

# Lotus knows.

Smarter software for a Smarter Planet.

## SHOW102 Using IBM Lotus Domino 8.5 Policies to Manage Your Clients

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## Agenda

- Who is this dude and what will I learn?
- Section 1 – A complete example, start to finish
- Section 2 – Understanding and Fixing Policies
- Session wrap up
- Q & A

## Who is this dude?

- Darren Duke
  - Technical lead and founder of Simplified Technology Solutions, Inc. (STS)
  - From Atlanta, GA (despite the accent – originally from Hartlepool in the UK)
  - Been “involved” with Notes/Domino since R3
  - All I do is Lotus portfolio related
- Blogs, websites, etc
  - <http://blog.darrenduke.net>
  - <http://www.TipsInTwo.com>
  - <http://www.simplified-tech.com>
  - <http://www.planetlotus.org>
- “Experience is then name one gives to their mistakes” – Oscar Wilde

## Where did the idea for this session come from?

- During audits, health checks, upgrades and training, it became apparent that some Domino customers....
  - Under-utilize policies
  - Don't recognize the benefits of policies
  - Haven't looked at policies since R6.x
  - Find policies confusing
- Or even worse....
  - Have never used policies. Shock. Horror. \*cue scary music!\*
- So, this session was created to help you, the Super.Human.Admin to
  - Better manage your Domino environment
  - Enhance your end users' Lotus Notes experience
  - Make your life easier!
  - Spend more time on the beach

## What will I learn? There's a policy for that!

- Just like the iPhone....
  - Need to find a clean public toilet? There's an app for that! (no, seriously, there is!)
  - Need to get lost in downtown Chattanooga looking for a restaurant? There's an app for that!
- The same is true for Notes....
  - Need to set password complexity rules? There's a policy for that!
  - Need to add icons to a users bookmark bar? There's a policy for that!
  - Need to enforce spell check and blank subject lines? There's a policy for that!
- With policies
  - You can make your Domino admin life a whole lot easier
  - Change settings at a moment's notice
  - Look like a rock star and get a pay raise\*
  - Accomplish tasks faster and more efficiently
  - Increase your skill set and show the AD folks that, “yes, we have them too”

\*sorry, we can only guarantee that you will deserve a raise, not that you will get one.

## Two sessions in one!

- Well, not quite, but close
- First half of this session will cover an example policy, and the common settings you may wish to apply, from start to finish
- Second half will cover what to do if your policies don't seem to work

## Agenda

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## Section 1 – An Example Policy

- First, we will create a registration policy that will automatically populate all the common settings an administrator would enter when registering new users
- Next, we will create a series of policy settings documents to make the end user experience with Lotus Notes much better
- Then, we will create an organization policy and assign the settings. This policy will be pushed out to all users within the organization
- Finally, we will create an additional policy for laptop users so that
  - Inheritance will be used to reduce the number of setting we have to manage
  - Their passwords are more complex



## In the beginning....

- When a Domino server is first installed...
  - All settings are set to their default configuration
  - No policies exist
  - You maybe overwhelmed with the possible permutations and options
  - Some default settings are just plain silly
- So, we will take the blank canvas that is the default/initial state and
  - Create a registration policy to allow a new user to be added by populating only 3 items of information
  - Create an organizational policy for a series of commonly enabled settings
    - To make your life easier
    - To make the end users' experience much, much better

## Example Policy

- Registration Settings
- Desktop Settings
- Mail Settings
- Security Settings
- Additional Policy for Laptop Users
- Archiving
- Other Settings

## Policy Settings - Registration

- Allows you to set common options used while registering a new user within Domino
- Will significantly reduce the time you spend registering new users
- Standardize common options across new users
  - Internet domain
  - Email address format (darren\_duke, darren.duke, dduke)
  - Quotas and warnings

## Registration Example

- Create a policy to register a new user and create a mail file in a clustered environment
- This will allow us to register a new user by entering just 3 pieces of information
  - First name
  - Last name
  - Password
- Other, “common to all new users” settings will be automatically populated by the policy
  - Registration server
  - Password quality
  - Internet address
  - Mail server, file and address attributes
  - Certifier and user ID file information

## Registration creation

- Create a new registration settings document
  - Open the Domino Directory
  - Open the Configuration, Policies, Settings view from the navigator
  - In the Add Settings action, select Registration

The screenshot shows the Domino Directory interface. On the left, the 'Policies' folder is expanded, and the 'Settings' sub-folder is highlighted with a red box. In the center, the 'Add Settings...' menu is open, and 'Registration' is selected. The right pane displays a table of existing settings.

Name	Description	Signed By
Archiving		Darren Duke/STS
Desktop		Darren Duke/STS
Mail		Darren Duke/STS
Security		Darren Duke/STS
Setup		Darren Duke/STS
Connections		Darren Duke/STS
Lotus Traveler		Darren Duke/STS
Roaming		Darren Duke/STS
Symphony		Darren Duke/STS
desktop		Darren Duke/STS
Mail Settings		Darren Duke/STS
mail		Darren Duke/STS
Registration Settings		Darren Duke/STS
Contractor Setup (web)		Darren Duke/STS
Default User		Darren Duke/STS
Employee Setup		Darren Duke/STS
Security Settings		Darren Duke/STS
INET PW		Darren Duke/STS

## Registration creation - Basics

- Populate some meaningful name and description
- Choose a registration server
- Set the internet password

Save & Close Cancel Inheritance Enforcement

### Registration Settings : LS10 New User Reg

Basics | Mail | ID/Certifier | Miscellaneous | Comments | Administration

**Basics**

Name: LS10 New User Reg

Description: Home server is Hosted

Basic User Registration Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Choose a registration server: hosted/STS	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

Password Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Choose a password quality: Strong user password (10)	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input checked="" type="checkbox"/> Set Internet Password	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

Roaming Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
<input type="checkbox"/> Roaming User (before Notes 8.5)	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Registration creation – Mail 1

- Populate mail system
  - Lotus Notes, right?
- Choose the (home) mail server
- Set the mail template for the new mail file
- Decide how the mail file should be created
- Enter the organization's internet domain to be used in the SMTP email address
- Create an internet address format
  - darren.duke
  - dduke
  - darren\_duke

Save & Close Cancel Inheritance Enforcement

### Registration Settings : LS10 New User Reg

Basics Mail ID/Certifier Miscellaneous Comments Administration

Mail User Registration Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Choose the mail system:			
Lotus Notes	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
POP			
IMAP			
Choose the mail server:			
hosted/STS	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Mail Template: mail85.ntf	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input checked="" type="radio"/> Create mail file now	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input type="radio"/> Create mail file in background			
Internet Address Options			
Internet Domain: simplified-tech.com	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Choose an internet address format:			
FirstName LastName	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
FirstName MI LastName			
FI LastName			
FI MI LastName			
Choose an internet address separator:			
None	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Underscore			
Dot			
Equal			

## Registration creation – Mail 2

- We have a clustered environment, so we will select to create a replica of the mail file on a cluster mate
- Select the ACL level for the new mail file owner
  - Set this to Editor
- Enter a manager if you need one
- We choose to create a FTI
- A quota of 2GB is set
- A warning of 2,000MB is set

Advanced Mail Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Create mail replica's on:	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input checked="" type="checkbox"/> All mail server cluster mates			
<input type="checkbox"/> Create mail replicas in background	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Mail file owner access:	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Manager Designer Editor			
Mail file manager:	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input checked="" type="checkbox"/> Darren Duke/STS			
<input checked="" type="checkbox"/> Create full text index	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input checked="" type="checkbox"/> Set database quota	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
2048 MB	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input checked="" type="checkbox"/> Set warning threshold	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
2000 MB	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce



## Registration creation – ID/Certifier

- Check the box to create a Notes ID
- We're going to up the key and width to 2048 bits and 128 bits respectively
- Set the expire date to 48 months out
  - This will be 48 months from when you actually register a new user, not today
- Notice no ID storage is selected
  - We'll use ID Vault for this
    - 8.5 server
    - 8.5 client

**Registration Settings : LS10 New User Reg**

Basics | Mail | ID/Certifier | Miscellaneous | Comments | Administration

ID/Certifier User Registration Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
<input checked="" type="checkbox"/> Create a Notes ID	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<b>Certifier Information</b>	<b>How to apply this setting:</b>	<b>Inherit from parent policy:</b>	<b>Enforce in child policies:</b>
Security Type: <input type="text" value="North American"/> <input type="text" value="International"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Public Key Specification: <input type="text" value="Compatible with all releases (630 bits)"/> <input type="text" value="Compatible with 6.0 and later (1024 bits)"/> <input type="text" value="Compatible with 7.0 and later (2048 bits)"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Password Key Width: <input type="text" value="Base strength on RSA key size"/> <input type="text" value="Compatible with all releases (64 bits RC2)"/> <input type="text" value="Compatible with 6.0 and later (128 bits RC2)"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Certificate Expiration Date: <input type="radio"/> Static Date <input checked="" type="radio"/> Months from user creation <input type="text" value="48"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<b>Location for Storing User ID</b>	<b>How to apply this setting:</b>	<b>Inherit from parent policy:</b>	<b>Enforce in child policies:</b>
<input type="checkbox"/> In Domino Directory	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input type="checkbox"/> In File	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Registration creation – Miscellaneous

- Add any groups than will have the new user added
- Setting is complete so click Save and Close

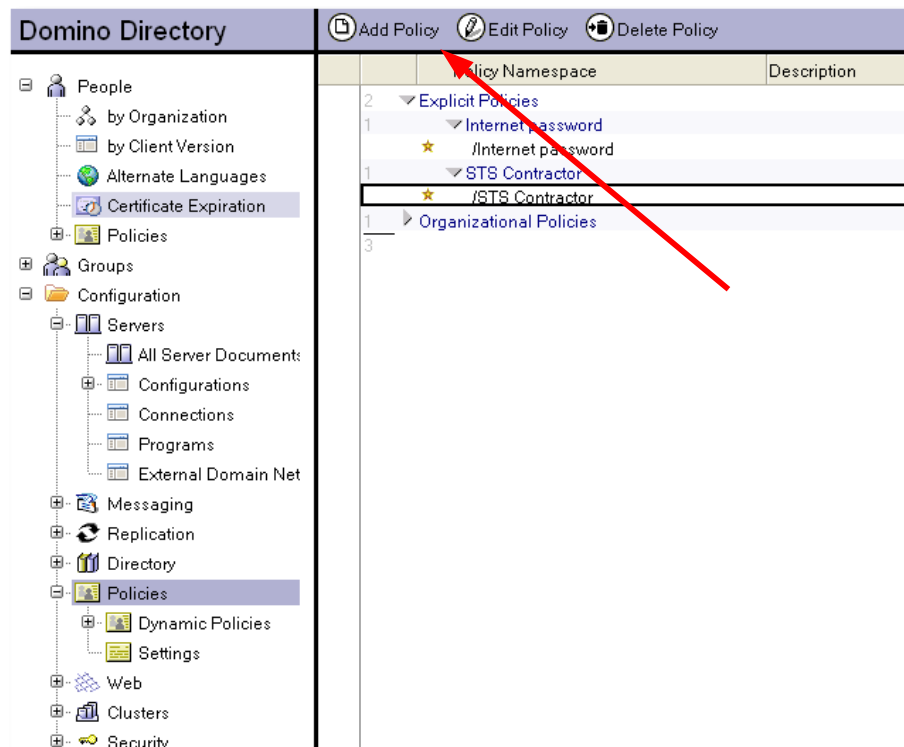
**Registration Settings : LS10 New User Reg**

Basics | Mail | ID/Certifier | Miscellaneous | Comments | Administration

Miscellaneous User Registration Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Group assignments: <input type="checkbox"/> STS Developers <input checked="" type="checkbox"/> STS Employees <input type="checkbox"/> STS Exec <input type="checkbox"/> STS Sales <input type="checkbox"/> STS Web Site Editors	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Local administrator:	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Create the Registration policy and add the setting

- Now we'll create a new policy and assign this new setting to it
- In the Domino Directory, navigate to Configuration/Policies and click the Add Policy action



## Registration policy – add the settings

- Add a policy name, make it meaningful
- Type is explicit
- Add an optional category
- Select our new registration settings document from the drop down in the Registration Setting Type field
- Save and close

**Policy : /LS10 New User on Hosted**

Basics | Policy Assignment | Policy Precedence | Comments | Administration

**Basics**

Policy name: /LS10 New User on Hosted Create Child

Policy type: Explicit

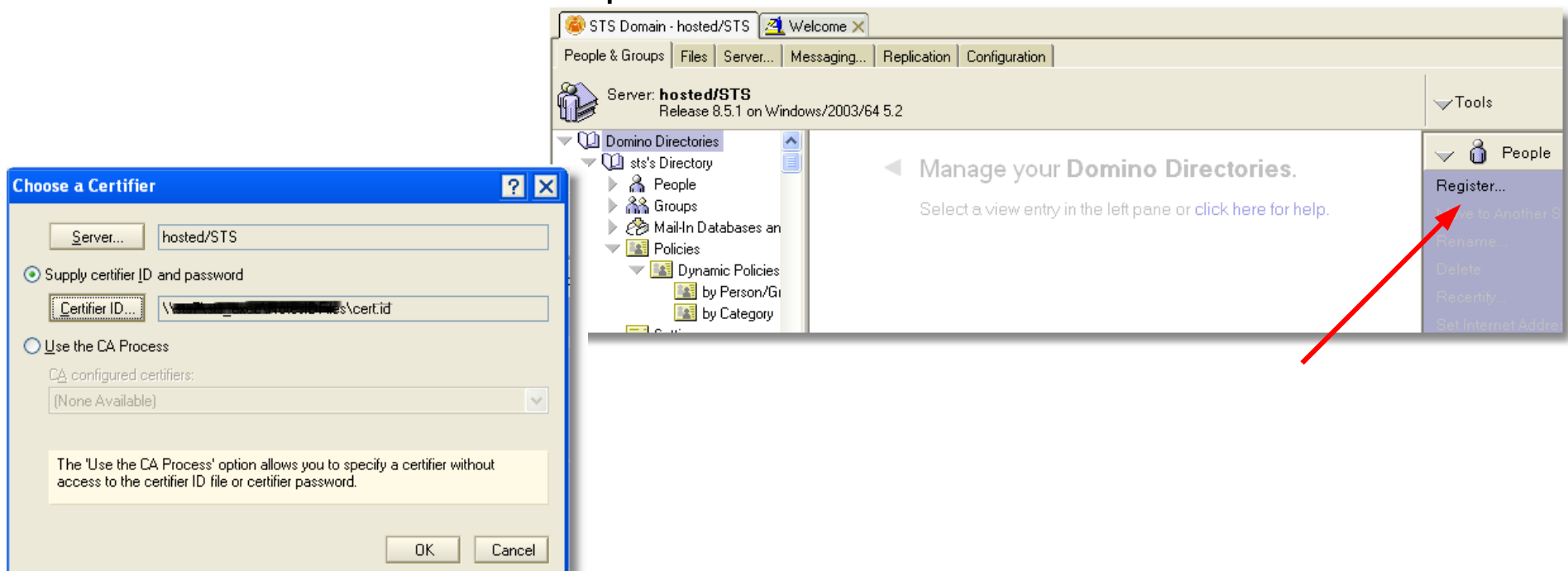
Description:

Category: Reg

Setting Type	Setting Name	
Registration:	/LS10 New User Reg	New...
Setup:		New...
Archiving:		New...
Desktop:		New...
Security:		New...
Mail:		New...

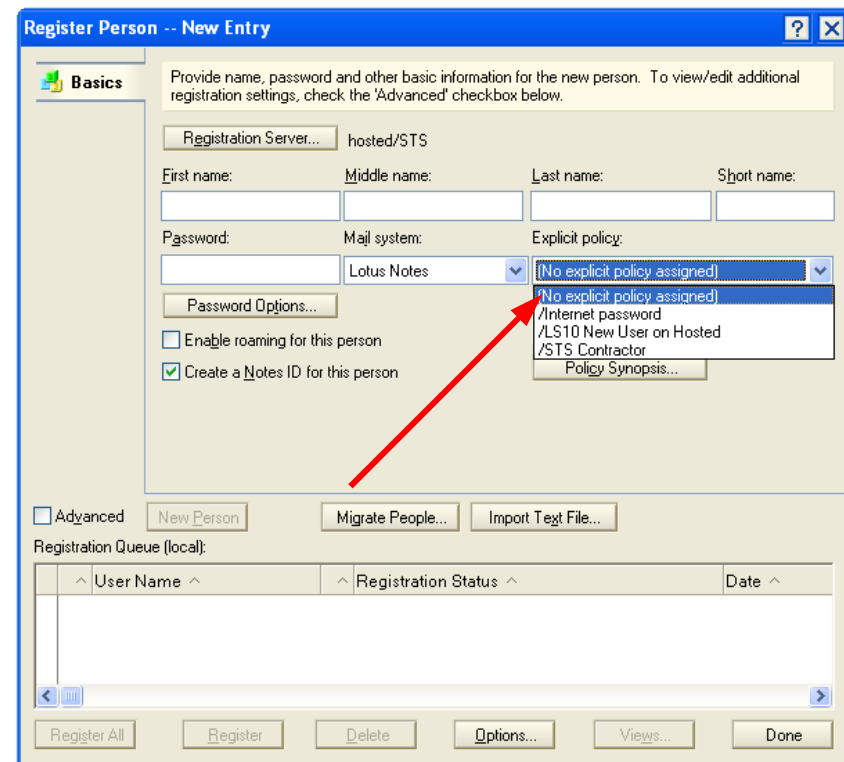
## Registration policy – time to test!

- Remember, the goal is to only enter 3 fields in order to get a new user registered
- Open up Domino Administrator and register a new user as you normally would
- Enter the certifier ID and password



## Registration policy – time to test!

- On the basics tab, select the new explicit policy we just created from the drop down list



The screenshot shows the 'Register Person -- New Entry' dialog box with the 'Basics' tab selected. The 'Explicit policy' dropdown menu is open, showing a list of policies. A red arrow points to the dropdown menu.

Registration Server... hosted/STS

First name: Middle name: Last name: Short name:

Password: Mail system: Explicit policy:

Lotus Notes

Explicit policy dropdown menu options:

- No explicit policy assigned
- Internet password
- LS10 New User on Hosted
- STS Contractor

Policy Synopsis...

Advanced: ☐ New Person:  Migrate People...:  Import Text File...:

Registration Queue (local):

User Name	Registration Status	Date
-----------	---------------------	------

Register All:  Delete:  Options...:  Views...:  Done:

## Registration policy – time to test!

- Fill in the following:
  - First name
  - Last name
  - Password
- Yes, that is it
  - All the settings from the “LS 10 New User on Hosted” are applied
  - To check this.....

**Register Person -- New Entry**

Provide name, password and other basic information for the new person. To view/edit additional registration settings, check the 'Advanced' checkbox below.

Registration Server... hosted/STS

First name: LS Middle name: Last name: 10 Short name: L10

Password: LS10willRock Mail system: Lotus Notes Explicit policy: /LS10 New User on Hosted

Password Options... Organization policy: \*/STS

☐ Enable roaming for this person

☒ Create a Notes ID for this person

Policy Synopsis...

☐ Advanced New Person Migrate People... Import Text File...

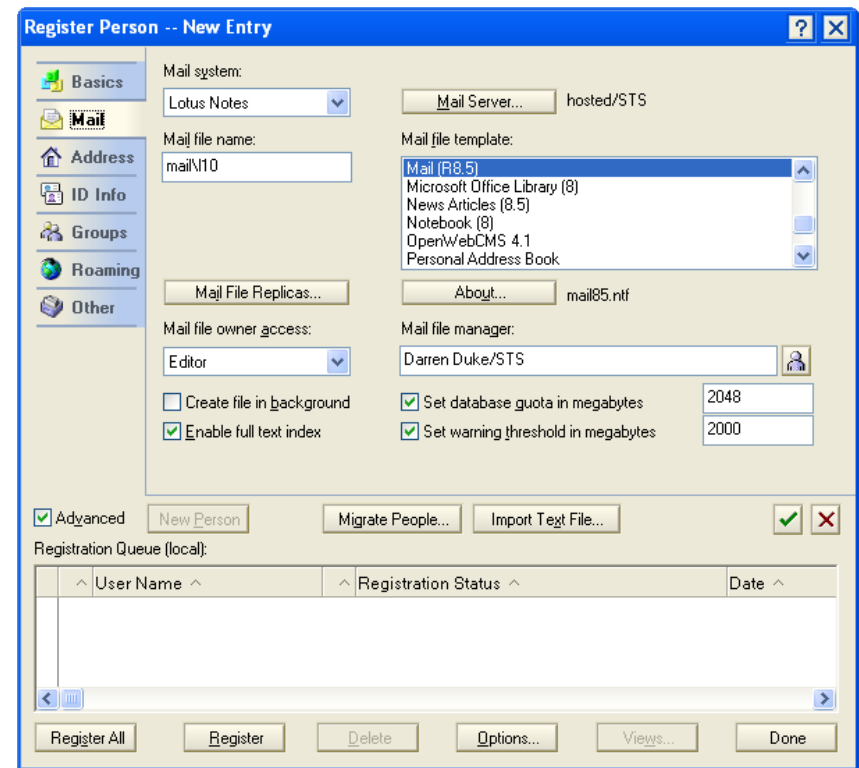
Registration Queue (local):

User Name ^	Registration Status ^	Date ^
-------------	-----------------------	--------

Register All Register Delete Options... Views... Done

## Registration policy – success!!!

- Check the Advanced check box
  - Check some other random tabs
  - In this case Mail
    - All the settings are populated!
- And then bask in the time you saved
- Remember to keep your policy updated
  - When the mail template is updated
  - If you need extra mail file replicas





## Example Policy

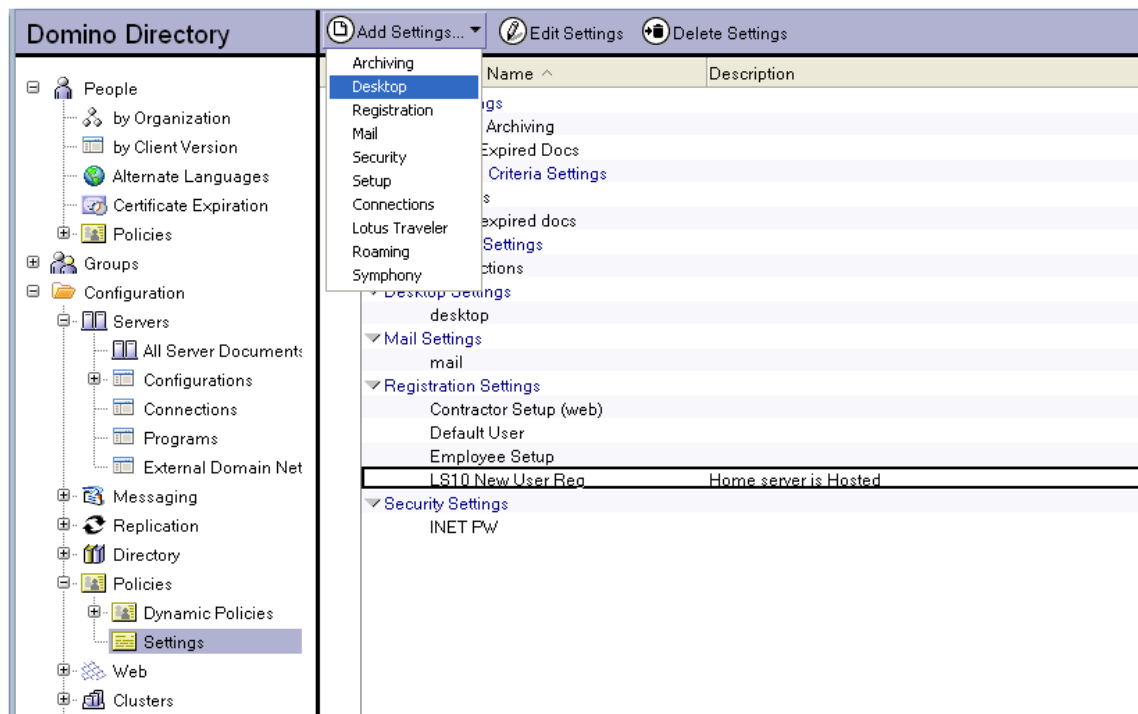
- Registration Settings
- Desktop Settings
- Mail Settings
- Security Settings
- Additional Policy for Laptop Users
- Archiving
- Other Settings

## Desktop settings for end users

- Some really useful settings are not enabled by default
- We will add this new setting to an existing organizational policy to apply these useful settings
- Again, we need a desktop settings document and a policy document

## Desktop settings creation

- Create a new registration settings document
  - Open the Domino Directory
  - Open the Configuration, Policies, Settings view from the navigator
  - In the Add Settings action, select Desktop



## Desktop - Basics

- Select Enable “Synchronize Contacts” on the replicator tab
  - New in 8.5.1 (thanks, Mary Beth!)

Display Advanced Menus in the client:	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Open list/Launcher:	<input type="checkbox"/> Open button	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<b>Contacts</b>				
Enable "Synchronize Contacts" on the Replicator:	<input checked="" type="checkbox"/> Yes	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<b>Lotus Protector Options</b>				
Specify the URL that accesses the Protector server:	<input type="checkbox"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce


















## Desktop – Preferences\Basics

- Enable autosave
- Autosave every N
- Lock ID

**Desktop Settings : LS10 Desktop Settings**

Basics | Smart Upgrade | Applications | Widgets | Dial-up Connections | Accounts | Name Servers | SSL | Applet Security | Proxies | Mail | Preferences

Basics | Miscellaneous | Window Management | Regional Settings | Internet | Mail | Instant Messaging | Replication | Network Ports | Fonts and Languages

Basic Preferences	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Icon color scheme: 	Don't set value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Empty trash folder: 	Don't set value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Scan for unread: 	Don't set value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Save state on exit: 	Don't set value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable AutoSave:  <b>Enable </b>	Set initial value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
AutoSave every N minutes: <b>5  minutes</b>	Set initial value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Lock ID after N minutes of inactivity: <b>20  minutes</b>	Set initial value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable scheduled local agents: 	Don't set value 	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Desktop – Preferences\Misc 1

- Enable right-double click
- Process print in background
- Retain view column sorting
- Enable MS Office SendTo

**Desktop Settings : LS10 Desktop Settings**

Basics | Smart Upgrade | Applications | Widgets | Dial-up Connections | Accounts | Name Servers | SSL | Applet Security | Proxies | Mail | Preferences | C

Basics | Miscellaneous | Window Management | Regional Settings | Internet | Mail | Instant Messaging | Replication | Network Ports | Fonts and Colors |

Miscellaneous Settings	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Mark documents read when opened in preview pane: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Make Internet URLs into Hotspots: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Textured Workspace: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Right double-click closes window: <b>Enable</b>	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable Java applets: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable JavaScript: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable Java access from JavaScript: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable Plugins in Notes Browser: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable ActiveX in Notes Browser: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Accept cookies: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Disable View updates as a background task: <input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Process Print requests as a background task: <b>Enable</b>	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Retain View column sorting: <b>Enable</b>	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Enable MS Office 97 SendTo to Notes: <b>Enable</b>	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Desktop – Preferences\Misc 2

- Enable Compress images pasted into documents

Do not prompt when closing all currently open windows tabs:	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Do not prompt when exiting Notes, Domino Designer/Administrator:	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Do not prompt when closing a document with edited attachments:	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Compress images pasted into documents:	Enable	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Desktop – Preferences\Mail

- Check for new mail
- Mail checking interval
- Play a sound
- Refresh inbox
- Show an icon

**Desktop Settings : LS10 Desktop Settings**

Basics | Smart Upgrade | Applications | Widgets | Dial-up Connections | Accounts | Name Servers | SSL | Applet Security | Proxies | Mail | Preferences

Basics | Miscellaneous | Window Management | Regional Settings | Internet | Mail | Instant Messaging | Replication | Network Ports | Fonts and Colors

Mail and News Settings		How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Save sent mail:	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Sign sent mail:	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Encrypt sent mail:	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Encrypt saved mail:	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Check for new mail:	<input checked="" type="checkbox"/> Enable	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Mail checking interval:	5  minutes	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Show a Popup:	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Play a Sound:	<input checked="" type="checkbox"/> Enable	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Automatically Refresh Inbox :	<input checked="" type="checkbox"/> Enable	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Show an icon in System Tray:	<input checked="" type="checkbox"/> Enable	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce



## Desktop – Preferences\Network Ports

- Set the ports you use to compress
  - Note, you also have to enable port compression on the server too

**Desktop Settings : LS10 Desktop Settings**

Basics | Smart Upgrade | Applications | Widgets | Dial-up Connections | Accounts | Name Servers | SSL | Applet Security | Proxies | Mail | Preferences

Basics | Miscellaneous | Window Management | Regional Settings | Internet | Mail | Instant Messaging | Replication | Network Ports | Fonts and Colors

Network Port Settings	Compression	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
NETBIOS	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
NWSPX	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
TCP	<input checked="" type="checkbox"/> Compress	Set value and prevent changes	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
XPC	<input type="checkbox"/>	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Desktop – Diagnostic

- Having a Notes client send in NSD reports can be very helpful for troubleshooting client crashes
- (Create and) Select the NSD mail in database

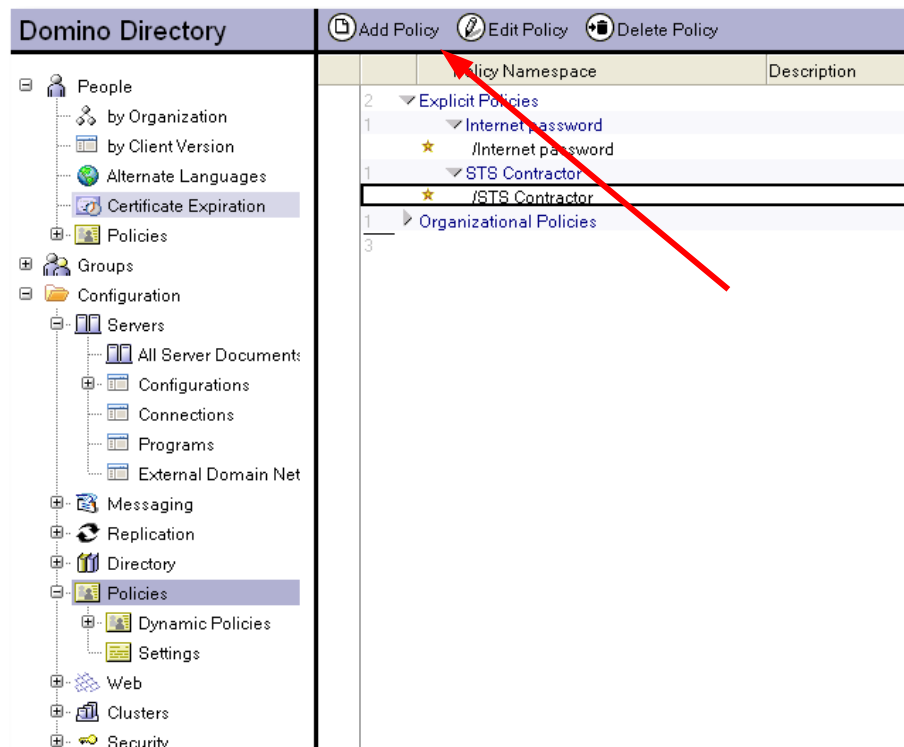
**Desktop Settings : LS10 Desktop Settings**

Widgets | Dial-up Connections | Accounts | Name Servers | SSL | Applet Security | Proxies | Mail | Preferences | Comments | Diagnostics | Custom Settings

Diagnostic Collection Options		How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Mail-in Database for diagnostic reports:	NSD Mail In	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Prompt user to send diagnostic report:	Yes	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Prompt user for comments:	Yes	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Maximum size of diagnostic message including attachments (in MB):	5	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Maximum size of NSD output to attach (in MB):	2	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Maximum amount of console output file to attach (in KB):	10240	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Diagnostic file patterns:		<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Remove diagnostic files after a specified number of days:	Yes	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Number of days to keep diagnostic files:	90	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Desktop – Assign it to an organization policy

- Now we'll create a new policy and assign this new setting to it
- In the Domino Directory navigate to Configuration/Policies and click the Add Policy action



## Desktop – Assign it to an organization policy

- Add a policy name - make it meaningful
- Type is Organizational
- Add an optional category to make it easy to understand
- Select our new desktop settings document from the drop down in the Desktop Setting Type field
- Save and close

**Policy : \*/STS**

Basics | Comments | Administration

**Basics**

Policy name:  Create Child

Policy type:

Description:

Category:

**Policy type help**

Organizational policies are implicitly applied to all users matching this policy and all of its parent policies. They cannot be explicitly assigned.

Setting Type	Setting Name
Registration:	<input type="text"/> New...
Setup:	<input type="text"/> New...
Archiving:	<input type="text"/> New...
Desktop:	<input type="text" value="LS10 Desktop Settings"/> New...
Security:	<input type="text"/> New...
Mail:	<input type="text"/> New...

Save Cancel

## Desktop – Assign it to an organization policy

- Notes about what we just did
  - We can reuse the same organization policy to push out other settings, i.e Mail, Archiving, etc
  - When a user authenticates with their home server, then new settings will be pushed down to the client and applied if necessary
  - We set most settings to “Set Initial Value” so that end users can change them if they so wish

## The truth about settings – you need more than one

- “Desktop” is really just one of the trilogy of the settings you want to implement as standard
- The others are “Mail” and “Security”
- We will now create a mail settings document and assign it to our organizational policy

## Example Policy

- Registration Settings
- Desktop Settings
- Mail Settings
- Security Settings
- Additional Policy for Laptop Users
- Archiving
- Other Settings

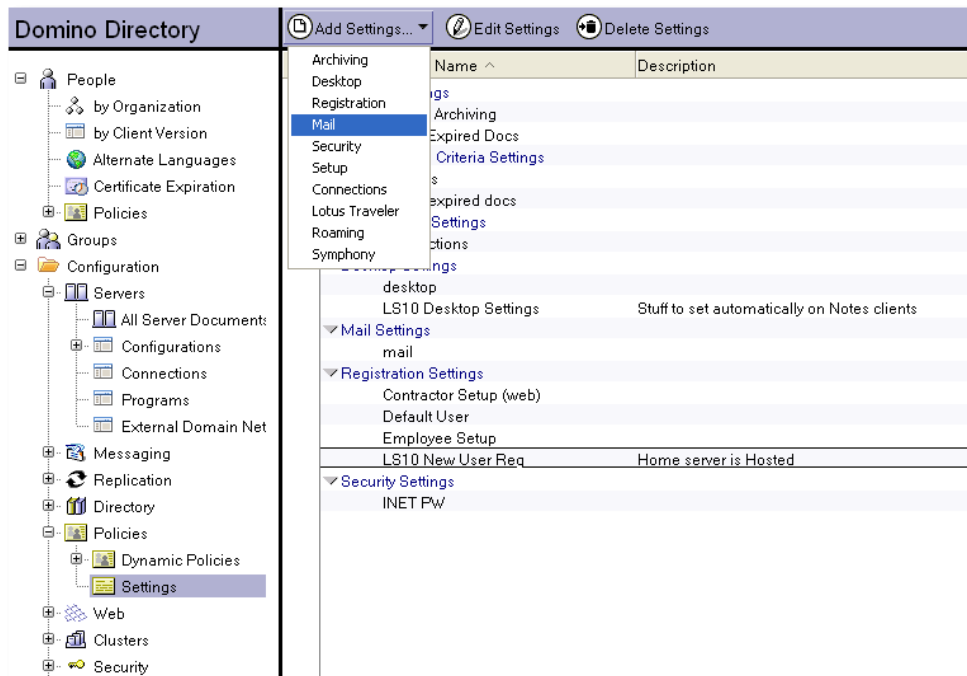
## Mail settings for end users

- Some really useful settings are not enabled by default
- We will add this new setting to an existing organizational policy to apply these useful settings
- Again, we need a new settings document and an existing policy document



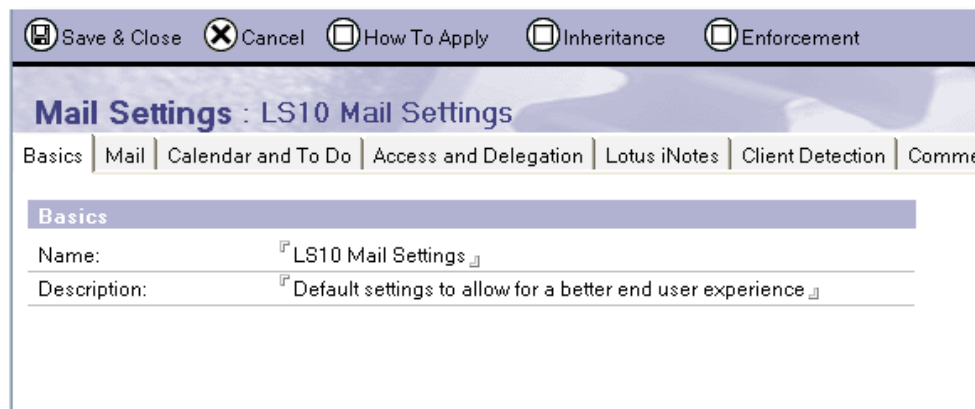
## Mail Settings Document

- Create a new mail settings document
  - Open the Domino Directory
  - Open the Configuration, Policies, Settings view from the navigator
  - In the Add Settings action, select Mail



## Mail Settings - Basics

- Enter a meaningful name and description



The screenshot shows a dialog box titled "Mail Settings : LS10 Mail Settings". At the top, there is a toolbar with five icons: "Save & Close", "Cancel", "How To Apply", "Inheritance", and "Enforcement". Below the toolbar, there is a tabbed interface with tabs for "Basics", "Mail", "Calendar and To Do", "Access and Delegation", "Lotus iNotes", "Client Detection", and "Comments". The "Basics" tab is selected. Under the "Basics" tab, there are two text input fields: "Name:" with the value "LS10 Mail Settings" and "Description:" with the value "Default settings to allow for a better end user experience".

## Mail Settings - Mail\Basics

- Disable ownership changing
- Enable spell check
- Enable blank subject warning
- Enable inbox maintenance
- Enter a number of days for inbox removal

Save & Close Cancel How To Apply Inheritance Enforcement

### Mail Settings : LS10 Mail Settings

Basics Mail Calendar and To Do Access and Delegation Lotus iNotes Client Detection Comments Administration

Basics Letterhead Follow Up Attention Indicators Message Recall Message Disclaimers

User Configuration	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
<input type="checkbox"/> Allow users to change mail file ownership	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

Outgoing Mail Checking	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Spell-check messages before sending: <input checked="" type="checkbox"/> Yes	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Warn user about blank message subjects: <input checked="" type="checkbox"/> Yes	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

Mail View and Folder Management	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
When user deletes a collapsed conversation in any view or folder: Ask user	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
When user deletes any document in the sent view: Ask user	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
When user deletes a calendar document from any view or folder: Ask user whether to remove or delete	Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Delete documents in user's Trash folder after how many hours: 48	Set initial value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

Mail Inbox Maintenance	Inherit from parent policy:	Enforce in child policies:
Enable mail Inbox maintenance: <input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Remove documents older than [X] days from Inbox: 90	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Maximum number of documents to remove per cleanup: 500	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Do not remove unread documents from Inbox: <input type="checkbox"/> Yes	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## Mail Settings - Mail\Attention Indicators

- Enable recipient icons

**Mail Settings : LS10 Mail Settings**

Basics | Mail | Calendar and To Do | Access and Delegation | Lotus iNotes | Client Detection | Comments | Administration

Basics | Letterhead | Follow Up | Attention Indicators | Message Recall | Message Disclaimers

**Sender Colors** How to apply this setting:

Sender names 1  Don't set value

Text color 10:  Don't set value

**Recipient Icons** How to apply this setting:

Display a solid circle when user is the only recipient of a message: ☒ Yes Set initial value

Maximum number of recipients for half circle display: 2 Set initial value

Display a half circle when mail is sent to no more than the maximum number of recipients: ☒ Yes

Display an empty circle when user's name is in the cc field: ☒ Yes Set initial value

## Mail Settings - Mail\Message Recall

- Check with your legal counsel or upper management before enabling this
  - It can cause issues with retention policies
  - I didn't stay at a Holiday Inn Express last night, so don't ask me

## Mail Settings - Mail\Message Disclaimers

- If your organization requires this, this is where to set it
- You also need to set the server configuration document, too!

**Mail Settings : LS10 Mail Settings**

Basics | Mail | Calendar and To Do | Access and Delegation | Lotus iNotes | Client Detection | Comments

Basics | Letterhead | Follow Up | Attention Indicators | Message Recall | Message Disclaimers

Message Disclaimer		How to apply this setting
Notes client can add disclaimers:	Disabled	<input type="checkbox"/> Don't set value
Disclaimer text:	<p><input type="text" value=""/></p> <p><input type="button" value="Modify"/></p> <p>This message is for the intended recipient. You should really visit <a href="http://blog.darrenduke.net">http://blog.darrenduke.net</a></p>	<input type="checkbox"/> Don't set value
Disclaimer text format:	Plain Text	<input type="checkbox"/> Don't set value
Disclaimer position:	Append	<input type="checkbox"/> Don't set value
Multilingual Internet mail:	Use Best Match	<input type="checkbox"/> Don't set value

## Mail Settings - Calendar\Display



- Enable display new (unprocessed) notices

**Mail Settings : LS10 Mail Settings**


Basics | Mail | Calendar and To Do | Access and Delegation | Lotus iNotes | Client Detection | Comments | Admin


Basics | Display | Notices | Scheduling | Alarms | Automatic Processing | Rooms and Resources


**How the Calendar View is Displayed** How to apply this setting:


Start of the work day: 07:00 AM  Don't set value 


---

Ask me before deleting calendar and to do documents: ☐ Yes Don't set value 

Display new (unprocessed) notices: ☒ Yes Don't set value 

Process cancelled meetings automatically: ☐ Yes Don't set value 

Display To Do entries in the Calendar: ☐ Yes Don't set value 

Calendar Overlay: ☒ Enabled  ☐ Don't set value

## Mail Settings - Calendar\Scheduling

- Change the availability to hours that suit your organization's work day
- Enable checking for conflicts

**Mail Settings : LS10 Mail Settings**

Basics | Mail | Calendar and To Do | Access and Delegation | Lotus iNotes | Client Detection | Comments | Administration

Basics | Display | Notices | Scheduling | Alarms | Automatic Processing | Rooms and Resources

### Your Availability

How to apply this setting: Set initial value

<input type="checkbox"/> Sunday	
<input checked="" type="checkbox"/> Monday	08:00 AM - 05:30 PM
<input checked="" type="checkbox"/> Tuesday	08:00 AM - 05:30 PM
<input checked="" type="checkbox"/> Wednesday	08:00 AM - 05:30 PM
<input checked="" type="checkbox"/> Thursday	08:00 AM - 05:30 PM
<input checked="" type="checkbox"/> Friday	08:00 AM - 05:30 PM
<input type="checkbox"/> Saturday	

### When adding an Entry to Your Calendar

How to apply this setting: Set initial value

Check for conflicts when adding appointments, accepting meetings, scheduling a new meeting: ☒ Yes

Note as a conflict if entry occurs outside of user's available hours: ☐ Yes

For new meetings, the Scheduler initially shows: ☒ Schedule details for each participant ☐ Suggested best times for meeting

Show 24-hour scheduler: ☐ Yes



## Mail Settings - Calendar\Alarms

- My pet peeve, and one of the silliest settings is that alarms are disabled by default!
- Enable all alarms and adjust the advance time as necessary

**Mail Settings : LS10 Mail Settings**

Basics | Mail | Calendar and To Do | Access and Delegation | Lotus iNotes | Client Detection | Comments | Administration

Basics | Display | Notices | Scheduling | Alarms | Automatic Processing | Rooms and Resources

Enable/Disable Alarms		How to apply this setting:	Inher
Enable the display of alarm notifications:	<input checked="" type="checkbox"/> Yes	Don't set value	<input type="checkbox"/> Int

Default Alarm Settings When Creating a New Entry (On/Off)	How Far in Advance	How to apply this setting:	Inher
<input checked="" type="checkbox"/> Appointments/Meetings	30 minute(s) in advance	Don't set value	<input type="checkbox"/> Int
<input checked="" type="checkbox"/> Reminders	0 minute(s) in advance	Don't set value	<input type="checkbox"/> Int
<input checked="" type="checkbox"/> Events	1 day(s) in advance	Don't set value	<input type="checkbox"/> Int
<input checked="" type="checkbox"/> Anniversaries	1 day(s) in advance	Don't set value	<input type="checkbox"/> Int
<input checked="" type="checkbox"/> To Do	1 day(s) in advance of due date	Don't set value	<input type="checkbox"/> Int

## Mail Settings - iNotes\Configuration

- 8.5 and 8.5.1 added some nice settings to iNotes
- Making iNotes as similar as possible to Notes clients makes end users happy
- Enable mail threads
- Enable refresh inbox
- Enable unread count
- Enable scroll hints

**Mail Settings : LS10 Mail Settings**

Basics | Mail | Calendar and To Do | Access and Delegation | Lotus iNotes | Client Detection | Comments | Administration

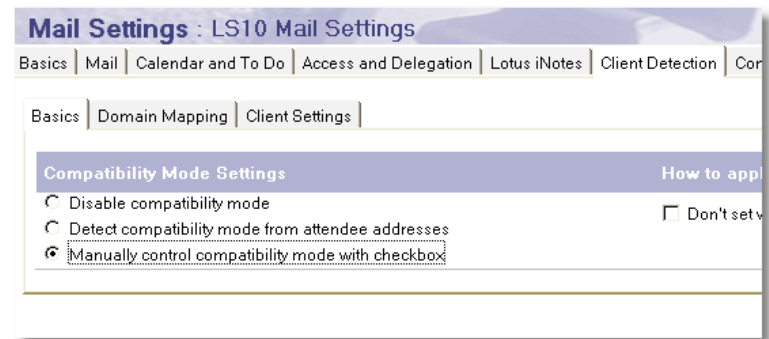
Basics | Configuration | Offline

Mail	How to apply this setting:	Inherit parent
Maximum attachment size (kb): 50000	Don't set value	<input type="checkbox"/> Inherit
Mail threads: <input checked="" type="checkbox"/> Yes	Set initial value	<input type="checkbox"/> Inherit
Do not show remote images without permission: <input type="checkbox"/> Yes	Don't set value	<input type="checkbox"/> Inherit
Refresh Inbox automatically: <input checked="" type="checkbox"/> Yes	Set initial value	<input type="checkbox"/> Inherit
Enable unread count: <input checked="" type="checkbox"/> Yes	Set initial value	<input type="checkbox"/> Inherit
Autoupdate unread count: Inbox Only	Don't set value	<input type="checkbox"/> Inherit
Enable scrollhints: <input checked="" type="checkbox"/> Yes	Set initial value	<input type="checkbox"/> Inherit
Disable warning on opening attachments: <input type="checkbox"/> Yes	Don't set value	<input type="checkbox"/> Inherit
Filter out images from emails: <input type="checkbox"/> Yes	<input checked="" type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit

**Browser Cache Management** How to apply this setting: Inherit

## Mail Settings - Client Detection

- Another great setting used for calendar interoperability between Notes/Domino and other messaging platforms, specifically for repeating options in meeting invites
- Allows administrators to map internet domains to specific messaging platforms like MS Exchange, Zimbra and Mozilla
- or
- Allows the end user to select manually when sending an invite
- This can also affect Lotus Notes invitees
- You will need to train your end users about this feature if you choose manual



## Mail – Assign it to an organization policy

- Notes about what we just did
  - We can reuse the same organization policy we created earlier to push out with other settings, i.e Desktop, Archiving, etc
  - We set most settings to “Set Initial Value” so that end users can change them if they so wish
  - Next up is the last of our common client settings, Security

**Policy : \*/STS**

Basics | Comments | Administration

**Basics**

Policy name:

Policy type:

Description:

Category:

Setting Type	Setting Name	
Registration:	<input type="text"/>	<input type="button" value="New..."/>
Setup:	<input type="text"/>	<input type="button" value="New..."/>
Archiving:	<input type="text"/>	<input type="button" value="New..."/>
Desktop:	<input type="text" value="LS10 Desktop Settings"/>	<input type="button" value="New..."/>
Security:	<input type="text"/>	<input type="button" value="New..."/>
Mail:	<input type="text" value="LS10 Mail Settings"/>	<input type="button" value="New..."/>
Connections:	<input type="text"/>	<input type="button" value="New..."/>
Lotus Traveler:	<input type="text"/>	<input type="button" value="New..."/>

## Example Policy

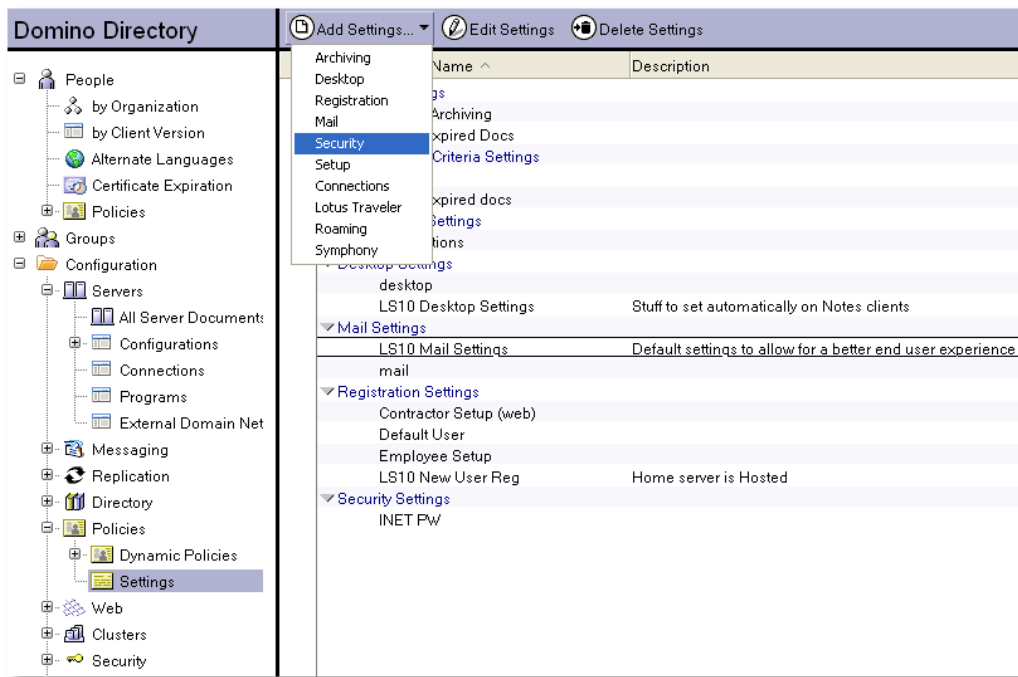
- Registration Settings
- Desktop Settings
- Mail Settings
- Security Settings
- Additional Policy for Laptop Users
- Archiving
- Other Settings

## Security Settings

- Ostensibly this contains settings to make the administrator's life easier
- Or
- To make the Domino environment more secure
- We will add this new setting to an existing organizational policy to apply these useful settings
- Again, we need a new settings document and an existing policy document

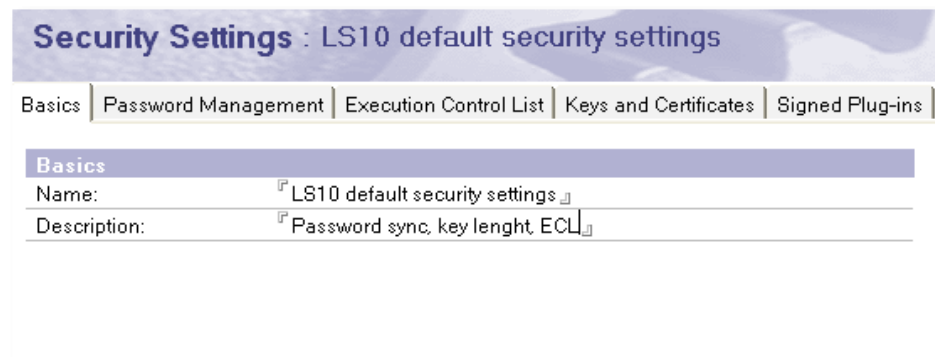
## Security Settings Document

- Create a new security settings document
  - Open the Domino Directory
  - Open the Configuration, Policies, Settings view from the navigator
  - In the Add Settings action, select Security



## Security Settings - Basic

- Enter a meaningful name and description



**Security Settings : LS10 default security settings**

Basics | Password Management | Execution Control List | Keys and Certificates | Signed Plug-ins

**Basics**

Name: [LS10 default security settings]

Description: [Password sync, key lenght, ECL]



## Security Settings – Password Mgmt\Basics

- Lotus Notes has the capability to allow for some very sophisticated password options
- To allow for this option, enable Custom Password Policy and a new tab appears
- Enable Update Internet Password
- Enable Password Expiration, the required change interval and a grace period

**Security Settings : LS10 default security settings**

Basics | Password Management | Execution Control List | Keys and Certificates | Signed Plug-ins

Password Management Basics | Custom Password Policy | Notes Shared Login

**Password Management Options** How to

Use Custom Password Policy for Notes Clients	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Don't
Check password on Notes id file	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Don't
Allow Users to Change Internet Password over HTTP	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Don't
Update Internet Password When Notes Client Password Changes	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> Don't

**Password Expiration Settings** How to

Enforce Password Expiration	<input checked="" type="checkbox"/> Notes & Internet	<input type="checkbox"/> Don't
Required Change Interval	90 days	<input type="checkbox"/> Don't
Allowed Grace Period	15 days	<input type="checkbox"/> Don't
Password History (Notes only)	50 passwords	<input type="checkbox"/> Don't
Warning Period	30 days	<input type="checkbox"/> Don't
Custom Warning Message		<input type="checkbox"/> Don't

## Security Settings – Password Mgmt\Custom Password Policy

- Yes, you can force users to change their password the first time they use a Lotus Notes client
  - No more “lotusnotes”, “p@ssword”, etc
- Fill in the fields that are required by your organizations' complexity requirements

**Security Settings : LS10 default security settings**

Basics | Password Management | Execution Control List | Keys and Certificates | Sign

Password Management Basics | Custom Password Policy | Notes Shared Login

Custom Options	How to
Change Password on First Notes Client Use	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Allow Common Name in Password	<input type="checkbox"/> No <input type="checkbox"/> Yes
Password Length Minimum	<input type="checkbox"/> 8 characters
Password Length Maximum	<input type="checkbox"/> characters
Password Quality Minimum	<input type="checkbox"/>
Minimum Number of Alphabetic Characters Required	<input type="checkbox"/> 1
Minimum Number of UpperCase Characters Required	<input type="checkbox"/> 1
Minimum Number of LowerCase Characters Required	<input type="checkbox"/> 1
Minimum Number of Numeric Characters Required	<input type="checkbox"/> 1
Minimum Number of Special Characters Required	<input type="checkbox"/> 1
Minimum Number of Non-LowerCase Characters Required	<input type="checkbox"/> characters of <input type="checkbox"/>
Maximum Number of Repeated Characters Required	<input type="checkbox"/> 2
Minimum Number of Unique Characters Required	<input type="checkbox"/> 4
Password May Not Begin With	<input type="checkbox"/>
Password May Not End With	<input type="checkbox"/>

## Security Settings – Password Mgmt\Notes Shared Login

- Replacement for “Single Sign-On” option that is now controlled via a policy
- Enable if you wish to have Notes automatically login with the end users Windows password
- Be careful using with “ID Lock Out” - the password prompt is hidden!

**Security Settings : LS10 default security settings**

Basics | Password Management | Execution Control List | Keys and Certificates | Signed Plug-ins | Portal Server | ID Vault

Password Management Basics | Custom Password Policy | Notes Shared Login

Notes Shared Login		How to apply this setting:
Enable Notes shared login with operating system:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Don't set value <input type="button" value="v"/>
Allow User Changes?	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="checkbox"/> Don't set value

Activation Notification		How to apply this setting:
How to notify users when enabled:	<input checked="" type="radio"/> No notification <input type="radio"/> Yes	<input type="checkbox"/> Don't set value
Custom message text:	<div></div>	

Deactivation Notification		How to apply this setting:
How to notify users when disabled:	<input checked="" type="radio"/> No notification <input type="radio"/> Yes	<input type="checkbox"/> Don't set value
Custom message text:	<div></div>	

## Security Settings – ID Vault

- One of the best features in 8.5
- Not usually set manually, but via the ID Vault wizard
- See session SHOW101 for more details on ID Vault
- If you want to assign an existing vault, do so here

**Security Settings : LS10 default security settings**

Basics | Password Management | Execution Control List | Keys and Certificates | Signed Plug-ins | Portal Server | ID Vault | Prox

ID Vault Options:		How to apply this setting:	Inheri
Assigned vault:	<input checked="" type="radio"/> ID Vault	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inh
Forgotten password help text:	<input type="radio"/> Please call the help desk at 3344 to reset your password	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inh
Enforce password change after password has been reset:	<input checked="" type="radio"/> Yes	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inh
Allow Notes-based programs to use the Notes ID Vault:	<input checked="" type="radio"/> No	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inh

Automatic ID Downloads:		How to apply this setting:	Inheri
Allow automatic ID downloads:	<input checked="" type="radio"/> Yes	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inh
Allow ID downloads for:	1 days	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inh
	0 hours		
ID download authorization failure message:			

## Security – Assign it to an organization policy

- Notes about what we just did
  - We can reuse the same organization policy we created earlier to push out with other settings, i.e Mail, Archiving, etc
  - Most of the security settings do not have a drop down option. More on that later.
  - We are now done. Some useful settings are now enabled and will be pushed down to the Lotus Notes client.

The screenshot shows the 'Policy : \*/STS' configuration window. It has tabs for 'Basics', 'Comments', and 'Administration'. The 'Basics' tab is active, showing fields for 'Policy name' (\*/STS), 'Policy type' (Organizational), 'Description', and 'Category'. A 'Create Child' button is next to the policy name. Below these fields is a table with two columns: 'Setting Type' and 'Setting Name'. The table lists various settings with their current values and a 'New...' button for each.

Setting Type	Setting Name	Action
Registration:	*/	New...
Setup:	*/	New...
Archiving:	*/	New...
Desktop:	LS10 Desktop Settings	New...
Security:	LS10 default security settings	New...
Mail:	LS10 Mail Settings	New...
Connections:	*/	New...
Lotus Traveler:	*/	New...

## Example Policy

- Registration Settings
- Desktop Settings
- Mail Settings
- Security Settings
- Additional Policy for Laptop Users
- Archiving
- Other Settings

## Additional policy for laptop users

- To create a new policy we can
  - Start afresh with all new policy and settings documents
  - Start afresh with all new policy document, reuse similar settings, create new settings for changes
    - Both of these are time consuming and error prone

OR

- We can use policy inheritance to inherit values from a parent policy and change only the items we wish in the child
  - Fast, and we are assured whenever a parent changes, the child will too
  - Create a child policy, set for inheritance
  - Add new settings documents to change as required

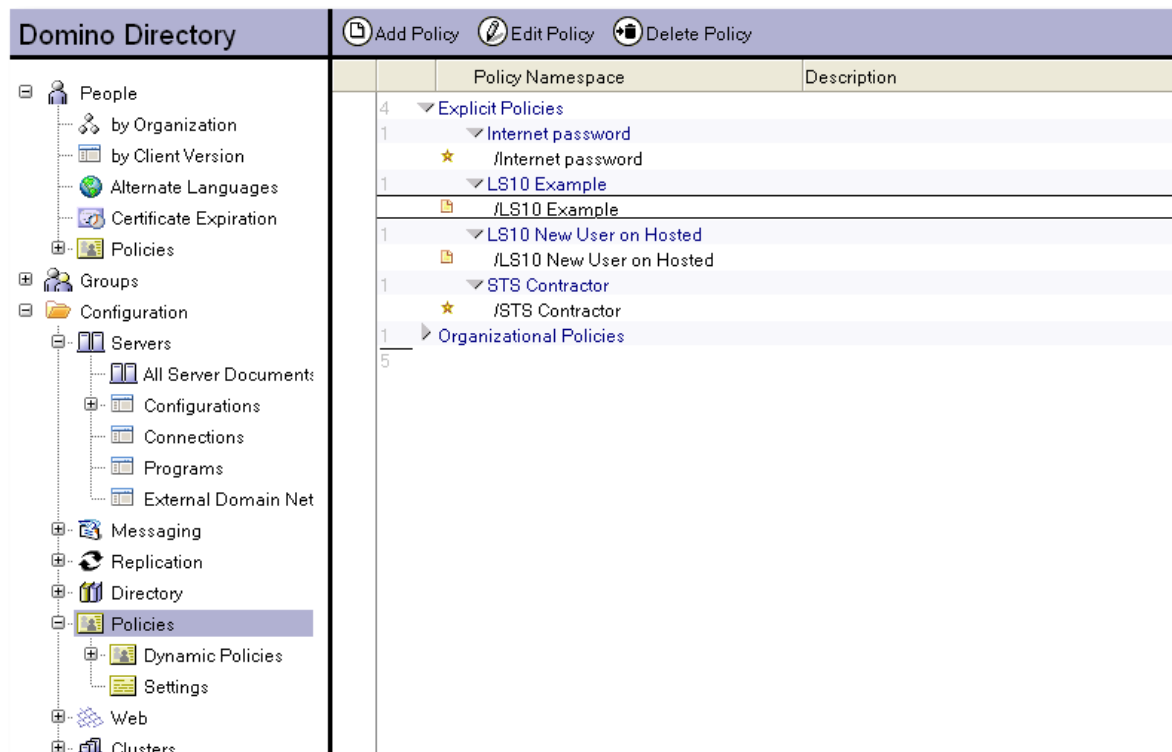
## Additional policy for laptop users

- Recap
  - All of the settings from the “LS10 Example” policy (created earlier) will be inherited to these users
  - Their passwords are more complex
- Our new users will be in a group called “Laptop Users”
  - This will be assigned the new explicit dynamic policy we are about to create



## Edit an existing policy

- Create a new child policy from an existing policy document
  - Edit an existing policy in the Domino Directory, Configuration, Policies navigator
  - The one we will edit will be the parent for our new laptop policy



## Edit an existing policy

- Use the Create Child button to create new policy document

**Policy : /LS10 Example**

Basics | Policy Assignment | Policy Precedence | Comments | Administration

**Basics**

Policy name: /LS10 Example

Policy type: Explicit

Description:

Category:

**Setting Type      Setting Name**

Registration:

Setup:

Archiving:

Desktop: [LS10 Desktop Settings](#)

Security: [LS10 default security settings](#)

Mail: [LS10 Mail Settings](#)

Connections:

Lotus Traveler:

Roaming:

Symphony:

**Create Child**

Explicit assign document

## Edit an existing policy

- Enter a policy name for the child
  - Notice the parent policy is indicated here

**Policy**

Basics | Policy Assignment | Policy Precedence | Comments | Administration

**Basics**

Parent policy: [/LS10 Example](#)

Policy name: **Laptop Users**

Policy type: Explicit

Description:

Category:

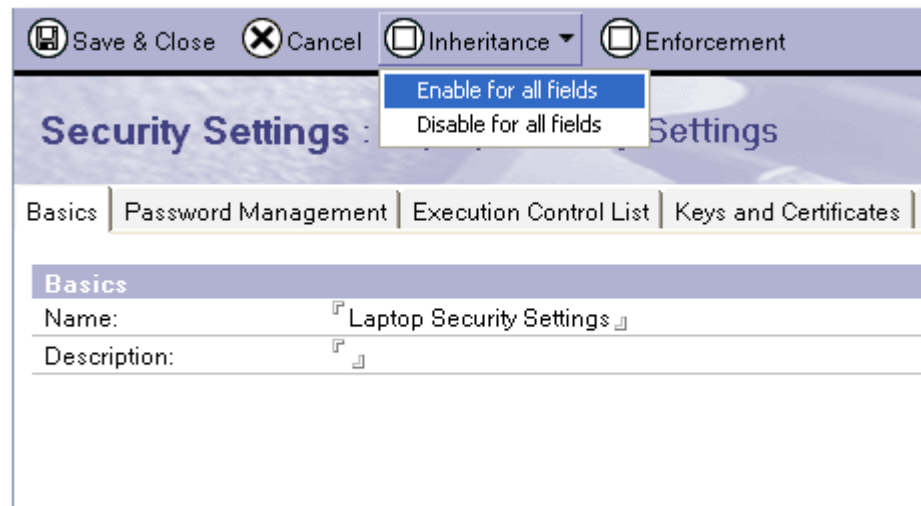
**Policy type**

Explicit policy assigned to document

Setting Type	Setting Name
Registration:	New...
Setup:	New...
Archiving:	New...
Desktop:	New...

## More complex passwords

- We will add a new Security Settings document to this policy
  - Click the New button in the policy document
  - Add a name and description to the new security settings document
  - To add inheritance to all fields manually is tedious, so select the Inheritance action button and select Enable for all fields



## More complex passwords

- Notice how all options now have “Inherit for parent policy” checked
  - These settings will now be inherited from the parent
- The parent policy, via its own settings, has a password length of 8. For this policy we will set it to 12
- Our new change will be entered under the Password Mgmt/Custom Password Policy tab
  - Uncheck Inherit, so that this policy will specify its own setting
  - Change the password length value to 12
  - So any children of this policy cannot change from 12, we check enforce

**Security Settings : Laptop Security Settings**

Basics | Password Management | Execution Control List | Keys and Certificates | Signed Plug-ins | Portal Server | ID Vault | Proxies | Comments | Administration

Password Management Basics | Custom Password Policy | Notes Shared Login

Custom Options	How to apply this setting:	Inherit from parent policy:	Enforce in child policies:
Change Password on First Notes Client Use <input type="radio"/> No <input type="radio"/> Yes	<input type="checkbox"/> Don't set value	<input checked="" type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Allow Common Name in Password <input type="radio"/> Yes <input type="radio"/> No	<input type="checkbox"/> Don't set value	<input checked="" type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Password Length Minimum <input type="text" value="12"/> characters	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input checked="" type="checkbox"/> Enforce
Password Length Maximum <input type="text" value=""/> characters	<input type="checkbox"/> Don't set value	<input checked="" type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Password Quality Minimum <input type="text" value=""/>	<input type="checkbox"/> Don't set value	<input checked="" type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Minimum Number of Alphabetic Characters Required <input type="text" value=""/>	<input type="checkbox"/> Don't set value	<input checked="" type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Minimum Number of UpperCase Characters Required <input type="text" value=""/>	<input type="checkbox"/> Don't set value	<input checked="" type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Minimum Number of LowerCase Characters Required <input type="text" value=""/>	<input type="checkbox"/> Don't set value	<input checked="" type="checkbox"/> Inherit	<input type="checkbox"/> Enforce

## More complex passwords

- Save and close and assign the setting to our child policy
- Once the child policy document is saved, we now have child policy that can be used as a dynamic policy

**Policy : /Laptop Users/LS10 Example**

Basics | Policy Assignment | Policy Precedence | Comments | Administration

**Basics**

Policy name: /Laptop Users/LS10 Example Create Child

Policy type: Explicit

Description:

Category:

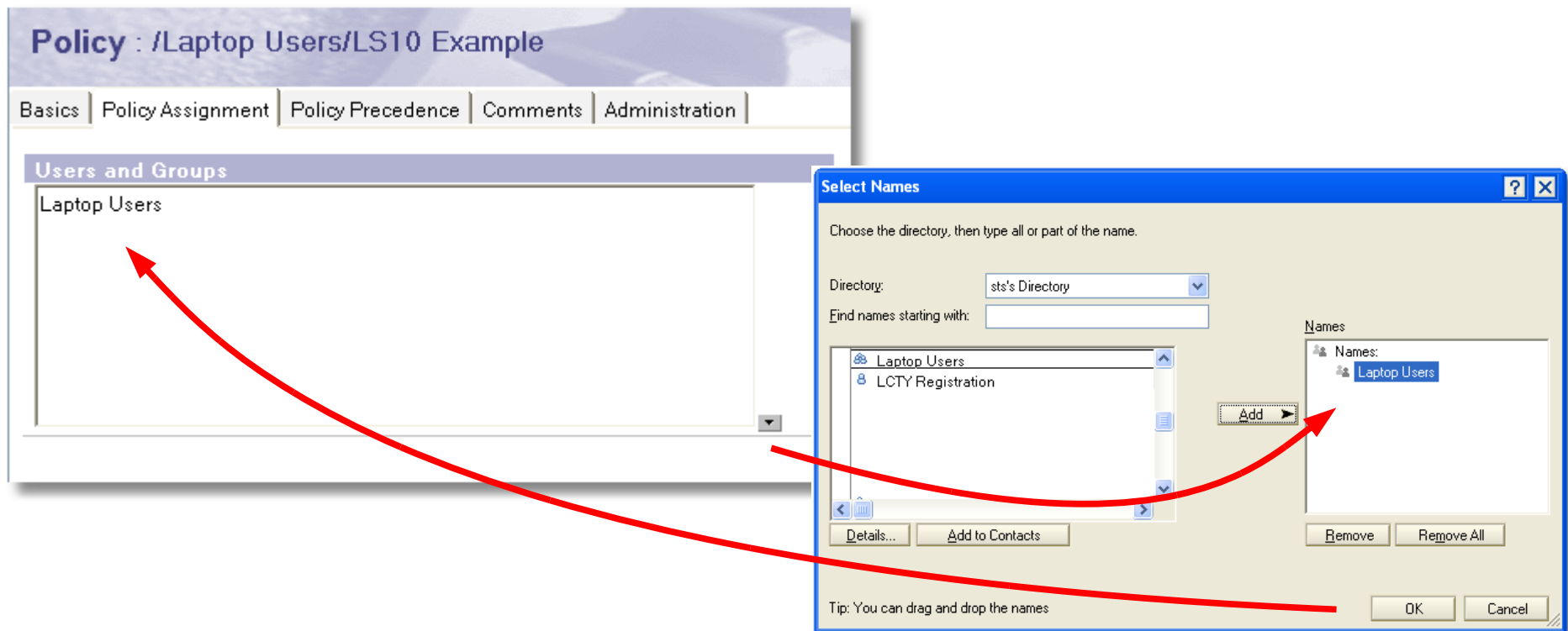
**Policy type help**

Explicit policies are assigned to user document.

Setting Type	Setting Name	
Registration:		New...
Setup:		New...
Archiving:		New...
Desktop:		New...
Security:	Laptop Security Settings	New...
Mail:		New...

## Assigning the dynamic policy

- Assuming we already have a group called "Laptop Users", we will now assign that via a dynamic policy
- Open the Policy Assignment tab on your child policy document and use the drop down pick list to select the group



## Forcing precedence

- So that this new policy will always be applied, this new policy will have the highest precedence

Domino Directory

Add Policy

Edit Policy

Delete Policy

Increase Precedence

Decrease Precedence

People

by Organization

by Client Version

Alternate Languages

Certificate Expiration

Policies

Groups

Configuration

Servers

All Server Documents

Precedence	Dynamic Policy	Author
1	/Laptop Users/LS10 Example	Darren Duke/STS
2	/Internet password	Darren Duke/STS
3	/STS Contractor	Darren Duke/STS



## Testing child policies and inheritance

- Users in the Laptop Users group will now be assigned the new policy
- Using the Policy Synopsis Tool (covered in detail later), we can see the new settings as assigned to a member for the above group
  - Note the PwdLenMin =12 came from Laptop Users
  - While
  - PwdLowMin=1 came from LS10 Example
  - This is due to the inheritance we just created

PwdLenMax = 30 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
PwdLenMax does not have a value set  
PwdLenMin = 12 from [Laptop Security Settings](#) assigned in policy [/Laptop Users/LS10 Example](#)  
PwdLowMin = 1 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
PwdNotEnd does not have a value set  
PwdNotStart does not have a value set  
PwdNumMin = 1 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)

## Section 1 - Summary

- We just created a set of policy settings documents that will allow for a much better Lotus Notes experience for both end users and administrators
- We can have a single policy document and assign settings to it
- We set most settings to “Set default value” so an end user can still change the setting

## Example Policy

- Registration Settings
- Desktop Settings
- Mail Settings
- Security Settings
- Additional Policy for Laptop Users
- Archiving
- Other Settings

## Policy Settings – Archiving

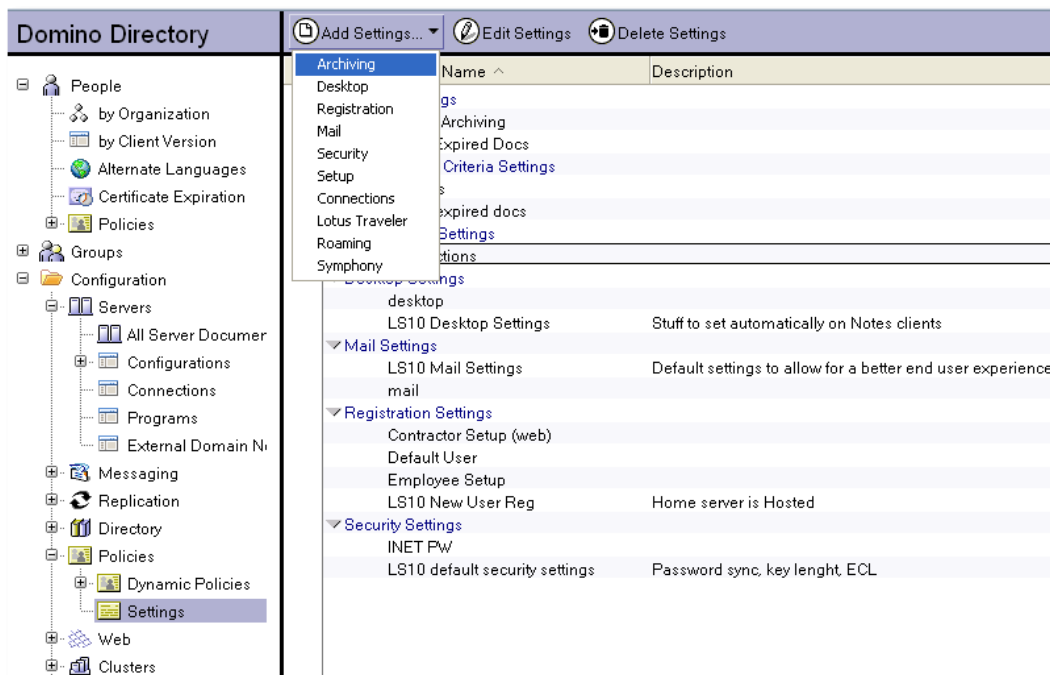
- Now for something completely different
- One of the most divisive options in an organization
  - Just like Fight Club, the first rule of archiving is never talk about archiving
  - I use it, I like it
- It can also be used to disable local archiving, not just enable it
- We will look at creating an archive policy that will move all documents

## Archiving Example

- We will look at creating an archive policy
- This policy will
  - Be run on the server
  - Archive to the users' mail server
  - Archive all documents old then 365 days old

## Archiving Document

- Create a new archiving settings document
  - Open the Domino Directory
  - Open the Configuration, Policies, Settings view from the navigator
  - In the Add Settings action, select Archiving



## Archiving Document - Basics

- Add a meaningful name
- Check Server as this will take place on the server
- As the source select Mail server
- As the destination select Mail server

**Archiving Settings : 45 Day Archiving**

Basics | Selection Criteria | Logging | Advanced | Comments | Administration

**Basics**

Name: 365 Day Archiving

Description:

Archiving Options:	How to apply this setting:
<input type="checkbox"/> Prohibit archiving	<input type="checkbox"/> Don't set value
<input type="checkbox"/> Prohibit private archiving criteria	<input type="checkbox"/> Don't set value
<b>Archiving will be performed on:</b>	<b>How to apply this setting:</b>
<input type="radio"/> User's local workstation	<input type="checkbox"/> Don't set value
<input checked="" type="radio"/> Server	
<b>Archiving source database is on:</b>	<b>How to apply this setting:</b>
Source Server:	<input type="checkbox"/> Don't set value
<input type="radio"/> Specific server	
<input checked="" type="radio"/> Mail server	
<b>Destination database is on:</b>	<b>How to apply this setting:</b>
Destination Server:	<input type="checkbox"/> Don't set value
<input type="radio"/> Specific server	
<input checked="" type="radio"/> Mail server	

## Archiving Document – Selection Criteria

- Create a new criteria with the New Criteria button

The image shows two overlapping screenshots from the Lotus Symphony software interface. The top screenshot is the 'Archiving Settings' window, which has tabs for 'Basics', 'Selection Criteria', 'Logging', 'Advanced', 'Comments', and 'Administration'. The 'Selection Criteria' tab is active. It contains three checkboxes: 'Don't set value', 'Inherit Selection Criteria', and 'Enforce Selection Criteria'. Below these are three buttons: 'New Criteria', 'Add Criteria', and 'Remove Criteria'. A red arrow points from the 'New Criteria' button to the 'Archive Criteria Settings' dialog box shown in the foreground. The 'Archive Criteria Settings' dialog also has tabs for 'Basics', 'Destination', 'Comments', and 'Administration'. The 'Basics' tab is active and contains the following fields and options:

- Name:** A text input field.
- Description:** A text input field.
- ☐ **Enable archive criteria**
- How should documents be archived?**
  - ☒ Copy old documents into archive database; then clean up database
  - ☐ Clean up database without archiving
- How should documents be cleaned up?**
  - ☒ Delete older documents from the database
  - ☐ Reduce the size of documents in the database
- Which documents should be cleaned up?**
  - A dropdown menu showing 'not modified in more than' followed by a text input field containing '365' and a dropdown menu showing 'days'.
- Archive By View/Folder:**
  - Server:** A dropdown menu showing 'Local'.
  - Template:** A dropdown menu.
  - Change template server:** A text input field.
  - Choose template:** A dropdown menu.
- ☐ **In views or folders:**



## Archiving Criteria Document - Basics

- Enter a meaningful name
- Check Enable archive criteria
- For How should documents be archived, select Copy old documents; then clean up
- For How should documents be cleaned up, select Delete older documents
- For Which document should be cleaned up, select older than 365 days
- Pick a template server and archive template

### Archive Criteria Settings : 365 Days

[Basics](#)
[Destination](#)
[Comments](#)
[Administration](#)

#### Basics

Name: 365 Days

Description:

☒ Enable archive criteria

#### How should documents be archived?

☒ Copy old documents into archive database; then clean up database

☐ Clean up database without archiving

#### How should documents be cleaned up?

☒ Delete older documents from the database

☐ Reduce the size of documents in the database

#### Which documents should be cleaned up?

older than 365 days

**Note: 'older than' settings can only be applied to Domino 7 servers or later.**

Archive By View/Folder:

Server: hosted/STS

Template: Mail (R8.5)

Change template server: hosted/STS

Choose template: Mail (R8.5)

☐ In views or folders:

## Archiving Criteria Document - Destination

- The default values are OK
- Make sure if you change the suffix, that it still ends in .nsf
- Save and close

**Archive Criteria Settings : 365 Days**

Basics | **Destination** | Comments | Administration

**Path Information**

Archive Directory:	archive
Archive Prefix:	a_
Archive Suffix:	.nsf
Number of Characters from original filename:	6

[Preview an example:](#)  
archive\a\_dduke.nsf

## Archiving Document – Logging

- Logging is optional
  - We will enable it for at least the first few runs

Archiving Settings				
<a href="#">Basics</a>   <a href="#">Selection Criteria</a>   <a href="#">Logging</a>   <a href="#">Advanced</a>   <a href="#">Comments</a>   <a href="#">Administration</a>				
<b>Archive Logging</b>		<b>How to apply this setting:</b>	<b>Inherit from parent policy:</b>	<b>Enforce in child policies:</b>
<input checked="" type="checkbox"/> Log all archiving activity into a log database		<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<b>Path Information</b>		<b>How to apply this setting:</b>	<b>Inherit from parent policy:</b>	<b>Enforce in child policies:</b>
Log Directory:	<input type="text" value="archive"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Log Prefix:	<input type="text" value="l"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Log Suffix:	<input type="text" value=".nsf"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
Number of Characters from original filename:	<input type="text" value="50"/>	<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<input checked="" type="checkbox"/> Include document links to archived documents		<input type="checkbox"/> Don't set value	<input type="checkbox"/> Inherit	<input type="checkbox"/> Enforce
<a href="#">Preview an Example:</a> archive\l_dduke.nsf				

## Archiving Document – Advanced

- Ensure Delete a document only when the criteria can delete all responses as well is checked
- Save and close

**Archiving Settings : 365 Day Archiving**

Basics | Selection Criteria | Logging | **Advanced** | Comments | Administration

**Advanced Settings**

☒ Delete a document only when the criteria can delete all responses as well

Maximum document retention selection is: 99 Years

☐ Use customer generated expiration field

## Archiving Document – Advanced

- Ensure Delete a document only when the criteria can delete all responses as well is checked
- Save and close

**Archiving Settings : 365 Day Archiving**

Basics | Selection Criteria | Logging | **Advanced** | Comments | Administration

**Advanced Settings**

☒ Delete a document only when the criteria can delete all responses as well

Maximum document retention selection is: 99 Years

☐ Use customer generated expiration field

## Archiving Setup Complete

- We have successfully set up archiving from a settings perspective
- We will now assign this to an existing policy

Add Settings...          Edit Settings          Delete Settings			
Type	Setting Name ^	Description	Signed By
▼ Archive Settings			
	365 Day Archiving Settings		Darren Duke/STS
	Clean Expired Docs		Darren Duke/STS
▼ Archive Criteria Settings			
	365 Days		Darren Duke/STS
	Purge expired docs		Darren Duke/STS
▼ Connections Settings			
	Connections		Darren Duke/STS
▼ Desktop Settings			
	desktop		Darren Duke/STS
	LS10 Desktop Settings	Stuff to set automatically on Notes clients	Darren Duke/STS
▼ Mail Settings			

## Assign Archive to a Policy

- Simply select the new archive settings document in the archiving section

**Policy : /Internet password**

Basics | Policy Assignment | Policy Precedence | Comments | Administration

**Basics**

Policy name: /Internet password Create Child

Policy type: Explicit

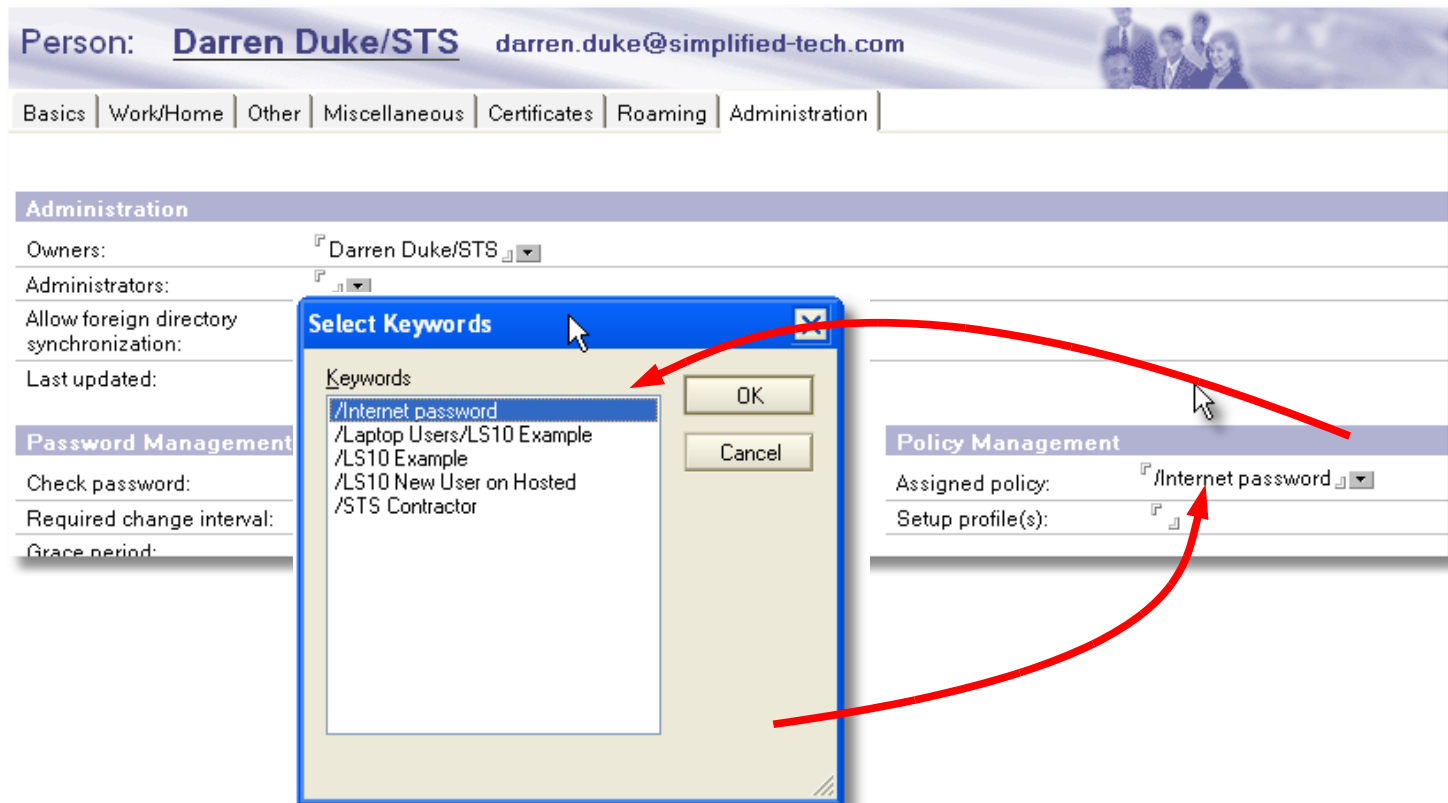
Description:

Category:

Setting Type	Setting Name	
Registration:	Employee Setup	New...
Setup:		New...
Archiving:	365 Day Archiving Settings	New...
Desktop:	desktop	New...
Security:	INET PW	New...

## Assign this Policy to a User Explicitly

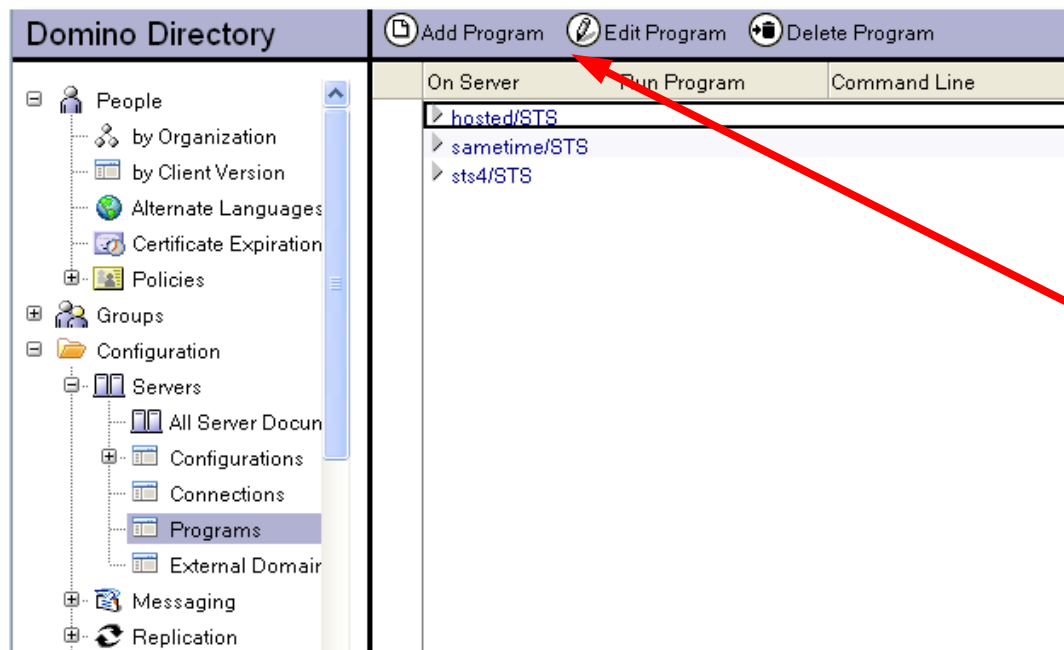
- For this example we will use yet another way to assign a policy, explicitly
- Open the user's Person document in the Domino Directory and navigate to the Administration tab
- Under Policy Management select the drop down list and select the correct explicit policy





## But we are not done yet!

- Unlike all other policy settings, archiving will not work automatically
- This policy only signifies the users' mail file is eligible for archiving
- We need to create a program document to run the archiving task on the server
- From the Domino Directory, select Configuration, Servers, Programs from the left navigator
- Click the Add Program action button



## Create the Program Document

- Enter the program name as “compact”
- Enter -A as the Command line
- Enter the Server to run on
- Enable the schedule
- Our run time will be 8:05PM every Friday
  - Note -A not only archives document from the source, but will also do file size reduction on the source database too
  - So no need to -B on these files

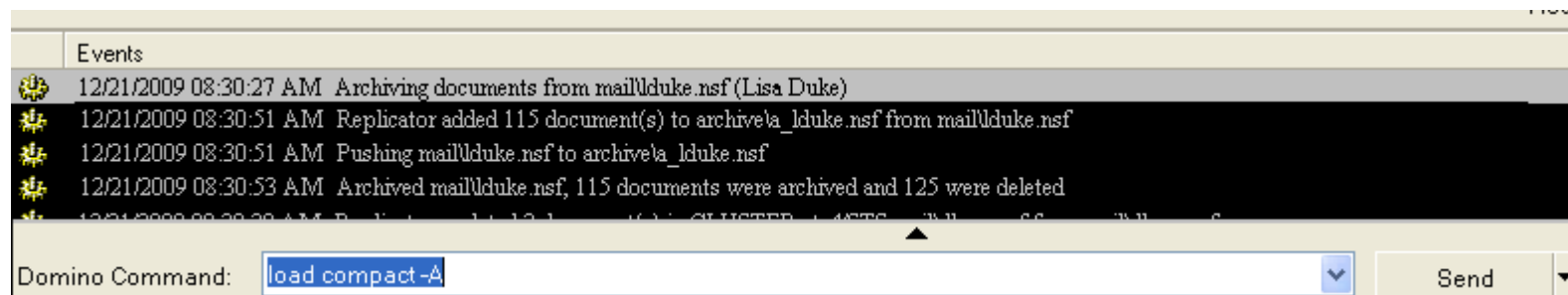
**Program: Compact**

Basics | Administration

Basics		Schedule	
Program name:	Compact	Enabled/disabled:	Enabled
Command line:	-A	Run at times:	08:05 PM each day
Server to run on:	hosted/STS	Repeat interval of:	0 minutes
Comments:		Days of week:	Fri

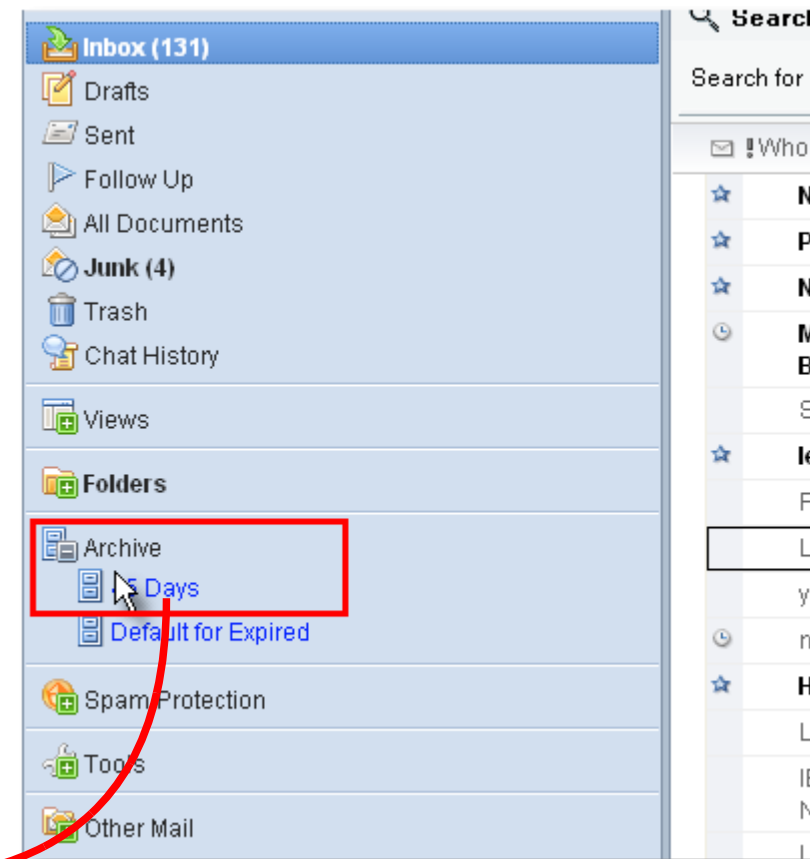
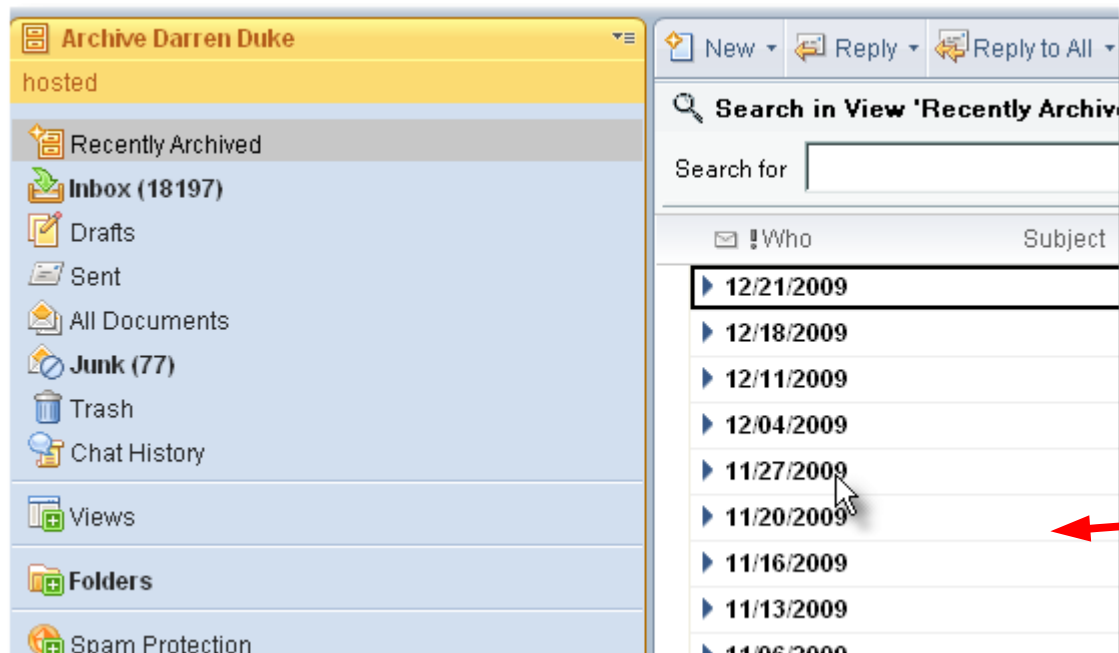
## Archiving Test

- You can either wait until 8:05PM on Friday, or run it from the Domino console. The latter is suggested
- Open a Domino console on the archive server and enter
  - Load compact -A
- All databases on that server eligible for archiving will be archived
  - New archive databases will be created if required
  - Documents are moved to the archive, then deleted from the mail file



## Lets take a look at what the user will see

- When an end users' mail file has an archive a new navigator item is added to their mail file
- Simply expand Archive on the left mail file navigator and click to open the archive



## Archiving Summary

- This is a policy setting that makes sense to set explicitly to users or groups (with Dynamic Policies)
- You still need to issue a “compact -A” or “compact -a” on the server to carry out any server side archiving
- If you use local archives, make sure you back them up
  - If you lose the drive, you lose the archive
- It can be very beneficial for the server
  - Less indexing
  - Keeps production mail files slim and svelte
- Archiving, like fiber and exercise, is good for you and your server even though no one likes it

## Example Policy

- Registration Settings
- Desktop Settings
- Mail Settings
- Security Settings
- Additional Policy for Laptop Users
- Archiving
- Other Settings

## Other Lotus Notes Policy Settings

- Setup Settings
- Roaming Settings
- Summary

## Policy Settings – Setup Document

- **Don't use this policy setting!**
  - All “Setup” options are now available in desktop settings documents
  - It is recommended you migrate to using desktop settings documents
- Allows you to set common options used when Lotus Notes is started for the first time by a user
- Sets options in the location document and user preferences
- As this is deprecated, see the Desktop Settings slide



## Other Lotus Notes Policy Settings

- Setup Settings
- Roaming Settings
- Summary

## Policy Settings – Roaming Document

- Allows a policy to control roaming
  - Easier to manage than manually setting on a per user basis
- See session SHOW103 for more details on roaming
- Again, Dynamic Policies can be your friend
  - Create a group called “Roaming Users”
  - Add a Dynamic Policy with this setting to this group
  - Add or remove users from group as required

**Roaming Settings**

Basics | Comments | Administration

---

**Basics**

Name:

Description:

---

File Server	Roaming Options	How to
Server name:	<input type="text" value="hosted/STS"/>	<input type="checkbox"/> Don't
Base folder:	<input type="text" value="roamingl"/>	<input type="checkbox"/> Don't
Sub-folder format:	<input type="text" value="Shortname"/>	<input type="checkbox"/> Don't
Example:	..roamingltamadol...	
Files that roam:	bookmark.nsf, roamingdata.nsf, notebook.nsf, names.nsf, localfeedcontent.nsf	<input type="checkbox"/> Don't
Show roaming setup dialogs:	<input type="text" value="No"/>	<input type="checkbox"/> Don't
Modifiable text for the first dialog:	<input type="text" value="Your Lotus Notes administrator has made you a 'roaming user' so that you can get all of your Notes data on different computers. You can continue to do your work and monitor the progress on the Replication tab."/>	<input type="checkbox"/> Don't
Text for the "Roaming complete" dialog:	<input type="text" value="The roaming user setup process is complete on this computer. Your Lotus Notes data will be the same on any computer."/>	<input type="checkbox"/> Don't
Data removal on local drives:	<input type="text" value="Do not remove data"/>	<input type="checkbox"/> Don't
Allow user to temporarily disable roaming:	<input type="text" value="No"/>	<input type="checkbox"/> Don't

## Other Lotus Notes Policy Settings

- Setup Settings
- Roaming Settings
- Summary

## Other Lotus Notes Policy Settings - Summary

- With other settings documents you can control a whole host of other Lotus Notes and end user related options
- Setup is deprecated, use desktop settings instead

## Agenda

- Who is this dude and what will I learn?
- Section 1 – A complete example, start to finish
- Section 2 – Understanding and Fixing Policies
- Session wrap up
- Q & A

## Understanding and Fixing Policies

- Demystifying the “How to apply this setting”
- When it all goes wrong

## Understanding Your Options

- Now we have created some policies, applied them and seem their results, it is time to take a look at the other options we have when applying setting values
- There are four possible options when applying settings and we didn't use them all
  - Don't set value
  - Set initial value
  - Set whenever modified
  - Set value and prevent changes
- Let's see some detailed examples

## Demystify “How to apply this setting”

- Check boxes and drop downs indicate setting exposure
  - Checkboxes - no Notes client setting is available for the user to change
    - Use Custom Password Policy (Security Settings)
  - Drop downs - the setting is exposed to the Notes client and the user may change
    - Spell-check messages before sending (Mail Settings)

**Mail Settings : LS10 Mail Settings**

Basics | Mail | Calendar and To Do | Access and Delegation | Lotus iNotes | Client Detection | Comments | Administration

Basics | Letterhead | Follow Up | Attention Indicators | Message Recall | Message Disclaimers

**User Configuration** | How to apply this setting | ☐ Don't set value

☐ Allow users to change mail file ownership | ☐ Don't set value

**Outgoing Mail Checking** | How to apply this setting |

Spell-check messages before sending: ☒ Yes |

Warn user about blank message subjects: ☒ Yes |

Don't set value  
Set initial value  
Set value whenever modified  
Set value and prevent changes

- We'll now look at how these options impact the user and the client using some of our examples from earlier



## Don't set value – drop down

- Even if a value is specified, no value is applied!
- Uses the initial client install setting
- End user can change the value on their client
- The setting is usually “off” or “disabled”

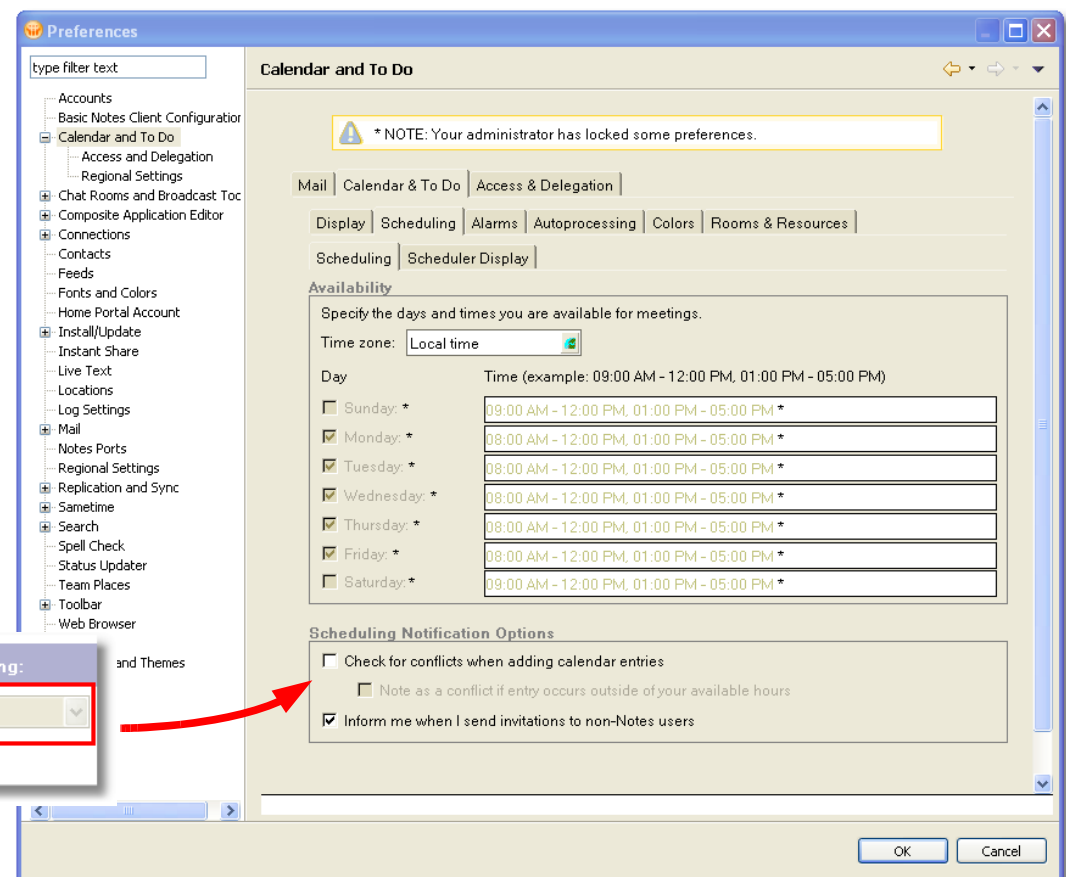
### When adding an Entry to Your Calendar

Check for conflicts when adding appointments, accepting meetings, scheduling a new meeting:

☒ Yes

### How to apply this setting:

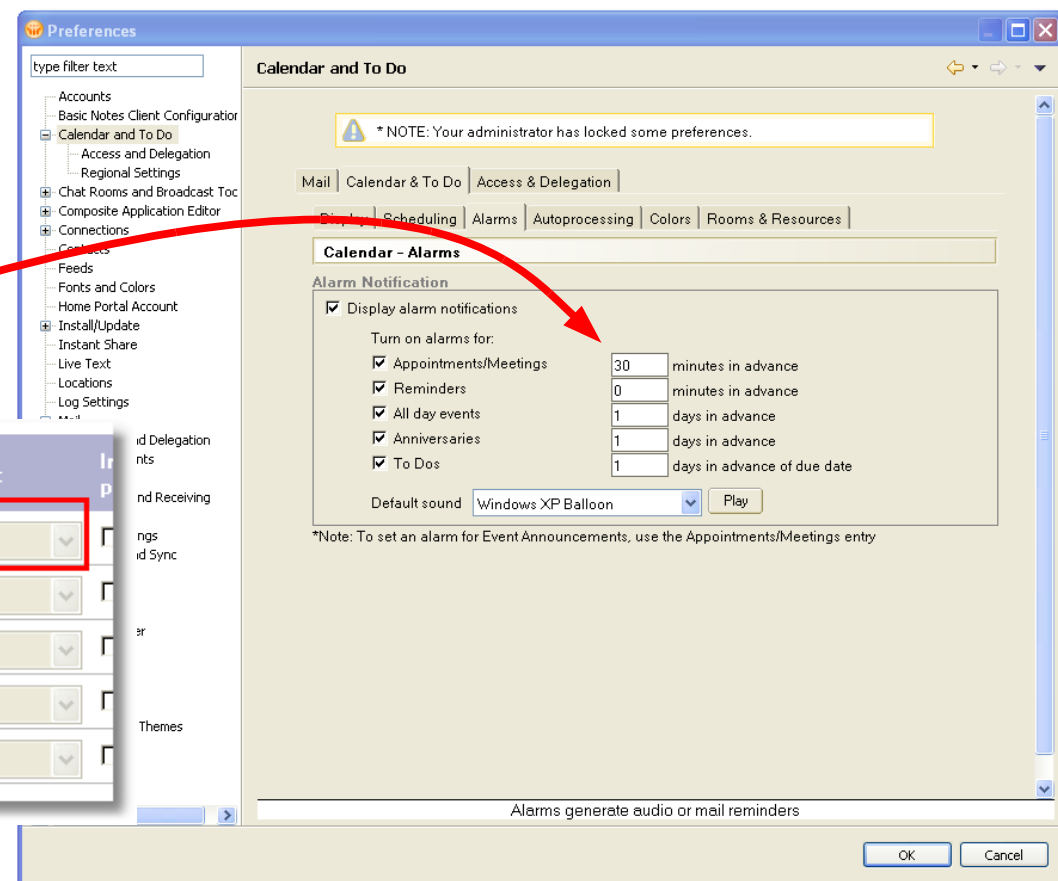
Don't set value



## Set initial value

- The setting specifies the “new” default value
  - And is sent to the end user a single time
- End user can change the value on their client
  - Then their custom value is used going forward

Default Alarm Settings When Creating a New Entry (On/Off)	How Far in Advance	How to apply this setting:
<input checked="" type="checkbox"/> Appointments/Meetings	30 minute(s) in advance	<span>Set initial value</span>
<input checked="" type="checkbox"/> Reminders	0 minute(s) in advance	<span>Set initial value</span>
<input checked="" type="checkbox"/> Events	1 day(s) in advance	<span>Set initial value</span>
<input checked="" type="checkbox"/> Anniversaries	1 day(s) in advance	<span>Set initial value</span>
<input checked="" type="checkbox"/> To Do	1 day(s) in advance of due date	<span>Set initial value</span>



## Set value whenever modified

- The newest option and the least useful
- End user can change the value on their client
- However, the end users' value is overwritten by the policy
  - This “refresh” happens when the policy is applied, approx every 12 hours
  - If you have end users you hate, this is for you
    - You can drive them insane
- I can't really think of a use for this

## Set value and prevent changes

- The value you specify is used in the client
- End user cannot change the value on their client
  - It will most likely be grayed out and disabled on the client

Your Availability		How to apply this setting:
<input type="checkbox"/> Sunday		Set value and prevent changes
<input checked="" type="checkbox"/> Monday	08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM	
<input checked="" type="checkbox"/> Tuesday	08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM	
<input checked="" type="checkbox"/> Wednesday	08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM	
<input checked="" type="checkbox"/> Thursday	08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM	
<input checked="" type="checkbox"/> Friday	08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM	
<input type="checkbox"/> Saturday		

Preferences

Calendar and To Do

\* NOTE: Your administrator has locked some preferences.

Mail | Calendar & To Do | Access & Delegation

Display | Scheduling | Alarms | Autoprocessing | Colors | Rooms & Resources

Scheduling | Scheduler Display

Availability

Specify the days and times you are available for meetings.

Time zone: Local time

Day

☐ Sunday: \*

☒ Monday: \*

☒ Tuesday: \*

☒ Wednesday: \*

☒ Thursday: \*

☒ Friday: \*

☐ Saturday: \*

Time (example: 09:00 AM - 12:00 PM, 01:00 PM - 05:00 PM)

09:00 AM - 12:00 PM, 01:00 PM - 05:00 PM \*

08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM \*

08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM \*

08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM \*

08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM \*

08:00 AM - 12:00 PM, 01:00 PM - 05:00 PM \*

09:00 AM - 12:00 PM, 01:00 PM - 05:00 PM \*

Scheduling Notification Option

☐ Check for conflicts when adding calendar entries

☐ Notify of conflict if entry occurs outside of your available hours

☒ Inform me when I send invitations to non-Notes users

OK Cancel

## How to Apply Summary

- Now we know
  - How settings will be applied
  - When settings will be applied
  - What settings will be applied
- But what happens when things don't go as expected?
  - Funny you should ask. That's next....

## Understanding and Fixing Policies

- Demystifying the “How to apply this setting”
- When it all goes wrong

## When it all goes wrong

- What to check if policies are not quite working right...

## If you can't create policies

- If it appears you can't create or edit policies, check the ACL
  - You need [PolicyCreator] to add rules
  - You need [PolicyModifier] to edit rules
  - You need [PolicyReader] to read rules
- Policy documents are encrypted...
  - With the Owners ID
  - Guess what happens when the owner leaves...
    - They stop working
    - They will need to be re-saved
    - So always populate the “Administrators” field

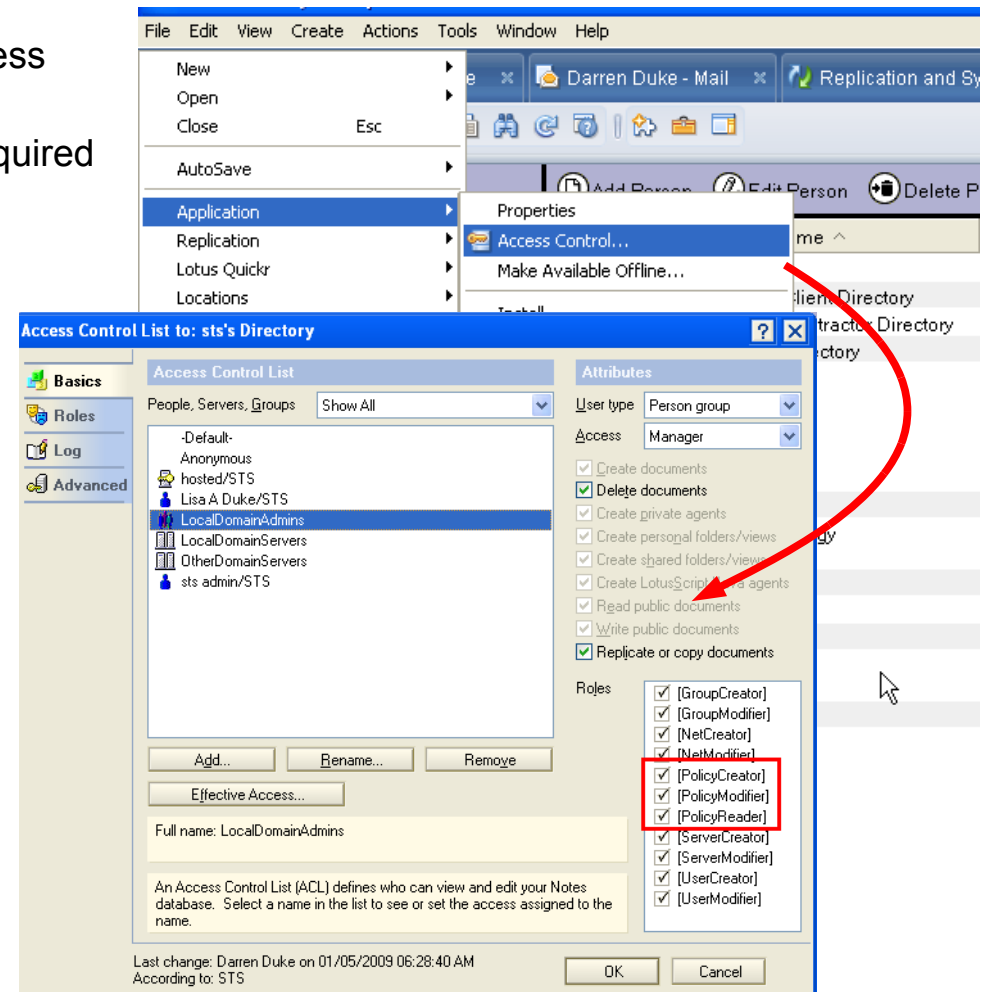
<input type="checkbox"/>	[GroupCreator]
<input type="checkbox"/>	[GroupModifier]
<input type="checkbox"/>	[NetCreator]
<input type="checkbox"/>	[NetModifier]
<input type="checkbox"/>	[PolicyCreator]
<input type="checkbox"/>	[PolicyModifier]
<input type="checkbox"/>	[PolicyReader]
<input type="checkbox"/>	[ServerCreator]
<input type="checkbox"/>	[ServerModifier]
<input type="checkbox"/>	[UserCreator]
<input type="checkbox"/>	[UserModifier]

Policy : /Internet password	
Basics	Policy Assignment
Policy Precedence	Comments
Administration	
Administration	
Owners:	Darren Duke/STS
Administrators:	LocalDomainAdmins
Exception Policy:	<input type="checkbox"/> Ignore settings from ancestor policies
Last updated:	09/06/2006 06:25:47 PM Darren Duke/STS



## If you can't create policies

- Open the Domino Directory
- The edit the ACL with the File, Application, Access Control menu
- Select the user or group and check mark the required rules
- Click OK
- Close the Domino Directory
- Reopen and try again

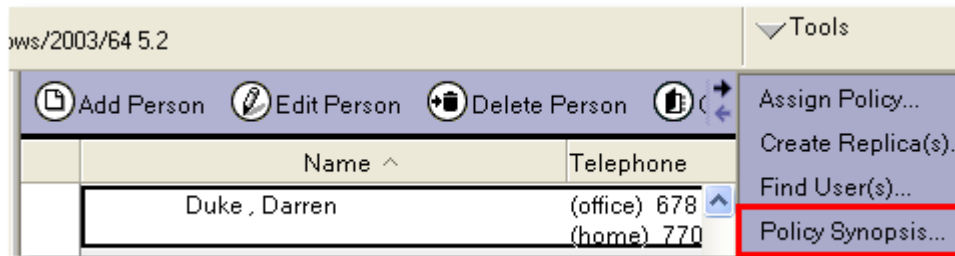


## Troubleshooting Policies

- Make sure the “How this setting is applied” is correct
- Make sure the user is assigned the policy
- If archiving on the server ensure compact is correctly configured
- Finally, understand the “effective policy” that a user has applied
  - There is a tool to do just that
- It could be the policy or it could be the client
  - Let's see how to troubleshoot

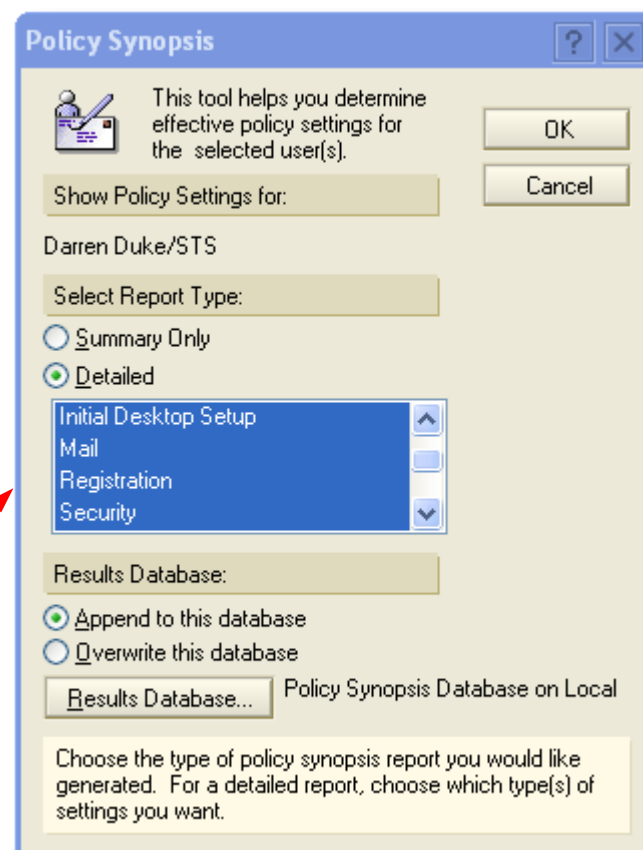
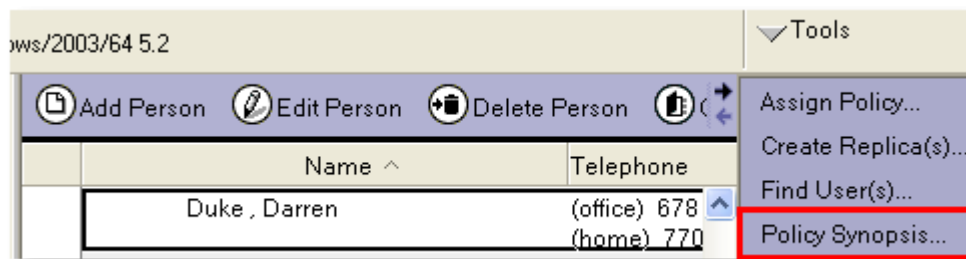
## Let's look at an effective policy

- With so many different ways of assigning a policy it can be useful to understand how they are evaluated and assigned
  - Organization level policies are applied first
  - Explicit policies with dynamic policies are applied next
  - Finally, explicit policies without dynamic policies are applied
- This can still be difficult to resolve the exact policy a user is assigned and how they are assigned it
  - Policy Synopsis is your friend
  - Available from the Person view in Domino Administrator



## Using Policy Synopsis

- Select a user from the person view in Domino Administrator
- Expand Tools and click “Policy Synopsis”
- Select the desired options
  - Hold CTRL to select multiple “Detailed” reports
  - Select a synopsis database location
  - Hit OK
  - The synopsis DB will open
  - Default DB is local/polcysyn.nsf



## Reading a Policy Synopsis

- Open the “Policy Synopsis Database”, and the synopsis document
- Each policy setting field is listed with its value
- It helps if you know the field names ;)

**Policy Synopsis** for Darren Duke/STS from Domino Directory on server hosted/STS created at 12/13/2009 01:08:29

Effective Policy for: [Darren Duke/STS](#)

Blue text are hotspot links to the appropriate Notes document

Derived from the following policies:

[/Internet password](#)  
[\\*/STS](#)

How were the effective settings derived?

Lock signifies enforcement

\*

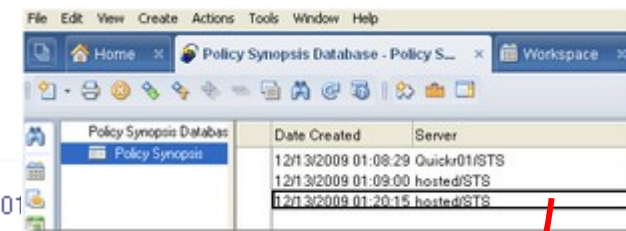
= Value was enforced in the specified settings document.

### Archive Settings:

ACP = 0EF8D4D4540CA72085257112005FE33B from [45 Day Archiving](#) assigned in policy [/Internet password](#)

ACPDsp = 45 Days from [45 Day Archiving](#) assigned in policy [/Internet password](#)

ACPDsp = 45 Days from [45 Day Archiving](#) assigned in policy [/Internet password](#)



Policy Synopsis Database	Date Created	Server
Policy Synopsis	12/13/2009 01:08:29	Quickr01/STS
	12/13/2009 01:09:00	hosted/STS
	12/13/2009 01:20:15	hosted/STS

## Reading a Policy Synopsis

- Let's say that I need to find out the password length for a specific user
  - Search the synopsis document for “PasswordQuality”, this is the field name that we are interested in
  - As we can see, the setting is 8, but we can also see how the setting was derived
  - We now know that the “LS10 Example” policy and the “LS10 default security settings” settings document is how and where these settings are being assigned

PWExpWarnDays = 30 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
**Parameters does not have a value set**  
PasswordChangeInterval = 90 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
PasswordGracePeriod = 15 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
**PasswordQuality = 8 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)**  
PwdAlphaMin = 1 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
PwdAlwHTTP = 1 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
PwdCNAllow = 0 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
PwdChgPostReset = 1 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)  
PwdChk = 1 from [LS10 default security settings](#) assigned in policy [/LS10 Example](#)

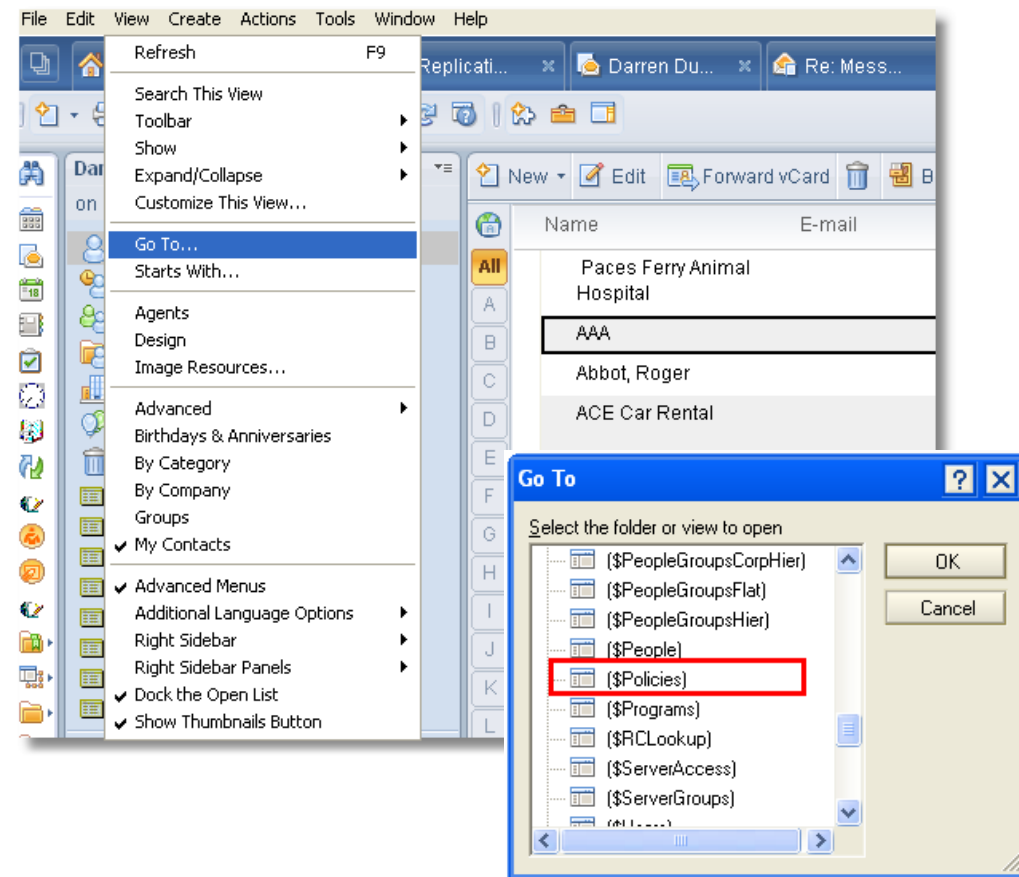
## Sometimes the issue can be on the Lotus Notes client

- If the effective policy looks OK, then
  - It maybe a corrupted policy document on the client
  - Remember the client has settings applied to it from the server
    - These settings are stored in the users' local address book
    - As with all things Notes, these settings are just Notes documents
    - And they can be deleted, just like any other document

Policy Type or Name	Policy Name   UNID
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C85257478002E0940
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C8525747A0055CFBD
[Replication or Save Conflict]	
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C85257482004D4F44
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C8525748D00737590
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C852574930051A7D9
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C8525749C007D7FA5

## Deleting local policy documents

- Open the local names.nsf file for the user in question
- From the view menu, select Go To while holding down the Shift and Control keys
  - Shift + Control will show hidden views
- Select the view (\$Policies) in the dialog





## Deleting local policy documents

- In the (\$Policies) view you will see a series of policy documents
- To reset all policies on the client simply delete all of the policy documents from this view
- Restart the affected Lotus Notes client and the policies will be retrieved from the server
- Mail policies may take up to 12 hours, as they are controlled by AdminP

Policy Type or Name	Policy Name   UNID	PolLastMod	Effective Policy Name
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C85257478002E0940		SecSets CN=Dar Duke/O=STS
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C8525747A0055CFBD		SecSets CN=Dar Duke/O=STS
[Replication or Save Conflict]			
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C85257482004D4F44		SecSets CN=Dar Duke/O=STS
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C8525748D00737590		SecSets CN=Dar Duke/O=STS
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C852574930051A7D9		SecSets CN=Dar Duke/O=STS
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C8525749C007D7FA5		SecSets CN=Dar Duke/O=STS
PolicySecurity	Effective Policy for: Notes Admin/FPPW DAF664D689B61F50852574A300496E88		SecSets CN=Not Admin/O=FPPW
PolicySecurity	Effective Policy for: Darren Duke/STS E59018E537F9057C852574B7005AD832		SecSets CN=Dar Duke/O=STS
PolicySecurity	Effective Policy for: Notes Admin/FPPW DAF664D689B61F50852574A300496E88		SecSets CN=Not Admin/O=FPPW

## Agenda

- Who is this dude and what will I learn?
- Section 1 – A complete example, start to finish
- Section 2 – Understanding and Fixing Policies
- Session wrap up
- Q & A

## Session wrap up

- In this session we have seen how
  - Policies can be used to alleviate apparent end user issues with Lotus Notes
  - Lotus Notes can do complex password requirements
  - You can force Lotus Notes users to change their password the first time they use Lotus Notes
  - To create a series of useful settings and assign them to an organization policy and/or an explicit policy
- We have also learned
  - How to use the Policy Synopsis tool
  - That other Lotus Notes policy settings can have a beneficial impact on server and end user management

## Other sessions you may want to attend

- SHOW101- Step by Step: Install, Manage and Configure DAOS and ID Vault
- BP102 - Adminblast 2010: Over 60 Tips in 60 Minutes!
- SHOW106 - Configuring the Tivoli Directory Integrator for IBM Lotus Domino and Active Directory
- SHOW103 - Roaming in IBM Domino 8.5: Configure the Best Choice for Your Servers
- BP106 - The Top 11 Tips for Keeping Your Servers Healthy

## Agenda

- Who is this dude and what will I learn?
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## Questions (and hopefully Answers)

- ???????

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