

# Lotus cc:MAIL

## Quick Reference Card

*cc:Mail Mobile Release 6 for Windows*

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### Installing cc:Mail Mobile

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Run INSTALL.EXE from a CD-ROM drive, a disk drive, or a network drive.

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### Getting Help

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Press **F1** in any window or dialog box.

Choose a command from the Help menu.



From a Help topic, click the related topics icon to see a list of related topics.

Choose Search from a related topic popup to find a topic by keyword.

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### Collecting the information you need before logging in

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Get the following information from your cc:Mail administrator before logging in for the first time.

**Name of your home post office:**

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**Telephone number of your home post office:**

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**Your cc:Mail user name and password:**

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**Note** Keep your password secure, and do not write it down where others can see it.

If you are not familiar with Mobile concepts, see the last page of this card.

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### Logging in for the first time

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1. Double-click the cc:Mail Mobile program icon.
2. Enter your user name or select it from the Log-in Name list box.
3. Enter your password.
4. Select Mobile mode.
5. Enter the post office path in the P.O. Path box. For example,  
C:\LOTAPPS\CCMOBILE\CCDATA1
6. Click OK.
7. When asked if you want to create a new post office, click OK.

**Note** These instructions tell you how to connect using a basic phone connection. To use another type of transport, choose Help - How Do I? - Configure Mobile Communications.

8. In the Home Post Office Setup dialog box, enter the name of your home post office in the PO Name field.
9. (Optional) Enter comments in the Comment field.
10. By default, the Address Type is set to Phone. If necessary, select a different address type.
11. Select the country from the Country list box.
12. Enter the telephone area or city code of the home post office in the Area/City Code box.
13. Type a telephone number for the home post office in the Local Number box.
14. Click Add.
15. Click OK.

16. The Edit Communication Method dialog box default settings work for most telephone connections:

Setting	Default Value
Method Name	Default Communication Method
Method Type	Modem
Modem Type	Default
Speaker Volume	Medium
Serial Port	COM2
Speed	9600

If these settings are correct for the communication method that you will use to connect to your home post office, click OK.

18. When you see a message confirming that you've successfully installed a cc:Mail Mobile post office, click OK.
19. If you see a confirmation message, click OK.

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## Adding users to your Mobile Directory automatically

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1. Choose Mobile - Mobile Setup.
2. Select Add Author to Mobile Directory on opening new mail.
3. Click OK.

Each time you open a message from someone who is not in your Mobile Directory, that person's address is added to your Mobile Directory.

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## Adding users to your Mobile Directory manually

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1. Choose Mobile - New Directory Entry.
2. Click User.
3. Enter the user name (usually in last name, first name format).
4. (Optional) Enter a comment that describes the user.
5. Click OK.

You can now address to this person.

**Tip** You can also drag and drop addresses from messages into your Mobile Directory.

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## Addressing to users not in your Mobile Directory

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If the person you want to address to isn't in your cc:Mail Mobile Directory but is in your LAN Directory, you can address to that person through your home post office.

1. Begin preparing your message.
  2. In the Address box, enter the name of your home post office; for example, Silver-HQ, and press **ENTER**.
- Tip** The name of your home post office should appear when you start typing it.
3. Enter the exact name of the person in the Post Office Addressing dialog box (in first name last name format).
  4. Click Add to List.
  5. Select the name from the list and click OK.
- Tip** Use this process to address to Internet users. Include your Internet gateway name at the end of the address; for example, jvalentine@silver.com at Internet-Mail.
- Tip** If you address to this person frequently, it's easier to add the address to your Mobile Directory.

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## Creating and sending messages

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1. Choose Message - New Message.
  2. Start typing the recipient's name (usually in last name, first name format) in the Address box.
  3. When the name that you want appears in the Address box, press **ENTER**.
- Tip** See "Addressing to users not in your Mobile Directory" in this card if you do not see names as you type them in.
- Tip** You can also drag and drop recipients from other messages.
4. Repeat steps 2 and 3 for each recipient.
  5. Press **ENTER** again or click anywhere in the Subject box.
  6. Type a subject for your message (up to 60 characters) and press **ENTER**.
  7. Type your message in the item-view pane.
  8. Choose Message - Send to send the message to your Outbox.
  9. Choose Mobile - Send Only or Mobile - Send/Receive Mail.



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## Receiving messages

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1. Choose Mobile - Receive Only or, if you have outgoing messages as well, choose Mobile - Send/Receive.



The unread messages in your LAN Inbox are transmitted to you.

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## Filtering incoming messages automatically

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1. Choose Mobile - Filters.
2. Select the filtering options that you want to apply.

**Tip** Choose Help - How Do I? - Send and Receive Messages - Filtering messages automatically for a description of filter options.

3. Click OK.

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## Filtering incoming messages manually

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1. Choose Mobile - Filters.
2. Select Preview message summaries.
3. Enter the number of seconds that you want the Message Summary dialog box to display.

**Tip** The default is 10 seconds. Incoming messages are downloaded if you don't respond within this time.

4. Click OK.
5. When you see the Message Summary dialog box in cc:Mail Background, choose one of the following options:

Accept—Downloads the message

Reject—Does not download the message

Stop—Does not download the message and terminates the connection

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## Keeping a log of your communications sessions

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1. Choose Mobile - Mobile Setup.
2. Select Save cc:Mail Background session log.

3. Click OK.

The session logs are stored as messages in your Session Log folder.

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## Securing cc:Mail Background

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You can hide post office phone numbers and calling card numbers, and deactivate message summaries.



1. Choose Mobile - Mobile Setup.
2. Select the “Enable restricted display in cc:Mail Background” checkbox.

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## Exchanging messages between your LAN and Mobile mailboxes

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1. Log in to either LAN mode or Mobile mode.



2. Choose Mobile - Docking Mode.
3. If necessary, select the mode in which you want to dock.
4. Verify that the login name and post office path are correct.
5. Enter your password.
6. Click OK.
7. Select the messages that you want to copy or move.



8. Choose Mobile - Copy to Docked Account or Mobile - Move to Docked Account.



9. Choose Exit Docking Mode.

10. Click Yes.

**Tip** If you want to see the results of your copy or move, exit from cc:Mail Mobile and log in to the other mode (LAN or Mobile).

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## Creating location profiles

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1. Choose Mobile - Locations.
2. Click New.
3. Type a name and select an icon that represent the location from which this profile is used.
4. Click OK.
5. Configure your new location profile.

**Tip** Choose Help - How Do I? - Configure Mobile Communications and then choose one of these sections:

- Setting telephone options
- Setting communications options
- Setting schedule options

9. Click OK to save your new profile.

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## Selecting different location profiles

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Select the profile that you want from the popup menu in the status bar.

You can also select a location profile when you log in. Choose Help - How Do I? - Configure Mobile Communications - Selecting a location profile for information.

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## Creating or editing communication methods

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1. Choose Mobile - Locations.
  2. Select the location profile that you want to configure from the Current Location list box.
  3. Select the Communications component.
  4. To create a new communication method, click New.  
or  
To edit an existing method, select the method and click Edit.
  5. Enter a name that describes the communication method in the Method Name box.
  6. Select a communication method type from the Method Type list box.
- Note** The following steps use the Modem method type as an example. To use another type of transport, choose Help - How Do I? - Configure Mobile Communications.
7. If you're using a modem connection, select the modem that you're using from the Modem Type list box.
  8. (Optional) Select the volume at which the phone connection is played from your PC from the Speaker Volume list box.
  9. Select the port that you'll use to make your connection from the Serial Port list box.
  10. Select the speed that applies to your modem from the Speed list box.
  11. Click OK.

**Note** New communication methods appear in the List of Communication Methods for each location profile and are enabled by default.

**Note** Modified communication methods remain in their previous settings (either enabled or disabled) in the List of Communication Methods for each location profile.

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## Changing your post office name or address

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1. Choose Mobile - Mobile Setup.
2. Click Edit Address.
3. Type a new name for your home post office in the PO Name field.
4. (Optional) Type comments in the Comment field. Comments appear in your Mobile Directory.
5. By default, the Address Type is set to Phone. If necessary, select a different address type.

**Note** The following steps use the Phone address type as an example.

6. Select the country from the Country list box.
7. Type the telephone area or city code of the home post office in the Area/City Code box.
8. Type a telephone number for the home post office in the Local Number box.
9. Click Replace to replace an existing address, or click Insert to insert an address above an existing address.
10. If you have more than one telephone number for your home post office, add them all so that each is tried in succession.

**Tip** You can also add and delete addresses at this point.

11. Click OK to return to the Mobile Setup dialog box.
12. Click OK to close the Mobile Setup dialog box.

**Note** You must have a valid communication method for each address type. See "Creating and editing communication methods" in this card.

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## Confirming Directory updates

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1. Choose Mobile - Mobile Setup.
2. Select Confirm to Process Directory Updates.
3. Click OK.

You'll see a confirmation message when you receive Directory update messages so that you can choose to process them immediately or to defer processing.

# Processing a Directory update message immediately

Depending on the size of your cc:Mail Directory and the size of the update messages, processing may take several hours. If necessary, ask your cc:Mail administrator for an estimate of how long processing will take.

1. Click OK to process the messages now.  
or  
Click Cancel to postpone processing the messages.
2. If you click OK, wait until processing is complete.

**Tip** Choose Help - How Do I? - Address Messages - Building your Mobile Directory for information on delaying processing of Directory update messages.

## Troubleshooting connection problems

If you receive a cc:Mail Background error message, note the number of the message and look it up in the Help - How Do I? - Troubleshooting - cc:Mail Background error messages topic (the most common problems are included in the following table).

If you're using a modem and having connection problems, verify that you're using the correct modem file.

If you can't solve the problem after trying the solutions listed, contact your cc:Mail administrator with the following information:

- cc:Mail product name and release number
- Type of hardware
- Operating system and version number
- Exact text of the message you received
- What you were trying to do when you received the error
- Type of modem or other connection type
- Exact number of the cc:Mail Background message you received
- A copy of the session log containing the error message, preferably including Diagnostics.

## cc:Mail Background error messages

Message	Solution
[1000]: Post office did not answer or Packet mismatch.	Try again later.  Check that the correct modem file is selected.  Lower the baud rate (to 9600).  Verify the modem selection, DIP switch settings, and phone number.
[1001]: Data connection not requested.	Check that the correct modem file is selected.  Lower the baud rate (to 9600).  Verify the modem selection, DIP switch settings, and phone number.
[1002]: Data connection lost.	If you're expecting a call, verify that Error Correction is set to Automatic.  Try calling back to see if the post office is shut down.  Check that the hardware flow control is set (on the modem).
[1020]: No valid communication methods are available.	Use the Location Setup dialog box to enable a communication method.  Use the Directory Entry dialog box to verify that the post office address includes this communication method.
[1023]: Problems initializing modem.	Check the modem settings (modem type, serial port, and so on) for this communication method.  Turn Diagnostics on to help debug the problem.
[1034]: Serial port not responding.	Make sure that a card with a serial port is properly installed in your PC.  Change the communication port to COM1, COM2, COM3, or COM4.  Make sure you aren't simultaneously using both COM1 and COM3, or COM2 and COM4.
[1035]: Modem not responding.	Turn on the modem.  Select the correct modem from the Modem Type menu in the Edit Communication Method dialog box.  Either move the modem cable to the serial port you selected or change the serial port. Verify that the serial cable is plugged in.
[1055]: Post office did not answer.	Try again later. If the problem persists, contact your cc:Mail administrator.
[1061]: No carrier detected.	Verify the phone number. If the problem persists, contact your cc:Mail administrator.

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## cc:Mail Mobile concepts

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### **Sending and receiving messages**

When you create messages at a remote site and choose Message - Send, the messages are stored in your Outbox. When you choose a send command from the Mobile menu, you connect to the home post office and your messages are sent. New messages are transmitted to you only when you choose a receive command from the Mobile menu.

### **Working on the LAN**

You can use cc:Mail Mobile when you're working on a local area network (LAN) or when you're working from a remote site. To use cc:Mail Mobile when you have a LAN connection, log in to LAN mode or use a Direct connection in Mobile mode.

You can use Docking mode to exchange messages between your LAN and Mobile mailboxes when you are connected to the LAN.

### **The Mobile Directory**

In Mobile mode, you do not have direct access to your home post office Directory. Choose Help - How Do I? - Address Messages - Building the Mobile Directory for information on building a Mobile Directory. Without a Mobile Directory, you can address messages only by entering each name manually through your home post office name or by adding individual names directly to your Mobile Directory.

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## cc:Mail Mobile terms

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### **Home post office**

The post office on your local area network (LAN) in which you are a local (L) user. When you connect to your home post office, cc:Mail Mobile delivers messages stored in your Outbox and retrieves new messages stored in your LAN Inbox.

### **LAN mode**

LAN mode is the operating mode that you log in to when you have a LAN connection available. In LAN mode, you have access to new mail, bulletin boards, and the cc:Mail Directory without having to place a call or establish a connection to your home post office.

### **Mobile mode**

Mobile mode is the operating mode that you use when you're working offline or when you're not connected to the LAN. In Mobile mode, you access your home post office from a remote location by making a connection using a modem or another communication method.

### **Outbox**

In Mobile mode, the Outbox stores the messages that you've completed and asked to send (by choosing the Send command) until you're ready to connect to your home post office. The messages are delivered when you connect to your home post office using a modem or another communication method (by choosing a send command from the Mobile menu).

### **Location profile**

Location profiles simplify the process of connecting to your home post office from different locations (such as your home, hotel, or remote business site). Once you've created a profile for each location (usually by setting a different phone number), you can select the correct profile for your current location. cc:Mail Mobile uses those settings to connect to your home post office.

### **Communication method**

Communication methods are used to connect to your home post office and are part of your location profiles. You can specify which methods (Modem, Wireless, NetWare [SPX/IPX], TCP/IP, X.25, ISDN, PBX, or Direct) you want to use for each location profile that you create.

### **cc:Mail Background**

cc:Mail Background transports your cc:Mail Mobile messages. It features two options, Message Summary and Diagnostics. The Message Summary option lets you filter incoming messages one at a time; the Diagnostics option increases the level of detail displayed in cc:Mail Background communication sessions.

### **Communication session**

A cc:Mail Mobile session represents all communication connections established when you call out to exchange mail or receive a call. cc:Mail Background displays a record of each session. You can store records of your communication sessions in the Session Log folder and use the data later for analysis or troubleshooting.

### **Filtering**

Filters are a set of criteria that you define for selecting which messages to download to your Mobile PC. You can configure cc:Mail Mobile to download only those messages that meet specific criteria. You can also manually reject a message that otherwise meets your filtering criteria by reviewing summaries of incoming messages before actually downloading them.

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