

Notes Classifier Installation Guide

UM638509

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Gold
Microsoft Partner


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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

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)

2 INSTALLATION PROCEDURE

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.

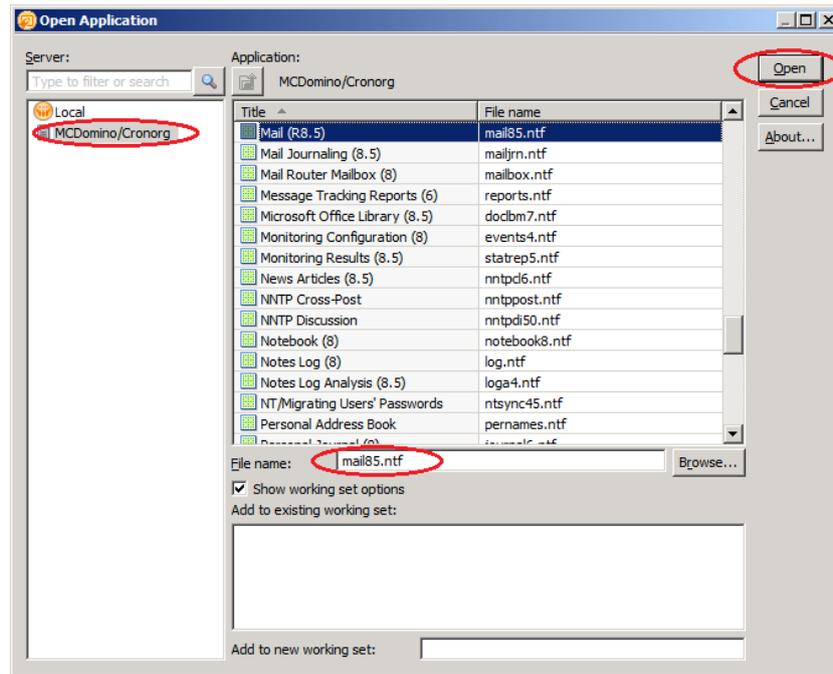
Before you start, observe the following notes.

Notes:

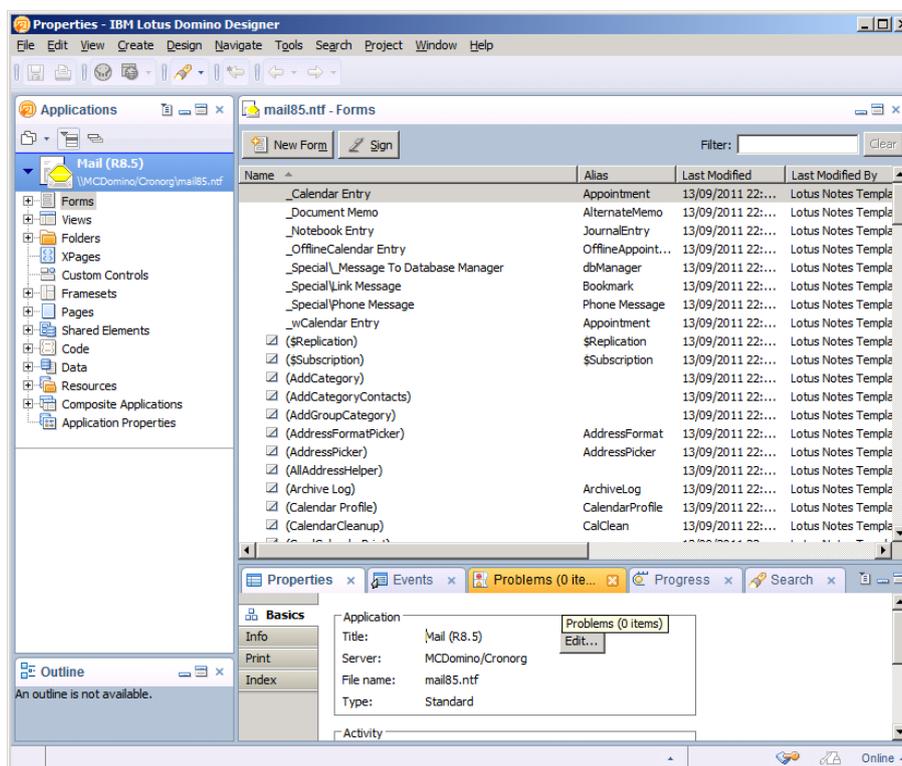
- **Different versions of Lotus Notes/Domino and customised installations may contain variations in the mail template file. You will need to exercise judgement on the exact location to insert script additions.**
 - **Make sure you back up the mail template file before starting this procedure.**
 - **Remember 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:



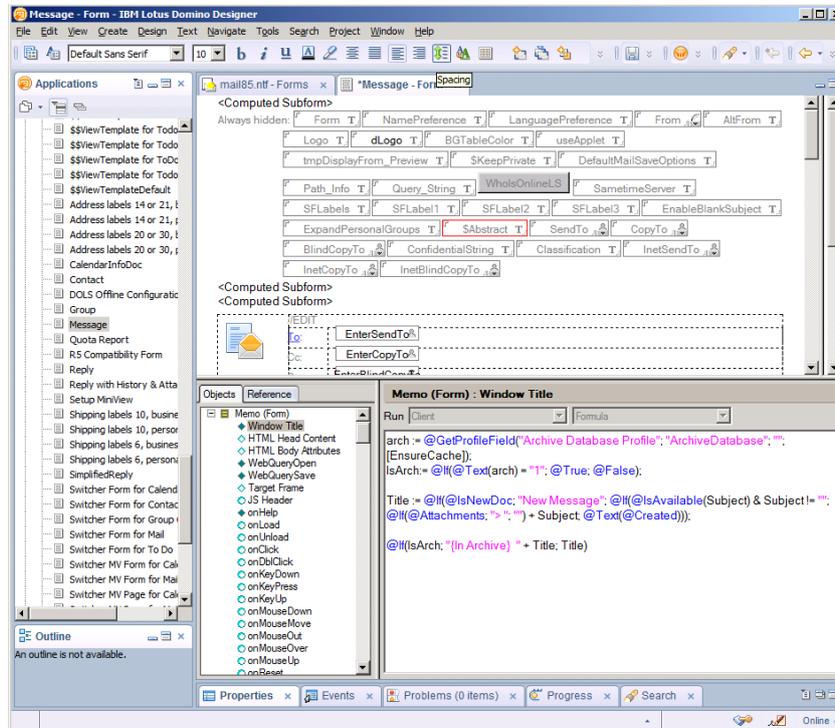
- It takes time to open the mail template file, but once it is loaded, you will see a view similar to the following:



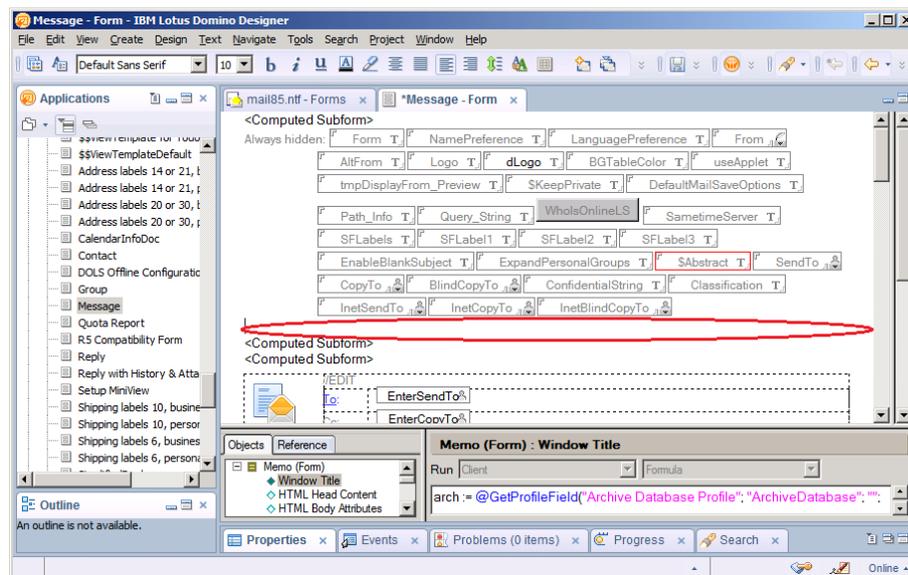
2.2 Adding the Notes Classifier Label Banner

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

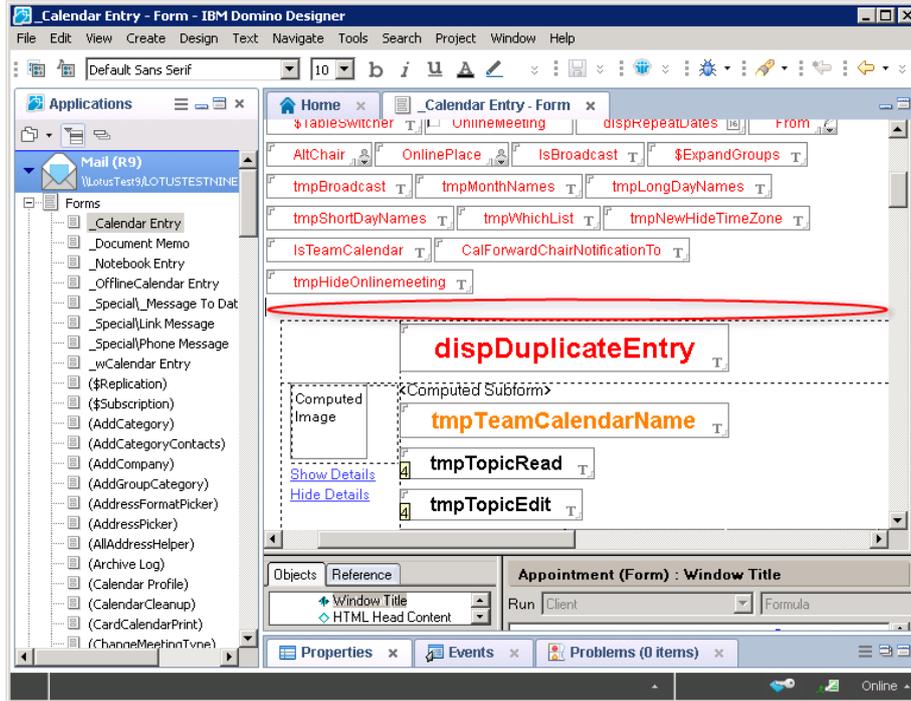
- The following steps will need to be repeated for the “Message”, “Reply” and “Reply with History & Attachments” forms for messages and the “_Calendar Entry” and “(Notice)” forms for calendar items.
- Expand Forms in the left-hand Applications pane and double-click on the Message form to open in the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



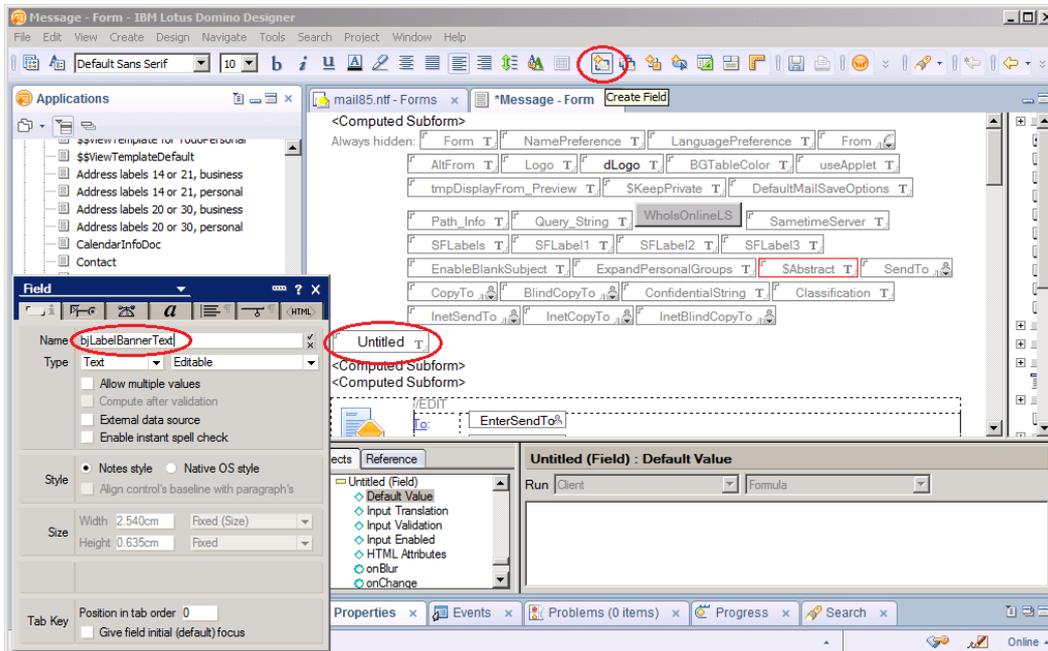
- In the “Message”, “Reply” and “Reply with History & Attachments” forms place the cursor in the form, immediately after the last form field before the <Computed Subform> and To, Cc areas and press Enter to create a new line as shown below.



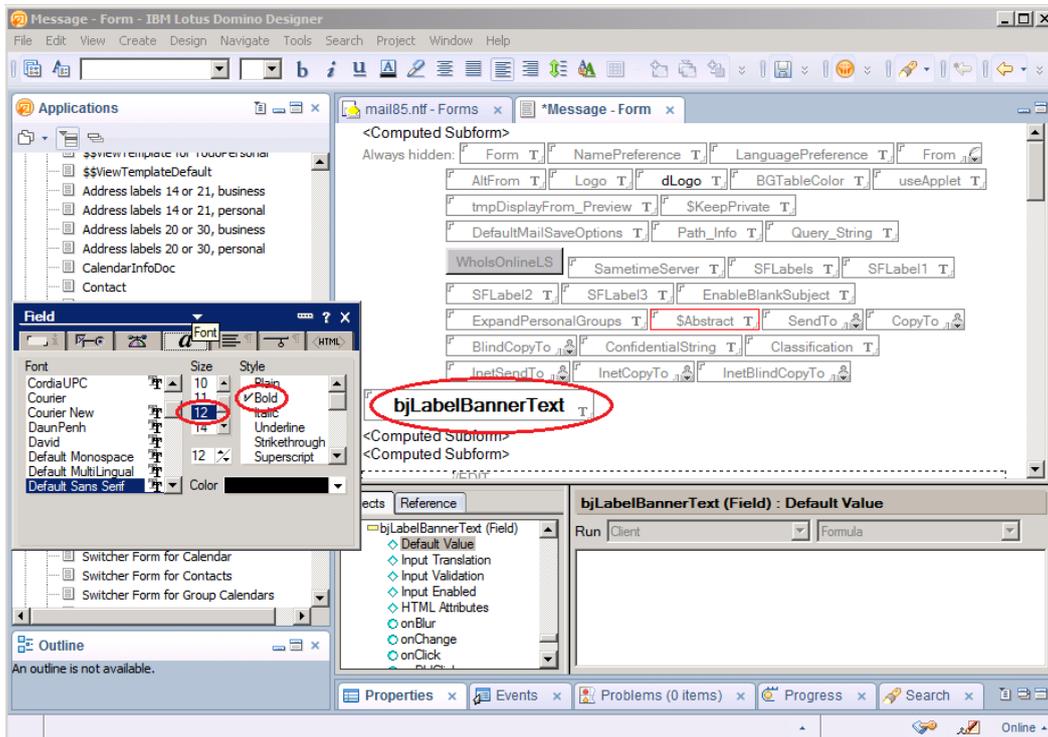
In the “_Calendar Entry” and “(Notice)” forms place the cursor in the form, immediately after the tmpHideOnlinemeeting form field before the dispDuplicateEntry area, and press Enter to create a new line as shown below.



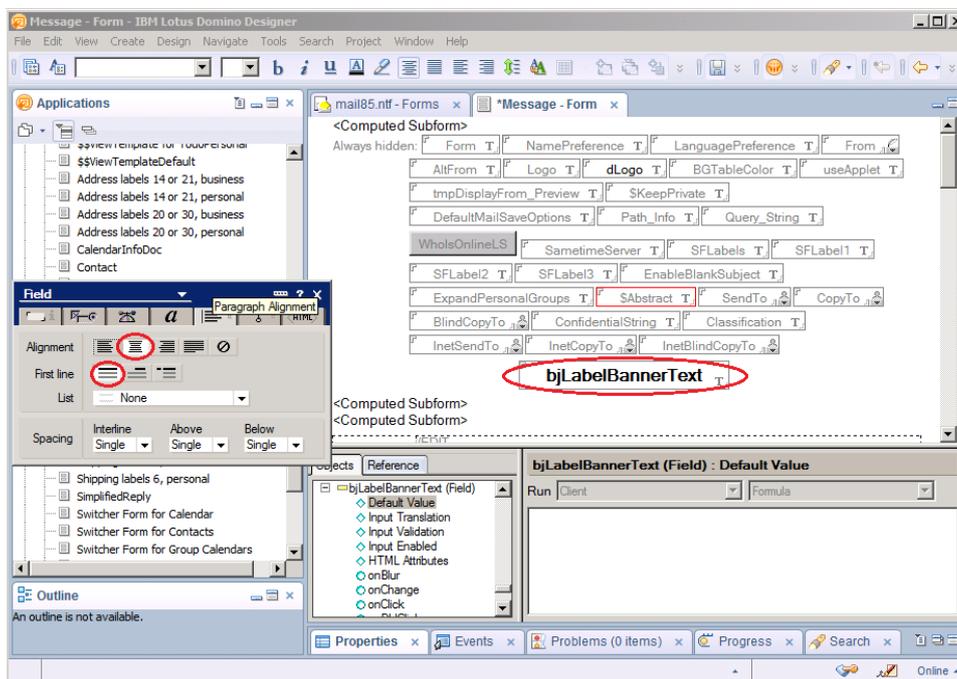
5. Press the “Create Field” button on the toolbar to add a new text field, and when the Field properties dialog pops up, change the Name from “Untitled” to “bjLabelBannerText”, as follows.



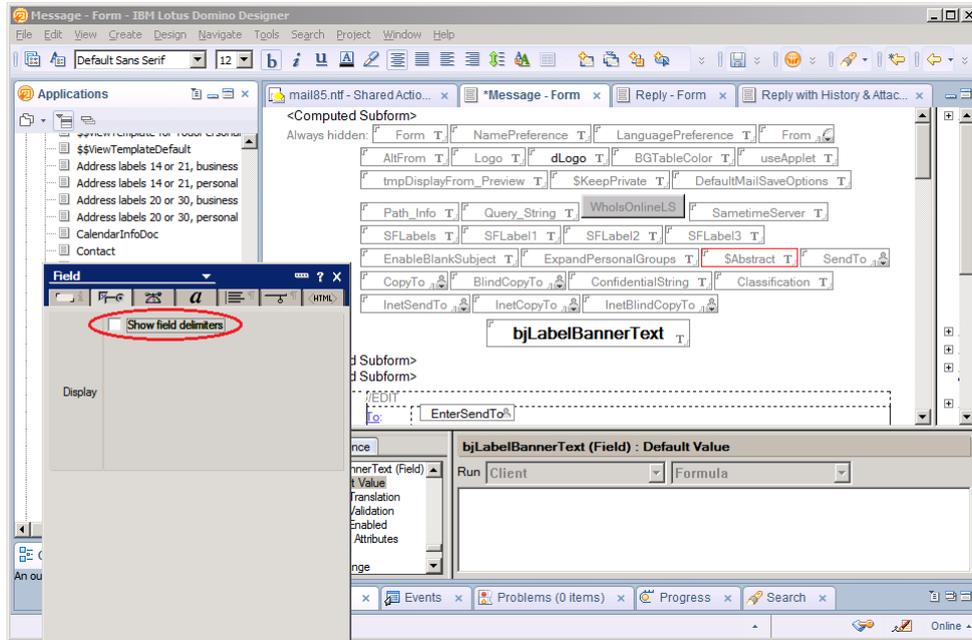
6. Select the “Fonts” tab in the Field properties dialog, and note that the field name on the form is updated with the new name “bjLabelBannerText”. Choose font size 12 and “Bold” style, as follows.



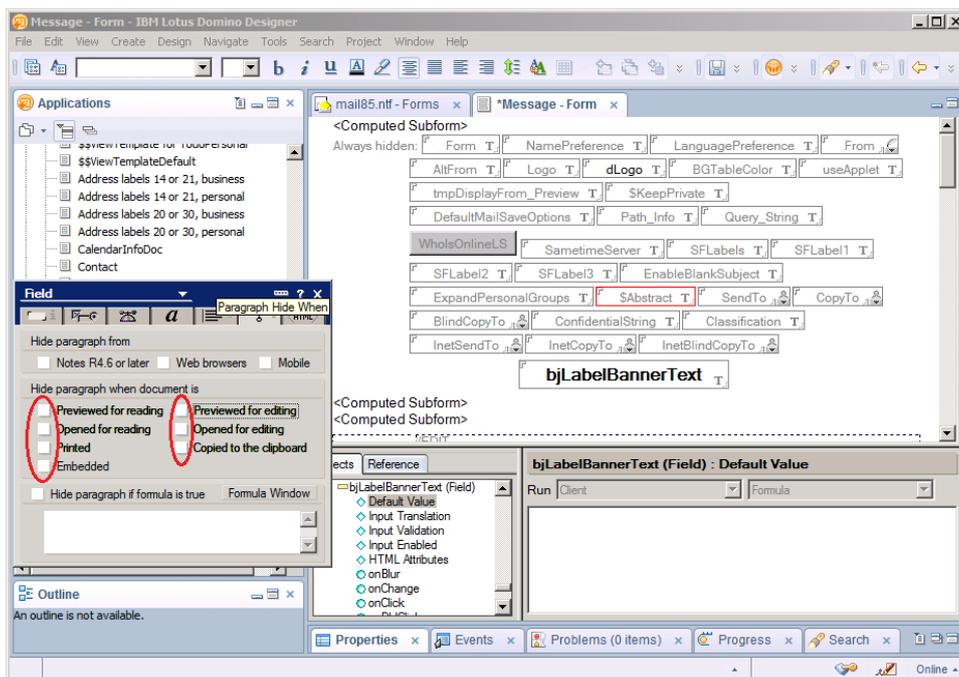
7. Select the "Paragraph Alignment" tab in the Field properties dialog, and select "centre" Alignment and "continuous" First Line. Note that the form field is now centred.



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



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.

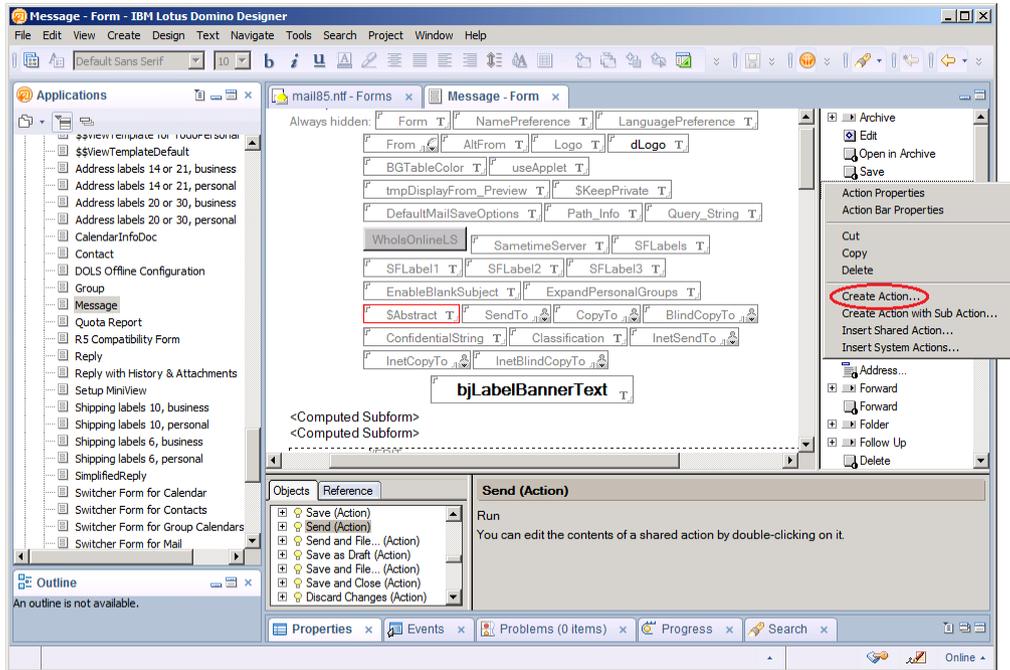


10. Repeat the above steps for the “Reply” and “Reply with History & Attachments” forms for messages and the “_Calendar Entry” and “(Notice)” forms for calendar items.
11. Label banner modifications are now complete.

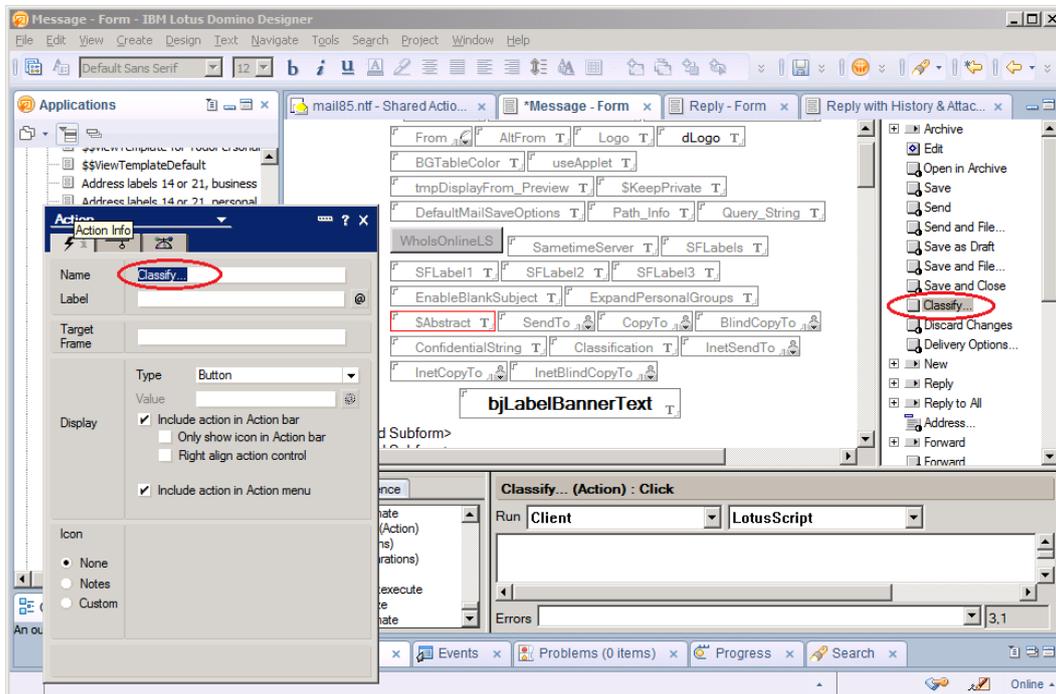
2.3 Adding the Classify Button to the Toolbars

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.

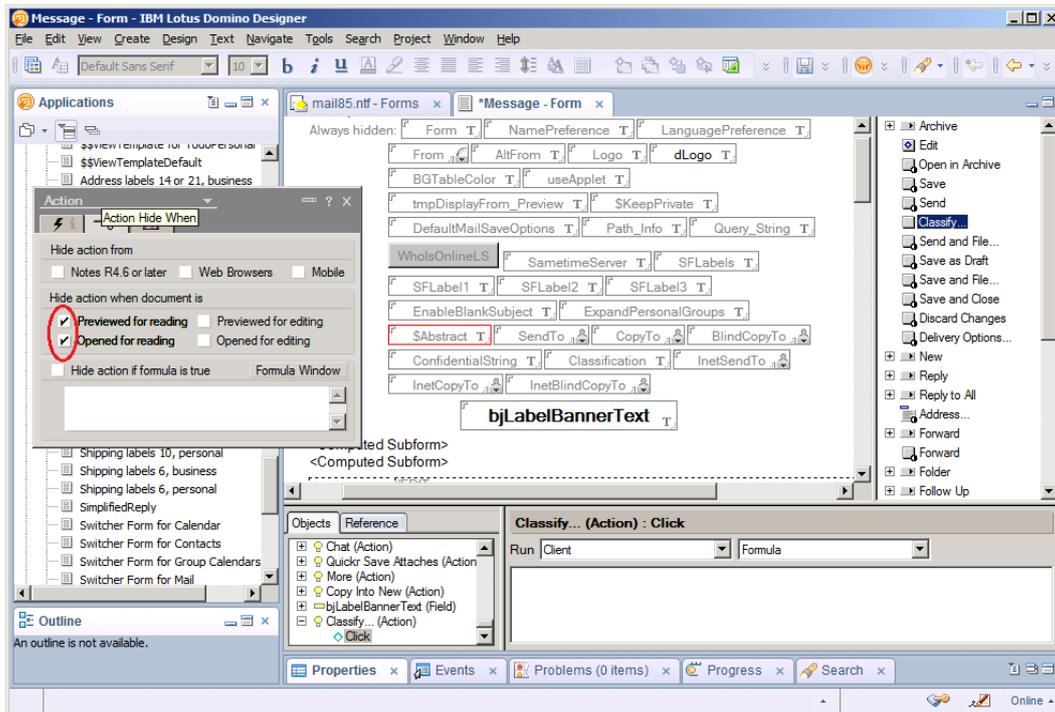
- Right-click on the “Save and Close...” action in the Action Pane, and select “Create Action...” to create a new button to the right of the “Save and Close...” button on the form.



- In the Action properties dialog, “Action Info” tab, change the name to “Classify...”.



- 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”.



6. 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.
2. 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.
4. 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.

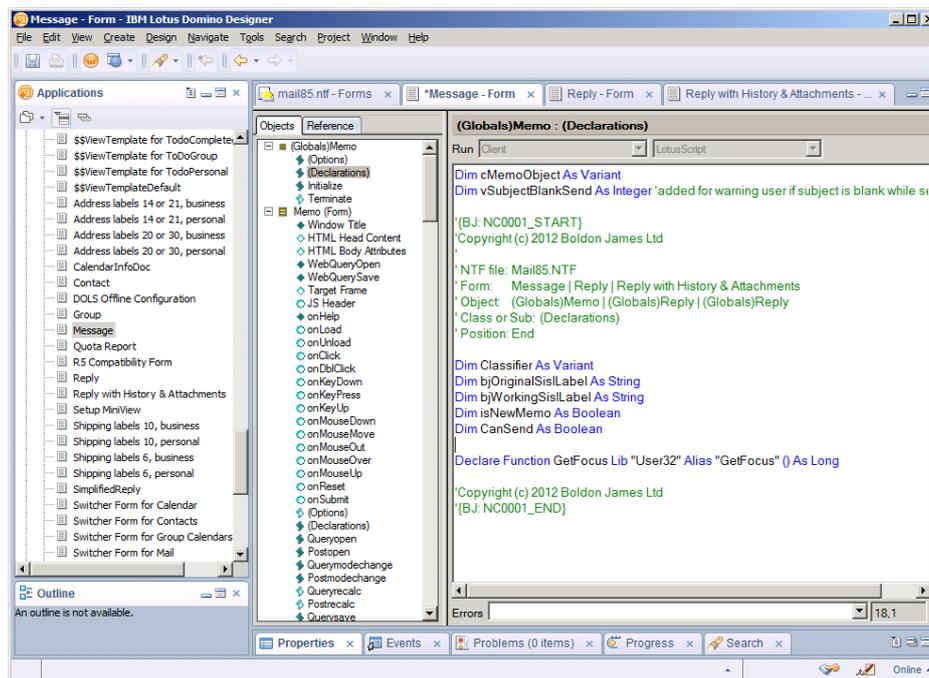
```
{BJ: NC0001_START}
'Copyright (c) 2012 Boldon James Ltd
'
' NTF file:           Mail template file
' Form:              Message | Reply | Reply with History & Attachments | _Calendar Entry | (Notice)
' Object:            (Globals)Memo | (Globals)Reply | (Globals)Reply | (Globals)Appointment | (Globals)Notice
' Class or Sub:      (Declarations)
' Position:          End
```

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

2.4.1 BJ_0001.COD

The contents of this file needs to be added to:

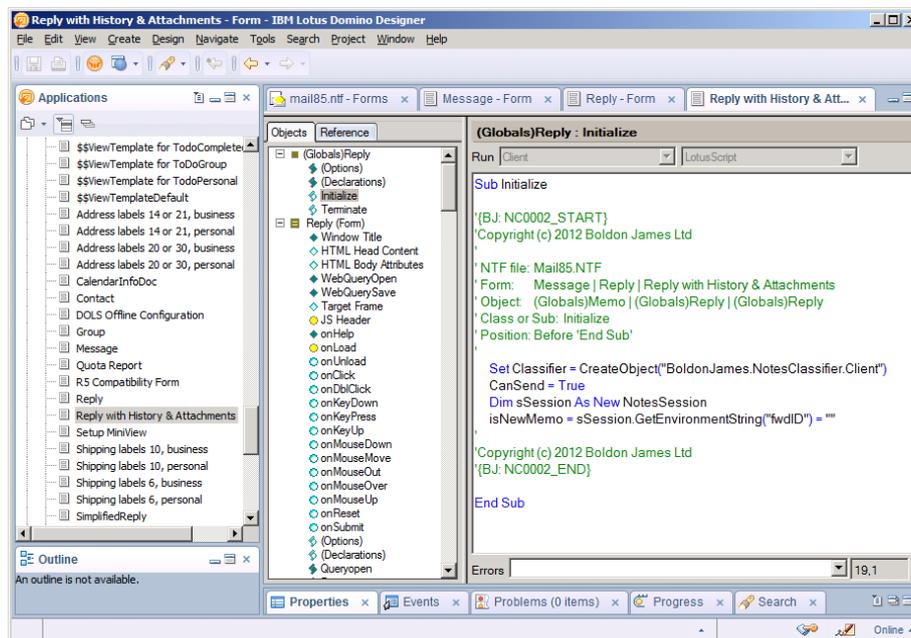
- Message form - Globals(Memo), (Declarations)
- Reply form - Globals(Reply), (Declarations)
- Reply with History & Attachments form - Globals(Reply), (Declarations)
- _Calendar Entry form - Globals(Appointment), (Declarations)
- (Notice) form - Globals(Notice), (Declarations)



2.4.2 BJ_0002.COD

The contents of this file need to be added to:

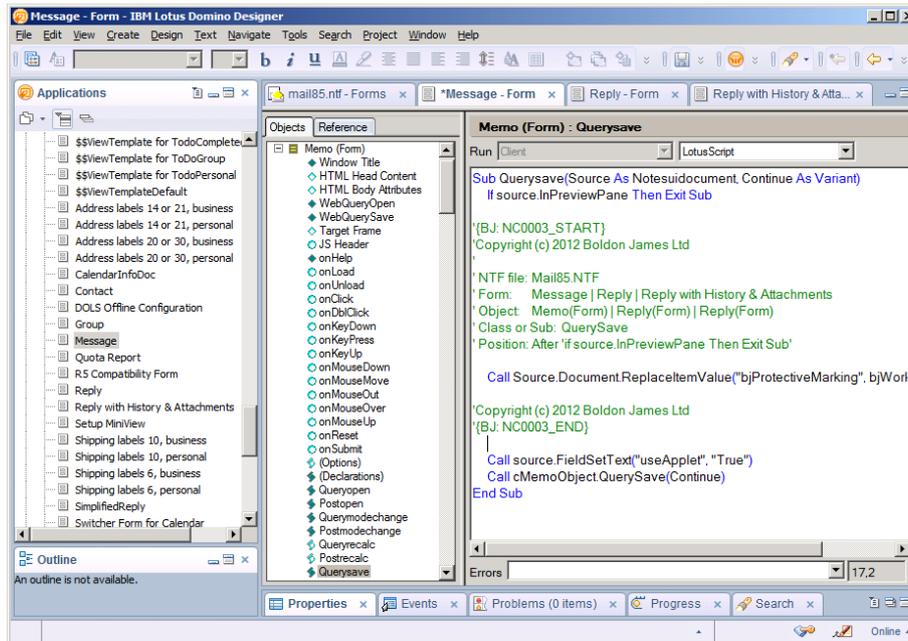
- Message form - Globals(Memo), Initialize
- Reply form - Globals(Reply), Initialize
- Reply with History & Attachments form - Globals(Reply), Initialize
- _Calendar Entry form - Globals(Appointment), Initialize
- (Notice) form - Globals(Notice), Initialize



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

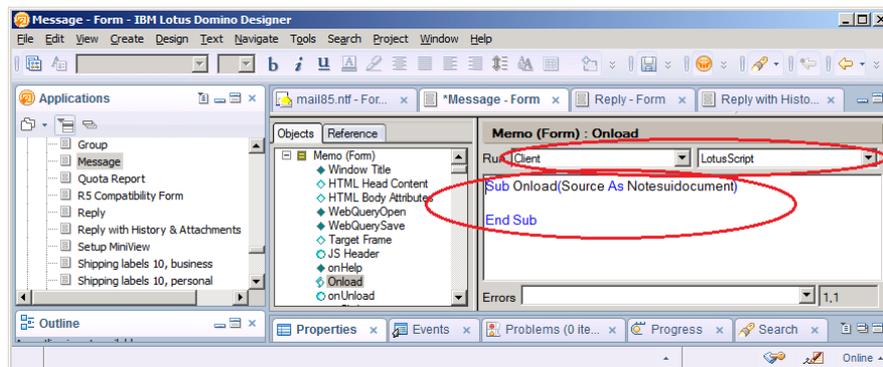
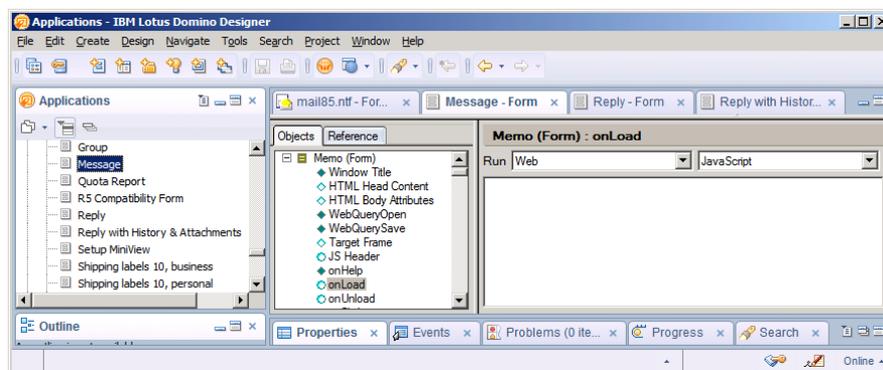


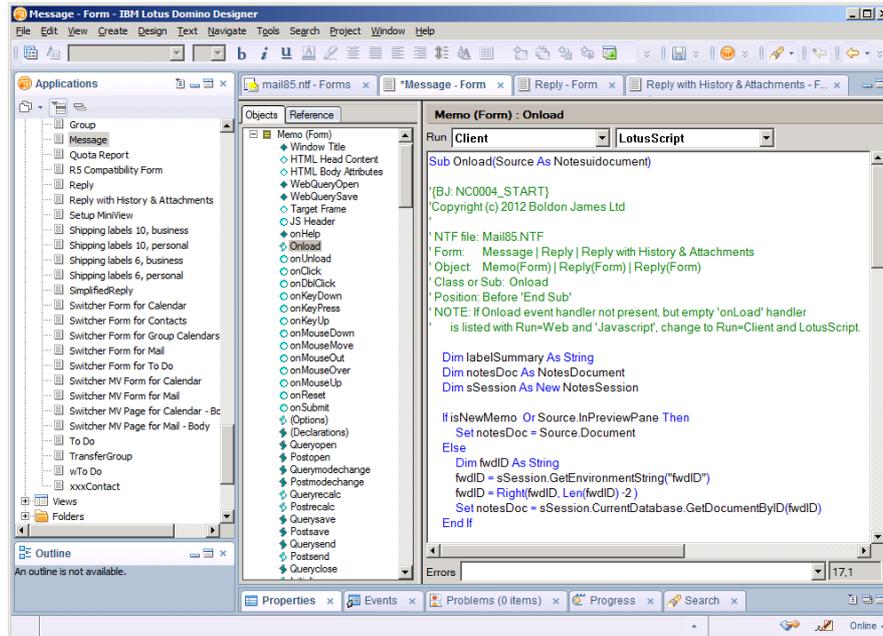
2.4.4 BJ_0004.COD

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

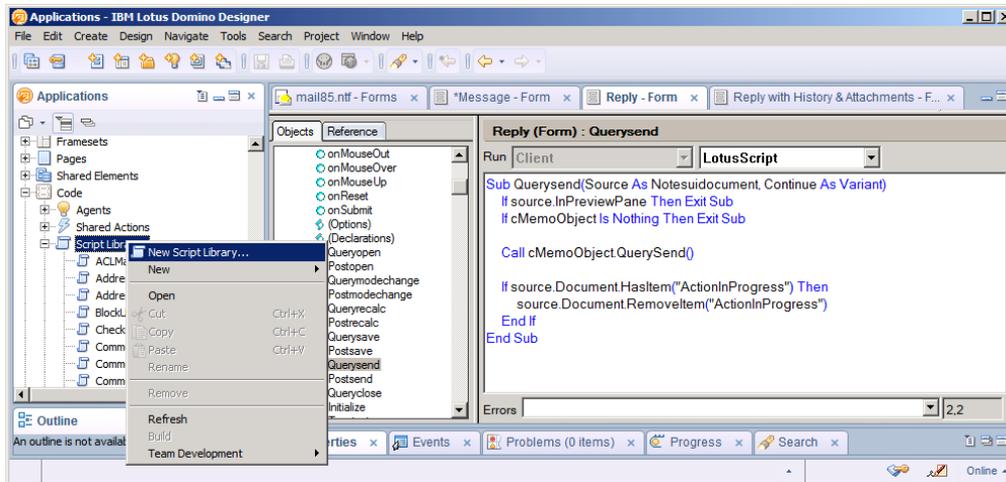
The default “onLoad” event handler shown in the Designer is the Web/Javascript handler. To add the script file to the Client “OnLoad” handler, you need to select Client/LotusScript from the Run dropdowns. If your installation has not been customized, this will show an empty “OnLoad” handler subroutine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



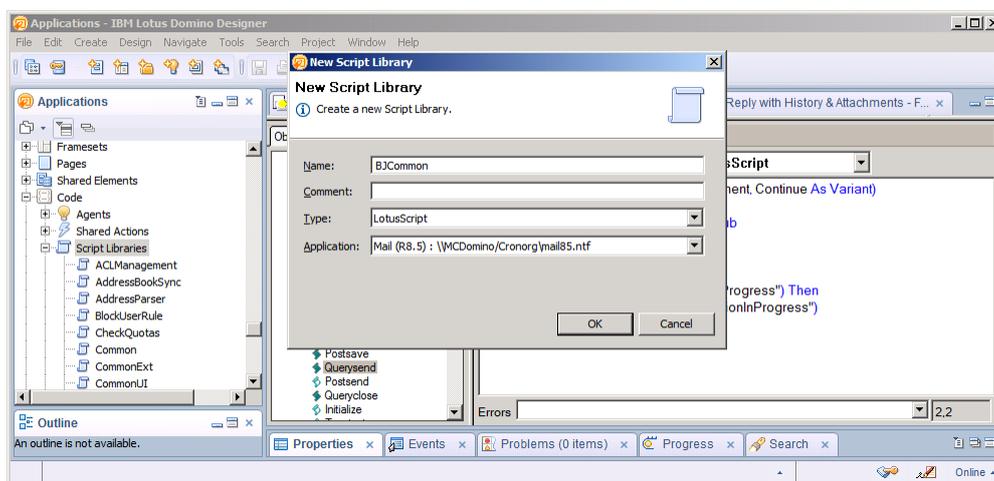


2.4.5 BJ_0005.COD

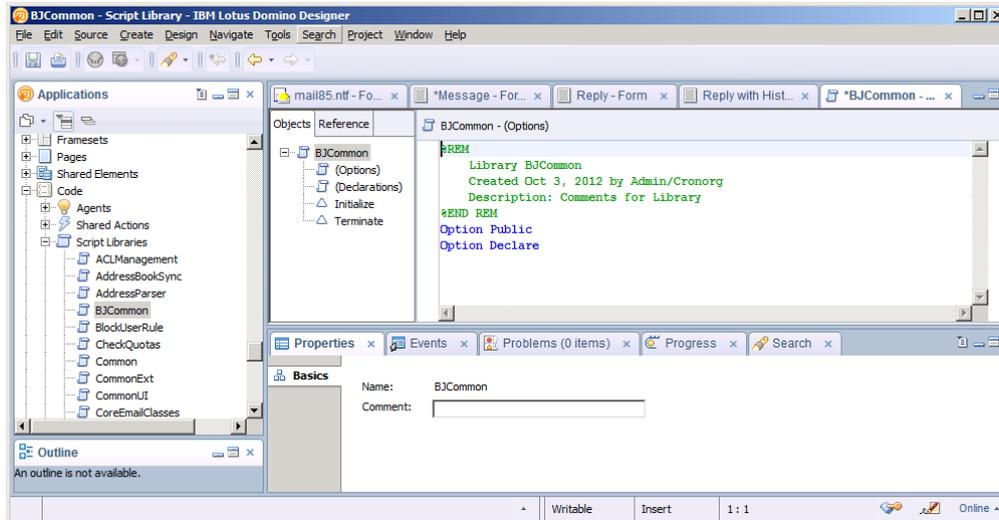
Select “Code/Script Libraries” in the Applications pane, and right-click and select “New Script Library...”



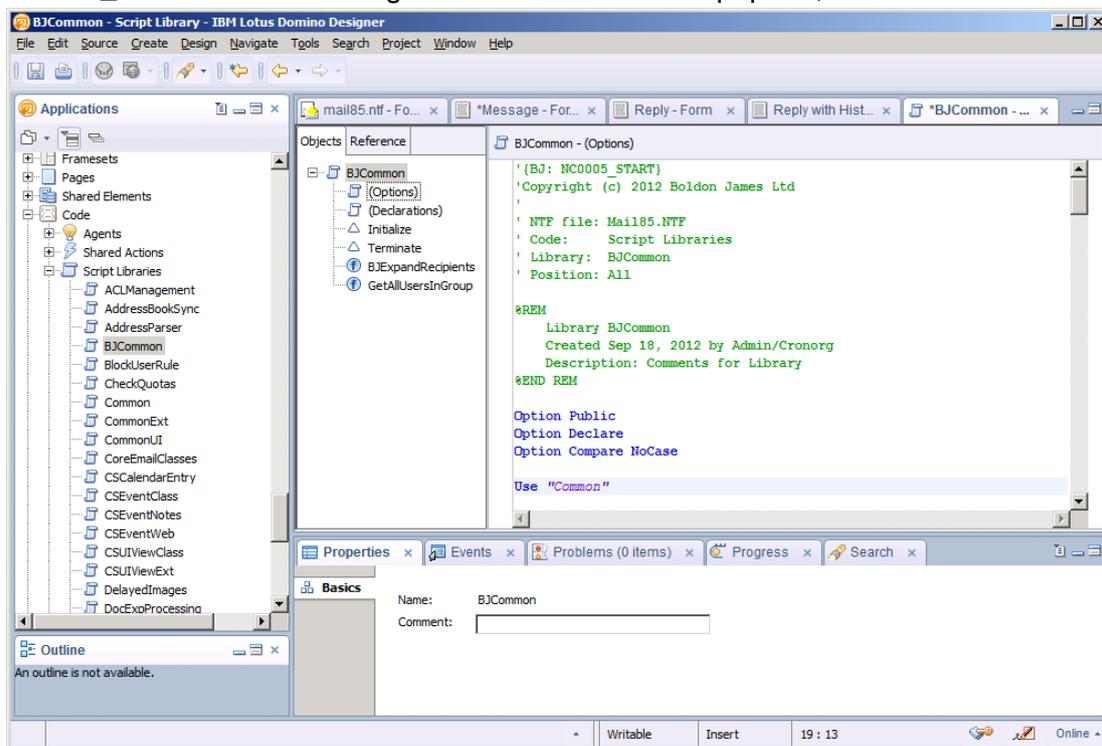
Enter the new script library name “BJCommon”, and press OK.



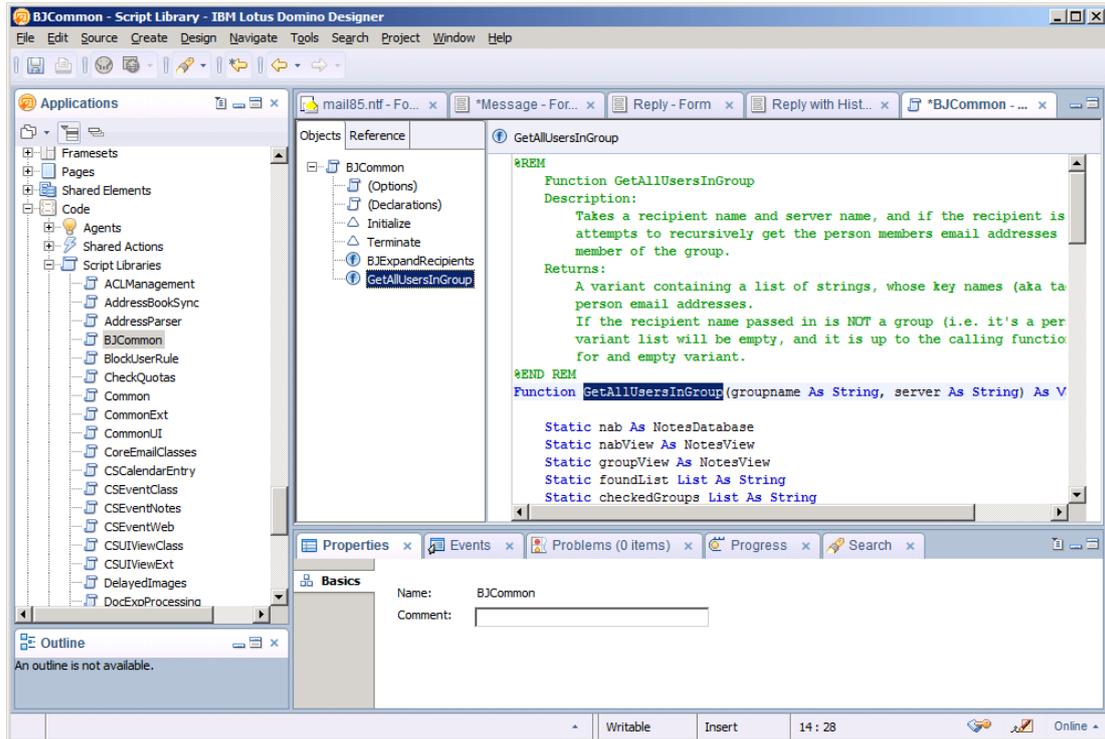
The new script library is created with Public and Declare options.



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.



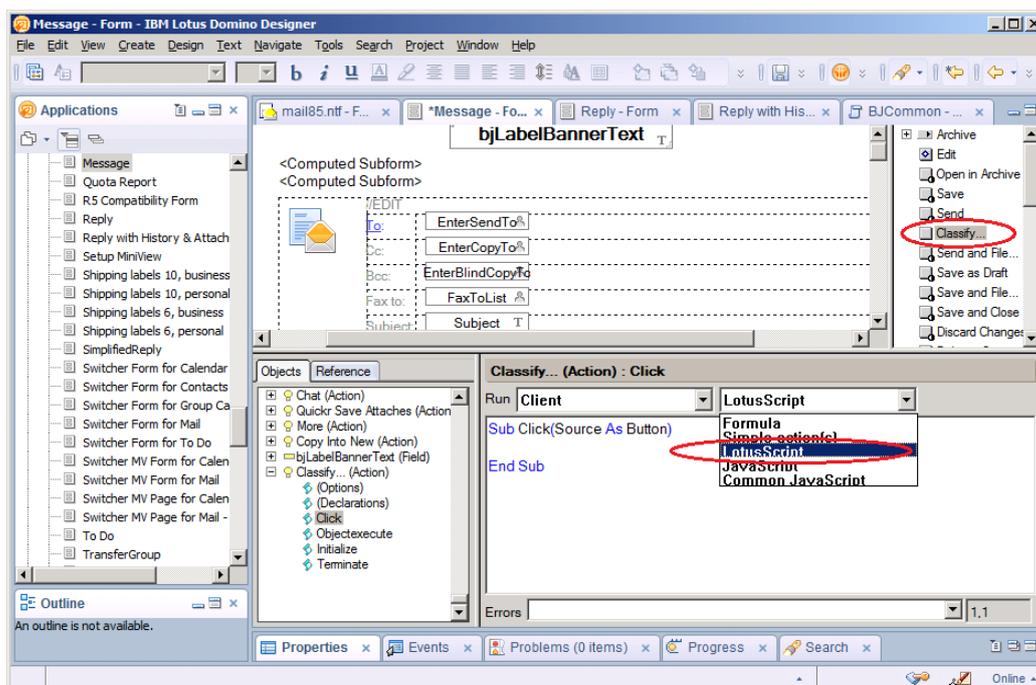
2.4.6 BJ_0006.COD

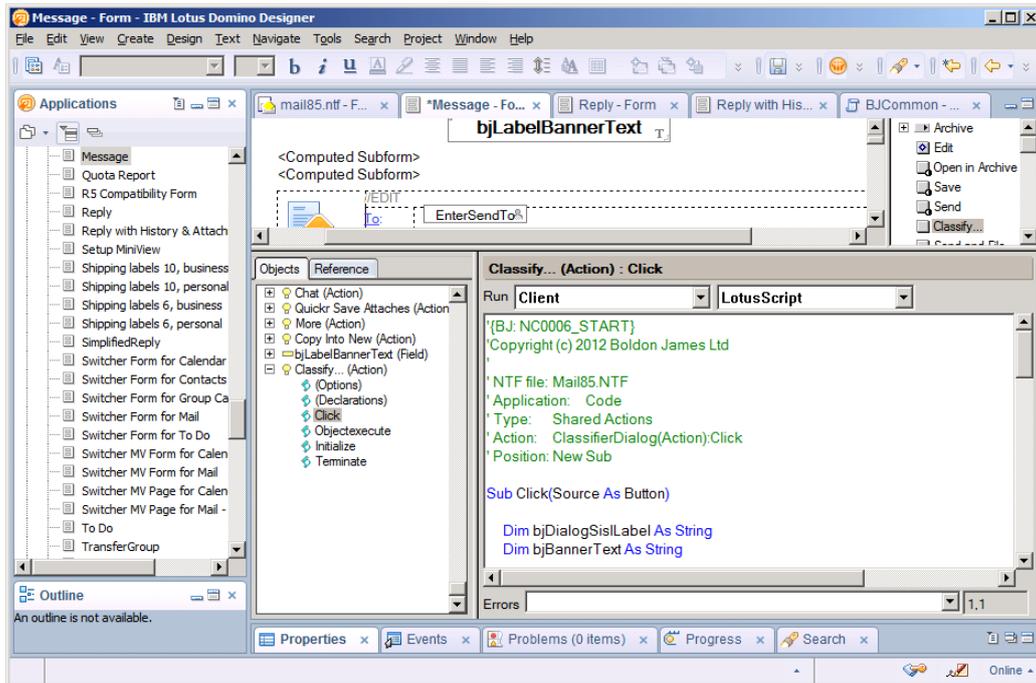
The contents of this file need to be added to:

- 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 (Form), 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.

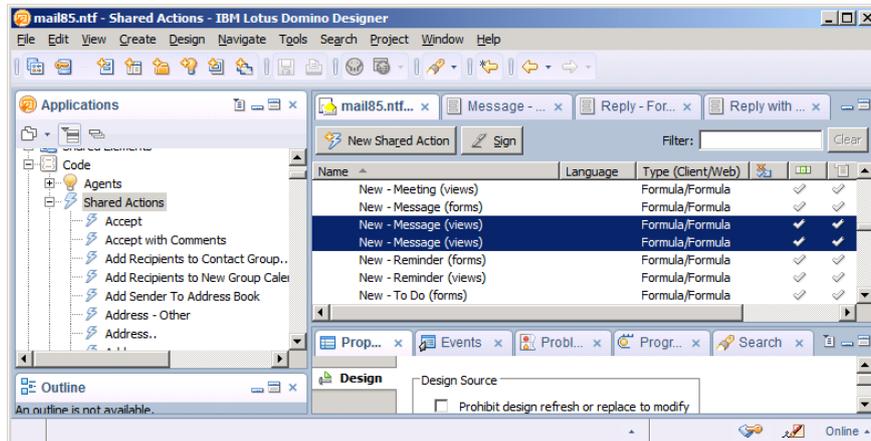




2.4.7 BJ_0007.COD

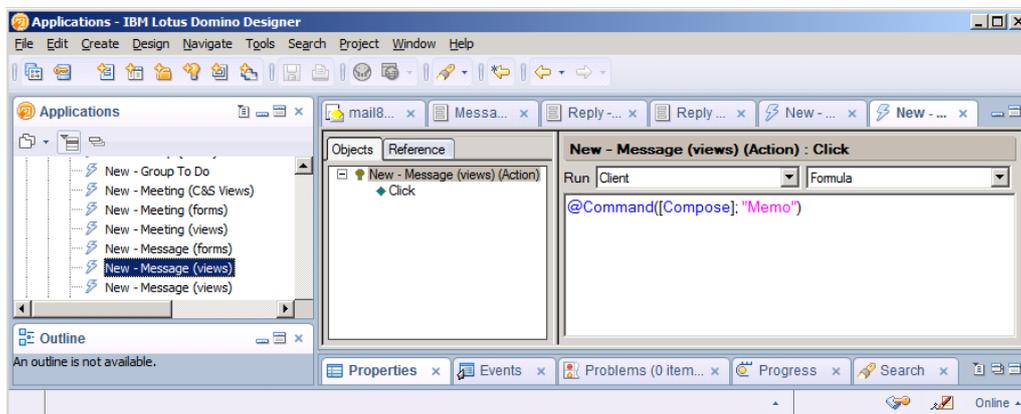
The content of this file needs to be added to the beginning of:

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

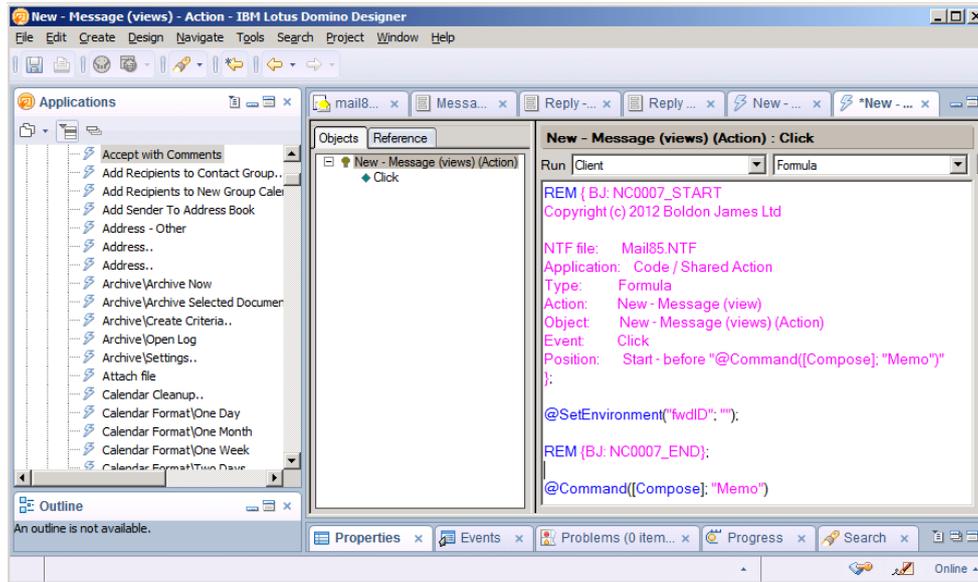


Open New – Message (views) (Action), Click.

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.

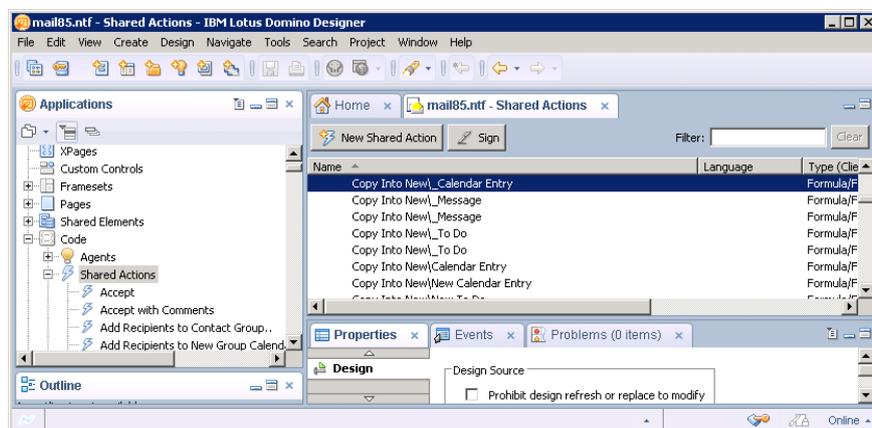


Repeat for Open New – Meeting (views) (Action), Click.

2.4.8 BJ_0007A.COD

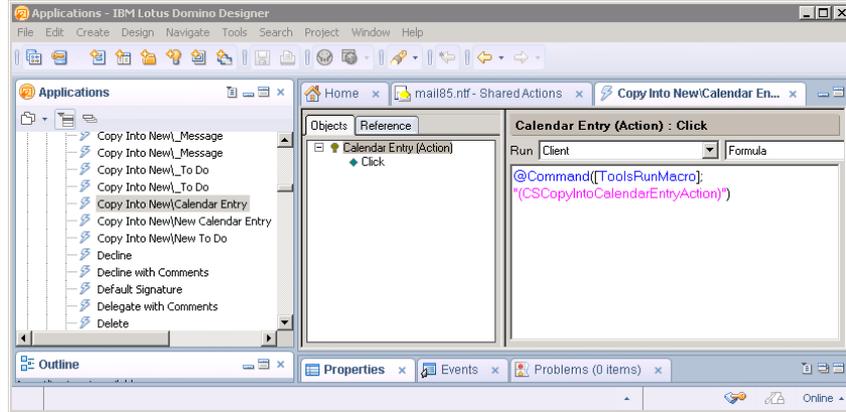
The content of this file needs to be added to the beginning of:

- 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.

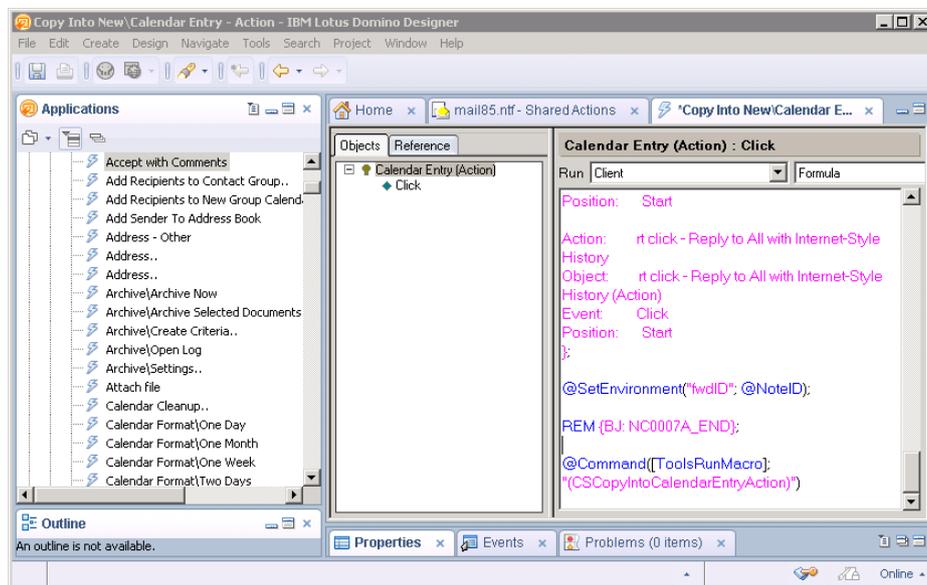


Open Copy Into New\Calendar Entry (Action), Click.

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.

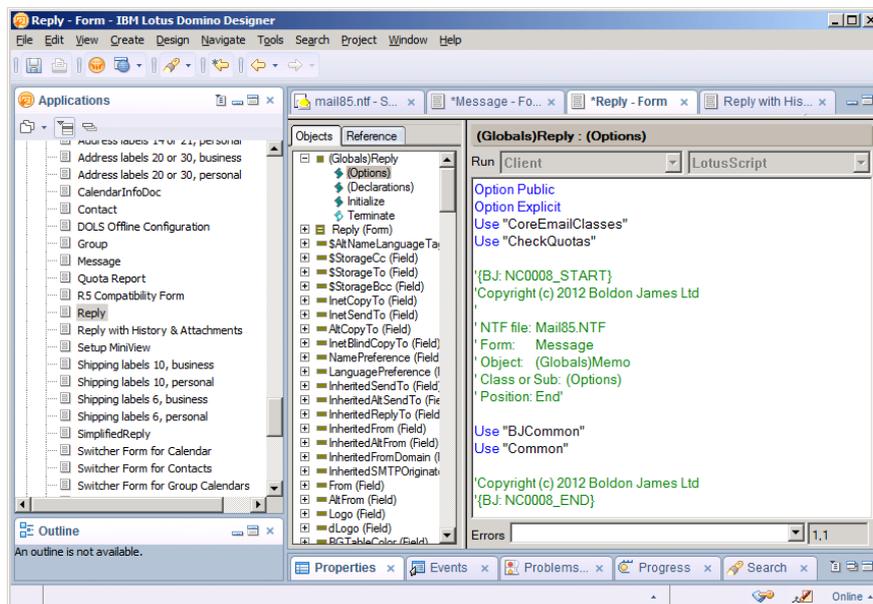


Repeat for all Actions in the list.

2.4.9 BJ_0008.COD

The contents of this file need to be added to:

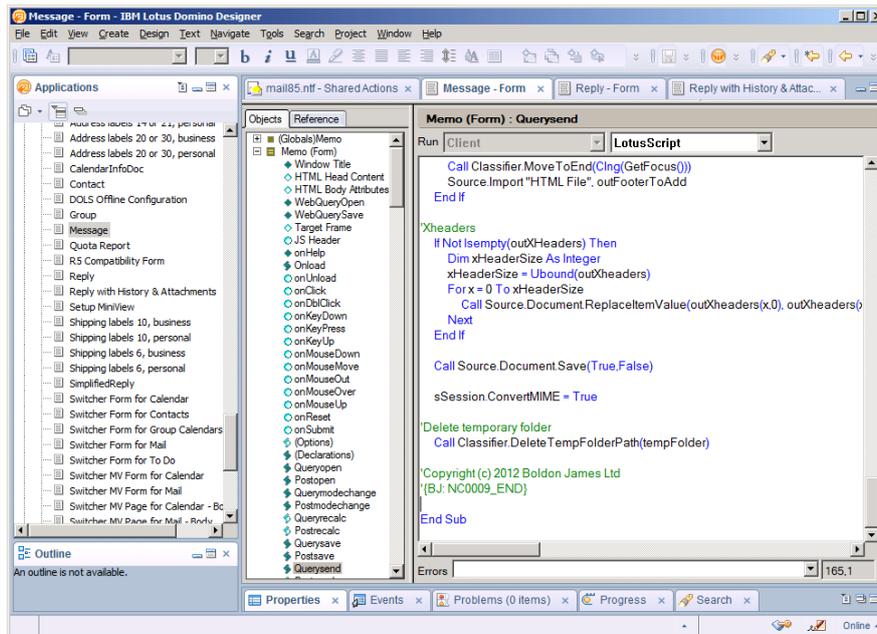
- Message form - Globals(Memo), (Options)
- Reply form - Globals(Reply), (Options)
- Reply with History & Attachments form - Globals(Reply), (Options)
- _Calendar Entry form - Globals(Appointment), (Options)
- (Notice) form - Globals(Notice), (Options)



2.4.10 BJ_0009.COD

The contents of this file need to be added to:

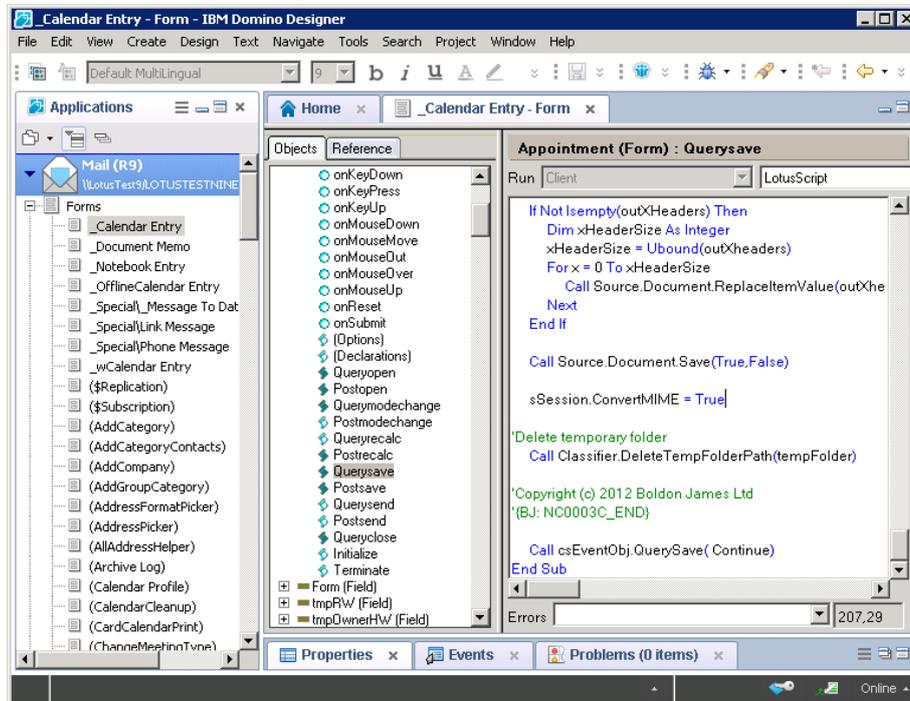
- Message form - Memo(Form), QuerySend
- Reply form - Reply (Form), QuerySend
- Reply with History & Attachments form - Reply (Form), QuerySend



2.4.11 BJ_0003C.COD

The contents of this file need to be added to:

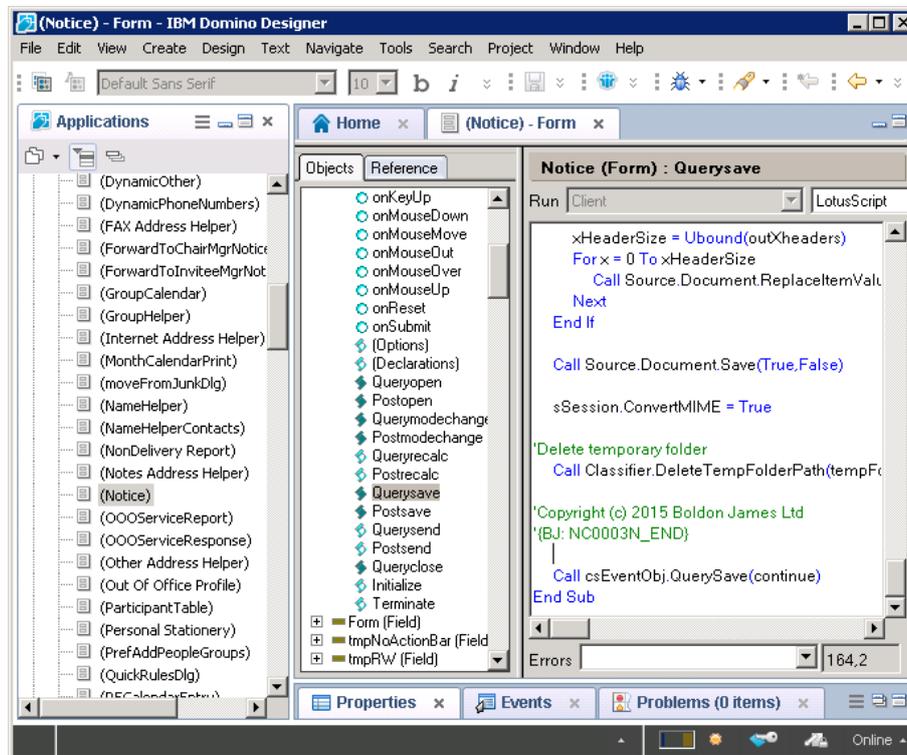
- `_Calendar Entry form - Appointment (From), QuerySave`



2.4.12 BJ_0003N.COD

The contents of this file need to be added to:

- (Notice) form - Notice (Form), QuerySave



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:

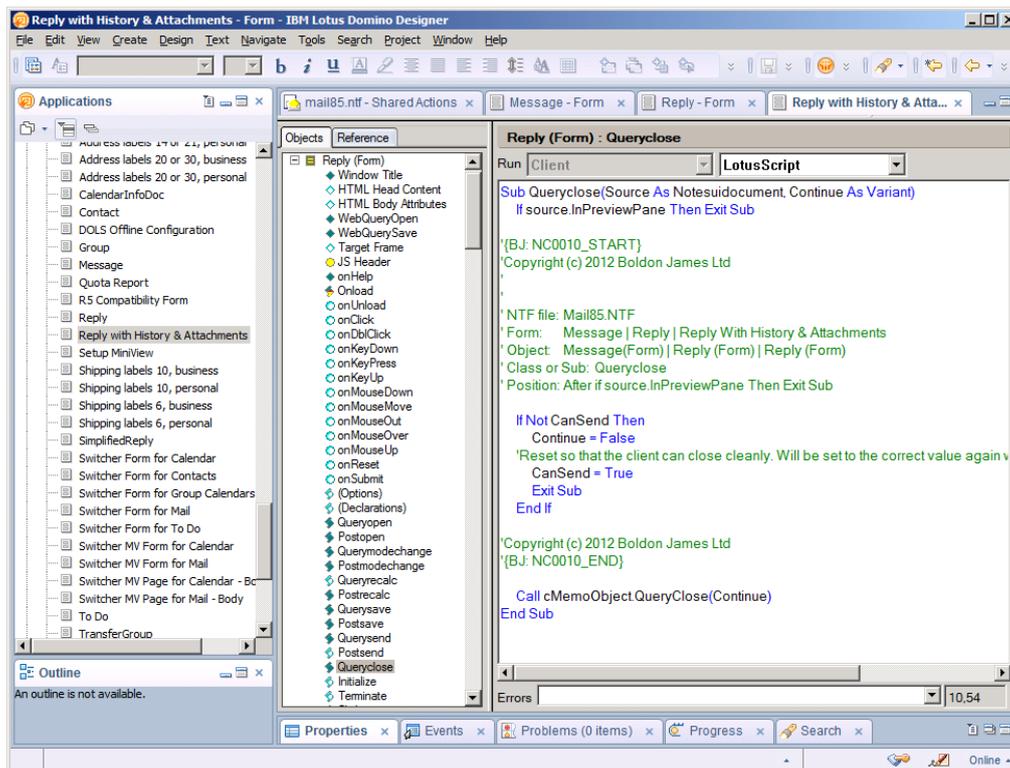
- Message form - Memo(Form), QueryClose
- Reply form - Reply(Form), QueryClose
- Reply with History & Attachments form - Reply(Form), QueryClose

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

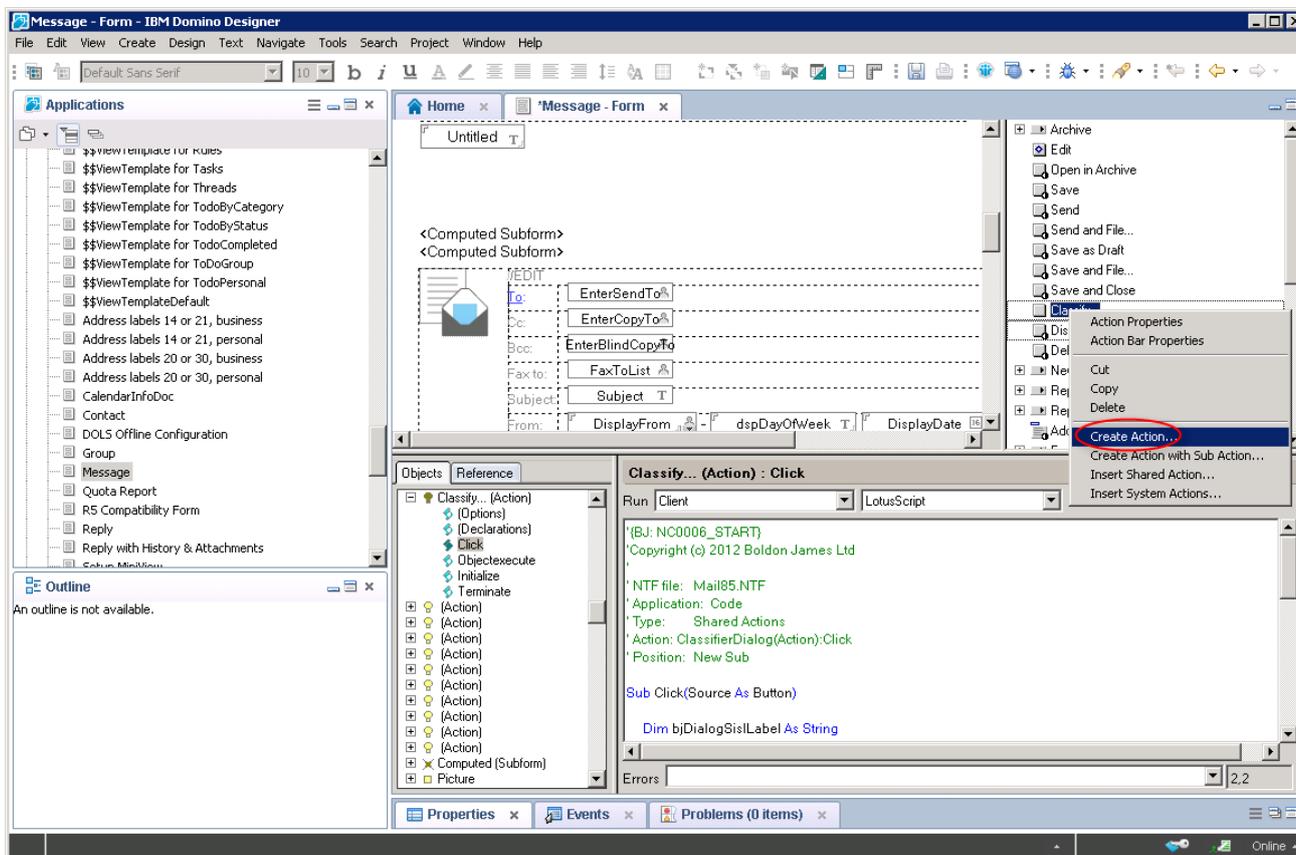
The contents of this file provide the code for the Click event for Single Click buttons. **It is only required if you wish to have single-click buttons on the forms.**

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

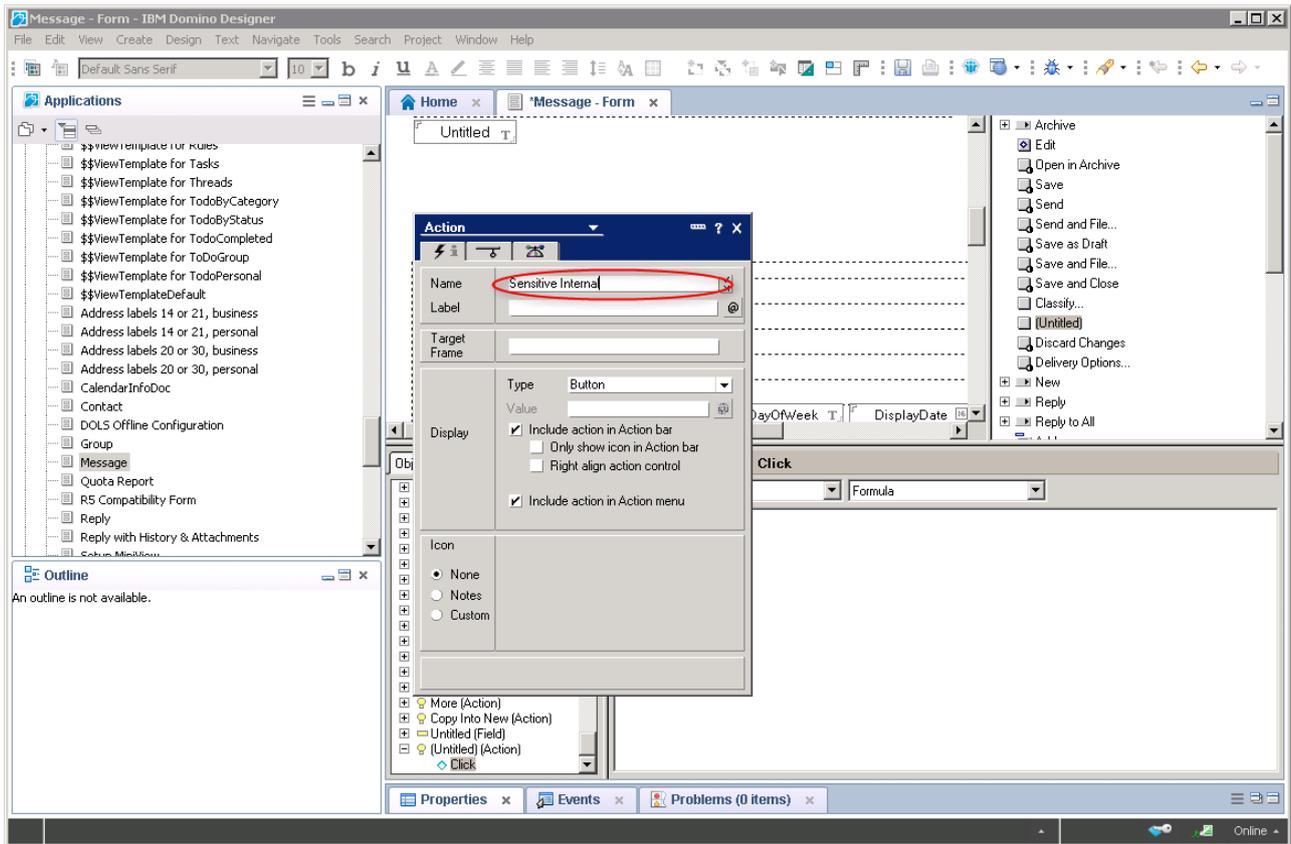
- Message form - Memo(Form), SingleClick(Action):Click
- Reply form - Reply(Form), SingleClick(Action):Click
- Reply with History & Attachments form - Reply(Form), SingleClick(Action):Click
- _Calendar Entry form - Appointment(From), SingleClick(Action):Click
- (Notice) form - Notice(Form), SingleClick(Action):Click

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.

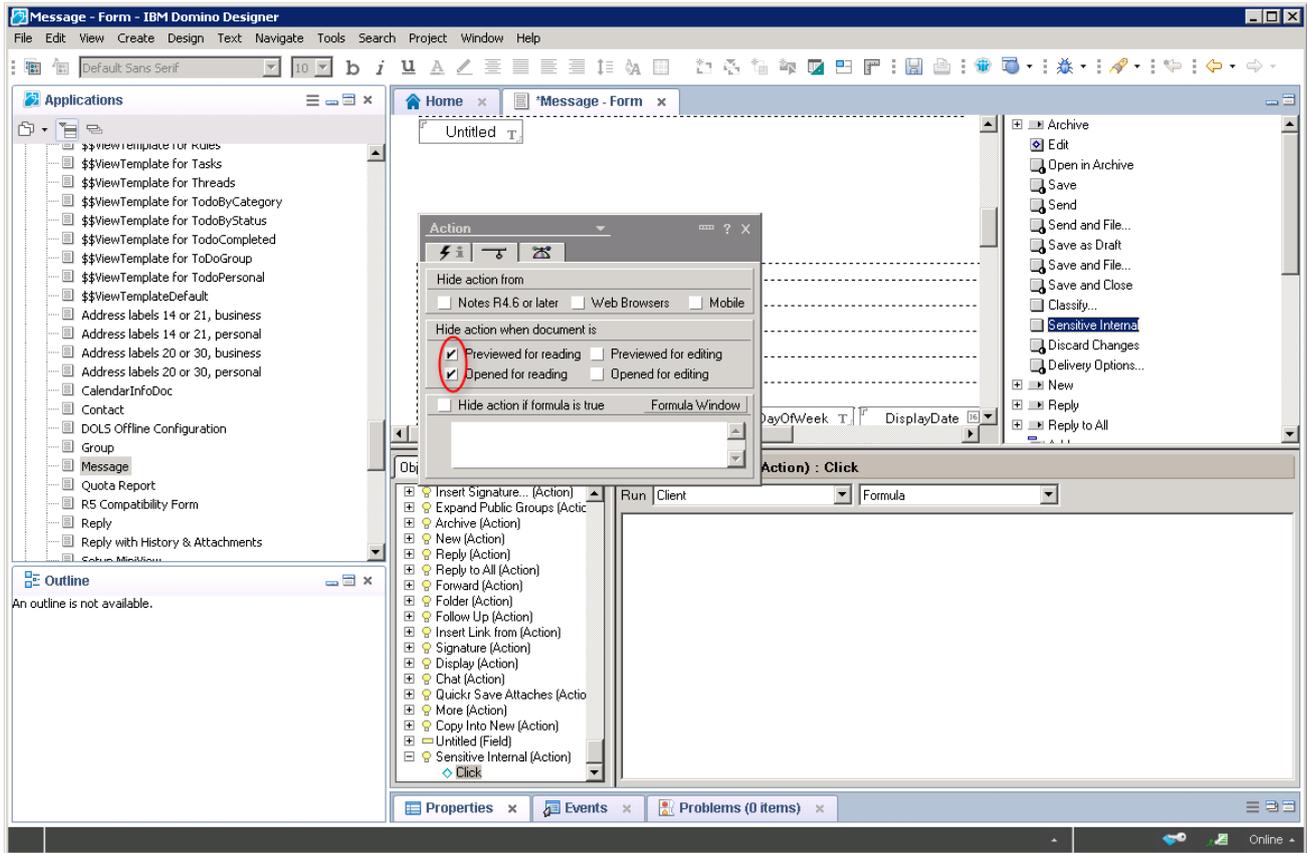
1. The following steps will need to be repeated for the “Message”, “Reply” and “Reply with History & Attachments” forms for messages and the “_Calendar Entry” and “(Notice)” forms for calendar items.
2. Right-click on the “Classify...” ``action in the Action Pane, and select “Create Action...” to create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



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

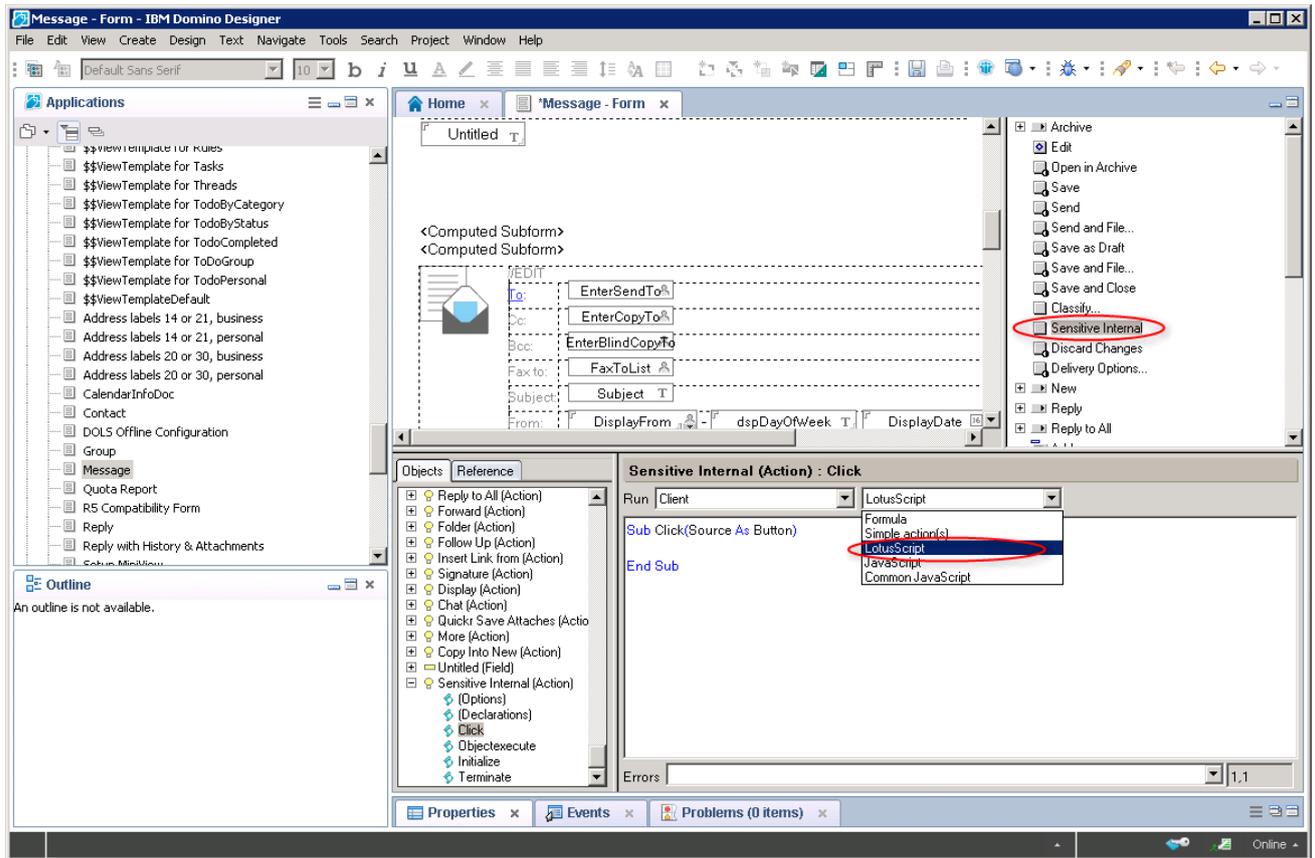


4. In the Action properties dialog, “Action Hide When” tab, check the options to hide the action when the document is “Previewed for reading” and “Opened for reading”.



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.



- 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.



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

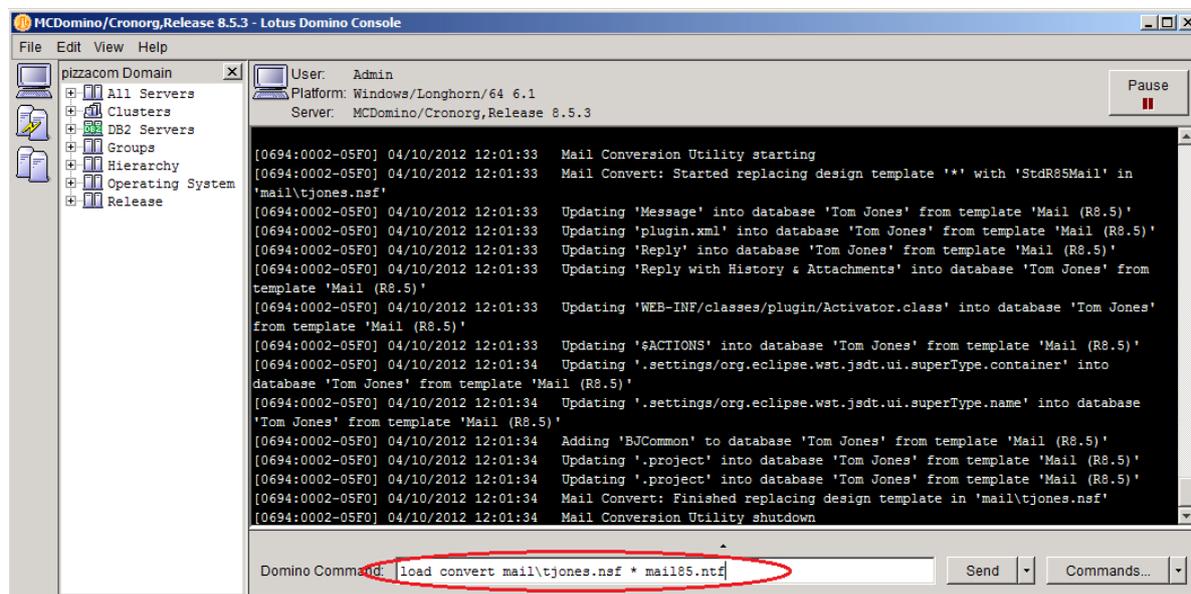
- Close the Action properties dialog and repeat the above steps with the “Reply” and “Reply with History & Attachments” forms for messages and the “_Calendar Entry” and “(Notice)” forms for calendar items.

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.



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.
- Ligon 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 [Testing and Deploying the Form and Script Changes](#) 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.**
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