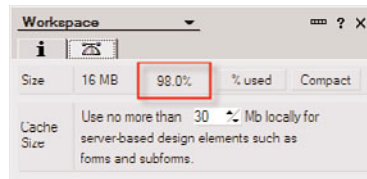


Figure 2.3 You can see how much of the workspace has been compacted.

Defragmenting Your Hard Drive (Windows)

Defragmenting your hard drive will improve the overall efficiency of your workstation. What is **defragmenting**? It's a process whereby files are reorganized and stored in continuous blocks of space on the disk drive. Having the entire file in a single location improves the system performance by reducing the work performed by the hard drive. As a result, information is accessed and displayed with less latency.

How did files get spread across the disk? In short, it just happens as part of the normal read and write process. Over time, as information is saved, the operating system stores the information various places. Eventually, information is stored in multiple non-contiguous locations.

Defragmenting is the process where files are arranged and stored in continuous blocks of space, and only needs to be performed when analysis shows the disk contains a significantly high number of fragmented files. The Microsoft Windows operating system includes a tool called Disk Defragmenter that performs both the analysis and the defragmenting.

The following steps outline the process from a Windows XP perspective. It's important to note that this process can take anywhere from a few minutes to several hours to run. Users might want to start this at the end of the day to let the process run overnight.

- Step 1.** Close all running applications.
- Step 2.** Select **Start > Programs > Accessories > System Tools > Disk Defragmenter** from the Microsoft Windows Start menu. The Disk Defragmenter tool launches and appears, as shown in Figure 2.4. The tool will include a list of all attached storage devices.
- Step 3.** Click on the **Analyze** button. The tool performs a check of the storage device and recommends whether or not the device should be defragmented. This might take a minute to run. No action is needed if you receive the message, "You do not need to defragment this volume."
- Step 4.** Click the **Defragment** button if the tool recommends it.

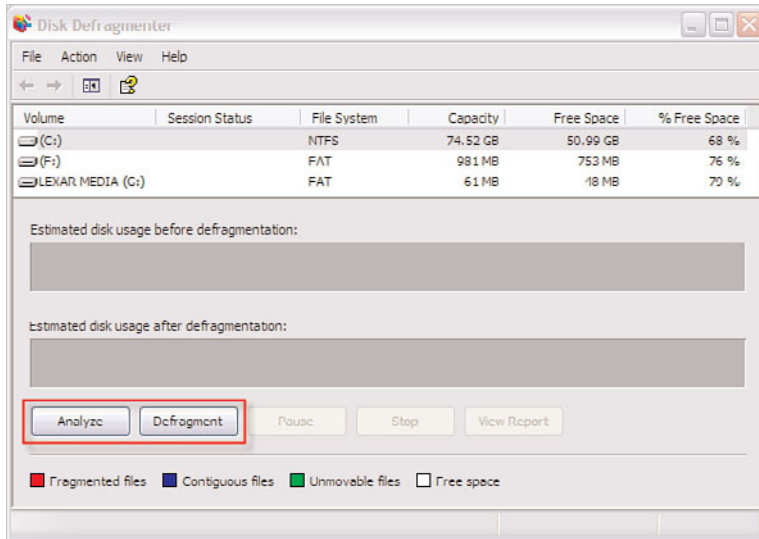


Figure 2.4 The Microsoft Windows Disk Defragmenter application.

General Settings That Can Affect Performance

This section contains a general list of settings and recommendations that can affect the performance of the Lotus Notes client.

- Best practices suggest users should always create and work from a local replica of the mail application. Using a local replica offers improved performance as the information is local to the workstation and is not being transmitted between the client and the server over network lines. This option also allows the user to work remotely and in the event the server is not accessible. For additional information see the “Setting up Mail Replication” section in Chapter 1 for step-by-step instructions.
- As a general rule, users should allow at least 15% free space on the hard drive for general Lotus Notes processing, caching, file swapping, mail storage, and other database application storage. Users should consider running the Microsoft Windows Defragmenter, increasing the hard drive capacity or taking other actions as discussed in the earlier “Defragmenting Your Hard Drive (Windows)” section.
- When creating connection documents to Domino servers, always use the domain name (as opposed to the decimal IP address). An IP address is a series of four numbers separated by periods, such as 9.67.2.100. This number is the unique address that is associated with the server and is used to communicate with the server. A domain name is an alias that is also tied to the server, such as Server1.ibm.com. Both values point to the

same server. However, specifying the domain name in the connection document offers several advantages. First, the connection document will still work if the IP address for the server is changed. Second, you can create a generic connection document to cover all servers within a specific domain. For example, instead of creating a separate connection document for 100 unique servers in the `ibm.com` domain, you could create one connection document with the value `*.ibm.com` in the address field (see Figure 2.5). Creating a connection document will reduce the time required by the client to locate and connect to the Domino server.

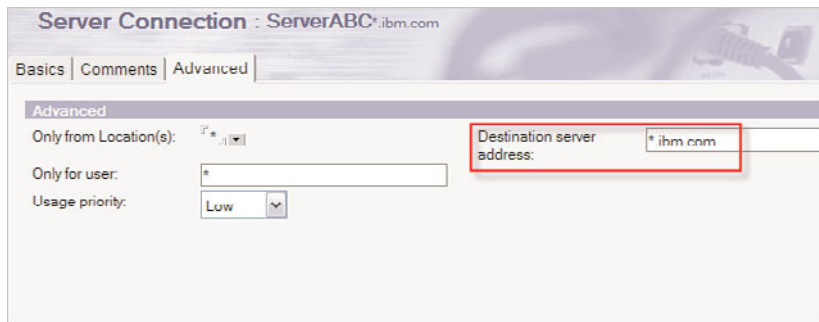


Figure 2.5 A sample connection document using a domain name range of `*.ibm.com`.

- Establish a mail archive to automatically move documents from your mail application to the archive database. This reduces the size of the mail application. This improves performance of the Notes client and potentially helps the user meet any mail quotas established by the company. See the “Enabling Mail Archive” section in Chapter 1 for additional information and instructions.

Managing Your Mail Database

Managing the size of your mail application can be a challenging and often never-ending task. Keeping the size at a minimum can help with performance and is often required in order to comply with company storage size quotas. This section offers a variety of options for managing your mail database including the mail database size and removal of obsolete calendar entries.

Managing Your Mail Database Size

While there's little you can do to prevent others from sending large documents, you can perform a number of actions to help reduce the size of your mail application and that of your colleague's. This section offers a few suggestions and pointers that can help keep the mail application as small as reasonably possible.

- Wherever feasible avoid sending attachments in mail memos and calendar invitations. Instead, consider placing the document in a shared team room and including a document link in the message. This approach provides a single access point to the document. Consider creating a team room for storage of project-related documents.
- Take careful consideration when sending mail memos as to which messages need to be saved. You have two options when sending mail: **Send** and **Send and Save**. Utilize the Send button if you do not need to keep a copy of the memo.
- When replying to a memo with an attachment, do not resend the file. Consider using the Reply with History Only feature.
- Avoid copying and pasting large screenshots or graphics in the body of messages or calendar invitations. Consider placing the document in a shared team room and including document link in the message.
- Be cautious when creating an embedded signature to use very small images. Remember the signature is attached to all mail memos. An image in the signature can easily consume a large amount of space in your mail application. If a graphic is included, make sure it is as small as possible.
- Create a mail archive to move older mail messages to a separate database. It's important to note that archived mail is still accessible. Users can still read, reply, or forward messages that have already been archived. If possible, schedule the archive to move documents earlier rather than later—say every 30 days as opposed to 6 months. See the “Enabling Mail Archive” section in Chapter 1 for additional information and instructions. It's worth noting that some corporations automatically set up mail archive. Be sure to check with your mail administrator before establishing a local instance as users might find it more difficult to find documents spread across multiple archives. Finally, when creating a local archive, users should always practice good data management techniques and back up the files on a regular basis. This can prevent loss of data in the event the workstation has hardware failure.
- Detach all attachments before filing the memo in a folder. Saving the attachment to the local workstation can greatly reduce the size of the mail application. Consider checking the **All Documents** view. Click on the **Size** column to sort by document size. Review the largest documents to determine whether you can remove any attachments and/or whether duplicate memos exist.
- Run the calendar cleanup function (in Lotus Notes 8) to clear old meetings from the calendar. Consider adding a monthly reminder to run the calendar cleanup process. The process for managing old or obsolete calendar entries is described in the next section.
- Instead of saving all mail memos that a user sends, consider changing the user preferences to Ask Me (see Figure 2.6). This option will ask you “Do you want to save a

copy?” before sending each mail memo. Consider only saving those memos that are absolutely necessary. To set this value, select **File > Preferences**. Navigate to the **Mail** section and then select the **Sending and Receiving** subsection. Locate the Save Copies of Messages That I Send: field and select the value **Ask Me**.

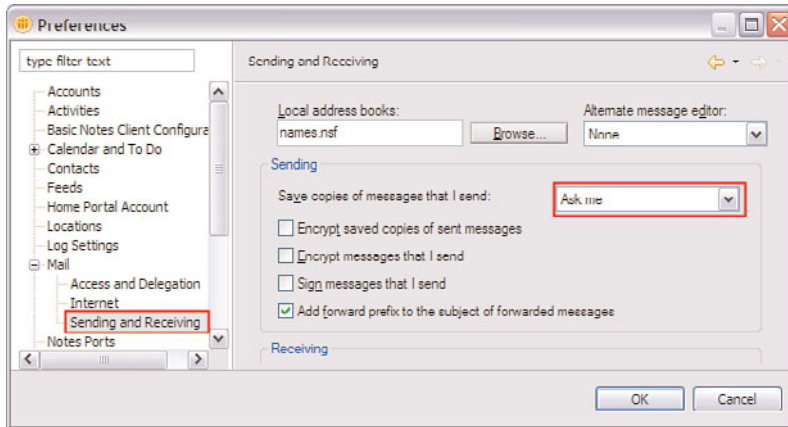


Figure 2.6 Using preferences you can set Notes to prompt you to always or never save messages.

Managing Old Calendar Entries Using Cleanup in Lotus Notes 8

To manage infrastructure costs, many companies have elected to implement a quota system where each employee is allotted an amount of storage space. Once a threshold limit has been reached, a user might start to receive warning messages or even have his or her mailbox “locked” until the overall storage size has been reduced.

One way to achieve this reduction is through the **Calendar Cleanup** function. Using Calendar Cleanup, you can remove historical events from your calendar. Frequently people will attach presentations or other documents to meetings. These files can be large and are often no longer needed after the meeting is held. This problem can be compounded when a large attachment is embedded in a recurring calendar entry—propagating the problem for each scheduled event.

In prior releases, cleaning up recurring events without impacting the integrity of future events was very challenging and cumbersome (and some would say downright impossible). Starting with release 8, Lotus has implemented this slick utility to efficiently and effectively manage calendar entries. Running this function on a regular basis, perhaps monthly, will help manage and reduce the size of your mailbox.

The following steps show how to run the Calendar Cleanup routine:

Step 1. Navigate to your personal calendar.

Step 2. To launch the utility, select **Actions > More > Calendar Cleanup**. You can also access this utility by selecting **More > Calendar Cleanup** from the action bar. A dialog, similar to that in Figure 2.7, appears.

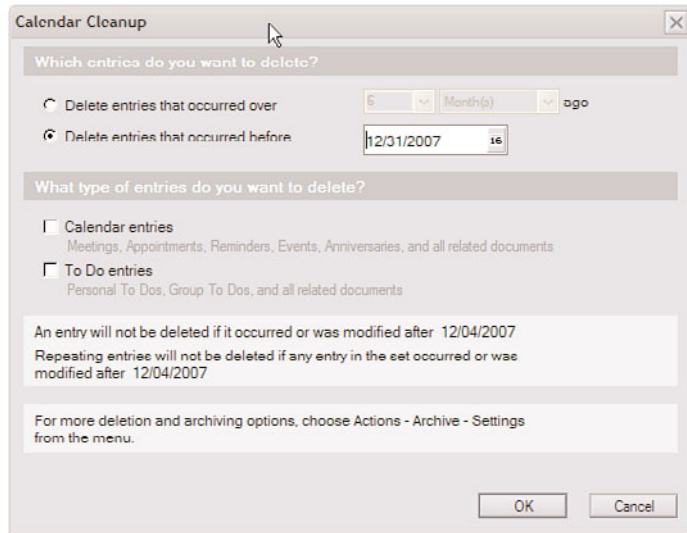


Figure 2.7 The configuration dialog for the Calendar Cleanup routine.

Step 3. You have two ways to define the events to be cleaned. You can delete entries based on duration (such as the last 6 months) or based on a specific date (such as 1/1/2008). Select an option in the **Which Entries Do You Want to Delete** section and define its corresponding cleanup parameters.

Step 4. Select the type of events to be processed as part of the Calendar Cleanup. The two options are **Calendar Entries** and **To Do Entries**. Selecting the Calendar entries check box will remove historical meetings, appointments, reminders, events, and anniversaries. Selecting To Do Entries will remove all personal or group To Do documents from the calendar. It's important to note that future meetings, recurring events, anniversaries, or other scheduled appointments are not impacted by the routine.

Step 5. Click **OK** after the cleanup parameters are specified. A confirmation message appears as shown in Figure 2.8. This is the final opportunity to cancel the routine.

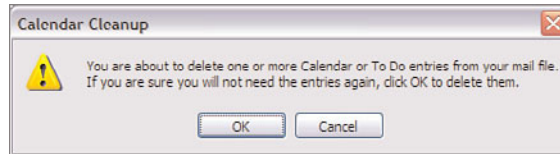


Figure 2.8 A confirmation message is displayed prior to performing the Calendar Cleanup.

Step 6. Click **OK** to start the cleanup process or click **Cancel** to abort the process. Once started, the progress of the cleanup appears in the message bar located at the bottom-left side of the client. You should see messages similar to the following:

```
Calendar Cleanup:Mark Elliott  
Calendar Cleanup:Selecting Documents  
Calendar Cleanup:Deleting Documents  
Calendar Cleanup:done. 21 documents deleted.
```

In some cases, these messages might appear in rapid succession. If the messages are no longer displayed or visible from the client window, simply click on the message bar and a history of the most recent messages will be displayed in a small list.

TIP

Consider adding monthly, quarterly, or semi-annual reminders to your calendar to run the Calendar Cleanup routine. Minimizing the size of the mail will improve performance and reduce mail server operating costs.

Emptying Your Trash

Emptying the trash folder is a key technique for reducing the overall size of the mail application. To understand how, let's start by reviewing the delete process. When a mail memo is deleted, the document is moved to the **Trash** folder. This folder is a temporary storage location for documents. All the documents in the folder have been essentially "earmarked" for deletion.

The document remains in this folder until either the user manually empties or, if configured, the Notes client automatically deletes the document. Until the document is formally deleted by the user clicking on the **Empty Trash** button or via the Notes automated process, these documents consume space in the mail application.

Some might question what the purpose of the folder is. The folder serves as a holding bin for files that are "about to be deleted." When a user deletes a file and it is moved to the trash

folder, this is considered a **Soft Delete**. This removes the document from the main mail application and will be permanently deleted unless the user takes action. At the same time, the soft delete process enables the user to recover documents that might have inadvertently been deleted or when the user later decides, “I better keep that document” shortly after pressing the Delete key.

Documents are permanently removed from the application only after the user clicks the Empty Trash button or if the Notes client is configured to automatically delete the document based on a set interval. When one of these events occurs the document is permanently deleted from the mail application and cannot be retrieved. This is called a **hard delete**. Users should be encouraged to empty the trash on a regular basis. A simple reminder on the calendar can also help facilitate users who need additional assistance.

To manually empty documents from the trash folder, navigate to the **Trash** folder and click the **Empty Trash** button. Once the button is clicked, the user will be prompted with a warning message, “Do you want to permanently remove the document(s) from the application?” This is the last opportunity to halt the process. Click **Yes** to permanently delete the documents. Click **No** to cancel the process. This option returns you to the trash folder where you can review and/or restore documents.

In addition to manually emptying documents in the trash folder, users can configure the Notes client to automatically empty the trash on a set interval in the user preferences. Once the set interval is reached, the documents will automatically be deleted from the mail application. To configure the delete interval, select the **File > Preferences** menu option. Navigate to the Mail section. Here you will find a field “Delete Documents in My Trash Folder After () Hours.”

Specify a value for this field and click **OK** to save the values.

WARNING

Users should specify a value between 1 and 5 digits. Users who specify a value greater than 6 digits will most likely encounter an Overflow error message when accessing their mail. Consider setting this value to a value such as 40 hours. To delete the message every seven days, set the value to 172. To delete messages every four weeks, set the value to 672.

Switching Back to the Old Desktop

Starting with Lotus Notes release 8, the application user interface was completely redesigned and now uses a new architecture based on Eclipse. The application includes new graphics, color schemes, and layout.

However, some users tend to resist change and might prefer to revert to previous layout settings. For those users, Lotus has included an option to toggle between the Notes 7 and Notes 8 desktop layout. Users should be aware, however, that performance might be degraded when

switching to a an older layout. By default, the new layout appears after upgrading to Notes release 8. To switch back to the previous workspace layout, complete the following steps:

- Step 1.** Select the **File > Preferences** menu option.
- Step 2.** Navigate to the **Basic Notes Client Configuration** section.
- Step 3.** Locate the **Additional Options** list box near the bottom of the dialog.
- Step 4.** Select the **Textured Workspace** option to display the old workspace interface as displayed in Figure 2.9.

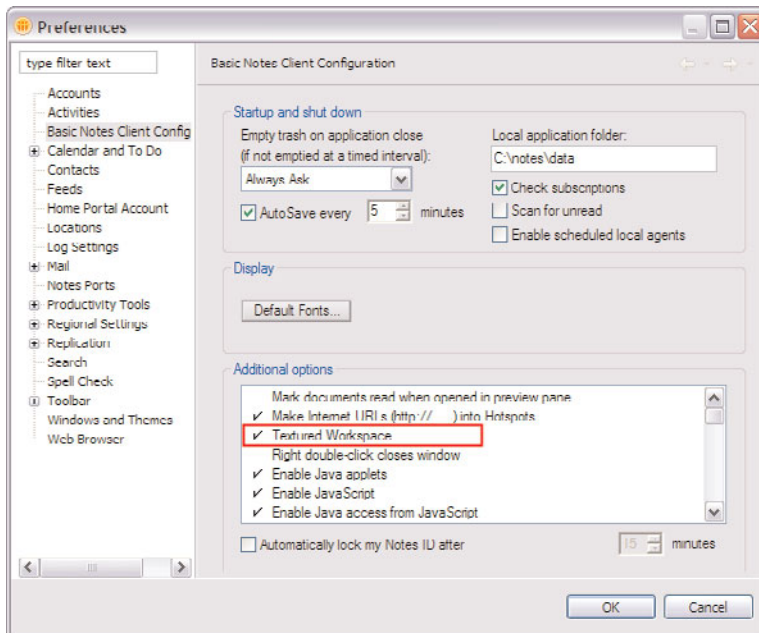


Figure 2.9 Select Textured Workspace to revert to the previous workspace layout. Users might see a degradation in performance with this option.

- Step 5.** Click **OK** to save the changes.

Troubleshooting

This section outlines just a few error messages, issues, and resolutions that users might experience while using the Lotus Notes client. This section is not intended to be an exhaustive list of problems but rather a list of the more common problems that tend to be encountered. It's also important to understand many of these items are general usage issues as opposed to actual problems with the client.

Obviously, corrective actions will vary depending on the application, workstation, and other corporate-specific customizations to the client or database application. You will notice each issue includes a description of the symptom, general analysis of the root cause, and resolution.

Additionally, to help with problem determination, some of the issues include a reference to a specific version of the Lotus Notes client, such as “(Lotus Notes 7).” This is intended to be a general indication as to the version of Lotus Notes that will most likely encounter the issue. Where no reference is provided, the issue tends to be release independent.

The majority of the instructions for this section are based on release 8. However, where feasible or appropriate, instructions have been included based on prior release levels. If in the process of running through the resolution instructions you find the menu options are different, simply scan through the menu list. In most cases, the menu option is still present, just located elsewhere within the menu list.

For instance, in release 8 the user preferences are accessed via the **File > Preferences** menu option whereas in release 7 it’s accessed via **File > Preferences > User Preferences**. Ideally the solutions listed in this section will correct the problem irrespective of the software release being used.

The section also includes a couple of the more common software code errors. These errors usually require the application developer to correct a design error or glitch. Even when an application has been thoroughly tested, errors are bound to slip through and appear. It’s possible that a scenario was not considered or was simply not feasible to test. As such, a couple of the common code error messages have been included along with some general tips for debugging the issue.

If you encounter one of these errors, make note of the steps or actions performed, and relay the information to an application developer if possible. The resolution section will clearly indicate this is not a problem the average user can resolve and intervention from a Domino developer will be needed. This will help distinguish between general client issues and programmatic issues.

Lastly, if the problem still exists after trying the suggested resolution, see Chapter 3, “Finding Additional Help,” for more information and assistance with problem determination.

All Messages Are Reset to Unread After Moving to Folder

Symptom: After moving one or more mail messages to a folder, the message changes from read to unread. Users then have to open the folder and reset the red flag for each document that was moved into the folder. (Lotus Notes 8)

Analysis: The configuration setting was reset in the process of upgrading from Lotus Notes release 7 to release 8, or the setting was inadvertently changed.

Resolution: Update the property setting for the database.

Step 1. Open the mail application.

Step 2. Select the **File > Application > Properties** menu option.

Step 3. Click on the **fourth tab** to display the design settings.

Step 4. Enable (or check mark) the option **Do Not Mark Modified Documents as Unread** (see Figure 2.10). This will correct the problem. You might need to exit and reopen the application for the change to be effective.

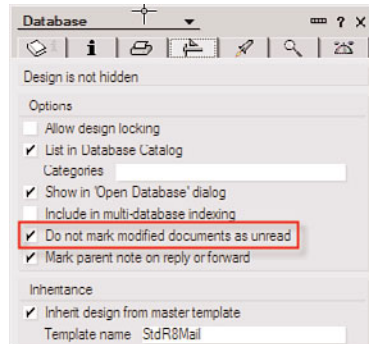


Figure 2.10 This option prevents messages from being automatically set to “unread” when moved to a folder.

Compact Local Database Fails

Symptom: The user receives an error when attempting to compact the database, or the compact process never completes.

Analysis: Lotus Notes often makes a copy of the database as well as writes data to a cache file. It's likely that the file size limit has been reached when attempting to make a copy of the database and/or the cache file.

Resolution: Clearing the cache files will frequently correct this error. Two files contain cache information: **cache.ndk** and **log.nsf**. Once these files are renamed, Lotus Notes will recreate them as part of the normal startup process.

Step 1. Close the Lotus Notes application.

Step 2. Locate the **Cache.ndk** and **Log.nsf** files. These files should be located in the **\Data** folder.

Step 3. Rename both files. (Do not delete these files as they are critical to troubleshooting.)

Step 4. Restart Lotus Notes.

Step 5. Restart the compact process for the database.

Customized Toolbar Buttons Missing after Software Upgrade

Symptom: Custom toolbar buttons that were created or added in a previous release no longer appear in the client after upgrading to the most current software release level. (Notes 8)

Analysis: User-created buttons are typically added to the “Universal toolbar.” After the upgrade to release 8, this toolbar was most likely disabled and is not being displayed in the client. Enabling the display of this toolbar typically corrects the problem.

Resolution: Check the toolbar display settings and enable the “Universal toolbar.” Select the **View > Toolbar** menu option. If the **Universal** toolbar is not currently enabled, then select the menu option. You can also navigate to the toolbar settings by right-clicking on the toolbar and selecting the same options as outlined previously. The toolbar will display and should contain the missing buttons. However, existing toolbar buttons might shift around the window to accommodate the new toolbar. To reorder the buttons, users might drag and drop the toolbars that are displayed on the screen.

If after enabling the Universal toolbar one or more buttons still do not display, then the function might no longer be supported in the current release. For instance, the Close All Open Windows function is no longer available. This button will not appear in release 8. Perform the following to check whether the desired function is still supported:

- Step 1.** Select the **File > Preferences** menu option.
- Step 2.** Navigate to the **Toolbar** and **Customize** section.
- Step 3.** Locate the button’s icon. If the icon is in the list, but does not appear in the toolbar, then the function is no longer supported. Consider adding a new button based on the currently supported functions as an alternative.

User Receives the Clock Synchronization Server Error

Symptom: User receives the clock synchronization error message (“Server Error: Connection failed because of a problem with clock synchronization and password change intervals. Check your clock settings, change your password, or consult your system administrator.”) when attempting to access mail, connect to a Domino server, or after changing operating system time. (Notes 7)

Analysis: One or more Lotus Notes documents (or files) are potentially corrupt or there is a save conflict with one of the user’s Location Documents.

Resolution: Resetting the Location Document and/or removing the conflict document usually corrects the issue.

- Step 1.** Set the operating system clock to the correct date and time.
- Step 2.** Close and restart the Lotus Notes client.

- Step 3.** Click on the current Location Document (lower-right corner of the client). A pop-up menu appears with a listing of locations and actions.
- Step 4.** Select the **Edit Current** option from the menu.
- Step 5.** Navigate to the **Advanced** and **Basics** tabs.
- Step 6.** Change the **Use Operating Systems Time Zone Settings** from Yes to No and save the document.
- Step 7.** Edit the Location Document a second time and change the value from No back to Yes and save the document.

This method should correct the problem. If you continue to encounter the problem, open the user's address book and navigate to the **Advanced** and **Locations** view. Check for a save conflict document and delete it if one exists.

Web Pages Open in Notes Browser after Software Upgrade to Lotus Notes 8

Symptom: When the user clicks on a link, the Web page opens in the Lotus Notes browser instead of the default browser. This problem started after the user upgraded to software release 8. The user did not experience the issue when using a prior version of the Lotus Notes client. Previously, when the user clicked on an Internet Web link, the page opened in the correct browser. The value is set correctly in the Location Document. Changing the value of the Location Document had no effect on the browser display. (Lotus Notes 8)

Analysis: Software is working as designed. Beginning with Lotus Notes release 8, the browser setting in the Location Document is no longer used. This field has been deprecated, but remains on the document. Instead, a new function has been added to the user preferences to manage the browser display. This value overrides that of the Location Document.

Resolution: To change the default preference, update the default browser setting in the user preferences.

- Step 1.** Select the **File > Preferences** menu option.
- Step 2.** Navigate to the **Web Browser** section (see Figure 2.11).
- Step 3.** Locate the **When Clicking on a Hyperlink in the Client** field.
- Step 4.** Select the **Use the Browser I Have Set as the Default for This Operating System** option.
- Step 5.** Click **OK** to save the setting.

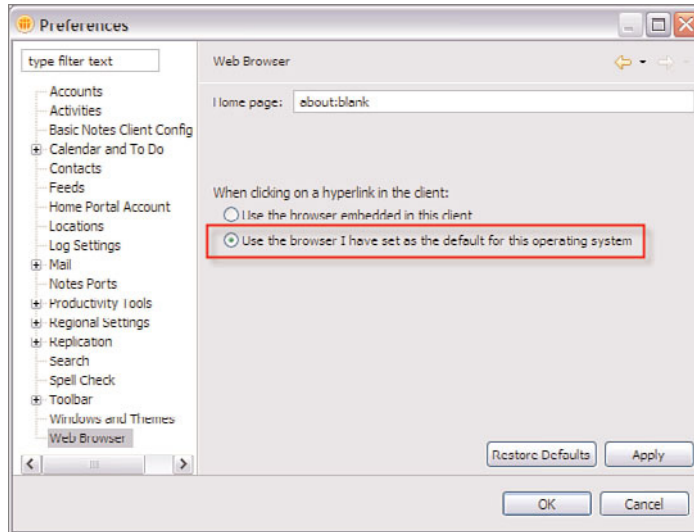


Figure 2.11 Using the Preferences dialog, the user can set where Web pages are opened.

Browser Does Not Launch

Symptom: When the user clicks on a link using Lotus Notes release 7 or earlier, the Web page opens in the Notes browser. (Lotus Notes 7 or earlier)

Analysis: The Lotus Notes client is working as designed. The Notes browser is the default setting when the software client is installed. Users can change the default by updating the appropriate setting in the user's Location Document.

Resolution: To change the default preference in the user's Location Document.

- Step 1.** Select the **File > Mobile > Edit Current Location** menu option. (Note: Users can also click on the current location displayed in the lower-right corner of the client and select **Edit Locations** from the popup menu.)
- Step 2.** Navigate to the Internet Browser tab (see Figure 2.12).
- Step 3.** Select the default browser.
- Step 4.** Click **OK** to complete the update.

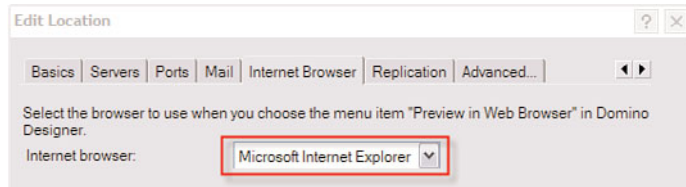


Figure 2.12 By editing the Location Document, users can select the default Web browser to automatically launch when clicking on a Web link (for release 7 or earlier).

Multiple Sametime Icons Displayed in Windows Tray

Symptom: After installing or upgrading to Lotus Notes release 8, multiple Sametime icons appear in the Windows system tray. One icon is selectable. When the user clicks on this icon, she can open the active list of users and perform normal instant message activities. The second icon is not selectable. This secondary icon cannot be halted and does not launch the Sametime dialog window when clicked.

Analysis: Two versions of the Sametime client have been installed. One version existed prior to the installation of Lotus Notes release 8. A second version, called the Integrated Sametime client, was selected and installed as part of the Notes upgrade. This is the Sametime icon in the system tray that cannot be managed. The Integrated Sametime Client is incorporated and managed from the Notes client. To access and manage instant messages, users will have to navigate to the **Sidebar** in Lotus Notes release 8.

Three options are available to the user: remove the integrated client, remove the stand-alone client, or take no action. Instructions for removing each client are outlined as follows.

Resolution 1: Uninstall the Integrated Sametime client. This will allow the user to have a separate client application for each product, similar to the workstation setup prior to the Notes upgrade.

- Step 1.** Close the Lotus Notes client.
- Step 2.** Stop the Sametime client where feasible.
- Step 3.** Launch the software installation program for Lotus Notes release 8. The Installation Wizard screen should appear with a general welcome message.
- Step 4.** Click **Next** at the Installation Wizard screen. Because the software has already been installed, the Program Maintenance dialog appears as shown in Figure 2.13. This window gives you the option to Modify, Repair, or Remove Lotus Notes from your workstation.

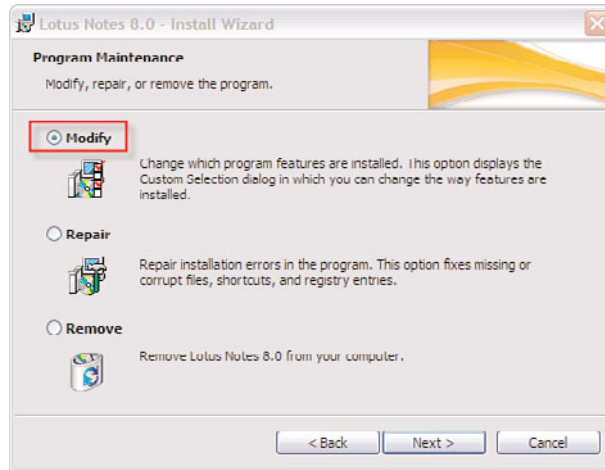


Figure 2.13 Using the Install Wizard, you can modify the Notes client installation.

Step 5. Select the **Modify** option and click **Next** to continue. The Custom Setup dialog appears as shown in Figure 2.14. This screen allows you to modify which features are included in the Lotus Notes client. In this particular case, you want to remove a feature that was previously installed.

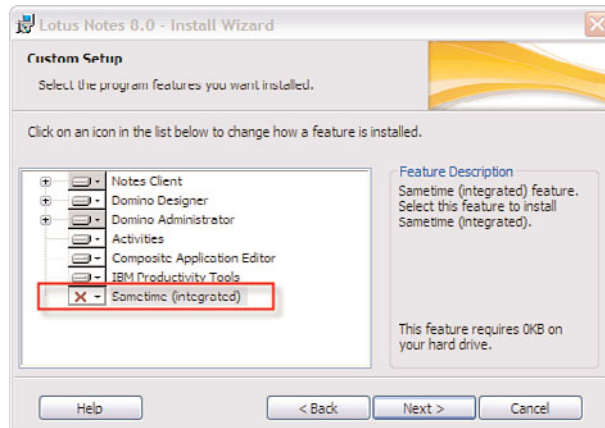


Figure 2.14 Running both integrated and stand-alone Sametime clients can cause usability issues. Using the Installation Wizard you can remove an integrated client from the Notes client.

Step 6. Click on the drop-down menu next to the **Sametime (integrated)** option and select the option **This feature will not be available**.

Step 7. Click **Next** to remove the feature and **Finish** to complete the software modification process. Once the process completes, you might need to reboot the workstation. Otherwise the Lotus Notes and Sametime clients are ready for use.

Resolution 2: Uninstall the stand-alone Sametime client application from the workstation. This option will require users to utilize the integrated client from the Lotus Notes Sidebar in order to manage instant messages.

Step 1. Close the Sametime stand-alone application.

Step 2. Select the **Start > Settings > Control Panel** menu option from the Windows toolbar.

Step 3. Select the **Add or Remove Programs** icon.

Step 4. Locate the **IBM Lotus Sametime Connect** application in the list of currently installed software programs.

Step 5. Click on the application and select **Remove** to uninstall the application. Close the dialog once the removal process completes.

Resolution 3: Take no action. Both applications can be installed concurrently.

Database Is Currently Being Replicated

Symptom: User receives the error message “Database is currently being replicated” when attempting to replicate an application to their local workstation. However, based on the progress indicator on the replication page, no replication is currently in progress.

Analysis: The Lotus Notes application incorrectly believes the replication process is already in progress. This problem might be caused by a corrupt cache file.

Resolution 1: Clear the cache files file for the Lotus Notes client. This is achieved by stopping the client and deleting the related files. When Lotus Notes restarts, it will generate new cache and log files for the user.

Step 1. Close the Lotus Notes application.

Step 2. Locate the **Cache.ndk** and **Log.nsf** files. These files should be located in the **Data** folder.

Step 3. Rename both files. (Do not delete these files as they are critical to troubleshooting.)

Step 4. Restart Lotus Notes and retrigger replication for the application.

Resolution 2: Remove both the local and server icons from the workspace and re-add them. The act of removing and re-adding the database will sometimes clear a varied array of anomalies associated with a database application. Be sure to note the application name and folders for both local and server instances of the database application before removing the icon from the workspace. This information can be found in the database Properties dialog. (Tip: You can

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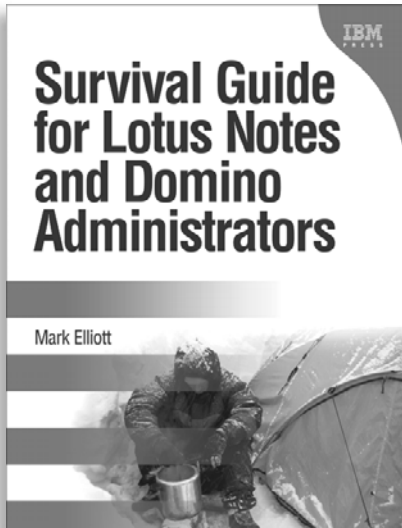


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