

# Notes Classifier Installation Guide

UM638509

November 2020



Gold Microsoft Partner

© Boldon James Ltd. All rights reserved. <u>www.boldonjames.com</u>

This document is for informational purposes only, and Boldon James cannot guarantee the precision of any information supplied.

Boldon James makes no warranties, express or implied, in this document.



#### UM638509

#### Contents

1	Introdu	iction	3
	1.1	Server Environment	3
	1.2	Desktop Environment	3
	1.3	Notes Classifier Installed Components	4
	1.4	Classifier Document References	4
2	Installa	ition Procedure	5
	2.1	Modifying Mail Template File in Domino Designer	5
	2.2	Adding the Notes Classifier Label Banner	6
	2.3	Adding the Classify Button to the Toolbars	. 10
	2.4	Installing the Notes Classifier Server Scripts	. 12
		2.4.1 BJ_0001.COD	13
		2.4.2 BJ_0002.COD	14
		2.4.3 BJ_0003.COD	15
		2.4.4 BJ_0004.COD	16
		2.4.5 BJ 0005.COD	18
		2.4.6 BJ 0006.COD	21
		2.4.7 BJ 0007.COD	23
		2.4.8 BJ 0007A.COD	25
		2.4.9 BJ 0008.COD	27
		2.4.10 BJ 0009.COD	28
		2.4.11 BJ 0003C.COD	29
		2.4.12 BJ 0003N.COD	30
		2.4.13 BJ 0010.COD	31
		2.4.14 BJ 0011.COD	32
	2.5	Testing and Deploying the Form and Script Changes	. 36
	2.6	Uninstallation	. 37

## 1 INTRODUCTION

Notes Classifier requires a Classifier Configuration established and published using Classifier Administration which can be installed from the Classifier Base Bundle.

This document is intended for administrators installing the Notes Classifier product.

Notes Classifier is one of the Classifier family of products that deliver the ability to apply visual and electronic Labels / Markings to messages and documents. The Classifier Suite uses common configuration data and administration mechanisms which must be installed and configured before Notes Classifier can function.

It is recommended that the person(s) installing Notes Classifier have intermediate to advanced knowledge of Lotus Domino Server management, and advanced knowledge of Lotus Domino Designer. This document assumes that the person installing this software is well versed with the concepts of Notes templates.

**Note:** Throughout this document, Administration Guide means Administration Guide or Administration Server Guide depending upon whether you are using the Administration Console or Administration Server environment.

## **1.1 Server Environment**

- 1. Domino Server 8.5.x, 9.0.x, 10.0.X or 11.0.X
- 2. Lotus Notes Designer

Notes Classifier does not install any binary components on the Lotus Domino server, so any environment with a Lotus Domino server installed and operable (i.e. a mailbox is available) will be suitable.

You will need an accessible and supported Windows platform with Classifier Administration installed and configured. You should consult the Classifier Administration and Notes Classifier Client Release Notes for definitive information regarding Windows versions and Service Packs.

## **1.2 Desktop Environment**

Your client will need a supported Windows environment and supported Lotus Domino server installed and operable (i.e. a mailbox is available). You should consult the Classifier Administration and Notes Classifier Client Release Notes for definitive information with regard to Service Packs, but the following indicates likely combinations:

Microsoft Windows	.NET Framework
XP SP3	3.5
Vista SP2	3.5
Windows 7	3.5
Windows 8	3.5
Windows 8.1	3.5

Notes Classifier Installation Guide

UM638509

## **1.3 Notes Classifier Installed Components**

Notes Classifier comprises server-side script additions and a client Lotus Notes plug-in which is installed into each user's environment.

The server-side script additions are installed into the mail template file using Domino Designer. The standard template file is **Mailxx.NTF**, where xx refers to the version of Domino Server installed. Please note that your mail template file may have a different name on your systems.

The client plug-in is installed using the Setup.exe or NotesClassifierClient.msi files from the Client folder under the Classifier Notes bundle.

### **1.4 Classifier Document References**

- 1 Administration Guide (UM6351) Administration Server Guide (UM6440)
- 2 Planning Considerations (UM6354)
- 3 Suite Overview (UM6352) Suite Overview (Server Administration) (UM6455)

UM638509

#### **INSTALLATION PROCEDURE** 2

This stage is simple and will:

- Install Notes Classifier server script changes
- Install Notes Classifier client plug-in
- Test and deploy the installation •

## 2.1 Modifying Mail Template File in Domino Designer

Notes Classifier requires modification of the mail template file to add the following to the "Message", "Reply" and "Reply with History & Attachments" forms for messages and the " Calendar Entry" and "(Notice)" forms for calendar items:

- A label banner above the To, Cc and Bcc fields
- A button labelled "Classify" to the toolbar
- > Script additions to certain event handlers and a new Code/Shared Library, to communicate with the central Classifier administration.

Once the changes are applied to the template file, they can be replicated to the user mail files.

Before you start, observe the following notes.

#### Notes:

- Different versions of Lotus Notes/Domino and customised installations may contain variations in the mail template file. You will need to exercise judgement on the exact location to insert script additions.
- > Make sure you back up the mail template file before starting this procedure.
- Remember to select the server mail template file, NOT the local mail template file!

#### **Getting Started**

- 1. To apply these scripts, start the Lotus Domino Designer (LDD) Software.
- 2. Using File->Application->Open, open the mail template file. Select the server from the left pane as shown in the following image:



Notes Classifier Installation Guide

UM638509

Type to filter or search	MCDomino/Cronorg		Oper
Docal	Title 🔶	File name	
MCDomino/Cronorg	Mail (R8.5)	mail85.ntf	<u>A</u> bout
	Mail Journaling (8.5)	mailjrn.ntf	
	Mail Router Mailbox (8)	mailbox.ntf	
	Message Tracking Reports (6)	reports.ntf	
	Microsoft Office Library (8.5)	doclbm7.ntf	
	Monitoring Configuration (8)	events4.ntf	
	Monitoring Results (8.5)	statrep5.ntf	
	News Articles (8.5)	nntpcl6.ntf	
	III NNTP Cross-Post	nntppost.ntf	
	NNTP Discussion	nntpdi50.ntf	
	Notebook (8)	notebook8.ntf	
	Notes Log (8)	log.ntf	
	Notes Log Analysis (8.5)	loga4.ntf	
	INT/Migrating Users' Passwords	ntsync45.ntf	
	Personal Address Book	pernames.ntf	
	B D 1 2 1 (0)	1	
	Eile name:mail85.ntf		Browse
	Show working set options		
	Add to existing working set:		

3. It takes time to open the mail template file, but once it is loaded, you will see a view similar to the following:

Properties - IBM Lotus Domino D	esigner			_ 🗆 ×
File Edit View Create Design Nav	ngate loois Search Project Window Help			
🥺 Applications 🛛 🗄 🛥 🗮 🗙	🔄 mail85.ntf - Forms			
	New Form Z Sign		Filter:	Clear
\MCDomino/Cronoro\mail85.ntf	Name 🔺	Alias	Last Modified	Last Modified By 🔺
F-E Forms	_Calendar Entry	Appointment	13/09/2011 22:	Lotus Notes Templa
+	_Document Memo	AlternateMemo	13/09/2011 22:	Lotus Notes Templa
E Folders	_Notebook Entry	JournalEntry	13/09/2011 22:	Lotus Notes Templa
XPages	_OfflineCalendar Entry	OfflineAppoint	13/09/2011 22:	Lotus Notes Templa
Custom Controls	_Special\_Message To Database Manager	dbManager	13/09/2011 22:	Lotus Notes Templa
E Framesets	_Special\Link Message	Bookmark	13/09/2011 22:	Lotus Notes Templa
Pages	_Special\Phone Message	Phone Message	13/09/2011 22:	Lotus Notes Templa
E B Shared Elements	_wCalendar Entry	Appointment	13/09/2011 22:	Lotus Notes Templa
E Code	☑ (\$Replication)	\$Replication	13/09/2011 22:	Lotus Notes Templa
🗄 🖣 Data		\$Subscription	13/09/2011 22:	Lotus Notes Templa
E Resources	(AddCategory)		13/09/2011 22:	Lotus Notes Templa
E Composite Applications	<ul> <li>(AddCategoryContacts)</li> </ul>		13/09/2011 22:	Lotus Notes Templa
Application Properties	<ul> <li>(AddGroupCategory)</li> </ul>		13/09/2011 22:	Lotus Notes Templa
	☑ (AddressFormatPicker)	AddressFormat	13/09/2011 22:	Lotus Notes Templa
	⊿ (AddressPicker)	AddressPicker	13/09/2011 22:	Lotus Notes Templa
	∠ (AllAddressHelper)		13/09/2011 22:	Lotus Notes Templa
	∠ (Archive Log)	ArchiveLog	13/09/2011 22:	Lotus Notes Templa
	<ul> <li>(Calendar Profile)</li> </ul>	CalendarProfile	13/09/2011 22:	Lotus Notes Templa
	∠ (CalendarCleanup)	CalClean	13/09/2011 22:	Lotus Notes Templa
	4		10/00/0011 00	
	Properties y Problem			arch v T = =
	E Properties x Z Events x K Problem			
	Basics Application	Desklasse (Otherse)		-
	Info Title: Mail (88.5)	Problems (0 items)		
	Print Server: MCDomino/Croporg	Eult		
🗄 Outline 👝 🖽 🗙				
An outline is not available.	rile name: mailos.ntr			
	Type: Standard			
	Activity			-
		*		🏓 🔏 Online 🔺

## 2.2 Adding the Notes Classifier Label Banner

1. Open the mail template file in Domino Designer as described in the previous section.



Notes Classifier Installation Guide

UM638509

- The following steps will need to be repeated for the "Message", "Reply" and "Reply with History & Attachments" forms for messages and the "\_Calendar Entry" and "(Notice)" forms for calendar items.
- 3. Expand Forms in the left-hand Applications pane and double-click on the Message form to open in the middle pane, as shown below.



4. In the "Message", "Reply" and "Reply with History & Attachments" forms place the cursor in the form, immediately after the last form field before the <Computed Subform> and To, Cc areas and press Enter to create a new line as shown below.

🧑 Message - Form - IBM Lotus Domino Designer	<u>- 0 ×</u>
Ele Edit <u>V</u> iew <u>Q</u> reate <u>D</u> esign <u>T</u> ext <u>N</u> avigate T <u>o</u> ols Segrch <u>P</u> roject <u>W</u> indow <u>H</u> elp	
📴 🌆 Default Sans Serif 🔄 10 💌 b 🧯 🖳 🖉 🧟 🗮 🧮 🗮 🗮 🗮 🗮 🖄 💷 🏠 💈   🔜 🗴   😡 🖉   🔗 ×   😡 ×   🔗 ×   🔗 ×   🖓 •   💝   <	<b>&gt; -</b> ×
😰 Applications 👔 🕳 🚍 🗴 🔂 mail85.ntf - Forms 🗙 📓 *Message - Form 🗴	
Computed Subform>	
Always hidden: Form T NamePreference T FunguagePreference T From	
B Address labels 14 or 21, t	
Address labels 14 or 21, r     The pDisplayFrom_Preview T SkeepPrivate T DefaultMailSaveOptions T	
Address labels 20 or 30, t	
Address labels 20 or 30, r     Path_into 1 duery_string 1 due	
CalendarInfoDoc     SFLabels T, F SFLabels T, SFLabels T, SFLabels T, SFLabels T, F SFLabels T,	
EnableBlankSubject T. ExpandPersonalGroups T. SAbstract T. SendTo	
Group Copyro a Bindcopyro a Contidentialstring 1 Classification 1	
Message InetSendTo இ InetBlindCopyTo 8	
Quota Report	
RS Compatibility Form < Computed Subform>	
Reply <computed subform=""></computed>	
Reply with History & Atta	
Setup MiniView	
Bipping labels 10, busine	<b>-</b>
Shipping labels 10, person	
Bipping labels 6, busines Objects Reference Memo (Form) : Window Title	
Shipping labels 6, persona 🗸 📄 Memo (Form)	
Window Tale	
Cutting	": <b>-</b>
An ocume is not available.	1 2 2
· · · · · · · · · · · · · · · · · · ·	Online 🔺

In the "\_Calendar Entry" and "(Notice)" forms place the cursor in the form, immediately after the tmpHideOnlinemeeting form field before the dispDuplicateEntry area, and press Enter to create a new line as shown below.

Boldon James

Notes Classifier Installation Guide

UM638509

File Edit View Create Design Text Navigate Tools Search Project Window Help	) ×
🛅 🛅 Default Sans Serif 🔄 🚺 10 🖬 b i 🖳 🔺 🦉 🗧 🔡 🗧 🐨 🗧 🔅 🐨 🖉 🖓 🔹 🖓 🔹 🤅 🖓	• *
Applications  Calendar Entry Applications  AltChairCalendar Entry AltChairCollendar Entry AltChairCollendar Entry AltChairCollendar Entry AltChairCollendar Entry  AltChairCollendar Entry  TmpBroadcast TTmpWhichList TTmpNewHideTimeZone T  TsTeamCalendar TCalForwardChairNotificationTo T TmpHideOnlinemeeting T	
Special_Message To Dat Special_Unix Message Special_Phone Message	-
(AddroupCategory)         (AddressPicker)         (Calendar Profile)         (Calendar Profile) <th></th>	

5. Press the "Create Field" button on the toolbar to add a new text field, and when the Field properties dialog pops up, change the Name from "Untitled" to "bjLabelBannerText", as follows.



6. Select the "Fonts" tab in the Field properties dialog, and note that the field name on the form is updated with the new name "bjLabelBannerText". Choose font size 12 and "Bold" style, as follows.

Boldon James A HelpSystems Company

Notes Classifier Installation Guide

UM638509

👰 Message - Form - IBM Lotus Domino Designer		_O×
File Edit View Create Design Navigate Tools S	earch Project Window Help	
	: Ц 🛯 2 差 目 ह ∃ \$\$ & ■ - ☆ ☆ ☆ >   2 >   😔 >   / →   ♥	*
Applications	🚰 mail85.ntf - Forms 🗙 🗐 *Message - Form 🗴	_ =
Size Sylew Template for 1000 PE Solial     Sylew Template Default     Address labels 14 or 21, business     Address labels 14 or 21, personal     Address labels 20 or 30, business     Address labels 20 or 30, personal     CalendarInfoDoc     Contact      Field     Fort     Size Style     CordelUPC     T     10     Ae	Computed Subform> Always hidden: Form T, MamePreference T, Always hidden: Form T, AltFrom T, Logo T, AltFrom T, Logo T, BGTableColor T, weApplet T, Form T, BGTableColor T, weApplet T, Form T, BGTableColor T, BGTableColor T, Weapplet T, Form T, F	×
Courier New Transformer New Transformer New Transformer Strikethrough David Transformer Strikethrough Default Monospace Transformer Strikethrough Default Sens Serf Transformer Color		<b>•</b>
Switcher Form for Calendar		
	Properties × 🕼 Events × 🖹 Problems (0 items) × 🖉 Progress × 🔗 Search ×	
	* 💝 🧏	Online +

7. Select the "Paragraph Alignment" tab in the Field properties dialog, and select "centre" Alignment and "continuous" First Line. Note that the form field is now centred.

😥 Message - Form - IBM Lotus Domino Designer	_ 🗆 🗵
File Edit View Create Design Navigate Tools Search Project Window Help	
I 🖬 /a 📃 🔽 b i Ц 🛛 2 🗐 E ∃ 🗱 🔌 🗉 (b i 🗟 % × 1 🖉 × 1 🔗 × 1 🔗 • 1 🖙 1 <	<b>⇔ -</b> ×
😡 Applications 🔰 🕳 🚍 × 🔀 mail85.ntf - Forms 🗴 📳 *Message - Form 🗴	_ 3
Computed Subform> Always hidden: Form T NamePreference T Form 1 Always hidden: Form T NamePreference T BGTableColor T useApplet T T hupDisplayer T BGTableColor T UseApplet T T hupDisplayer T Stabels 10 r 30, business Address labels 20 r 30, personal Contact Fred Paragraph Algoment BindCopyTo 1 Space Sonde So	
bjLabelBannerText (Field) : Default Value	
Simpling labels 6, personal     Simpling labels     Simpling labels     Simpling labels     Simpling labels     Simpling labels 6, personal     Simpling labels     Simpl	
🔲 Properties x 👰 Events x 🖹 Problems (0 items) x 🙋 Progress x 🔗 Search x 🕻	193
	Online 🔺

8. Select the "Control" tab in the Field properties dialog, and uncheck "Show field delimiters".

Boldon James

Notes Classifier Installation Guide

UM638509



9. Select the "Paragraph Hide When" tab in the Field properties dialog, and uncheck all of the "Hide paragraph when the document is" checkboxes, as shown below.

Message - Form - IBM Lotus Domino Designer     File Edit View Create Design Navigate Tools S	earch Project Window Help	_ 🗆 🗙
	" 및 Δ 2 Ξ Ξ Ξ \$ \$ \$ 0 0 0 0 0 0 0 0 0 0 0 0 0 0	🤃 - ×
Applications	mail85.ntf - Forms × Steessage - Form ×	
System remunate the 1000remotion       \$\$ViewTemplateDefault       Address labels 14 or 21, business       Address labels 14 or 21, personal       Address labels 14 or 21, personal       Address labels 14 or 21, personal       Address labels 20 or 30, business       Address labels 20 or 30, personal       Contact       Field       Paragraph Hide W       Hide paragraph from       Notes R4.6 or later       Web browsers       Mobil       Hide paragraph when document is       Previewed for reading       Previewed for reading       Opened for reading	Computed Subform> Always hidden: [Form T][ NamePreference T][ LanguagePreference T][ From	, T
Printed Copied to the clipboard	ects Reference bjLabelBannerText (Field) : Default Value	
Hide paragraph if formula is true Formula Window	Befailt Value     Optimit	Y
	Properties x 🖉 Events x 🖹 Problems (0 items) x 🖉 Progress x 🔗 Search x	193
		Unine -

- 10. Repeat the above steps for the "Reply" and "Reply with History & Attachments" forms for messages and the "\_Calendar Entry" and "(Notice)" forms for calendar items.
- 11. Label banner modifications are now complete.

### **2.3 Adding the Classify Button to the Toolbars**

- 1. Open the mail template file in Domino Designer as described earlier.
- 2. The following steps will need to be repeated for the "Message", "Reply" and "Reply with History & Attachments" forms for messages and the "\_Calendar Entry" and "(Notice)" forms for calendar items.

boldonjames.com



3. Right-click on the "Save and Close..." action in the Action Pane, and select "Create Action..." to create a new button to the right of the "Save and Close..." button on the form.



4. In the Action properties dialog, "Action Info" tab, change the name to "Classify...".

Message - Form - IBM Lotus Domino Designer     Edit View Create Design Text Navigate Tools Sea	ych <u>Project Wi</u> ndow Help	<u>- 0 ×</u>
🛚 📴 🌆 Default Sans Serif 💌 12 💌 b i 😃	◬◿ё▤▤▤▤◨◖◮▦◜◮◓◮◮▫▫▯▯▫▯◙◦।∥◦।	🗘 🔸 🗧
Applications I = I × Amail@s.ntf	f - Shared Actio × 📳 *Message - Form 🗙 🎚 Reply - Form 🗴 📳 Reply with History & Attac 🗴	_=
Image: Sylew Template: Or Your Claving       Sylew Template: Or Your Claving       Sylew Template: Or Your Claving       Address labels: 14 or 21, business       Address labels: 14 or 21, business       Address labels: 14 or 21, business       Action Info       Action Info       Action Info       Target       Frame       Display       Value       Only show icon in Action bar       Right align action control	From "G AltFrom T. [* Logo T.]       dLogo T.]       Clogo T.]         BGTableColor T.]       useApplet T.]       Start         *       The DisplayFrom_Preview T.]       SkeepPrivate T.]       Save         *       DefaultMailSaveOptions T.]       Path_Info T.]       Query_String T.]         WholsOnlineLS       SametimeServer T.]       SFLabels T.]       Save and Observed T.]         *       Shabetract T.]       Stabstract T.]       Save and Observed T.]         *       Shabetract T.]       Send on File       Save and Observed T.]         *       Shabetract T.]       *       Send on File       Save and Observed T.]         *       Shabetract T.]       *       Send on File       Save and Observed T.]         *       Shabetract T.]       *       Save and Observed T.]       Save and Observed T.]         *       Shabetract T.]       *       Save and Observed T.]       Save and Observed T.]         *       *       Save and Observed T.]       *       Save and Observed T.]         *       *       Save and Observed T.]       *         *       *       *       New       *         *       *       *       *       New       *         *       <	s 
Include action in Action menu	nce Classify (Action) : Click	
Icon ● None ● Notes BE ( Custom An ou	(Action) Ts) rations) e xecute te te te te terrors	
	x	0nline ▲

5. In the Action properties dialog, "Action Hide When" tab, check the options to hide the action when the document is "Previewed for reading" and "Opened for reading".

Boldon James A HelpSystems Company

Notes Classifier Installation Guide

UM638509



- Close the Action properties dialog and repeat the above steps with the "Reply" and "Reply with History & Attachments" forms for messages and the "\_Calendar Entry" and "(Notice)" forms for calendar items.
- 7. Toolbar modifications are now complete.

### 2.4 Installing the Notes Classifier Server Scripts

- 1. Open the mail template file in Domino Designer as described earlier.
- Most of the following steps will need to be repeated for the "Message", "Reply" and "Reply with History & Attachments" forms for messages and the "\_Calendar Entry" and "(Notice)" forms for calendar items.
- 3. There are fourteen script files that need to be applied to the mail template file. These files have the file extension ".COD" and can be found in the 'Server' folder under the Classifier Notes bundle.
- Each ".COD" file contains a comment header, which explains which Application, Form, Object and Class/Subroutine or Function that the script addition applies to, as shown here for the script file BJ\_0001.COD.

```
      '{BJ: NC0001_START}

      'Copyright (c) 2012 Boldon James Ltd

      '

      'NTF file:

      'NTF file:

      Mail template file

      'Form:
      Message | Reply | Reply with History & Attachments | _Calendar Entry | (Notice)

      'Object:
      (Globals)Memo | (Globals)Reply | (Globals)Reply | (Globals)Appointment | (Globals)Notice

      'Class or Sub:
      (Declarations)

      'Position:
      End
```

5. After each of the following steps, remember to save your changes.

Notes Classifier Installation Guide

Boldon James | Customer Confidential

#### UM638509

#### 2.4.1 BJ\_0001.COD

The contents of this file needs to be added to:

- Message form Globals(Memo), (Declarations)
- Reply form Globals(Reply), (Declarations)
- Reply with History & Attachments form Globals(Reply), (Declarations)
- Calendar Entry form Globals(Appointment), (Declarations)
- (Notice) form Globals(Notice), (Declarations)



Notes Classifier Installation Guide

Boldon James | Customer Confidential

UM638509

#### 2.4.2 BJ\_0002.COD

The contents of this file need to be added to:

- Message form Globals(Memo), Initialize
- Reply form Globals(Reply), Initialize
- > Reply with History & Attachments form Globals(Reply), Initialize
- Calendar Entry form Globals(Appointment), Initialize
- (Notice) form Globals(Notice), Initialize



Notes Classifier Installation Guide

Boldon James | Customer Confidential

UM638509

#### 2.4.3 BJ\_0003.COD

The contents of this file need to be added to:

- Message form Memo(Form), QuerySave
- Reply form Reply (Form), QuerySave
- > Reply with History & Attachments form Reply (Form), QuerySave

🧑 Message - Form - IBM Lotus Domino Desi	gner	
<u>File Edit View Create Design Text Naviga</u>	ite T <u>o</u> ols Se <u>a</u> rch <u>P</u> roject <u>W</u> indow <u>H</u>	lelp
	b <i>i</i> ≞ ≧ 2 ≣ ≡ ≣	1 🗱 💩 💷 🗠 🖄 💈 🛛 🔛 🗴 🖌 🥪 🗴 🔗 • 🛛 😓 • 📚
🧔 Applications 👔 🕳 🗮 🗙	🔂 mail85.ntf - Forms 🗙 🗐 *Me	ssage - Form 🗙 🗐 Reply - Form 🗙 🗐 Reply with History & Atta 🗙 🖃
	Objects Reference	Memo (Form) : Querysave
\$\$ViewTemplate for ToDoGroup     \$\$ViewTemplate for ToDoGroup	🖃 🖪 Memo (Form)	Run Client 💌 LotusScript
S\$ViewTemplate for TodoPersonal	◆ Window Title ♦ HTML Head Content	Sub Querysave/Source As Notesuidocument Continue As Variant)
\$\$ViewTemplateDefault	HTML Body Attributes	If source.InPreviewPane Then Exit Sub
Address labels 14 or 21, business	WebQueryOpen     WebQuerySave	
Address labels 14 or 21, personal	♦ Target Frame	'{BJ: NC0003_START}
Address labels 20 or 30, business	O JS Header	'Copyright (c) 2012 Boldon James Ltd
Address labels 20 or 30, personal		
Contact	o on Unload	NTF file: Mail85.NTF
DOLS Offline Configuration	O onClick	Object Memo/Form)   Reply/Form)   Reply/Form)
Group	o onKeyDown	Class or Sub: QuerySave
B Message	<ul> <li>onKeyPress</li> </ul>	'Position: After 'if source.InPreviewPane Then Exit Sub'
🗏 Quota Report	O on Key Up	
R5 Compatibility Form	o onMouseMove	Call Source.Document.ReplaceItemValue("bjProtectiveMarking", bjWorl
Reply	O on MouseOut	
Reply with History & Attachments	O onMouseUp	Copyright (c) 2012 Boldon James Ltd
	O on Reset	{BJ: NC0003_END}
Shipping labels 10, personal	O on Submit	Call source FieldSetText/"useApplet" "True")
	<ul> <li>(Options)</li> <li>(Declarations)</li> </ul>	Call cMemoObject QuerySave(Continue)
E Shipping labels 6, personal	S Queryopen	End Sub
SimplifiedReply	Postopen	
Switcher Form for Calendar	Postmodechange	
	S Queryrecalc	
"a≞ Outline and a market and a	Postrecalc     Ouenverve	Frrom ▼ 17.2
An outline is not available.	· · · · · · · · · · · · · · · · · · ·	
	Properties × 🗗 Events ×	🖹 Problems (0 items) 🗴 🦉 Progress 🗴 🚀 Search 🗴 🗈 🖼 🗆
		ـــ 😪 🔊 Online الجير دي

UM638509

#### 2.4.4 BJ\_0004.COD

The contents of this file needs to be added to:

- Message form Memo(Form), OnLoad
- Reply form Reply (Form), OnLoad
- Reply with History & Attachments form Reply (Form), OnLoad
- Calendar Entry form Appointment (From), OnLoad
- (Notice) form Notice (Form), OnLoad

Reply

E Outline

Reply with History & Attach
 Setup MiniView
 Shipping labels 10, business

Shipping labels 10, personal

The default "onLoad" event handler shown in the Designer is the Web/Javascript handler. To add the script file to the Client "OnLoad" handler, you need to select Client/LotusScript from the Run dropdowns. If your installation has not been customized, this will show an empty "OnLoad" handler subroutine to add the script into.



nd Sub

Errors

🔲 Properties 🗴 🚛 Events 🗴 🖹 Problems (0 ite... 🗴 🙋 Progress 🗴 🔗 Search 🗴 🗓 🤤

WebQueryOper

WebQuerySave
 Target Frame
 JS Header
 onHelp
 Onload
 OnUnload

• 1.1

🥖 Onlin



Notes Classifier Installation Guide

UM638509



#### UM638509

#### 2.4.5 BJ\_0005.COD

Select "Code/Script Libraries" in the Applications pane, and right-click and select "New Script Library..."



Enter the new script library name "BJCommon", and press OK.

🧑 Applications - IBM Lotus Domino De	SF	<u>_ 🗆 ×</u>
File Edit Create Design Navigate To	Search Project Window Help	
1 🖬 😑 👌 🎦 🏠 🏠 🏠	🛛 🧑 New Script Library	
Applications I =	New Script Library  Concrete a new Script Library.  Reply with History & Attachments - F.	×
6 • 1 = -		<u></u>
Framesets		
E Pages	Name: BJCommon SCript 💌	
E Shared Elements	Comment: hent, Continue As Variant)	
Building Code	Type:	
🗈 🦻 Shared Actions		
😑 🛅 Script Libraries	Application: Mail (R8.5) : \MCDomino/Cronorg\mail85.ntf	
- ACLManagement		
AddressBookSync	rogress") Then	
Block IserPule	onInProgress")	
	OK Cancel	
🗁 Common	Postsave	
CommonExt	♦ Querysend	
CommonUI	Overvelage	
	♦ Initialize	122
🗄 Outline 📟		
An outline is not available.	🔲 📰 Properties 🗙 🕼 Events 🗴 🗽 Problems (0 items) 🗴 🙋 Progress 🗴 🔗 Search 🗴	193
	ړ 🕪 .	🖉 Online 🔺

The new script library is created with Public and Declare options.

Boldon James

Notes Classifier Installation Guide

UM638509



With "BJCommon" selected in the Objects | Reference middle pane, paste the entire contents of BJ\_0005.COD into the right hand BJCommon script pane, as shown below.



Check that two new functions, "BJExpandRecipients" and "GetAllUsersInGroup" have been added and that selecting those items in the middle pane shows the relevant function body in the right-hand pane.

Notes Classi

Boldon James | Customer Confidential

Notes Classifier Installation Guide

UM638509



Notes Classifier Installation Guide

#### UM638509

#### 2.4.6 BJ\_0006.COD

The contents of this file need to be added to:

- Message form Memo(Form), Classify... (Action):Click
- Reply form Reply (Form), Classify... (Action):Click
- > Reply with History & Attachments form Reply (Form), Classify... (Action):Click
- > \_Calendar Entry form Appointment (From), Classify... (Action):Click
- > (Notice) form Notice (Form), Classify... (Action):Click

Click "Classify..." in the upper right-hand Action pane, and select "Run: Client / LotusScript" in the "Classify... (Action) : Click" handler in the lower right hand pane.

The script from BJ\_0006.COD should replace the empty Sub.

👰 Message - Form - IBM Lotus Domin	o Designer
<u>File Edit View Create Design Text</u>	Navigate Tools Search Project Window Help
	▶ b i Ц Д 2 Ξ Ξ Ξ ≇ & Ш ☆ ☆ ☆ ↓   🛛 ×   😡 ×   🔗 •   ♥ •   ♥ •   ♥
🥺 Applications 👔 🔤 🗙	🔄 mail85.ntf - F 🗙 📳 *Message - Fo 🗙 📳 Reply - Form 🛛 📓 Reply with His 🗙 🗗 BJCommon 🗙 🛥
	bjLabelBannerText
Message     Ouota Report	<computed subform=""></computed>
85 Compatibility Form	LEDIT
Reply	To: EnterSendTo%
	C: EnterCopyToA
Shipping labels 10, business	Bcc: EnterBlindCopyto
Shipping labels 10, personal	Fax to: FaxToList A
B Shipping labels 6, personal	Subject Subject T
SimplifiedReply	
Switcher Form for Contacts	Objects Reference Classify (Action) : Click
Switcher Form for Group Ca	
Switcher Form for Mail	More (Action)     Sub Click(Source As Button)     Sub Click(Source As Button)
Switcher MV Form for Calen	
Switcher MV Form for Mail	Common JavaScript     Common JavaScript
Switcher MV Page for Calen	(Declarations)     (Tirdy
To Do	© Objectexecute
TransferGroup	<ul> <li>♦ Initialize</li> <li>♦ Terminate</li> </ul>
🗄 Outline 🔤 🖛 🖼 🗙	Errors 1.1
An outine is not available.	Properties × 🖉 Events × 🖹 Problems (0 items) × 🖉 Progress × 🔗 Search ×
	🔺 🌾 🐙 Online 🔺

Boldon James A HelpSystems Company

Notes Classifier Installation Guide

UM638509



Notes Classifier Installation Guide

#### UM638509

#### 2.4.7 BJ\_0007.COD

The content of this file needs to be added to the beginning of:

- Code / Shared Actions, New Message (views) (Action), Click.
- > Code / Shared Actions, New Meeting (views) (Action), Click.



Open New – Message (views) (Action), Click.

Note: New – Message (views) (Action) and New – Meeting (views) (Action) may exist multiple times, we recommend modifying all versions with the same changes



Insert the contents of BJ\_0007.COD at the beginning of the formula.

## **Boldon James**

A HelpSystems Company

Notes Classifier Installation Guide

UM638509



Repeat for Open New – Meeting (views) (Action), Click.

#### UM638509

#### 2.4.8 BJ\_0007A.COD

The content of this file needs to be added to the beginning of:

- > Code / Shared Actions, Copy Into New\Calendar Entry (Action), Click.
- > Code / Shared Actions, Copy Into New\New Calendar Entry (Action), Click.
- Code / Shared Actions, Copy Into New\\_Calendar Entry (Action), Click.
- Code / Shared Actions, Copy Into New\\_Message (Action), Click.
- > Code / Shared Actions, rt click Copy Into New Message (Action), Click.
- > Code / Shared Actions, rt click Copy Into New Calendar Entry (Action), Click.
- > Code / Shared Actions, rt click cont Forward (Action), Click.
- > Code / Shared Actions, rt click Forward (Action), Click.
- > Code / Shared Actions, rt click Fwd with attachments (Action), Click.
- > Code / Shared Actions, rt click Reply (Action), Click.
- > Code / Shared Actions, rt click Reply with History & Attachments (Action), Click.
- > Code / Shared Actions, rt click Reply with History Only (Action), Click.
- > Code / Shared Actions, rt click Reply with Internet-Style History (Action), Click.
- > Code / Shared Actions, rt click Reply to All (Action), Click.
- > Code / Shared Actions, rt click Reply to All with History & Attachments (Action), Click.
- > Code / Shared Actions, rt click Reply to All with History Only (Action), Click.
- > Code / Shared Actions, rt click Reply to All with Internet-Style History (Action), Click.

🧑 mail85.ntf - Shared Actions - IBM Lotus Domin	o Designer		
File Edit View Create Design Navigate Tools	Search Project Window Help		
1 🗄 🗐 - 省 😚 🏠 🧐 🏖 🗎 🔜 🖻			
🥺 Applications 👔 🕳 🖼 🗙	Home 🗙 🔂 mail85.ntf - Shared Actions 🗙		_ 3
	⅔ New Shared Action	Filter:	Clear
Custom Controls	Name 🔺	Language	Type (Clie 🔺
F- Framesets	Copy Into New\_Calendar Entry		Formula/F
Pages	Copy Into New\_Message		Formula/F
E B Shared Elements	Copy Into New\_Message		Formula/F
E-B Code	Copy Into New\_To Do		Formula/F
Arents	Copy Into New\_To Do		Formula/F
- Shared Actions	Copy Into New\Calendar Entry		Formula/F
- 2 Accept	Copy Into New\New Calendar Entry		Formula/F
- 5 Accept with Comments	4		
- 5 Add Recipients to Contact Group	📰 Properties 🗙 🗿 Events 🗴 🖹 Problems (0 iter	ms) ×	1 - 3
			<u> </u>
	Design Design Source		
	Prohibit design refresh or repla	ace to modify	-
~		• 💝	🔏 Online 🔺

Open Copy Into New\Calendar Entry (Action), Click.

UM638509

## Note: Actions may exist multiple times, we recommend modifying all versions with the same changes



Insert the contents of BJ\_0007A.COD at the beginning of the formula.

He Edit Create Design Navigate Tools Search Project Window Help	
😰 Applications 👔 🔤 🗶 🚮 Home 🗙 📩 mail85.ntf - Shared Actions	s 🗙 🔗 *Copy Into New\Calendar E 🗙 🛶 🚍
Diects Reference Calend	lar Entry (Action) : Click
	ent 💽 Formula
Add Recipients to New Group Calend.      Position     S Add Sender To Address Book	n: Start 🔟
Address - Other Action:	rt click - Reply to All with Internet-Style
- 5 Address Object	rt click - Reply to All with Internet-Style
Archive\Archive Now     Selected Documents     Event	(Action) Click
	n: Start
	nvironment("fwdID"; @NoteID);
Calendar Format\One Day	3J: NC0007A_END};
Calendar Format\One Month	mand([ToolsRunMacro];
Calendar Format\Two Days	pyIntoCalendarEntryAction)")
E Outline	
An outline is not available. Events × 🛃 Events ×	olems (O items) 🗙 🚺 🗎 🗎

Repeat for all Actions in the list.

Notes Classifier Installation Guide

Boldon James | Customer Confidential

UM638509

#### 2.4.9 BJ\_0008.COD

The contents of this file need to be added to:

- Message form Globals(Memo), (Options)
- Reply form Globals(Reply), (Options)
- Reply with History & Attachments form Globals(Reply), (Options)
- Calendar Entry form Globals(Appointment), (Options)
- (Notice) form Globals(Notice), (Options)



Notes Classifier Installation Guide

UM638509

#### 2.4.10 BJ\_0009.COD

The contents of this file need to be added to:

- Message form Memo(Form), QuerySend
- Reply form Reply (Form), QuerySend
- > Reply with History & Attachments form Reply (Form), QuerySend



Notes Classifier Installation Guide

UM638509

#### 2.4.11 BJ\_0003C.COD

The contents of this file need to be added to:

Calendar Entry form - Appointment (From), QuerySave



Notes Classifier Installation Guide

#### UM638509

#### 2.4.12 BJ\_0003N.COD

The contents of this file need to be added to:

(Notice) form - Notice (Form), QuerySave



Notes Classifier Installation Guide

Boldon James | Customer Confidential

UM638509

#### 2.4.13 BJ\_0010.COD

The contents of this file need to be added, just after the statement "If source.InPreviewPane Then Exit Sub" to:

- Message form Memo(Form), QueryClose
- Reply form Reply(Form), QueryClose
- Reply with History & Attachments form Reply(Form), QueryClose

The contents of this file need to be added, just before the statement "Call csEventObj.QueryClose(Continue)" to:

Calendar Entry form - Appointment (From), QueryClose

The contents of this file need to be added, just before the statement "If (csEventObj.WasSaved) Then Call csEventObj.QueryClose(continue)" to:

(Notice) form - Notice (Form), QueryClose



If you have applied the form code changes to all three forms and saved the changes, this stage of the installation is complete.

#### 2.4.14 BJ 0011.COD

The contents of this file provide the code for the Click event for Single Click buttons. It is only required if you wish to have single-click buttons on the forms.

If you require Single Click buttons the following forms require the changes applied to them:

- Message form Memo(Form), SingleClick(Action):Click
- Reply form Reply(Form), SingleClick(Action):Click
- Reply with History & Attachments form Reply(Form), SingleClick(Action):Click
- \_Calendar Entry form Appointment(From), SingleClick(Action):Click  $\geq$
- (Notice) form Notice(Form), SingleClick(Action):Click

Add a new action onto the form's Action Pane. Set the action type to Button and enter a name for the Single-Click button.

- 1. The following steps will need to be repeated for the "Message", "Reply" and "Reply with History & Attachments" forms for messages and the "\_Calendar Entry" and "(Notice)" forms for calendar items.
- 2. Right-click on the "Classify..." ``action in the Action Pane, and select "Create Action..." to create a new button to the right of the "Classify..." button on the form.

🖄 Message - Form - IBM Domino Designer				×
File Edit View Create Design Text Navigate Tools Sear	h Project Window Help			
E Default Sans Serif 🔽 10 🔽 b i	$\underline{u} \ \underline{\land} \ \underline{<} \equiv \equiv \equiv \equiv \equiv \ddagger \ddagger$	A 🗉 👌 🏷 🏠 🐄 🖬 🖝 🗄 🔛	🗄 目 🏶 👼 • 目 燕 • 目 🛷 • 目 🌤 目 🗇 • 🗇 •	
Applications 🛛 🚍 🛥 🗃 🗙	😭 Home 🗙 🔳 *Message - F	orm ×		3
	Computed Subform> <computed subform=""> <computed subform=""></computed></computed>	SendTo® CopyTo® ndCopyTo ToList & oject T JayFrom "& - <sup>[*</sup> dspDayOfWeek T.] <sup>[*</sup> DisplayDa	Bet Archive     Denin Archive     Save     Save     Save     Save     Save     Save and File     Save and File     Save and File     Save and File     Denin Archive     Delete     Bet     Rep Copy     Bet     Delete     dx     Create Artion	
Group     Message     Quota Report     Gonaldality Form	Objects Reference	Classify (Action) : Click Run Client	Create Action with Sub Action Insert Shared Action Insert System Actions	
Control C	Controls     Controls	'{BJ: NC0006_START} 'Copyright (c) 2012 Boldon James Ltd ' ' NTF file: Mail85.NTF	-	
An outline is not available.		* Application: Code * Type: Shared Actions * Action: ClassifierDialog(Action):Click * Position: New Sub Sub Click(Source As Button) Dim biDialogSislLabel As String		
	(Action)     Computed (Subform)     Picture	Errors	2.2	Ĭ
	Properties × / Events	× Problems (0 items) ×		

3. In the Action properties dialog, "Action Info" tab, change the name your Single Click button to reflect the label it will select.

```
boldonjames.com
```

## Boldon James

A HelpSystems Company

UM638509

Message - Form - IBM Domino Designer		_ 🗆 ×
File Edit View Create Design Text Navigate Tools Searc	rch Project Window Help	
🗄 🕼 Default Sans Serif 🔽 10 💌 b i	i Ц Δ Z 王 王 王 王 和 Δ 🗉 🖄 🍕 🚾 🖻 🖻 🗄 🕸 🗟 • ! 券 • ! 🔗 • ! 🏷	:⇔ • ⇔ -
Applications = = ×	A Home 🗴 📃 *Message - Form 🗴	
Address labels 20 or 30, personal     Address labels 20 or 30, personal     Contact     Quota Report     Group     Message     Quota Report     Reply with History & Attachments     Cabus Ministrue	Untitled T Untitled T Action Action Action Action Action bar Frame Type Button Value Display Display Include action in Action bar Right align action control Unclude action in Action menu Con	•
E Outline	• None	
An outline is not available.	Custom     Custom     Custom     Copy Into New (Action)     Copy Into New (Action)     Unitled (Field)     Custom     Cuck     Cuck	= 3 3
	· · · · · · · · · · · · · · · · · · ·	🛛 🔏 🛛 Online 🔺

4. In the Action properties dialog, "Action Hide When" tab, check the options to hide the action when the document is "Previewed for reading" and "Opened for reading".

## **Boldon James**

A HelpSystems Company

Notes Classifier Installation Guide

UM638509



5. Click the Action you just created in the upper right-hand Action pane, and select "Run: Client / LotusScript" in the "Classify... (Action) : Click" handler in the lower righthand pane.

The script from BJ\_00011.COD should replace the empty Sub.

34

Boldon James | Customer Confidential

#### Notes Classifier Installation Guide

UM638509



6. Alter the value for the "bjSingleClickIndex" variable in the lotus script code to match the Single Click item this button represents in the Classifier policy. Single Click buttons are created in a Classifier policy using Classifier Administration. They are twelve buttons arranged in four columns with each column containing three rows.

The index value used for the "bjSingleClickIndex" variable references one of these twelve Single Click buttons. The index for each of the Single Click items are shown below. Set the "bjSingleClickIndex" variable to the index of the Single Click item this Notes Actions represents.

Selectors and rules a	ssigned to this policy.				
Set Selectors Conn	ect Selectors Single Click	Set Rules Review F	Rules Test Rules		
Single Click enables This display represer below.	Single Click Button Index	els with buttons the Single Click	on the client. ribbon bar. Select a b	outton to view its associated label	
		Not visible	Not visible		
		Not visible	Not visible		
		Not visible 9	Not visible 12		

7. Repeat items 2 to 6 to create the required number of Single Click buttons for your Classifier policy.

 Close the Action properties dialog and repeat the above steps with the "Reply" and "Reply with History & Attachments" forms for messages and the "\_Calendar Entry" and "(Notice)" forms for calendar items.

If you have applied the form code changes to all three forms and saved the changes, this stage of the installation is complete.

## 2.5 Testing and Deploying the Form and Script Changes

Once you have completed the code insertion, you must apply the changes made in the template file to the user mail file.

To apply changes made in the template file you must run a command from the Lotus Domino Console.

) MCDomino/Cronorg,Release 8.5.3 - Lotus Domino Console
File Edit View Help
McDomino/Cronorg.Release 8.5.3 - Lotus Domino Console         File       Edit View Help         File       Edit View Help         Pillaform: Windows/Longhorn/64 6.1       Pause         Bill Servers       File         Clusters       Server: MCDomino/Cronorg.Release 8.5.3         D22 Servers       File         File       Release         (0694:0002-05F0] 04/10/2012 12:01:33       Mail Conversion Utility starting         (0694:0002-05F0] 04/10/2012 12:01:33       Updating 'Message' into database 'Tom Jones' from template 'Mail (R8.5)'         (0694:0002-05F0] 04/10/2012 12:01:33       Updating 'Message' into database 'Tom Jones' from template 'Mail (R8.5)'         (0694:0002-05F0] 04/10/2012 12:01:33       Updating 'Message' into database 'Tom Jones' from template 'Mail (R8.5)'         (0694:0002-05F0] 04/10/2012 12:01:33       Updating 'Message' into database 'Tom Jones' from template 'Mail (R8.5)'         (0694:0002-05F0] 04/10/2012 12:01:33       Updating 'KeDIV' into database 'Tom Jones' from template 'Mail (R8.5)'         (0694:0002-05F0] 04/10/2012 12:01:33       Updating 'ACTIONS' into database 'Tom Jones' from template 'Mail (R8.5)'         (0694:0002-05F0] 04/10/2012 12:01:34       Updating '.settings/org.eclipse.wst.jsdt.ui.superType.container' into         database 'Tom Jones' from template 'Mail (R8.5)'       (0694:0002-05F0] 04/10/2012 12:01:34       Updating '.settings/org.eclipse.wst.jsdt.ui.superType.name' into
[0694:0002-05F0] 04/10/2012 12:01:34 Updating '.project' into database 'Tom Jones' from template 'Mail (R8.5)' [0694:0002-05F0] 04/10/2012 12:01:34 Mail Convert: Finished replacing design template in 'mail\tjones.nsf' [0694:0002-05F0] 04/10/2012 12:01:34 Mail Conversion Utility shutdown
Domino Command load convert mail\tjones.nsf * mail85.ntf Send V Commands V

To test operation for a single user you need to use the following command:

#### load convert mail\<user>.nsf \* <MailXX.NTF>

Replace the <user> with the appropriate userid filename.

Replace the <MailXX.NTF> with the appropriate mail template file name for your system.

When you have tested the correct operation of the product and want to install for all users to use the following command:

#### load convert mail\\*.nsf \* <MailXX.NTF>

**Note:** The above "load convert" command makes changes to the user database files. It is recommended that you make appropriate backups of the .NSF files before performing the action.

Install the Notes Classifier Client Plug-in

- Ensure that your client has an environment supported by Notes Classifier.
- Logon to the client with administrator privileges.
- From the Notes Classifier bundle open the **Client** folder and run **NotesClassifierClient.msi** (or Setup.exe). Follow the wizard installation steps to complete the install.

If desired, the client components may be distributed to client machines using Group Policy or other suitable network installation mechanisms.

## 2.6 Uninstallation

#### **Client Plug-in**

Notes Classifier can be uninstalled using the "Add/Remove Programs" provided by Microsoft Windows.

#### Server-side Scripts

During the installation, a backup mail template file was created to allow any changes made during the installation of Notes Classifier can be reverted back to the original in case of error. To uninstall the modifications, we recommend replacing this original mail template file, overwriting the template that was modified.

Once overwritten follow the steps outlined in <u>Testing and Deploying the Form and Script Changes</u> to publish the changes.

#### Note:

> You may wish to create a backup of the mail template file with the Notes Classifier changes applied if you do not wish to re-apply the modifications on re-install.