
IBM Notes Plug-in Installation Guide

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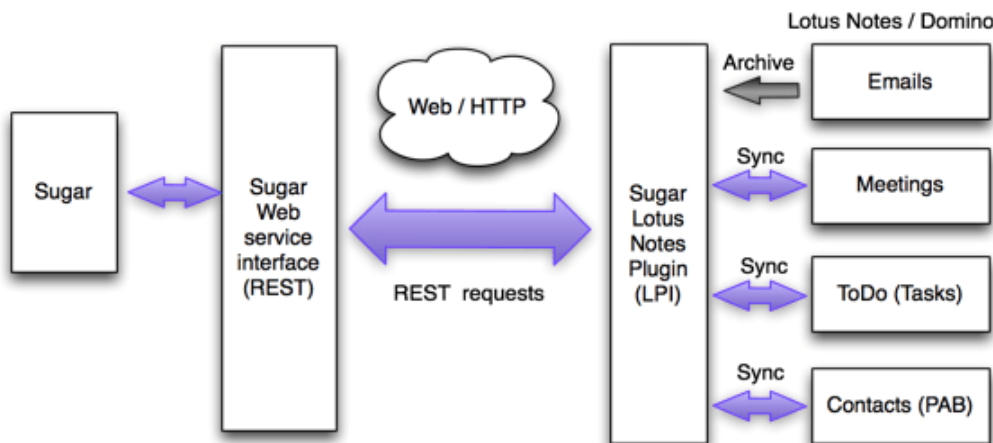
IBM Notes Plug-in Installation Guide

Overview

Sugar's Plug-in for IBM Notes (formerly IBM Lotus Notes) allows emails to be archived from IBM Notes to Sugar as well as allowing meetings, tasks, and contacts to be synchronized between Notes and Sugar. The installer allows you to modify the IBM Notes Mail Template and Mail Database. The IBM Notes Plug-in uses web service (REST) requests to exchange data between IBM Notes and the Sugar instance.

Note: Emails in Sugar cannot be synced to IBM Notes.

The image below represents the relationship between the Sugar instance, IBM Notes, and the Sugar Plug-in for IBM Notes:



For a complete list of platform requirements and supported environments, please refer to the [Plug-ins Supported Platforms](#) page.

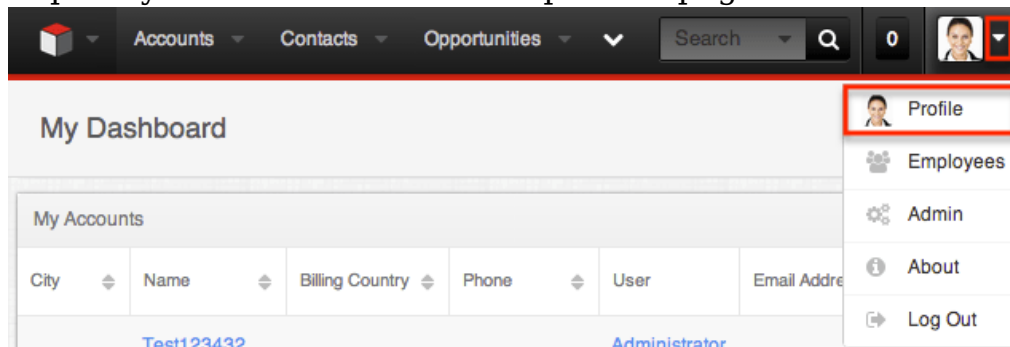
Installing the IBM Notes Plug-in

The IBM Notes Plug-in can be installed and used with Domino and other email servers.

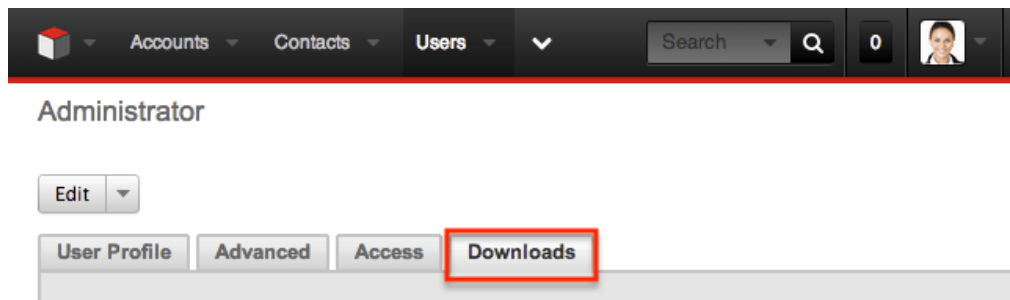
Client-Side Installation and Upgrade for End Users

The IBM Notes Plug-in can be installed on the IBM Notes client using a downloaded widget file. To install a new version of the plug-in, follow the instructions listed below:

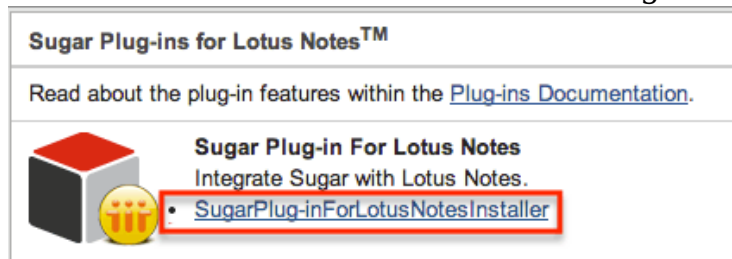
1. Log into your Sugar instance.
2. Expand your user menu at the top of the page and select "Profile".



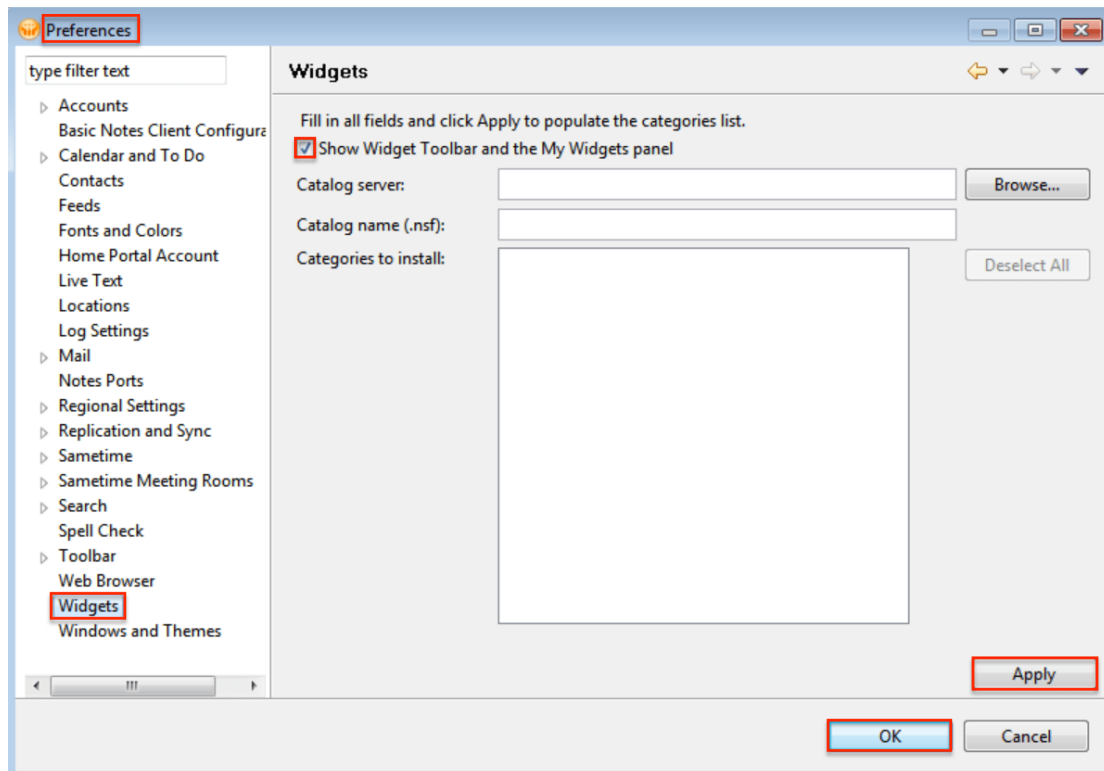
3. Click the Downloads tab.



4. Download the .xml file by right clicking on "SugarPlug-inForLotusNotesInstaller" and selecting "Save Target As".

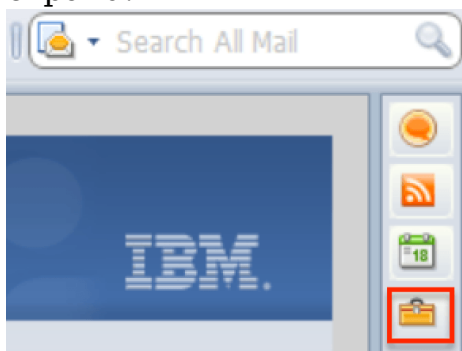


5. Open IBM Notes and confirm that the widget panel is enabled. To do this, go to Preferences > Widgets and verify that the "Show Widget Toolbar and the My Widgets panel" checkbox is selected.



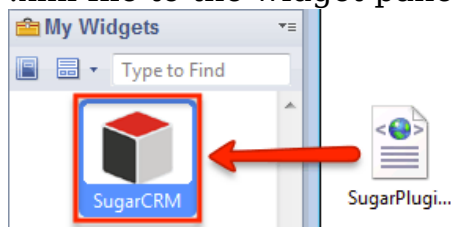
If not, check the box, click "Apply", and click "OK".

6. The Widgets icon should now appear on the right panel. Click on it to expand.



7. Drag and drop the IBM Notes Plug-in widget (.xml file) into the IBM Notes widget panel.

Note: To upgrade to a new version of the plug-in, drag the new version's .xml file to the widget panel and replace the existing version.

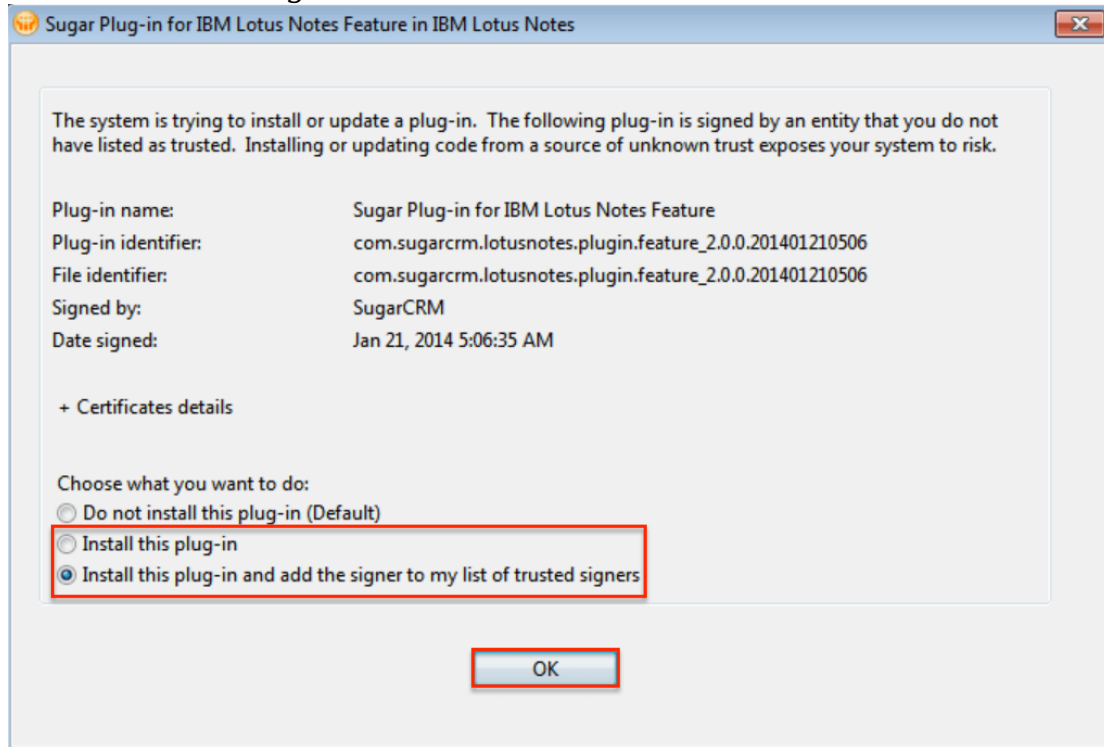


8. A pop-up will appear with the following options. Select the desired option and click "OK"

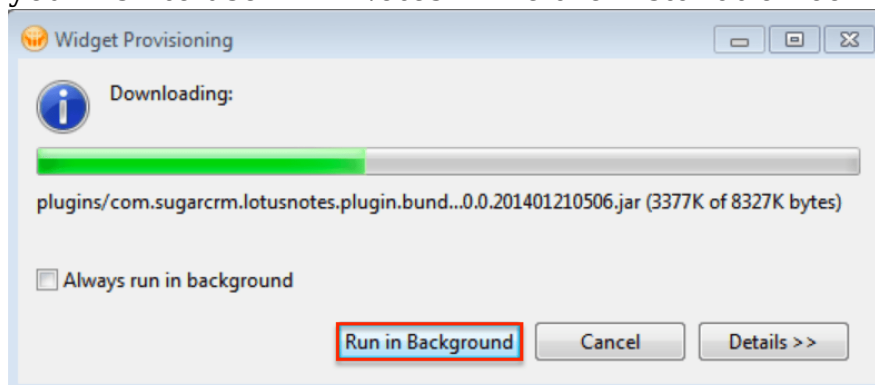
- **Do not install this plug-in** : Cancel installing the IBM Notes plug-

in by selecting this option.

- **Install this plug-in** : Install the IBM Notes plug-in without adding Sugar to your list of trusted signers by selecting this option.
- **Install this plug-in and add the signer to my list of trusted signers** : Install the IBM Notes plug-in and add Sugar to your list of trusted signers. You will not be prompted to confirm if Sugar is a trusted signer in the future.



9. The IBM Notes Plug-in will begin installing. Choose "Run in Background" if you wish to use IBM Notes while the installation completes.

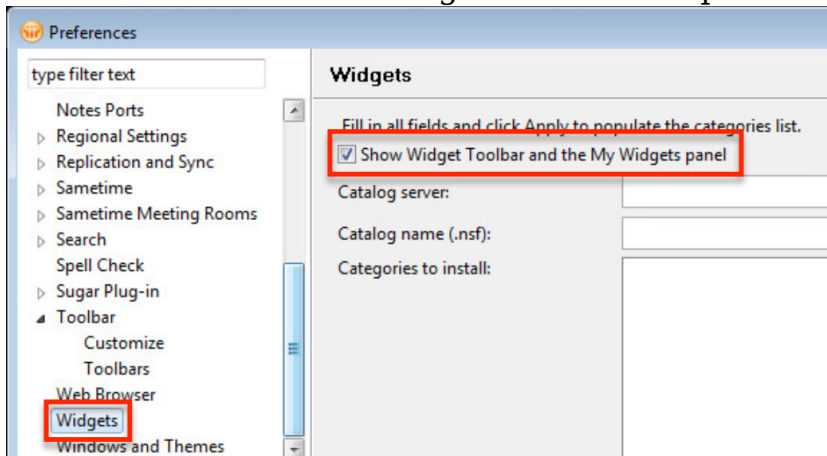


10. Once completed, restart IBM Notes.

After restarting IBM Notes, you should see a Sugar Cube icon in the IBM Notes toolbar:



If you do not see the Sugar Cube icon, navigate to File > Preferences > Widgets and ensure the "Show Widget Toolbar..." option is enabled:



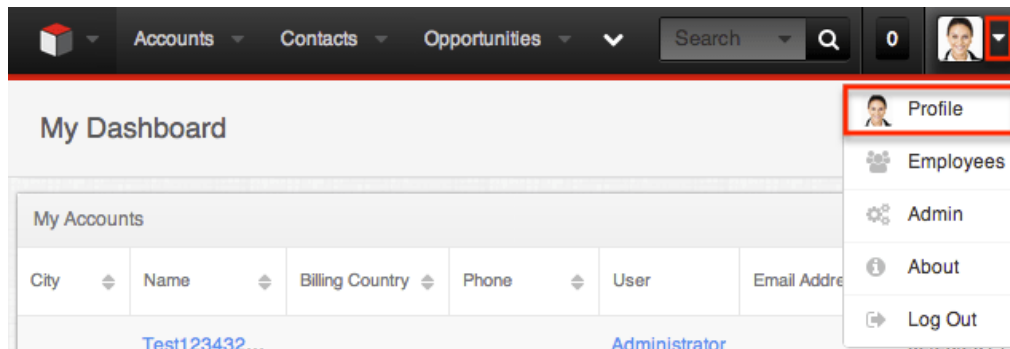
After successfully installing the plug-in, please refer to the [IBM Notes Plug-in User Guide](#) for steps to connect with Sugar, configure your sync settings, and use the plug-in.

Mass Deployment from Domino Server

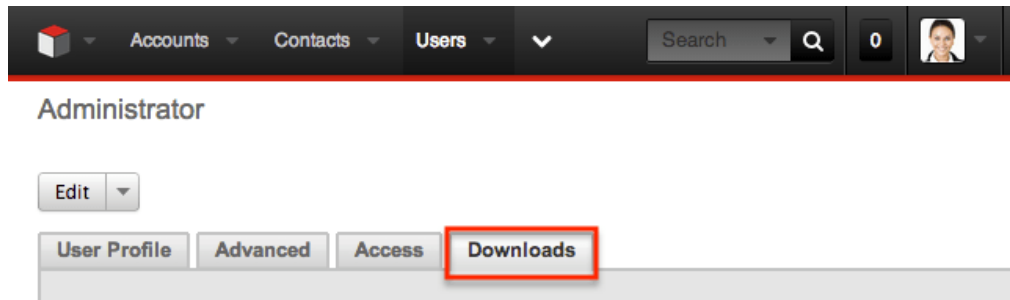
New installations and upgrades of the IBM Notes Plug-in can easily be deployed to all or a group of users via IBM Domino server desktop policy. In-depth information is available in the [IBM Domino](#) documentation. For additional assistance with installing and configuring a Domino server, please see IBM's [Deploying client plug-ins with widgets and the widget catalog](#) and [Creating a desktop policy settings document](#) articles for your version of IBM Domino.

Setting Up the Widget Document

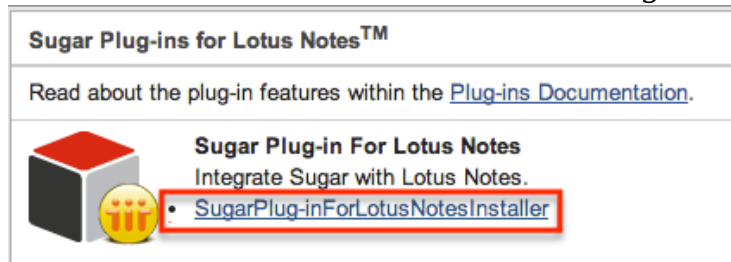
1. Log into your Sugar instance.
2. Expand your user menu at the top of the page and select "Profile".



3. Click the Downloads tab.



4. Download the .xml file by right clicking "SugarPlug-inForLotusNotesInstaller" and selecting "Save Target As".



5. Create a Widget catalog .nsf file using the widget catalog template. It should have the name "toolbox.nsf".
6. Open the newly created .nsf file.
7. Open the By Category view.
8. Choose "Add widget to catalog".
9. Enter the title as "Sugar Plug-in for IBM Notes".
10. Enter the category as "SugarCRM".
11. Choose the "IBM Notes 8.5.2" platform or above.
12. Check the "Plug-in and Features" checkbox and make sure all other checkboxes are unchecked.
13. Provide a short description.
14. Choose "Attach" and attach the downloaded plug-in widget .xml file.
Note: To upgrade to a new version of the plug-in, attach the new version's widget in the widget catalog document and replace the existing version.
15. Save the widget document.

Setting Up the Domino Server Backup Policy

1. Open the Domino Server Directory > names.nsf.

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2. Expand the Policies tab and select "Settings".
 3. Choose Add Settings > Desktop.
 4. Enter a name for the policy (e.g. "SugarPlug-in").
 5. Open the Widgets tab.
 6. Enter the details of the new widget catalog created in the steps above:
 - Server
 - Database Path / Name
 - Category
 7. Save the desktop policy document.
 8. Open the People or Users view.
 9. To deploy the plug-in "For any user".
 10. Open the User Document.
 11. Go to the Administration tab > Policy Management.
 12. Select the policy created above. The Domino server will now push the widget to all users with the policy assigned.

After deploying the plug-in, users can refer to the [IBM Notes Plug-in User Guide](#) for steps to configure their sync settings and use the plug-in.

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