



LITE

P r o f e s s i o n a l E x p e r t i s e D i s t i l l e d

IBM Lotus Notes 8.5 User Guide: LITE

A practical hands-on user guide with time saving tips and comprehensive instructions for using the Lotus Notes Client Interface and Mail effectively and efficiently

Karen Hooper

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Karen Hooper



BIRMINGHAM - MUMBAI

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Preface

Lotus Notes is quite a number of "things", including e-mail, calendar, To Dos (tasks), chat, RSS Feeder, an applications platform, and more. Many of us will use Lotus Notes for most of our working day; and being able to use it more efficiently is a gain in our hectic work life. Many of us want to use tools and features to save time, but often we are unsure of how to master those tools and features.

This short, fast-paced book enables business users to master the Client Interface and Mail features of Lotus Notes simply and effectively. Using clear explanations and instructions with explicit screenshots, this book gives business users a deeper and clearer understanding of basic functionality, providing the answers to many questions that are encountered while sending mails and working with Lotus Notes applications.

 This book is a LITE edition of a longer book, IBM Lotus Notes 8.5 User Guide. The full edition provides comprehensive coverage of Lotus Notes.

To find out more about upgrading to the full edition, visit www.packtpub.com/liteupgrade and log into your account for offers and help. If you don't have an account on PacktPub.com, visit today and set one up!

What this book covers

Chapter 1, First Impressions (The Client Interface), explores and explains what we first see and how we work with what we see when we open Lotus Notes.

Chapter 2, Mastering Lotus Notes Mail, helps us understand mail in more detail.

Chapter 3, Lotus Notes Mail Tools, focuses on the advanced features available in Mail and how we can best utilize them to assist us in being efficient with mail management.

What you need for this book

Lotus Notes is a multiplatform client application and is available in several languages. In this book, we have specifically covered the attributes of Lotus Notes 8.5 English client installed on a Windows operating system. As it is a client-server application, it works in conjunction with a Domino server. When we install and configure the client software, it will prompt us for our user name and home server. If we are performing these steps, we need to make sure we have these details, or we can contact our IT Department to determine what is required.

Who this book is for

This book is suitable for anyone who uses Lotus Notes, from beginners to seasoned professionals who have used it for years. Often we are creatures of habit, even if those habits are the long way around of doing things. This book aims to cover the features and tools that enable us to work smarter. Also, there are significant changes from the earlier versions of Lotus Notes to the current version of 8.5. This book covers the new features in detail so that we will be able to take advantage of them as well; it also covers key features from earlier versions that have stood the test of time.

Conventions

In this book, you will find a number of styles of text that distinguish between different kinds of information. Here are some examples of these styles, and an explanation of their meaning.

New terms and **important words** are shown in bold. Words that you see on the screen, in menus or dialog boxes for example, appear in our text like this: "We should see icons with a title for each icon such as **Mail**, **Calendar**, or **Contacts**."

[ Warnings or important notes appear in a box like this.]

[ Tips and tricks appear like this.]

Reader feedback

Feedback from our readers is always welcome. Let us know what you think about this book – what you liked or may have disliked. Reader feedback is important for us to develop titles that you really get the most out of.

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1

First Impressions (The Client Interface)

First impressions always count and, when you start Lotus Notes, there is no exception. You might notice that Lotus Notes is much more than just e-mail! There are many feature-rich tools available—for example, there is a free office suite application called **Lotus Symphony** that can be used as an alternative to Microsoft Office for those who just need the basics with an office suite. You will see the ability to create documents, spreadsheets, and presentations if Symphony is selected while installing Lotus Notes. You can also export each of those documents to PDF, HTML, or JPEG format if required.

Lotus Notes also has a Notebook application. This application allows you to create notes that can include pictures, attachments, ideas, and so on. It is a great place to store information that is just for you. It also has an inbuilt chat and presence capability called Sametime, along with an inbuilt RSS feed reader, a Widget panel, calendaring and scheduling capabilities, and applications if your organization has developed any or purchased them.

In this chapter we will focus on the client and will explore the following:

- Starting and shutting down Lotus Notes
- Open List
- Thumbnails
- Home Page
- Shortcuts
- Window tabs
- Toolbars
- Sidebar
- Lotus Notes Browser
- Preferences

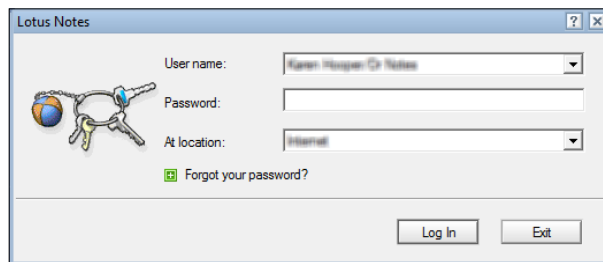
Starting Lotus Notes—start your engines

Starting Lotus Notes is similar to starting any application on your computer; simply go to **Start | Programs | Lotus Notes**. You may also have a shortcut to Lotus Notes in your taskbar or on your desktop.

Password prompt

As Lotus Notes is starting up, in most cases we will be prompted for a password. Lotus Notes is a very secure program; it requires us to verify that we are who we say we are, the same as when we use our PIN number with our ATM card. There are variations that can occur with the security within Lotus Notes in some organizations. Lotus Notes may start without a password prompt but be assured the security is still just as strong.

The following is an example of the password prompt dialog box. In the **User name** field, our name will be listed. Other names may be listed as well if there are multiple people using Lotus Notes on the PC. The **At location** field is where we select the location we are currently accessing Lotus Notes from. For example, we may be in the office or working remotely. If we have forgotten our password, we can expand the **Forgot your password** section as shown in the dialog box for instructions on what we need to do.



Closing Lotus Notes

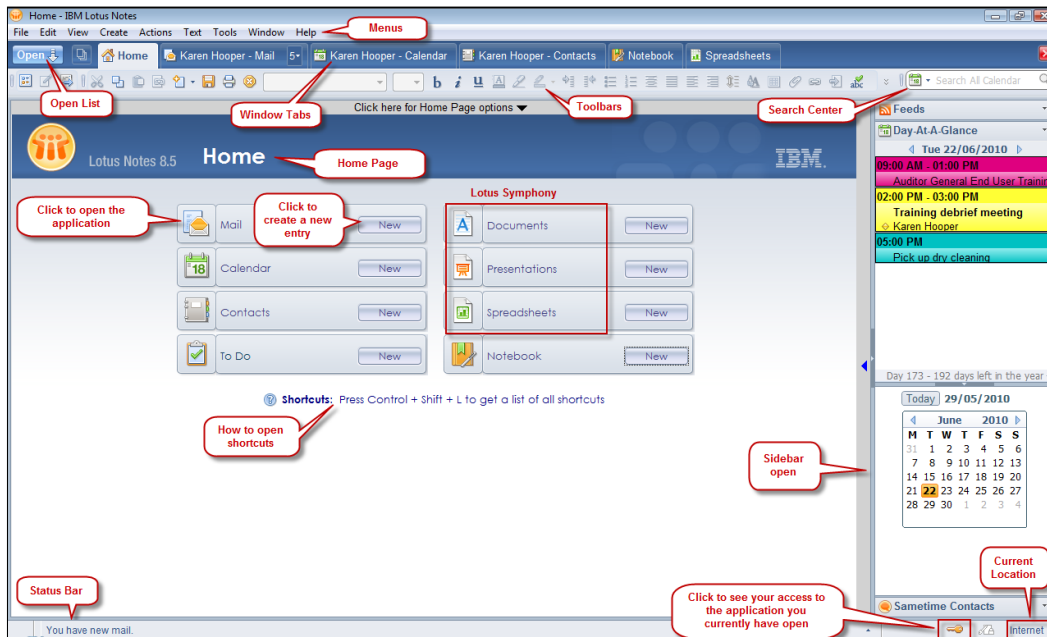
To close Lotus Notes, select either **File | Exit** or click the red X in the top right-hand side. Be aware that one needn't close all the open window tabs before shutting down. For example, if we have our mail and calendar tabs open, we can leave these open; so, when we start Lotus Notes again, our e-mail and calendar tabs will be open ready for us. This option is controlled via a preference that is set by default; it can be turned off if one wishes. To turn off this preference, go to **File | Preferences | Windows and Themes** and uncheck the **On restart, reopen any tabs that were open when I closed the client** option.



When we close Lotus Notes and are in the middle of replying to an e-mail or creating a new calendar entry, Lotus Notes will prompt us to confirm if we want to send or save; so never fear, we won't lose any work!

Exploring the interface—where, what, and how

When we open Lotus Notes, we won't just see mail; there is the homepage that points us to important applications such as our Mail, Calendar, and even a Notebook. There is the Sidebar which, if enabled, is a valuable resource for interfacing with our calendar, RSS feeds, and Sametime contacts. There are many options to explore, so let's begin.

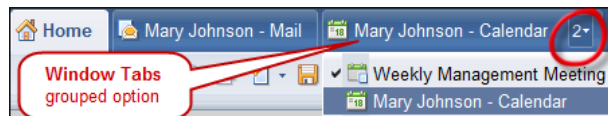


Window tabs

When we open an application in Windows, we will see it in the taskbar at the bottom of our computer screen (unless we have changed that option). When we open our e-mail or a message in Lotus Notes, a window tab appears for each opened item at the top, just under our menu options.

We can choose how we would like our window tabs to appear in Lotus Notes; these choices can be selected under **File | Preferences | Window and Themes**. The available choices are:

- **Open each document in its own window:** This option ensures that these windows appear in the taskbar of Windows – same behavior as Microsoft Outlook.
- **Open each document in its own tab:** This is the default setting in Lotus Notes.
- **Group documents from each application in a tab:** This is a great option if we want to keep our tabs more organized. The following is an example of this option. For the calendar, there are two pages open – **Mary Johnson - Calendar** and the **Weekly Management Meeting** calendar entry. If we select this option, the new way to close window tabs is the red X icon at the far right side of the window tab bar.



If we have selected to group our tabs, then we will have an option to close the group when we right-click on the tab.



[ To close all currently opened window tabs, select **File | Close All**. An alternative way to close an opened window tab is to press the *Esc* button on the keyboard.]

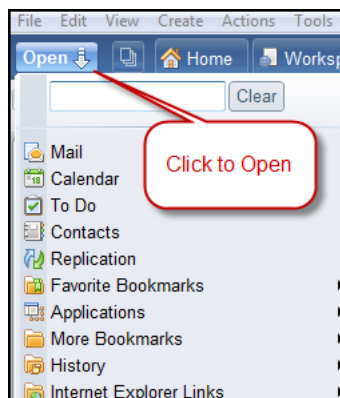
Window tabs can be rearranged by dragging them into a preferred position.

We can switch to a different window tab by pressing *Alt+W*. This will display a number for each window tab currently opened; type the number of the window tab we want to open.

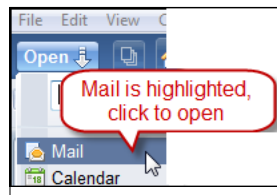
Open List—better known as the button that says "Open"

As previously mentioned, Lotus Notes is more than just e-mail and calendar. A company can have several Lotus Notes applications that they use to track or store information. We might have created some applications of our own. So, how do we access these applications including mail, calendar, and so on? By clicking the **Open** button of course!

If we have Lotus Notes open, why don't we give it a try and click on the opened list? We should see icons with a title for each icon such as **Mail**, **Calendar**, or **Contacts**.



If we wish to open mail, we can select **Mail**. We will see **Mail** highlighted as shown next; we can then click the left mouse button to open.

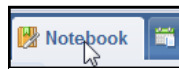


The Open list can be customized in the following ways:

- Right-click to select the **Dock the Open List** option. This will remove the Open List and instead show a bar called the Bookmark Bar positioned on the left-hand side of Lotus Notes with the icons but no title; we need to highlight each icon to see the title of the icon.



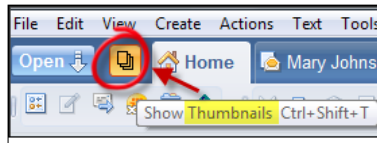
- Right-click to select the **Use Large Icons** option; this will change the size of the icons to large.
- If we wish to add a particular application, a message, or even stationary to our Open List, simply open the application or message and drag the window tab of the opened application or message to the Open List or the Bookmark Bar. This is similar to adding websites as Favorites in Internet Explorer. For example, to add the Notebook application to the Open List, open the **Notebook** application, click on the **Notebook** window tab as shown in the next screenshot, and then holding your left mouse button, drag to the Open List or Bookmark Bar.



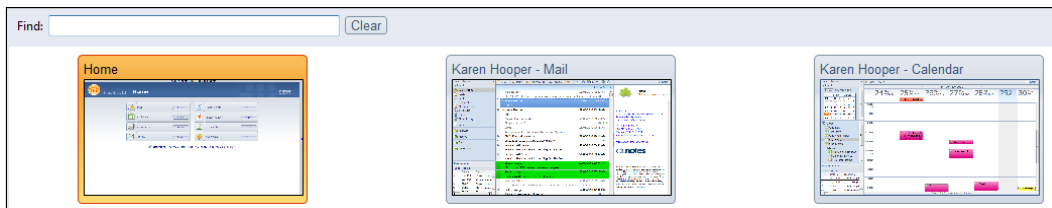
- We can also search the Open List, by simply typing what we are looking for in the **Type to find** field just below the **Open** button.

Thumbnails

Thumbnails, when clicked, show a graphical presentation of what is currently open in Lotus Notes. A screen will open showing each window tab that is open. Thumbnails are located next to the **Open List** as shown in the next screenshot; the shortcut to open is *Ctrl+Shift+T*.



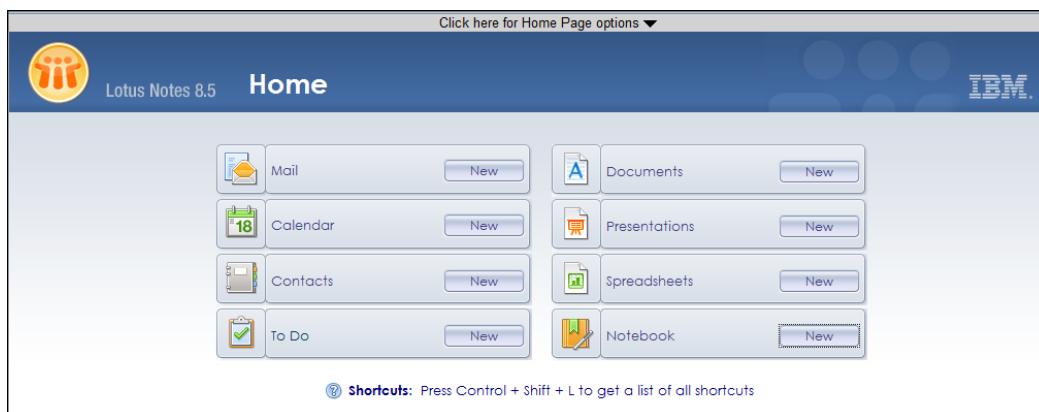
The following screenshot represents what thumbnails look like when opened:



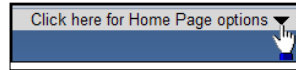
Homepage

The **Home** page has links to open Mail, Calendar, Contacts, To Do, and the Notebook application. We may also see options to create new documents, presentations, and spreadsheets; these are available if we have Symphony installed.

The following is a screenshot of the **Home** page:



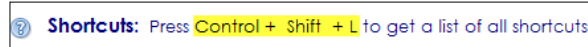
The **Home** page can be customized in a variety of ways. Select the option **Click here for Home Page options**, which is at the top of the **Home** page.



A cool feature of the Home page is the Notebook application. The name describes exactly what it is — a place where one can enter notes. No one else has access to our Notebook, so the information we enter is private. On the **Home** page, click on **New** to create the Notebook. Once the Notebook is created, the **New** button will create a document where we can enter notes in the Notebook.

Shortcuts

On the Home page, you will see a shortcut to open a list of shortcuts!!!



The next screenshot shows the shortcut list:

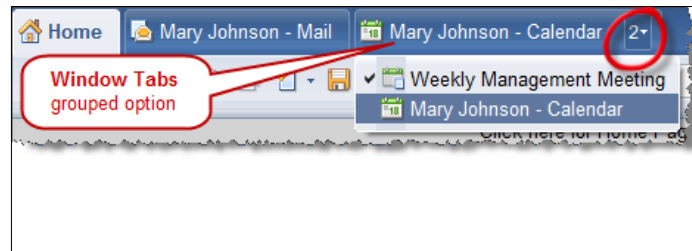
Back	Alt+Left
Bold	Ctrl+B
Break	Ctrl+Break
Center Caret	Ctrl+Y
Close	Esc
Collapse All	-
Collapse Selected Level	-
Compose Mail	Ctrl+M
Context Sensitive Help	F1
Copy	Ctrl+C
Cut	Ctrl+X

My favorite shortcut is *Ctrl+M* which, when selected, creates a message from anywhere within Lotus Notes. This comes very handy and quick as we don't always have to open our mail to create a message.

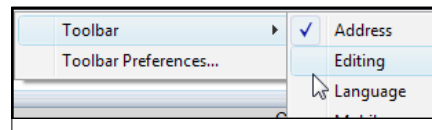
For a more extensive list of shortcuts, select **Help | Help Contents | Lotus Notes | Keyboard shortcuts**.

Toolbars

Toolbars are positioned under the window tabs and provide shortcuts to menu options. Toolbars within Lotus Notes can be repositioned, customized, and created. The following is an example of repositioning a toolbar:



By default, many toolbars are context sensitive, which means they appear only when they are needed. For example, we see only the Editing Toolbar when we are typing text in a document. When we are in our Inbox, the Editing Toolbar is grayed out and not available to be selected. To see a list of available toolbars, right-click in the toolbar area. From this area we can select which toolbars we want to display in the toolbar area.



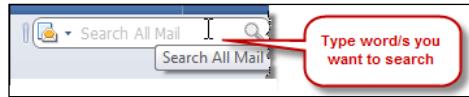
To customize a toolbar, right-click in the toolbar area and select **Toolbar Preferences**; from within here we can customize and create our own toolbars. Alternatively we can access toolbar preferences under **File | Preferences | Toolbar | Customize**.

Search toolbar

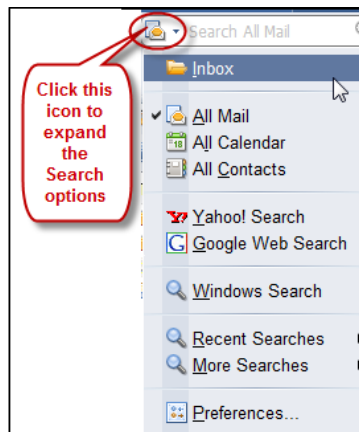
One toolbar which should be explored is the Search Toolbar. If we are in our mail and we want to search for a word within the subject, the body of the message, or the address fields, then simply type the word in the Search Toolbar and then select the *Enter* key or click the magnifying glass icon. The search will occur on all documents in our Mail including our Inbox, Sent folder, Drafts, and personal folders.

We can also search our Calendar and Contacts and even do a Yahoo or Google Search. Each search that we perform is saved under **Recent Searches**.

To perform a search in our mail, type the words we are searching for in the **Search All Mail** toolbar. If we are in our Calendar, the search will be performed in the Calendar and so on. Once we have typed the word, click on the magnifying icon to start the search.



Alternatively we can click the icon in the Search Toolbar to show the drop-down menu. This option allows us to choose different places to search. In the example shown in the following screenshot, the search would be performed in **All Mail** as this is the option selected:



To perform the search, click the magnifying glass icon or press the *Enter* key. A new window tab will open with the results of the search and it will also show all recent searches.

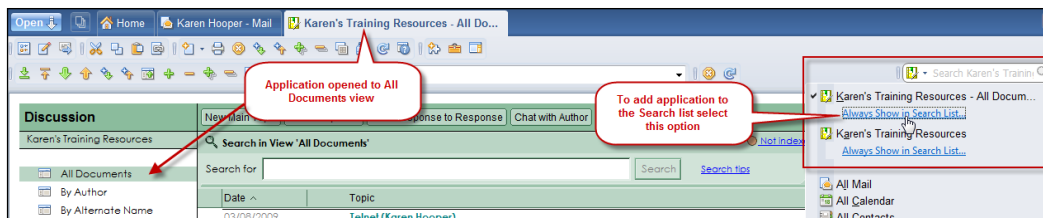
Search preferences

We can change the preferences available for searching. Go to **File | Preferences | Search**. In this area we can enable **Search History**, which is ON by default. There is also a button that we can select to clear history.

By default when we perform a web search, the results will be presented in the embedded browser in Lotus Notes. We can change this preference by deselecting **Use embedded browser to display Search Center web search results**. If this preference is not selected, the web search results will show in our default web browser.

We can change what is displayed in the search list. Go to **File | Preferences | Search | Search List**. We will see a list of what we are able to select; we can then check or uncheck the available options.

Finally, we can add our applications to the Search drop-down list. In the following screenshot, I have added **Karen's Training Resources** application to the Search drop-down list. To do this I opened the application, clicked the Search drop-down list in the Search toolbar, and then selected the option to **Always Show in Search List**. I can now, from anywhere in Lotus Notes, perform searches in the application by selecting the option in the Search toolbar.

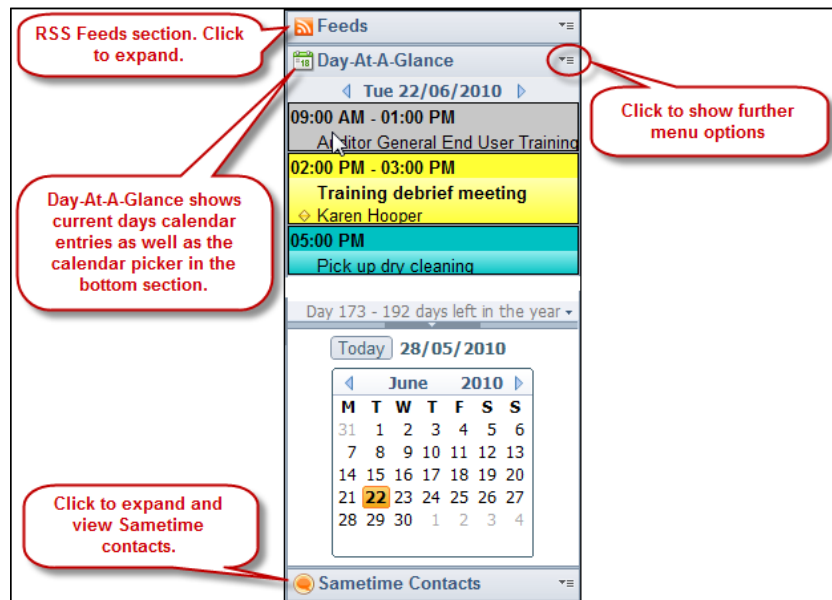


One of the search options listed is Windows Search. This option searches our local drives and returns to the search view in Lotus Notes, links to the files it has found.

SideBar

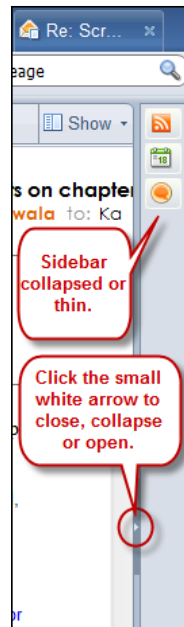
The sidebar is located on the right-hand side of the Lotus Notes screen. It contains some of our key applications such as calendar, Sametime (which is IBM's chat application), and our RSS Feeds as well as Widgets and Activities. The concept of the sidebar is that one can be in his/her inbox working and see on his/her right-hand side what is on the calendar today in the Day-At-A-Glance panel of the sidebar.

What is available in our sidebar is determined by what has been made available in our organization. For example, our organization may not have enabled RSS Feeds; if this is the case, we will not see the Feeds panel in the sidebar. The following is a screenshot of the sidebar. This sidebar has three panels: **Feeds**, **Day-At-A-Glance**, and **Sametime Contacts**.



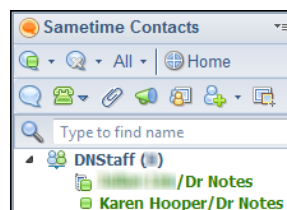
The sidebar has three states or three ways it can be viewed—open, closed, and thin:

- Open allows us to see all your sidebar options.
- Closed means it is not visible. We will have to click the small white arrow shown in the next screenshot to open.
- Thin means we see only available icons. We can click an icon to open the sidebar. The following screenshot shows the sidebar in the thin state:

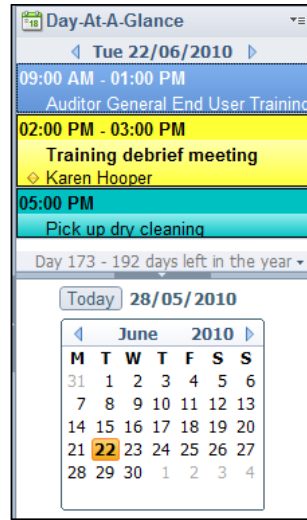


Our sidebar can have the following components:

- **Sametime Contacts:** Sametime is IBM's chat application. From within the sidebar, we have all the Sametime capabilities available to us such as seeing our contacts and, if they are available, being able to chat with current contacts and add or remove contacts, along with many other features. We may not see this option in the sidebar if Sametime has not been enabled in our organization. The next is a screenshot of what Sametime looks like in the sidebar. Sametime is discussed in detail in the next chapter.



- **Day-At-A-Glance:** This shows the current days calendar entries such as meetings, appointments, and so on. We can use the arrows to go back or forward through the days or click in the calendar below to select a different day to view. If we double-click any of the calendar entries, it will open that entry. Alternatively we can right-click and select the **Open in New Window** option.



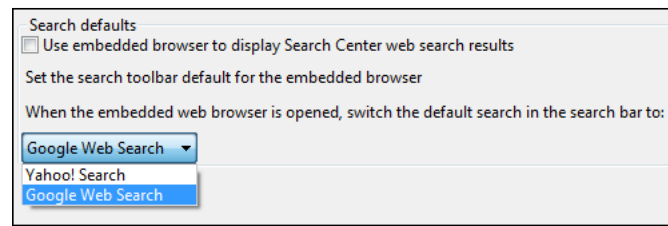
- **Feeds:** This shows RSS Feeds we have subscribed to. In this section, we can also manage and add new feeds. This is explained in detail in *Chapter 3, Feeds*.
- **Activities:** This application helps organize our documents under categories.
- **Quickr:** This is a document management application that integrates with Lotus Notes.

We can change which of these applications is displayed in our sidebar. Each of the panels includes a panel menu that we can use to manipulate the panel (including floating or removing the panel), as well as context commands for the application.

Lotus Notes browser

Within Lotus Notes, there is an inbuilt browser or embedded browser. The browser allows us to open and navigate web pages directly from within Lotus Notes.

We can change which web search engine the embedded browser uses in its search bar by clicking **File | Preferences | Search**, and then clicking a search engine in the list.



We can open the browser by:

- Clicking the **Open** button and then clicking **Web browser**. We can repeat this step if we want to have more than one browser page open.
- Typing a web address (URL) into the **Address** toolbar, and then clicking the **Go** button, which is to the left of the **Print** button. If the **Address** toolbar is not showing, right-click in the toolbar area and select **Address**. If we want to bookmark the page we have just opened, select **Create | Bookmark**.

From within the embedded browser toolbar, we can:

- Navigate to the previous page by clicking **Back**.
- Navigate to the next page by clicking **Forward**.
- Stop the web page from loading by clicking the **Stop** button.
- Reload the web page by clicking the **Refresh** button.
- Return to the page that is set as our Home page by clicking the **Go home** button.
- Print the web page that is displayed by clicking the **Print** button.
- Change the page settings for printing the displayed web page by selecting the down arrow next to the **Print** button and then clicking **Page Setup**.
- Preview how the displayed web page will look printed by selecting the down arrow next to the **Print** button and then clicking **Print Preview**.

The following is the browser toolbar:



Lotus Notes uses the embedded browser by default. We can disable it by accessing **File | Preferences**, clicking **Web Browser**, and then checking the **Use the browser I have set as the default for this operating system** option. This will mean that Lotus Notes will use Internet Explorer or Firefox for browsing.

Preferences

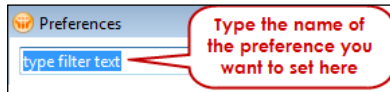
There are many options that we can select to personalize Lotus Notes. Some preferences may be set on one's behalf by the company's IT department as they have a set of policies that they can set that determines almost all of the possible preferences and features that might be available. For example, the IT department can set a policy for whether or not to show the Open List as a button, or whether to show it as docked.

We can customize Lotus Notes so that it operates and displays just the way we want it to. The following is an example of some of the available preferences:

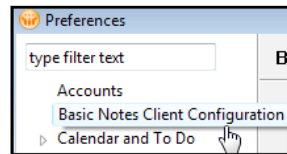
- Basic settings that determine the look and feel of our Lotus Notes client
- Our Mail, Calendar, To Do, and Contacts applications
- Replication
- Lotus Sametime
- The IBM Lotus Symphony such as Spreadsheets (if available)
- Activities or Websphere Portal accounts (if an organization uses them)

We have already explored some of the preferences available such as window and themes and toolbar preferences.

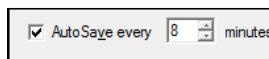
To access preferences, select **File | Preferences**. There are numerous preferences that can be set; to simplify finding a particular preference, type the name in the field at the top of the preferences dialog box as shown in the following screenshot:



An excellent preference to enable is the **Document AutoSave**, which is available under the **Basic Notes Client Configuration** option.



To enable, just check the box next to the **AutoSave every** field and then select the minutes. The default time is 15 minutes; in the following screenshot I have changed the time to **8 minutes**.



Once enabled, Lotus Notes can automatically save documents we are working on to prevent loss of data due to a system crash or power outage.

AutoSave is available within our mail file and any other databases that have been upgraded and the AutoSave options that have been enabled.

If a crash has occurred, on restarting Lotus Notes we are prompted to recover documents; if we select **Yes**, we will then be prompted with the following choices:

- **Recover:** This option will open the selected document and then close the dialog box.
- **Recover All:** This option will open all documents listed and close the dialog box.
- **Remove:** This option will remove the selected document from the AutoSave database.
- **Remove All:** This will remove all documents listed from the AutoSave.

There is a manual option to recover documents. If we choose to say **No** to the prompt received when we first open Lotus Notes after a crash, we can at any time select the option to recover documents by selecting **File | AutoSave | Recover AutoSaved Documents**.

Summary

In this chapter, we have explored the client interface of Lotus Notes, including the Open List, the Home Page, and the Sidebar as along with many other options. We should now be familiar with:

- Using the Open List and Thumbnails
- Features of the Home Page
- Available shortcuts (remember *Ctrl+M* creates a message)
- Use of the Sidebar
- Working with window tabs
- Toolbar options
- Preferences that assist you in customizing Lotus Notes to the way we want it

In the following chapters we will explore preferences further.

2

Mastering Lotus Notes Mail

Electronic mail is one of the most important forms of communications important forms of communication corporately as well as socially. Known by many names such as mail, e-mail, a memo, or a message, it is a convenient way of communicating, sending files, and reaching many people with one action.

Mail is a business tool that we typically use on a daily basis. When the mail system is down, many times work grinds to a halt! Because it is a tool that we count on, it is imperative that we understand all of its capabilities. It is like having a car that can save gas if we enable particular features; however, unless we know how to enable the gas saving features, we will get from destination A to destination B but won't be able to save gas!

This chapter helps us understand mail in more detail and will assist us with becoming more efficient in how we use Lotus Notes mail. Time saving features will be explored both in this chapter and the next chapter. In this chapter we will discuss the following topics:

- Accessing mail in Lotus Notes
- Creating and replying to messages
- Addressing messages
- Editing tools
- Attachments
- Viewing Mail
- Folders
- Mail icons
- Instant Spell checking
- Blank subject warning
- Signatures
- Deleting mail

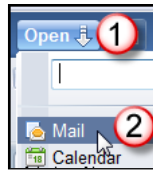
Accessing mail in Lotus Notes

The first step in exploring mail is to open mail in Lotus Notes. There are a couple of ways that we can open mail:

- First, from the **Home** page by clicking the **Mail** icon as in the following screenshot. If we click the **New** button, it will create a new message.



- Also, by clicking **Open** and selecting **Mail** from the list.

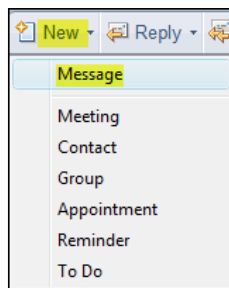


Creating and replying to messages

In the following sections we will discuss how to create and reply to messages including reviewing message actions including setting delivery options.

Creating a message

Once we have opened mail, we can create a message by clicking on the **New** button and then selecting **Message** as shown next. As we can see from the message drop down list, there are other options available such as **Meeting**, **Contact**, and so on that we can create.

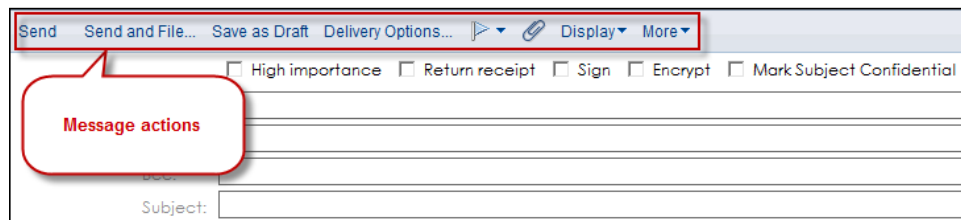




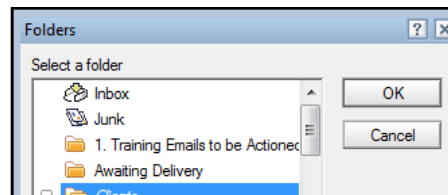
Another way to create a message is by using the keyboard shortcut *Ctrl+M*. This can be done from anywhere within Lotus Notes, not just when we have mail opened – for example, we can create a message when we are in our Calendar, from within Contacts, or from the Home page using the *Ctrl+M* option.

Message actions

Now that we have created a message, we will explore some of the message actions. Along the top of the message, we can see buttons that enable us to do certain things. The following is a screenshot of the available options. We will briefly explore each of these options.



- **Send:** This speaks for itself; when clicked the message is sent!
- **Send and File...:** This is an excellent option when sending messages, as it allows us to not only send the message but also to file the message into our folders at the same time. When we click **Send and File...**, we will see the **Folders** dialog box with all our personal folders available. The following is a screenshot of the **Folders** dialog box that appears when we select the **Send and File** option. We would select the folder we want to file the message into and then click either the **OK** button or press the *Enter* key. The message will be filed in the folder; it will also be automatically filed into Sent and All Documents. Note that this does not mean we have three copies of the message filed in the three locations. There is only the one copy of the message in our personal folder; Sent and All Documents. This means if we delete the message from our personal folder, it will be deleted from the Sent and All Documents.



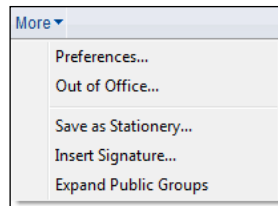


When the **Folders** dialog box opens, if we know the name of the folder, we can start typing the folder name and that folder will be highlighted. Then if we press the *Enter* key, the message will be filed into that folder. Typically this is a quicker option than scrolling, especially if we have several folders. When you type the folder name you can see what you have typed in the Status bar, you can delete what you have typed if you have made a typing error.

- **Save as Draft:** This option saves our message into the Drafts folder.
- **Delivery Options:** Include options such as mood stamps and prevent copying (we will look at this separately in the next section).
- **Flag:** We can flag a message before sending it. We will explore flagging in more detail in the next chapter.
- **Attachment:** Clicking this icon will allow us to add an attachment to our message. Note that we can also drag an attachment into the body of the memo from Windows Explorer; we will go into more detail later in this chapter regarding this capability.
- **Display:** When we click on this button, we can see further options regarding how we want our messages to be displayed. We can select if we want to show the **BCC field**, **Additional Mail Options**, or **Sender Information**. The following is a screenshot of what we can see when we enable the **Additional Mail Options** option:



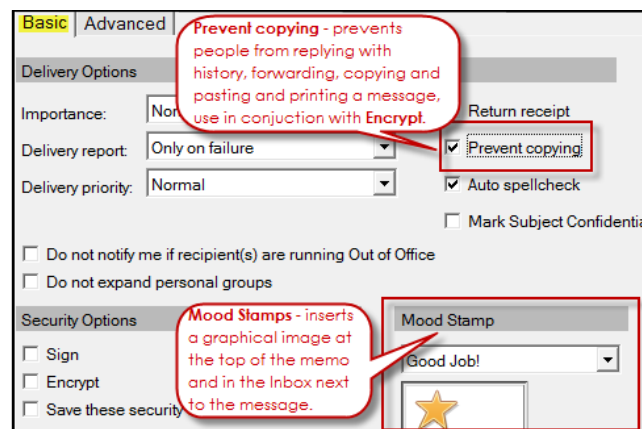
- **High Importance** is indicated to the sender by a red exclamation mark.
 - **Return receipt** sends us a notification when the recipient/s have read or previewed the message.
 - **Sign** adds an electronic signature to the message to ensure it has not been tampered with.
 - **Encrypt** marks the message secret and can be read by only those whose name appears in the To, CC, and BCC fields.
 - **Mark Subject Confidential** prepends "Mark Subject Confidential" to the subject field.
- **More:** This is the last message action, from here we can access **Preferences...**, **Out of Office...**, and so on as shown in the screenshot. We will explore these actions in detail, later in this chapter as well as in the next chapter.



Delivery options

When we click the **Delivery Options** button in a new message, a dialog box opens with two tabs.

Basic tab:



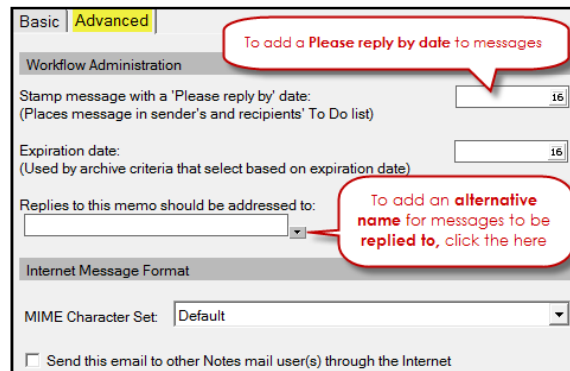
Note the difference between **Return receipt** and **Delivery report** – the **Return receipt** option sends us notification when the person has read or previewed the message, whereas the **Delivery Report** option tells us when the message failed to reach the recipient, which is the default option **Only on failure**. Other options available are **Confirm delivery** or **Trace entire path**; the later option shows us the server route taken to deliver the message.

Take the time to check out the **Mood Stamps**. I prefer adding the **Good Job** mood stamp to a message when I am congratulating someone. I often use the **Confident** mood stamp when I am sending a sensitive message. I will also select the **Encrypt** option that allows only those in the To, Cc, and Bcc fields to read it as well as **Prevent copying** which prevents people from forwarding, printing, copying to the clipboard and replying with history. Combining these options ensures the message is kept secure. The signing option adds digital signature to the message to confirm to the recipient the authenticity of the individual who has sent the mail.

Note that all three of these options typically work only for a message sent within our organization and may not be applied to messages sent to people external to us such as someone at another company.

Advanced tab:

On the **Advanced** tab, there are options that allow us to add a **Please reply by date**. We can also select that replies to the memo go to another person or several other people. We can also add our name. Some organizations have shared mail files such as Sales where messages sent to sales at the company name will go into a central mail file. It is preferable to add those addresses, along with my own, to the **Replies to this memo should be addressed to** field so that those we work with are kept in the loop with particular communications.



Replying to messages

We can reply to a message from our inbox or from within the memo. The reply options are:

- **Reply with History Only** (default) and **Reply to All with History Only**: This option includes the history of the original memo but does not include the attachment(s). Reply to all will include everyone in the To; CC and BCC fields, the reply option only includes those in the To field.
- **Reply with History & Attachments** or **Reply to All with History & Attachments**: This option includes the history of the original memo and the attachment(s).
- **Reply** and **Reply to All**: This option does not include any of the history of the original e-mails or attachments.



When replying to messages, use the permanent pen function that adds our comments in a color that is different from the original message. We can also use the highlighter pen to highlight text in the original message for emphasis. Access the **Permanent Pen** and the **Highlight Pen** from within the Editing Toolbar.

Addressing messages

We can address a message by either selecting a recipient's name from our contacts or the Corporate Directory. We can also type names directly into the To, Cc, and Bcc fields. If we type names directly, Lotus Notes uses a type-ahead feature that completes names based on the first few letters we type.

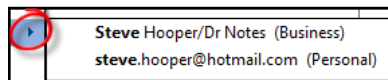
How to address a message

It is as simple as typing a person's name but there are some other options available as follows:

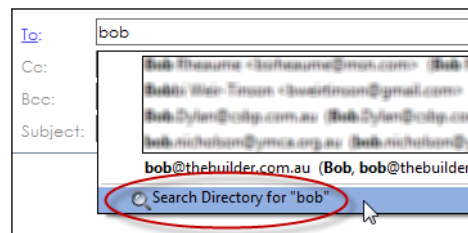
1. When we create a message, our cursor will automatically go to the To field in the new message. If we know the person's name, we just need to type it and we will see a list of names appear. This list shows our most Recent Contacts as Lotus Notes keeps track of the people that we communicate with most often and moves those names to the top of our type-ahead list. Note that the list is not in alphabetical order.



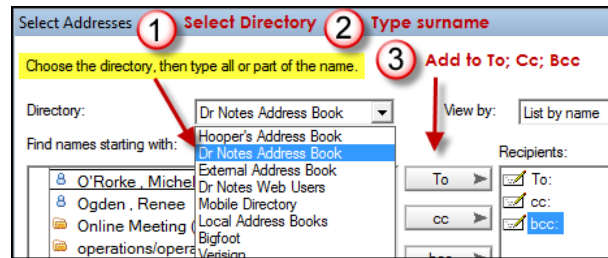
2. Many people have more than one e-mail address. If a person in our contacts has an alternative e-mail address, we would see an arrow as circled in the next screenshot. When we click on the arrow, it shows the alternative e-mail addresses as here:



3. If the person we want to send the e-mail to doesn't appear in the list and we know that they exist in the Corporate Directory, click the option at the bottom of the list—**Search Directory for**. This option will show all the names in the Corporate Directory that start with whatever we have typed.

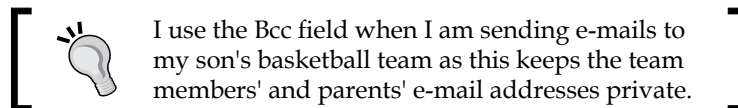


4. We can also select their name from our Contacts or the Corporate Directory by clicking **To**. This will open the Select Address dialog box and allow us to select the address book (directory) we want to search in (step 1). Type the name in the Find names starting with field (step 2). As the final step, add those people whom we have searched to the To, Cc, or Bcc fields by clicking the appropriate button (step 3).



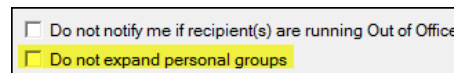
Protecting names in To, Cc, and Bcc fields

Often when we send a message, we are communicating with customers or suppliers, and there is a need to be discreet with what we allow to be seen in the To, and fields. We can utilize the Bcc field to allow only those people to see their own name. When the recipient receives the message, they will see only their name or Undisclosed recipient. Using this option allows privacy to be maintained.



Prevent the expansion of personal groups

When sending a message, go to **Delivery Options**. Then on the **Basics** tab, check the **Do not expand personal groups** option. When the recipient receives the memo, they will see only the group name and not the individuals listed within the group. By default if this option is not selected, the group name will not be shown to the recipient, only the group members will be shown.

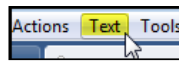


Formatting messages

Many times when we send a message, we want to format it in a particular way. There are several formatting options in Lotus Notes. Note that whatever formatting we can do in mail, we can also do in calendar entries, To Dos, and documents in Lotus Notes application which have rich text fields.

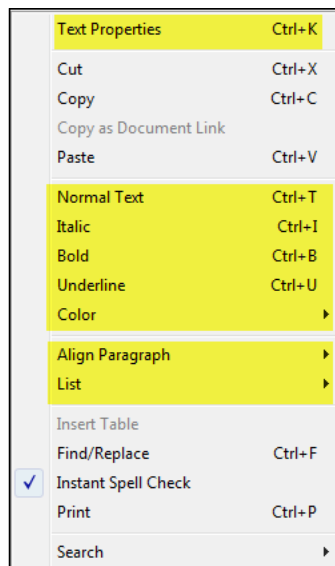
We can access formatting options in the following different ways:

- From the Toolbar
- From the Text menu as shown here:

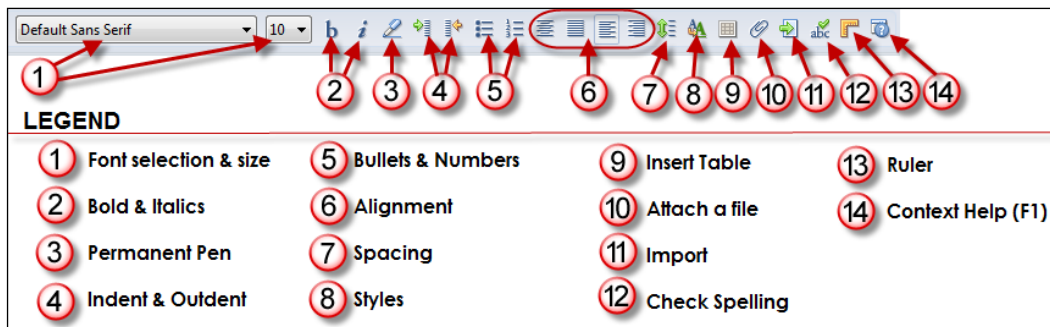


- From Text properties, which can be accessed by the right-click menu or via the keyboard shortcut *Ctrl+K*
- From the right click menu there is a subset of formatting options available
- Using keyboard shortcuts such as *Ctrl+B* for bold

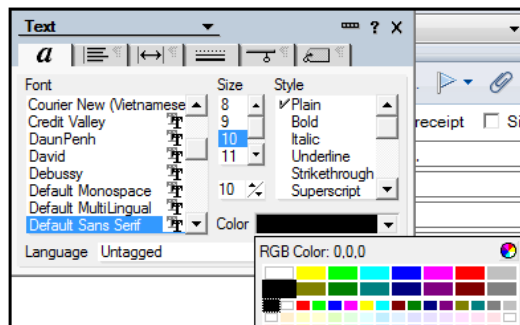
The following is a screenshot of the right-click menu, the formatting options are highlighted:



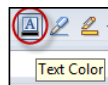
The Toolbar has several formatting options. The following is a legend of the Editing Toolbar for our reference:



Here is an example of the text properties dialog box, which has several tabs with options. The following screenshot shows the Font (a) tab with the **Color** options selected:



We mentioned as a tip the Permanent Pen and the Highlighter Pen as great tools to use when replying to messages because of their ability to allow us to show our text in a different color and also to highlight text. There is also the **Text Color** icon in the Toolbar; highlight text or put your cursor in a position where you want to change to another color then click this button to select a color.



Using the Permanent Pen and Highlighter Pen

To use the Permanent Pen, simply click the **Permanent Pen** icon in the Toolbar and start typing. To turn it off, we just need to click the icon again. When using the Permanent Pen, our cursor will have a pen-like icon.

To use the Highlight Pen, click the **Highlight Pen** icon and highlight text by dragging left to right over the text; to undo anything we have highlighted, drag right to left. To turn off the Highlighter Pen, click the **Highlighter Pen** icon again— basically it is toggle on and toggle off.



Changing the Permanent Pen font and color

By default, the permanent pen font is red, bold, and Default Sans Serif. To change these options, follow these steps:

1. Create a memo and put the cursor in the body of the memo.
2. Click on the **Text** menu, then **Text Properties**. Alternatively right-click and select **Text Properties** from the menu.
3. Click the Font **(a)** tab.
4. Select a font, size, style, and/or color.
5. Go to the **Text** menu and select **Permanent Pen - Set Permanent Pen**.
6. Discard the memo.

Dragging and dropping text

We can drag-and-drop text from within a document or message. We can also drag text from one document or message to another via the window tabs. We just need to highlight the text we want to move and then drag it to the desired location.



This facility is available with Windows® versions only.

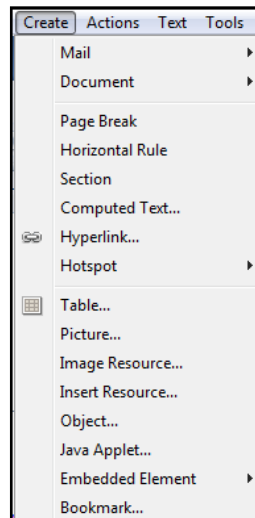
Shortcut keys in Lotus Notes

The *Ctrl* key on our keyboard comes in quite handy when we are editing text within Lotus Notes. Following are some common usages of the *Ctrl* key within Lotus Notes:

Keyboard shortcuts	Description
<i>Ctrl+B</i>	Selected text is made bold
<i>Ctrl+I</i>	Selected text is made italics
<i>Ctrl+U</i>	Selected text is underlined
<i>Ctrl+Z</i>	Undo option
<i>Ctrl+C</i>	Selected text is copied
<i>Ctrl+V</i>	Selected text is pasted
<i>Ctrl+X</i>	Selected text is cut

Further formatting options

If we click on the **Create** menu, we can see more formatting options. We can add pictures, page breaks, a horizontal rule (which is similar to a thick line), sections that collapse text under a heading, computed text that allows you to add animated text, hotspots that can link to URLs or file links, tables, images, and objects.



 When copying an Excel® spreadsheet into a message, use the **Paste Special** and select **Paste link to source** from the options presented. This will paste the spreadsheet into the message. Now if we double-click on the spreadsheet, it will activate Excel®.

 If we add a table into a message or Lotus Notes document, we can copy the table and paste it into Excel® – the cells will be maintained and the information copied across.

Attachments

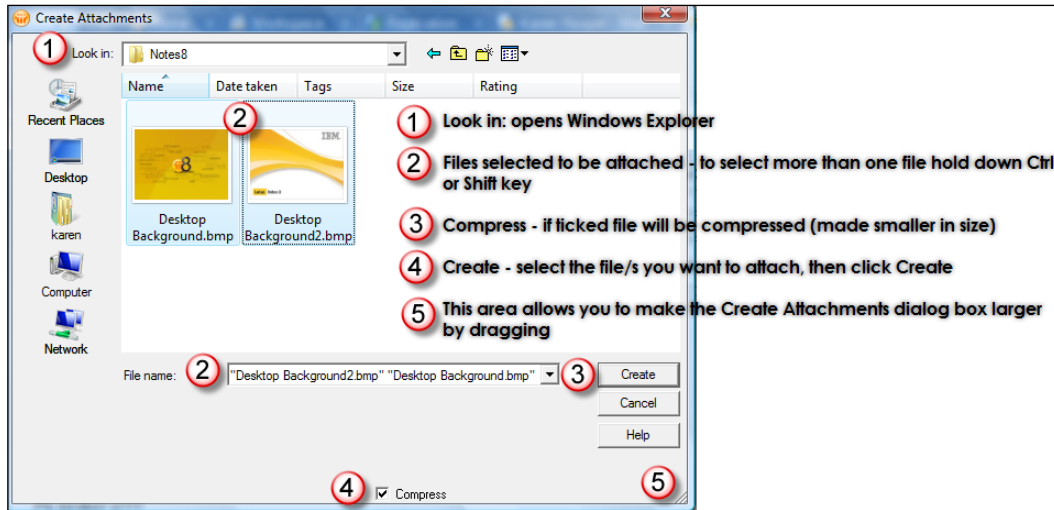
Many times, the reason we send a message to someone is because we want to send them a particular file. To send a file, we must attach it to the message.

Adding attachments to messages or documents

There are four ways to add an attachment to a message or document:

- Go to the menu and select **File | Attach**. A **Create Attachments** dialog box will open; browse here to select the attachment(s) we want to add and then click the **Create** button.
- Click the **Attach** icon in the Toolbar or the **Attach** button below the Toolbar. Both actions will result in the opening of the **Create Attachments** dialog box as it does when we select **File | Attach**.
- If we have Windows Explorer open, and our message or document is open in Lotus Notes, we can drag the attachment from Windows Explorer to the Lotus Notes icon in the Task bar, and then drop into the message or document we have open in Lotus Notes. If we resize the Windows Explorer dialog box to be smaller than the Lotus Notes window, we can simply drag from Windows Explorer straight to the message or document we have open in Lotus Notes.

The following is a screenshot of the **Create Attachments** dialog box; refer to the number legend to understand each area:

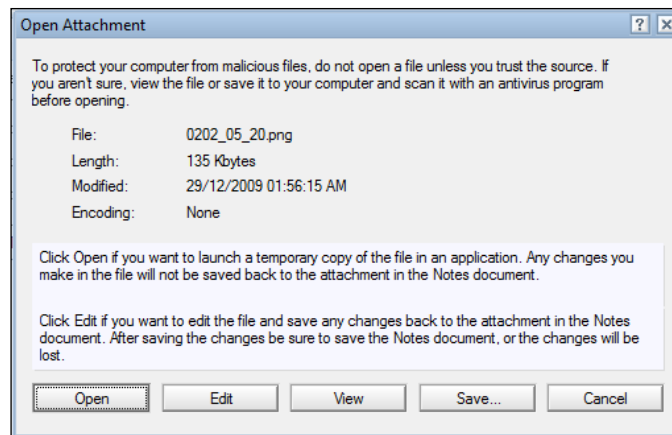


 We can also drag attachments from a message or document to a new message or document. Select attachment, drag to tabs, go to new message or new document, and then continue to drag to the position where we want to place it in the attachment.

Working with attachments

Now that we know how to add attachments, we need to explore what we can do with attachments.

When we double-click on the attachment, we will see the **Open Attachment** dialog box as shown in the next screenshot. From here we can select **Open**, **Edit**, **View**, **Save**, and **Cancel**. Alternatively if we right-click, we will see more available options.



Opening attachments: Open button

When we click the **Open** button, the attachment will be opened in the program it was created in. For example, if it is a Word attachment, it will launch Microsoft Word and open the attachment. When we click the **Open** button, it is similar to when we are opening a Microsoft document in "Read Only" mode. Any edits to the document will not be saved unless we select **File | Save As**. Use this option only when we want to view the attachment in the program it was created in.

Editing attachments: Edit button

When we click the **Edit** button, it allows us to open and edit attachments. An example of where we would use this option is if someone has sent a message with an attachment that they require us to update. We would select **Reply with History & Attachments**, which creates a new message with the history and a copy of the original attachment. Select the attachment we need to update and double-click or right-click and **Edit**; the attachment will open in the program it was created in. Update the attachment and then select the save option in the program it was created in. The attachment in the message has now been updated and we can send the message. This is the only place where the attachment edit has been saved so make sure we save the memo by either sending it or saving it as a draft. If we need to access the edited attachment, it can be found in the Sent and All Documents.

Viewing attachments: View button

The view option allows us to open the attachment in Lotus Notes rather than launching the program it was created in. This option is excellent for viewing the attachment quickly; previewing zipped files without unzipping them; or for viewing files of programs we do not have installed.

Saving attachments: Save button

When we click the **Save** button, it opens Windows Explorer. We can browse to where we want to save the attachment(s) and then click **Save**.

Working with multiple attachments

If we have multiple attachments in a message or document, we can right-click one attachment and then select any of the available options from the right-click menu.

- **Save All:** This option will save all the attachments in the message to the location we select.
- **Save and Delete All:** This allows us to not only save to Windows Explorer but also to delete the attachments in the message, which will result in saving space in our mail. It will leave text indicating that you have deleted the file and give the file name deleted.
- **Delete All:** This deletes the attachments from the memo.

Printing attachments

We can print an attachment by selecting the **View** button, which will open the attachment in Lotus Notes (*not* in the application it was created in) and then select **Print** from the **File** menu or *Ctrl+P*.

Alternatively, to print the attachment in its original application, select the **Open** button and then select **Print** from the **File** menu, or use keyboard shortcut *Ctrl+P*.

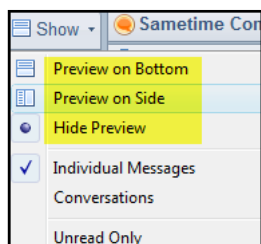
Viewing mail

When we open our mail, we can choose to show our mail in different ways. For example we might select to show the preview pane or we might also want to show only unread memos. In this section we will explore these different options.

Preview pane

We can preview mail using the preview pane, which saves us from having to open and close each message. Previewing allows us to see the document's contents without having to open the actual document.

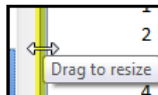
To access the preview pane options, click the **Show** button at the top of the inbox. From here we can preview mail on the bottom or from the side. To turn off the preview pane, select the **Hide Preview** option.



I enable the preference **Mark documents as read when opened in the preview pane**, which is available in **Preferences** on the **Basics Notes Client Configuration** tab in the **Additional Options** area—it is the first choice in the list. As the preference name implies, when I click on an e-mail to preview it, the e-mail is marked as being read. I have selected this option as I predominately preview e-mails, so it assists me in keeping track of what I have read.

The preview pane is a separate frame that opens in the view or folder we are in, exposing a part of the document that is selected.

To resize the preview pane, select the bar that separates the two panes and drag to our preferred size.



When we preview messages, a Return Receipt will be sent if it has been requested!

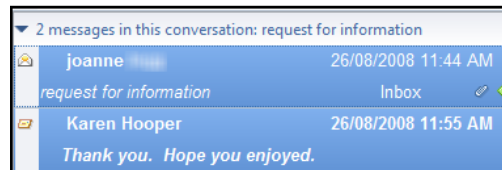
Conversations

We can view a message grouped with all of its replies so that we can read the message and replies at the same time. A message grouped with all of its replies is called a conversation and conversations save us the trouble of looking through our mail to find individual replies.

We can also act on all of the messages in a conversation at one time. For example, we could move all of the messages in a conversation to a folder by simply moving the conversation to the folder.

The following is an example of a conversation. In this conversation, there are two messages. The first message listed is the original, it is from Joanne, and the subject is **request for information**. Currently it is located in the inbox.

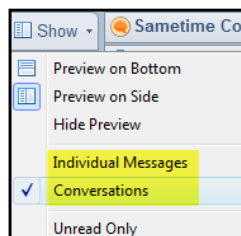
The second e-mail is the reply to Joanne from Karen Hooper that reads: **Thank you. Hope you enjoyed.** This was written in the body of the memo. This is because in conversations all replies listed show the first line of the reply, not the subject. This message is in the Sent folder.



Viewing conversations

To view conversations, switch from **Individual Messages** (in which messages and replies are displayed and sorted individually) to **Conversations** (in which messages and their replies are grouped together). These options are available under the **Show** button—the same place you selected the preview options.

We can switch to conversations mode in our inbox, All Documents and our personal folders.



Once in conversations mode, the most recent reply in a conversation is displayed, and any other replies and the original message are collapsed below the most recent reply.

Following is an example of a conversation that has not been expanded; we can see that there are two messages in this conversation. We would click on the arrow head icon, which is called a Twistie, to expand or open the conversation:



When we expand the conversation, each message displays on one line. The original message displays its subject and each reply displays the first line of text in the body of the memo. When we expand the conversation the rest of our inbox is grayed out, to close the conversation click in an area in the inbox. The conversation will collapse and the inbox will no longer be grayed out.

We can stay in Conversation mode if we wish to. When a new message is received that belongs to a particular conversation, that message appears at the top or bottom of the inbox (depending on how we choose to show new messages). The message shows as being unread and the number of messages in the conversation is increased; we can also see who sent the reply, including the date and time.

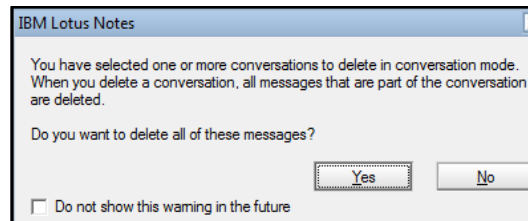
 **Note:** Conversations can be viewed and sorted only by Date. Sorting by another column such as Sender automatically switches the view or folder back to individual mode.

The following table explains different actions one can perform with conversation.

Task	Description
Act on all messages in a collapsed conversation	Click the conversation to select it and then perform the action. For example, to delete all messages in a conversation, click the conversation and then right-click the conversation and select Delete .
Act on all messages in an expanded conversation	If all of the conversation's messages are not selected, click the conversation header to select all of the messages and then perform the action.
Act on one message in a conversation	If necessary, expand the conversation. Then click the message to select it, and perform the action. For example, to delete a message in a conversation, click the message to select it, then right-click the message and select Delete .

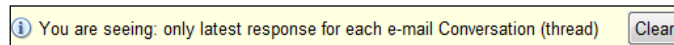
Deleting a conversation

When we delete a conversation, we will be prompted as shown in the following screenshot, confirming that the individual is aware of his/her actions of deleting all messages within that conversation.



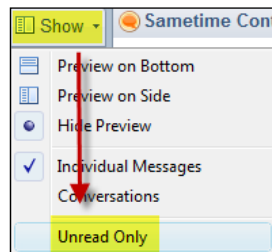
Turning off conversations

To turn off Conversation mode, simply go to the Show button and select Individual Messages. Or alternatively, when we are in Conversations mode, we will see at the top of the inbox, an information bar that tells us that we are seeing messages in conversation mode. To return to the original format of the inbox, click the **Clear** button; this will take us back to **Individual messages**.

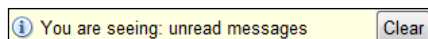


Viewing unread mail

Often it is useful if we can show only our unread e-mails. To do this in Lotus Notes, we can go to the **Show** button and select **Unread Only**.



To return to showing both read and unread, go to the **Show** button and select **Unread Only**, or alternatively when you are viewing **Unread Only** you will see at the top of the inbox an information bar that tells you that you are seeing messages in unread messages. There is a **Clear** button that will also take you back to read and unread messages.

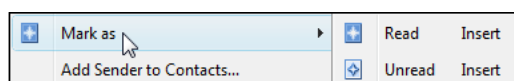


Once you have read a message you can mark it as being unread or select several messages and mark them as unread.

How to mark a message as Unread or Read

We can mark a message that is read as unread or vice versa by selecting the message(s) and then:

- Pressing the *Insert* key on your keyboard (it could be abbreviated as *INS*)
- Right-clicking and selecting **Mark as | Read** or **Mark as | Unread**



Managing mail with folders

All incoming mail goes directly to our inbox. After a while, our inbox can become quite large and one way to assist in managing the inbox as well as sorting our messages is to file them into folders.

Earlier in this chapter, we explored sending mail and the **Send and File** option, which allowed us to send a message and at the same time file it in its appropriate folder.

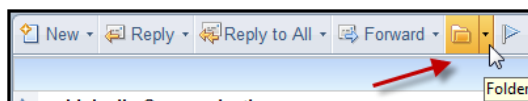
In this section, we will explore how to create folders as well as how to file received messages into folders.

First, let's start with how to create a folder.

Creating a folder

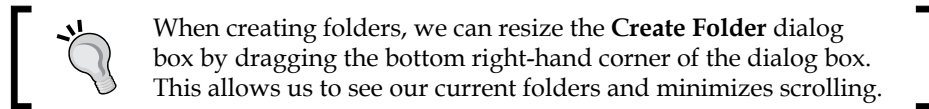
To create a folder, follow these steps:

1. Open mail and click the down arrow to the right of the **Folder** button at the top of the inbox.



2. We will see the following options: **Move to Folders**, **Remove from Folder**, **Discover Folders**, and **Create Folder** – select the **Create Folder** option.

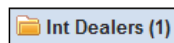
3. The **Create Folder** dialog box will be opened. The cursor will be placed in the **Folder Name** field; type the name of the new folder in this field. Note that folders are listed in our Mail alphabetically. If we want a particular folder to always be at the top of the list, we can prepend that folder with either numbers or letters. For example, to have the "Training" folder listed at the top of our folders, we can add either number "1" or letter "a" to the beginning of the name—1. Training or a.Training.
4. The next option is **Select a location for the new folder**. This option allows us to create a folder within another folder or to create a main folder. If we want this folder to be a subfolder of another, we can select the folder we want the new folder to be created in; if we do not select a folder, then the new folder will be the main folder.
5. Click the **OK** button to close the dialog box and create the folder.



We may have noticed that when we have unread messages in our inbox, the **Inbox** name is bold and the number of unread messages appears to the right as shown in the next screenshot:



Folders are the same. When there are unread messages in a folder, the name of the folder is bold and the number of unread shows to the right; as the following example shows there is one unread message in the **Int Dealers** folder:



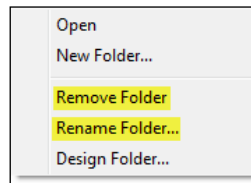
There are times when we create a folder and we need to rename the folder or remove it as it is no longer required. The following sections cover instructions on how to perform both tasks.

Renaming and removing folders

Often we create a folder, and further down the track, we may need to change the name of the folder or in some cases delete it. The following is how we can perform these tasks:

1. Expand **Folders** by clicking on the + icon next to **Folders**.

2. Select the folder to rename or remove, and right-click.
3. A menu will appear as shown in the following screenshot. Select **Rename Folder...** to rename the folder. We will then be prompted for the new name; enter the new name and then click the **OK** button.
4. To remove the folder, select **Remove Folder** from the menu. We will be prompted with a notification saying **this action cannot be undone, do you want to proceed?** Select the **Yes** button to proceed or **No** to cancel removing the folder.



We can also move a folder from one subfolder to another folder, or from a main folder to a subfolder, by simply dragging and dropping the folder to its new position.

Selecting messages

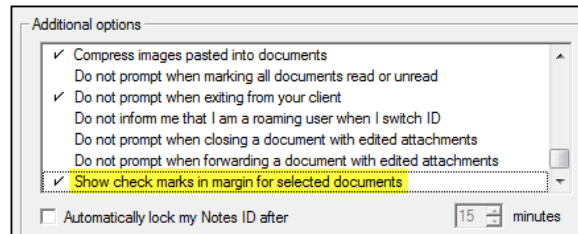
Often when we are managing our mail, we want to select several messages so that we can file, delete, or forward the selected messages to another person.

Selecting one or more messages or documents

We will often need to select documents so that we can file them, delete them, or forward them on to another person. The following are possible scenarios:

- **One or more consecutive documents:** Click a document, then press and hold the *Shift* key, and then click the final document we want to select.
- **One or more non-consecutive documents:** Press and hold the *Ctrl* key, and then click each document.
- **All of the documents in a view:** Click **Edit | Select All**, or **Edit | Deselect All**, or *Ctrl+A*.

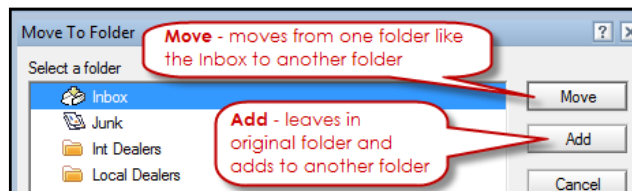
- **Tick in left-hand margin:** There is a preference that we can select: **File | Preferences | Basic Notes Client Configuration | Additional options | Show check marks in margin for selected documents**. This preference allows us to click in the margin. We can also press the spacebar to select documents and use up and down arrow keys to navigate to different documents.



[ Once we have a message selected in mail, we can perform the following operations: delete, print, archive, copy, forward, or mark as unread/read.]

Filing messages

As we have discussed, folders are useful for organizing messages. We can put a message in one folder or multiple folders. When we select a message or several messages and then the **Move to Folder** option, we will see a choice to either **Move**, **Add**, or **Cancel**.



- When we **Move** a message to a folder, Lotus Notes removes the message from its current folder and puts it in the target folder.
- When we **Add** a message to a folder, Lotus Notes keeps the message in its current folder and adds the message to the target folder.
- When we select **Cancel**, the dialog box is closed and the messages are not moved.



When filing messages, if we use the **Move to Folder** option, the **Move to Folder** dialog box opens. If we know the name of the folder, we can start typing the folder name and that folder will be selected and highlighted. Then if we press the *Enter* key, the message will be filed into that folder. Typically this is a quicker option than scrolling, especially if we have several folders.



There is only one message. If we delete a message that is in multiple folders or views, the message is deleted from all of the folders and views.

The other way to file messages is to drag-and-drop. We can drag messages from our inbox and then drop them into a folder. To move a message to a folder, display the target folder in the navigation pane, and then drag the message or selected messages into the folder.

So now that we have learned how to create folders and file our messages, hopefully our inbox is looking more organized. In the next section we will learn how to find messages.

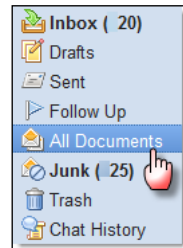
Finding filed messages

Sometimes we may file a message and then not remember which folder we filed it in. Other times, we may not have filed the message or we may be searching for a message that we sent. The next section discusses All Documents, which is a great place to find messages.

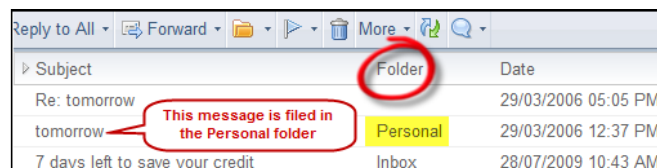
All Documents

All Documents contains all messages that are in **Inbox**, **Sent**, and our folders. In fact it shows every message in our mail, excluding deleted messages and is the perfect place to search for e-mails. If I can't find an e-mail in my inbox, I typically will go to **All Documents**, sort by sender, and look for the message there. To sort by sender, click on the column title. Basically all column titles are sortable; click once to put into ascending order and then click again to return to default sorting.

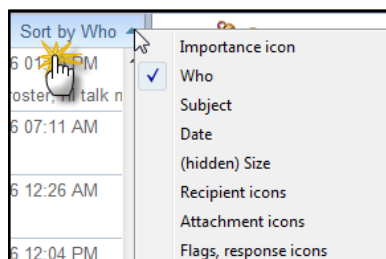
We can access **All Documents** in the side navigator under **Follow Up** as shown here:



In **All Documents**, there is a column that shows which folder the message is filed in. In the following screenshot, the **Folder** column is circled in red:



If we have the side preview pane opened, we may not see the **Folder** column or any columns. This is because there is not enough space to display the columns. In the next section we will learn what we will see instead is a **Sort by** button at the top of the messages where the column name would be. We can access the different columns by clicking the **Sort by** button and a menu will appear with the different sorting options as shown here, note the Folder column is not available from this area.

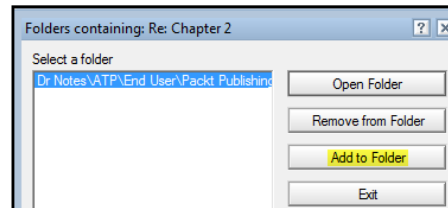


Discover Folders tool

Another way to find where we have filed a message is to use the Discover Folders tool. The following are the instructions on how to use this tool:

1. Select the message about whose folder location we want to know.
2. In the action bar, click **Folder** icon, and then select **Discover Folders**.

3. A dialog box will appear if the message resides in a folder and it will show the name of the folder. If it is in our Inbox or Sent folder, we have the **Add to Folder** option if we desire.

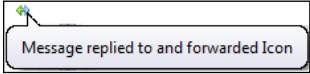
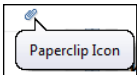


4. To close the **Discover Folders** dialog box, click the **Exit** button.

Mail icons

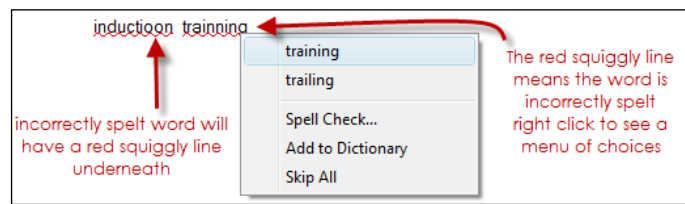
The following is a list of icons that we will see throughout our folders and views in mail. There are other icons but these typically are to do with Calendar and To Dos, and will be covered in later chapters.

Icon	Icon Help	Inbox Position	Description
		Left of message	Unread Message received, unread messages are bold or via preferences under Fonts and Colors can be selected to be Plain red text .
		Left of message	High Priority – when this person sent the message they selected the delivery option of High importance.
		Right of message	The green arrow represents the message has been replied to. If we open the message, we will see a History section.
		Right of message	The blue arrow represents the message has been forwarded. If we open the message, we will see a History section.

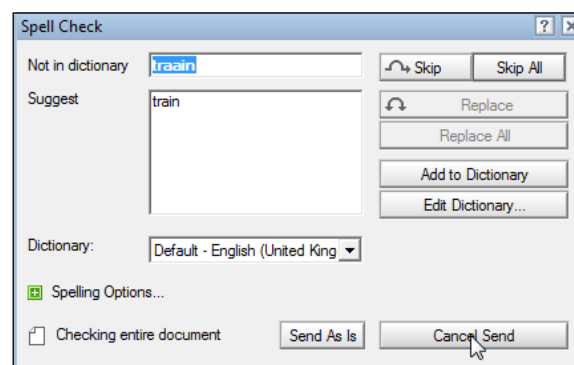
Icon	Icon Help	Inbox Position	Description
		Right of message	The green and blue arrow represent the message has been replied to and forwarded. If we open the message, we will see a History section.
		Right of message	The paperclip icon represents that this message has an attachment.

Spell check

When we are typing a message and we spell a word incorrectly, we will see a red squiggly line underneath the word in question. If we right-click on the word, we will see alternative suggestions for spelling as well as options to add the word to the dictionary or skip.

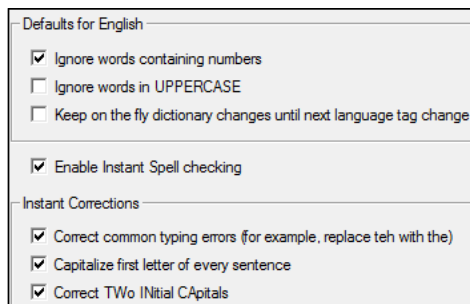


When we send a memo, if there is a word that is spelt incorrectly, we will again be prompted to correct the spelling. There is a **Send As Is** button if we want to bypass performing a spell check.



There are some excellent options to select in **Preferences** for spelling checks. I have found that people who work in manufacturing, or those who deal with part numbers, benefit from selecting the **Ignore words containing numbers** option as many of the part numbers that they deal with include numbers and letters.

The **Enable Instant Spell checking** option shows us instantly what we have spelled incorrectly by putting a red squiggly line underneath the word.



The **Instant Corrections** options speak for themselves and I have enabled them all as they are fantastic options.

 Dictionaries are provided for each country, so we need to make sure that we have selected our country's dictionary in the **Spell Check** preferences.

 If we have set up our signatures, we shouldn't forget to **Add to Dictionary** our name and other details that are in our signature.

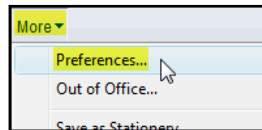
Subject warning

When sending a message, if we have not entered a subject, we are prompted to enter a subject when we attempt to send the message. When prompted, we can enter a subject and resend by selecting **Yes**. Alternatively, we can select **No** to send the message without a subject.

Adding a signature to messages

In Lotus Notes, as with other mail products, we can set up a signature that identifies us and our details. We can add our company logo, phone details, vCards, and even a web address. I have added my company title to my signature as well as my relevant details. To set up our signature, we need to follow these instructions:

1. Open Mail and click on the **More** button in the action bar at the top of messages. Then select **Preferences...**



2. Select the **Signature** tab. Check the **Automatically append a signature to the bottom of my outgoing mail messages** option if we required. If we don't select this option, we will need to manually add our signature to messages by the **More** button in the message and selecting **Insert Signature**.

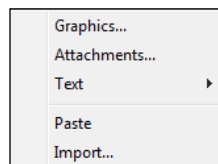
Note: The rich text signature is stored in your mail file so that the signature is available on any computer where you use Notes.

☒ Automatically append a signature to the bottom of my outgoing mail messages

3. Click the **Append my vCard** button if we want to add a vCard attachment as part of our signature.
4. We can then enter then our signature and format it by clicking on the **T** then **Text**. We can also add graphics, paste in an image, or import an image, among other things.



The choices available under the **T** are as shown in the following screenshot:

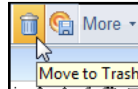




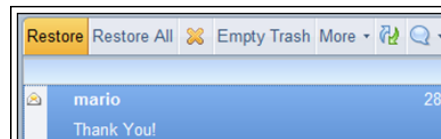
I have selected the **Automatically append a signature to the bottom of my outgoing mail messages** option. If I am sending a message to someone and I don't want my signature appended, I can simply highlight the signature and delete it from within the memo.

Deleting messages and restoring from Trash

Deleting messages is very simple within Lotus Notes. We can right-click and select **Delete** from the menu. We can also select the message and press the *Delete* key. We can also click the **Delete** icon in the action bar at the top of our messages, as follows:



When a message(s) is deleted it is immediately removed and placed into Trash until due to expire. We can restore deleted messages by opening **Trash**, selecting the messages we want to restore and then selecting the **Restore** button. We will need to restore before the message is due to expire, to confirm when Trash will be deleted go to **Preferences | Mail** and view **Delete documents in my Trash folder after # hours**.



Summary

In this chapter we have explored many aspects of mail in Lotus Notes. We have learned about creating, replying, and addressing messages. We also looked at the different ways we can edit messages. We explored working with attachments, folders, spell checking, and setting up signatures.

In the next chapter, we will delve into mail tools, which can assist us in being more efficient with the way we work with mail.

3

Lotus Notes Mail Tools

In the previous chapter, we navigated the basics of Lotus Notes mail. In this chapter, we will focus on the advanced features available and how we can best utilize them to assist us in being efficient with mail management.

Take the time to explore the available tools and you might be surprised to find that once we start using some of them, we might wonder how we ever lived without them. One of my favorite tools is **Stationery** – this is like a template for e-mails that I send on a regular basis such as a monthly report. Many colleagues I know have Stationery, which they have set up to send to their travel agent; it includes all their relative details such as frequent flyer numbers, passport details, and so on.

Another tool is **Copy Into New ... Memo/Calendar/To Do**, which copies the text from a selected message into a new memo, calendar entry, or To Do. I use this to copy details within a memo into a calendar entry so that I have all the details of the information in the memo right there in the calendar, which means I needn't search for the original e-mail.

I also love the **Find Available Time** tool, which is a context menu option available on messages, calendar entries, and To Dos. You select a message, for example of someone that you would like to meet with, and as the name suggests, it automatically finds the first time we are both available and gives us the option to create a meeting invite. It is a few less steps than doing it from scratch in our calendar.

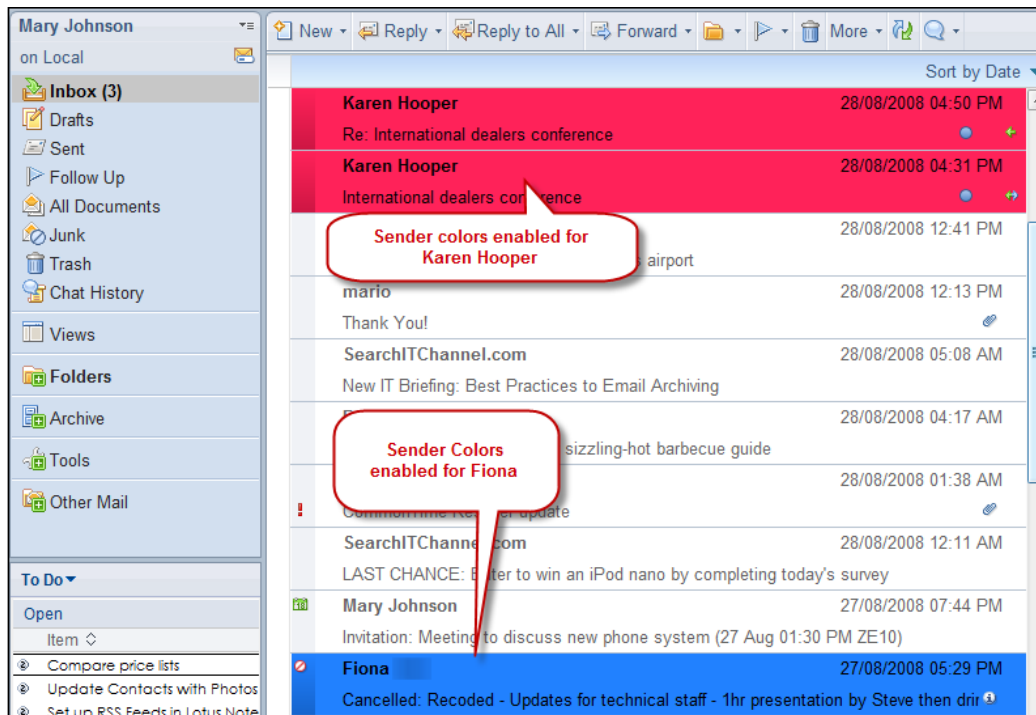
In this chapter, we will explore the following topics:

- Senders Colors and Recipient Icons
- Collaboration history
- Finding available time
- Copying into Tool ... Memo/Calendar/To Do
- Follow up Feature (flagging)
- Stationery
- Message recall
- Spell check

- Out of Office
- Managing Junk mail
- Rules
- Mail size indicators
- Archiving
- Mail Preferences

Senders' colors and recipient icons

Often it is important for us to identify particular e-mails in our inbox quickly, specifically if they are sent only to us or we have been CCed, or if an e-mail has been received from a certain person. We can specify text and background colors to identify messages from particular senders. For example, we could use one color combination to identify co-workers on an important project, another color combination for our manager, and some other combination for personal messages from friends. We can specify several color combinations. In the following screenshot, background colors of red and blue have been selected for specific individuals:

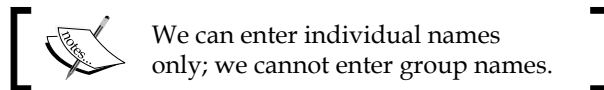


We can also display icons that identify messages in which we are the only recipient in the **To** field or our name appears only in the **Cc** field.

Specifying colors that identify senders

We can follow the instructions given next to enable **Sender Colors**:

1. If necessary, open your e-mail.
2. Click the **More** button above the message list, and then click **Preferences**.
3. Select the **Sender Colors** tab.
4. In the first **Sender names** field, enter one or more names of people whose messages we want to display in the first color combination. Separate names by pressing *Enter* (rather than using a comma as a separator). To select names from a directory, click the down arrow next to the field.



5. Select a background color and or text color.
6. Click **OK**.
7. To remove all color combinations, return to the **Senders Colors** tab in **Preferences**, click **Restore Default Colors**, and then click **OK**.

Basics	Letterhead	Signature	Follow Up	Sender Colors	Recipient Icons
Sender Colors					
Make it easy to spot messages from important senders in your Inbox by assigning unique background and text colors. Sender names are not case-sensitive. Group names are not supported.					
Sender names: (Enter one or more)		Background:		Text:	
Karen Hooper/Dr Notes					
Fiona Lea/Dr Notes					
Betty Navel/Dr Notes					
Luke Harrington@dealersareus.com.au					

Displaying icons that identify your recipient level

To Cc a person in a message typically means that the message content is for information and we may not need to respond or action anything. E-mail etiquette dictates that if we want a person to take action on an item we have included in the e-mail, we add their name into the **To** field. It is therefore handy for us to immediately identify an e-mail where we have been CCed or an e-mail where our name is in the **To** field. The following are the instructions on how to enable this feature:

1. If necessary, open mail.
2. Click the **More** button above the message list, and then click **Preferences**.
3. Go to the **Recipient Icons** tab.
4. Select one or more of the display fields to display solid-circle if **Mail sent to me only**, half-circle if **Mail sent to no more than this number of recipients in the To** field and then select the number, or empty-circle icons if **Mail sent to me as a cc**.
5. To display the selected icons when mail is addressed to us with an alternate e-mail address or group name, specify one or more alternate addresses or group names in the field below, this step is optional.
6. Click **OK** to save the settings.

Basics | Letterhead | Signature | Follow Up | Sender Colors | **Recipient Icons**

Recipient Icons

Select the recipient indicators to display in your Inbox. These icons identify mail that has been sent to you only or to a few people only.

☒ Mail sent to me only

☒ Mail sent to no more than this number of recipients in the To field
2

☒ Mail sent to me as a cc
Mail is sent to more than 2 recipients in the To field

The selected icons apply to your Notes address. To display them for other addresses (such as your internet address or the name of a group you are in), specify one or more addresses:

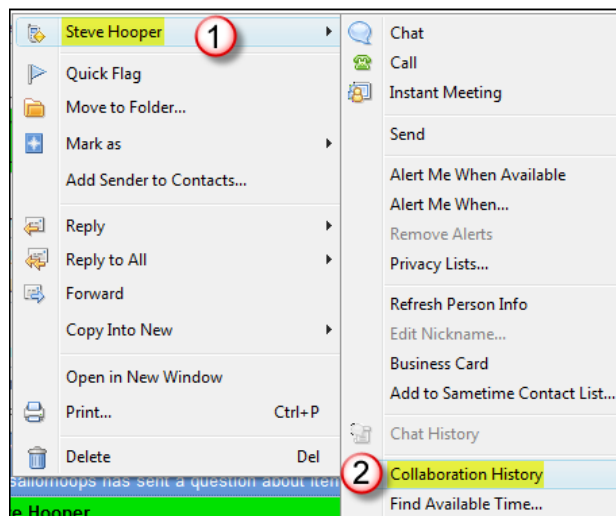
Collaboration history

Collaboration history incorporates quite a few features. We can view a history of collaborations or communications that we have had with one of our contacts such as e-mail, Sametime chat transcripts (if you have saved them), or meetings. Collaboration history includes all activity with a selected contact for the previous two weeks.

Viewing collaboration history for a person

Follow the instructions given next to see the options available with collaboration history:

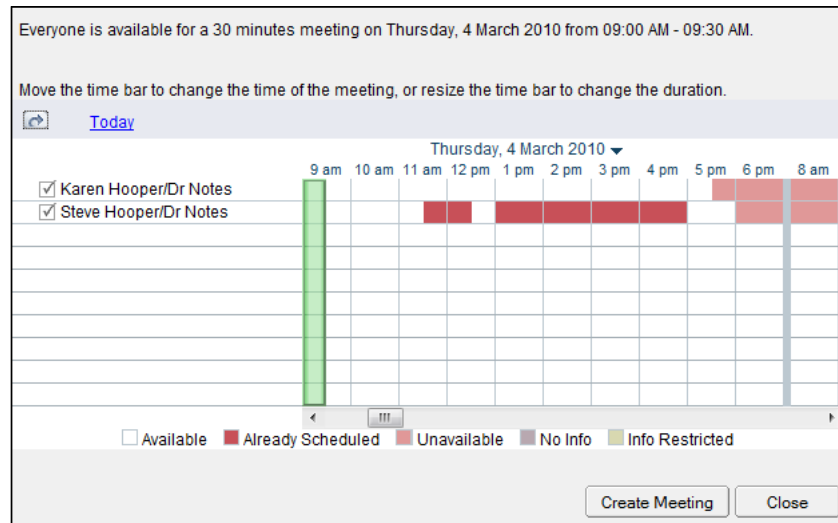
1. From within your mail select a message from a person who you want to view collaboration history.
2. Right-click on the message and we will see the person's name that we have selected at the top of the menu options. This is marked as step 1 in the following screenshot.
3. Select the person's name and then we will see an extended menu. We will see an extended menu.
4. Select **Collaboration History**. This is step 2 in the following screenshot.
5. A dialog box will appear with a collaboration list; select and double-click to open one of the collaborations.



Finding available time

Often when we receive a message from a person and we realize that we need to organize a meeting with them. The **Find Available Time** feature is a great shortcut to show us the first available time for ourselves and the sender of the message so that we can create a meeting with them.

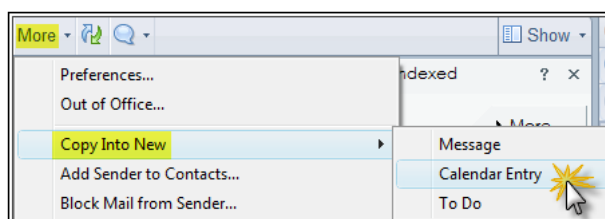
1. We can select the context menu by right-clicking on a person's name in our mail; we can then see their name listed at the top of the context menu.
2. When we select their name, an extended context menu appears.
3. Select **Find Available Time** to open the Calendar Scheduler and see when is the first available time for ourself and the person we have selected. If the person we have selected is an external person to our organization, the scheduler shows grayed out time slots as the information is not available; however, it does show our first available time.
4. From the **Calendar Scheduler** window, we can create a meeting as shown in the following screenshot:



Copy Into Tool

Often we might receive an e-mail giving details that we need to paste into a meeting, memo or To Do. The **Copy Into Tool** allows us to select a **Message**, **Calendar Entry**, or **To Do** and then copy the information from either one of these documents into a new **Message**, **Calendar Entry**, or **To Do**. This saves us from having to copy and paste information between the message and the target document.

This feature is available from the right-click menu and under the **More** button as shown next:



[ One can drag a message to the **Day-At-A-Glance** time slots area to create a calendar entry from that message.]

Follow Up feature

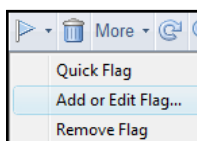
The "Follow Up" feature, or "flagging" as it is known in some other mail applications, is a fantastic tool for managing our mail. Many times when we receive an e-mail that we can't respond to there and then, we typically leave it in our inbox so that we remember to get back to it; we might even mark it as unread to further prompt us. The problem is that our inbox is designed for incoming e-mails, so as new mails keep pouring in our inbox, the e-mail that we need to follow up gets pushed further down the list.

Marking an e-mail for follow up assists us in managing those e-mails that we need to respond to, as it flags the message with an icon so it stands out from the other messages; we can also set alarms and view the flagged messages in a special follow up views to make managing them easier.

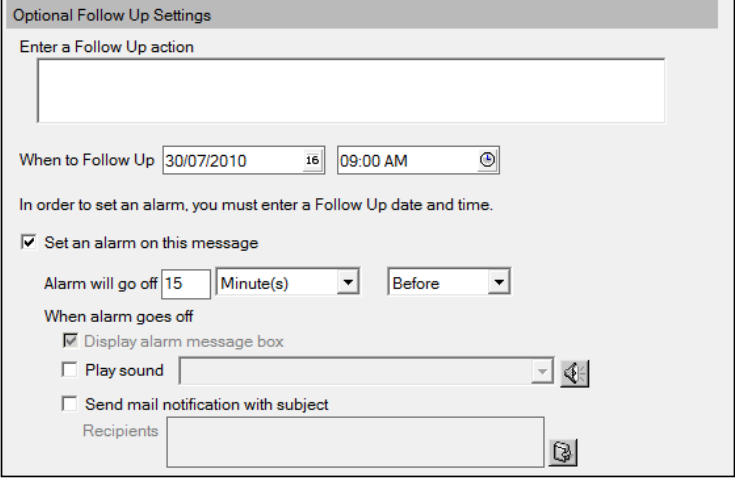
Flagging messages for follow up

Flagging messages is a great idea. We just need to select one or more messages in a folder or view and add a flag by performing any one of the following steps:

1. Click the flag icon above the message list, select **Add or Edit Flag....**

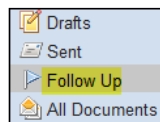


2. Enter flag priority, and follow up action, date, time, and alarm if required.

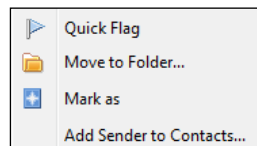


The dialog box is titled "Optional Follow Up Settings". It contains a text field for "Enter a Follow Up action". Below this is a section for "When to Follow Up" with a date field set to "30/07/2010", a time field set to "09:00 AM", and a small clock icon. A note states: "In order to set an alarm, you must enter a Follow Up date and time." There is a checked checkbox for "Set an alarm on this message". Below this, "Alarm will go off" is set to "15" minutes "Before". A section "When alarm goes off" includes a checked checkbox for "Display alarm message box", an unchecked checkbox for "Play sound" with a speaker icon, and an unchecked checkbox for "Send mail notification with subject" with a "Recipients" text field and an icon.

- Select a message or several messages and then drag to the **Follow Up** folder (this will move the message out of the **Inbox**). Then enter preferred options.



- Right-click and select **Quick Flag** (this will apply options that have been set in Mail Preferences).



3. The **Quick Flag** option is like a shortcut to flagging messages. Before we learn about the **Quick Flag** option, let's look at the several options that can be selected when we select the option to **Add or Edit Flag**.

 When we create an e-mail, we have the option to add a flag. This is handy when we want to mark an e-mail we are sending for follow up and it saves us from having to go to our Sent folder to perform the task after we have sent the message.

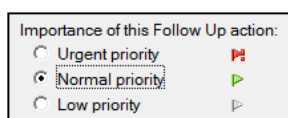
When we add or edit a flag, we will see an array of choices as to how we want to manage the flag depending on the importance and how we want to be notified. I will often use this area as a place to leave notes and set alarms for those messages that need more detail. If we have already added a flag and we want to change some of the options, we can select the same menu that we use to add a flag — **Add or Edit Flag**.

Importance

The first option we have is to select the flag priority icon that will be displayed next to the message or messages we have selected for follow up. There are three priorities to select from:

- Urgent
- Normal
- Low

As shown in the next screenshot, just click the priority that is relevant for what we have flagged for follow up; in the following screenshot **Normal** priority has been selected:



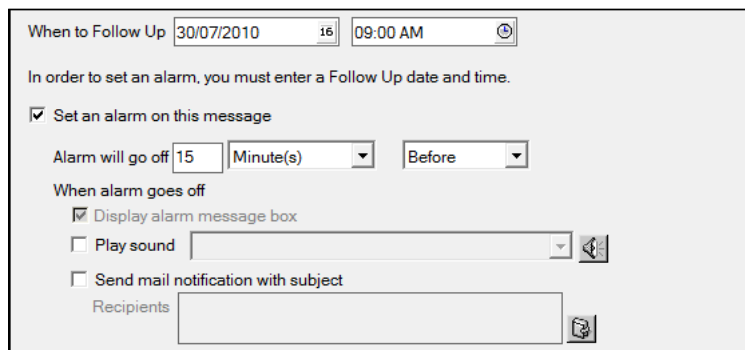
Optional follow up settings

In the **Enter a Follow Up Action**, we can add comments relevant to the follow up required for the message. I use this area in the same way I would add a Post-it note to add some comments or actions to something I am working on. It is great when we are going on leave and we can't finish off all of the messages. Just add comments in the **Enter a Follow Up Action** and, when we get back after a well-earned break, we will be able to look at the comments to refresh our memory as to the status or action required. If we have to share our job with someone or manage an individual's mail, we can add comments so that the person knows the status of the follow up and we can let them know what they need to do without having to send them a separate message about it. In our busy lives, adding comments to a message that we can't deal with there and then is a great advantage.

Other follow up settings available to us are:

- **When to Follow Up:** This option helps us to specify a follow up date and, optionally, a follow up time — I love alarms and I use this option often. I also like to see the due date for each follow up so that I can manage my time. It is like a "To Do" list or "Priority" list of messages I need to deal with.

- **Play sound:** This option is for those who set an alarm. Using this option, we can select a sound to play when the alarm goes off. Click the speaker icon to test the selected sound. We might want to select a separate sound for different priorities or have a sound dedicated just for follow ups.
- **Send e-mail notification with subject:** This option will send an e-mail when the alarm goes off. It is a great option if we want to remind someone else that something needs to be followed up. Make sure to type the addresses of those we want to receive the notification in the **Recipients** field. Click the address book icon to select names from a directory. I know lots of people who send a message to themselves to remind them that they have to follow up a message!



When to Follow Up 30/07/2010 09:00 AM

In order to set an alarm, you must enter a Follow Up date and time.

☒ Set an alarm on this message

Alarm will go off 15 Minute(s) Before

When alarm goes off

☒ Display alarm message box

☐ Play sound

☐ Send mail notification with subject

Recipients



At any time, we can edit the flag options. I sometimes do this to change the due by date or to add additional comments in the **Enter Follow Up Action** field. For example, I might have rung the person and been told they are on leave. I would change the due date to be a couple of days after they return and add comments noting the date I rang and that they are currently on leave.

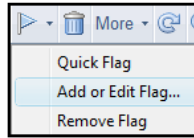
Quick Flag

The **Quick Flag** option allows us to quickly add a flag with preset options. To add a Quick Flag, we have the following options:

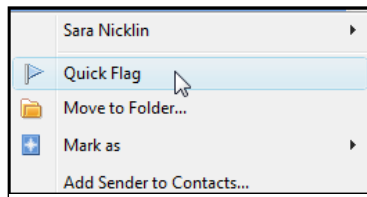
- Select a message(s) then click the flag icon above the message list as shown next:



- Select a message(s) and then click the flag icon above the message list and select **Quick Flag**:



- Select a message(s), and then right-click and select **Quick Flag**:



- From within a message, click the flag icon in the row of buttons above the e-mail header.

Setting Follow Up preferences for the Quick Flag option

The Quick Flag has similar options available that we have when we add a flag. We can follow the instructions given next to set this preference:

1. If necessary, open mail.
2. Click on **More** above the message list, select **Preferences**, and then the **Follow Up** tab.
3. For **Priority**, select a priority to display when we flag a message.
4. Check **Set follow-up date**, type a number, and select **day(s)**, **month(s)**, or **year(s)** to set a default follow up date. To add a follow up time, select **Set follow-up time** and select a time of day.
5. Check **Set an alarm to go off** and then type a number. Select **Day(s)**, **Hour(s)**, or **Minute(s)**, and select **Before** or **After** to set the amount of time before or after the follow up date or time to trigger the alarm. Then do any of the following:
 - To apply the default alarm settings when we use the **Quick Flag** feature, check **Use alarm settings for Quick Flag**.

- To play a sound when the alarm goes off, check **Play sound** and select a sound to play from the drop-down list. Click the speaker icon to test the selected sound.
- To send an e-mail when the alarm goes off, check **Send e-mail notification to** and type the addresses of those who should receive the notification. Click the address book icon to select names from a directory.

6. Click **OK**.



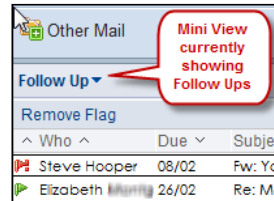
For alarms to work with follow up flags, we must first enable them in our preferences. Go to **File | Preferences | Calendar and To Do**, select the **Alarms** tab and check **Display alarm notifications**, and then click **OK**.

Follow Up view and Mini view

The **Follow Up** view is positioned under **Sent**. We can drag messages to this folder to add a follow up flag or we can open this view to manage our follow ups. From within this area, we can sort our columns, open or preview the message(s) that have been flagged, edit the flag, and remove the flag.

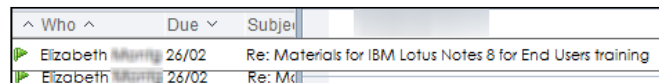


The Follow Up Mini view is always in the line of sight as it displays in the bottom of the navigator on the left-hand side of our mail file, which is an invaluable feature.



From within this area, we can sort our columns, open the message that has been flagged, edit the flag, and remove the flag:

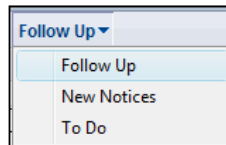
- We can display all of the columns for a message by moving the cursor over the message. Alternatively, we can resize this window.



- We can open the message by double-clicking it.
- We can remove the message from the Mini View and Follow Up view (once you have completed the action) by clicking **Remove Flag**. The message stays in other mail views or folders, but no longer has a follow up flag.
- In the Mini View we can resize the view and columns:
 - Resize the Mini View Vertically by dragging the area above the words **Follow Up**.
 - Resize the Mini View Horizontally by dragging its right edge.
 - Resize the Columns by dragging the column dividers.
 - Reorder the columns by dragging and dropping the column headers.



With the mini view we can choose to display meeting notices and To Dos, and not display Follow Up messages if we prefer. We can switch to the display **New Notices** (Calendar notices such as invites or acceptance and so on) or **To Do** by clicking the down arrow beside the words **Follow Up**.



In the mini view, there is a column dedicated to the priority flag icon. We will see this column in our Inbox and other views in our mail, as well where we can see the priority icon. We can then click on the column header to group all our priorities together; this will group all our high priority follow ups to the top of the list.

Allowing delegates to add follow up flags when managing our mail

We can give delegates (typically personal assistants) the ability to add follow up flags on our behalf within our mail. This option is enabled within **Access & Delegation | Mail Preferences**. Delegates must be given Read, edit, and create any document, send mail, enable Out-of-Office access or higher.



When I flag a message that is in my inbox I then file it into one of my folders. I can access the message from either the Follow Up view or the Mini view so it is not necessary to keep it in the inbox – a great option for keeping the size of one's inbox to a minimum.



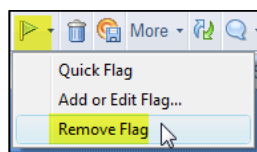
When we display conversations, we can flag conversations for follow up action and, when we do, the flag is added to each message in the conversation.

Removing flags

There are several ways to remove a flag from an e-mail. The obvious action, if one has completed the follow up action and no longer requires the e-mail, is to simply delete it! In the Mini view, click the **Remove Flag** button.



Alternatively from any view or folder or from within the e-mail, select the Follow Up button and then select **Remove Flag** as shown next:



Stationery

Stationery in Lotus Notes is a similar concept to templates in Microsoft Word, we can create a message that has information in it that we will reuse. For example many HR departments have a standard message they send to announce job vacancies. The IT department may send out a standard message announcing server outage, among other reasons. The information in these messages is predominately the same. For example, the server outage memo would have a different server name and date but the other information such as the value in the To and Subject fields would remain the same. Therefore using stationery in these instances saves us from having to recreate the message each time. I have come across quite a few people who have created Stationery to send when they are booking flights or accommodation. The stationery includes their frequent flyer information as well as passport details and so on. They typically will also include a table with headings such as Date, Time, Depart From, Arrive At, and so on so that when they are requesting flights they simply just enter details and tab through the table.

We can create stationery with text or graphics and include a recipient list that we can reuse.



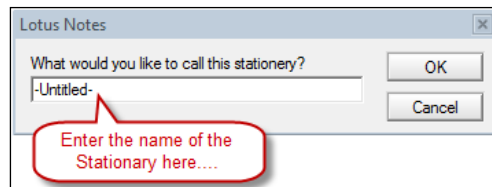
If the Stationery includes an attachment, we can edit the attachment each time we need to send the stationery.

Creating stationery

To create stationery is very simple. There are three options, which are as follows:

Option 1:

1. Create a message and add required text, recipient list (if necessary), delivery options, and any other elements we require in the message.
2. From the **More** button, select **Save as Stationery**; we will see a prompt requesting a name for the stationery.



3. Type in name and click the **OK** button (or press the *Enter* key).
4. Stationery will be saved in the **Stationery** folder.



Option 2:

1. In the mail side navigator, expand **Tools** and then select **Stationery**.
2. Click **New Stationery | Message**.
3. Add required text, recipient list (if necessary), delivery options, and any other elements we require in the message.
4. Click **Save**, type a name for the stationery, and then click **OK**.

Option 3:

1. In the mail side navigator, expand **Tools** and then select **Stationery**.
2. Click **New Stationery | Personal**.
3. Between the first set of brackets under **Header**, insert any text or graphics to show at the top of the message. Note that importing is the best way to include graphics.
4. Between the set of red brackets, insert any text or graphics to show directly before the body of the message.

5. Between the last set of brackets, insert any text or graphics to show at the bottom of the page. If we want to add our signature to this field, we can insert it between the red brackets and then cut and paste it between the last set of brackets.
6. Click **Save**, type a name for the stationery, and then click **OK**.

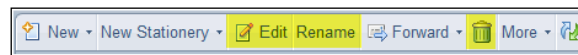
Of all the three options, I personally prefer option one.

Editing, renaming, or deleting stationery

Often we need to tweak the stationery that we have created. We may need to change the recipient list or add a new section to the body of the memo. Other times we may need to delete stationery as it is not longer required or we may need to rename stationery.

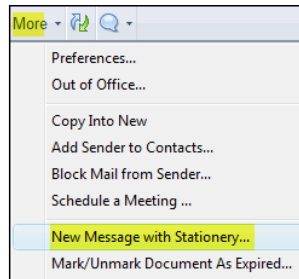
The following are steps we need to follow to edit, rename, or delete stationery:

1. In the mail side navigator, expand **Tools** and then select **Stationery**.
2. Select the stationery to change.
3. Perform any one of the following:
 - Click **Edit**, make changes to the stationery, and then click **Save**.
 - Click **Rename**, type a new name for the stationery, and then click **OK**.
 - Click the trash icon to delete the stationery.



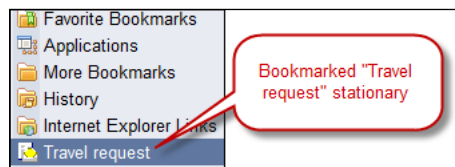
How to use stationery

Once we have created our stationery, we will find it very easy to use. Stationery is stored in the **Stationery** folder. To use stationery, we can go to the **Stationery** folder and double-click on the stationery we require. Alternatively, if we are in our inbox, we can click the **More** button and select **New Message with Stationery**; this will open a prompt box listing the stationery stored in the **Stationery** folder, we need to select the Stationery we require.



Bookmarking stationery

Stationery that is most often used can be bookmarked so it can be easily accessed. We can do this by opening the stationery message and then dragging the window tab of the opened stationery to the **Open** button or the **Bookmark Bar**. This will result in the stationery being listed in our **Open** button or the **Bookmark Bar**. The following screenshot shows that I have bookmarked the **Travel request** stationery. When I need to use the **Travel request** stationery, I simply click to open it from the **Open** button or the **Bookmark Bar**.



If we find ourselves searching for the last e-mail we sent to a person(s), copying the contents to the clipboard, pasting it into a new memo, making some slight changes and then sending it on a regular basis, it is time we think about using stationery!

Message recall

It happens at times that we send an e-mail and then immediately realize that we have either sent it to the wrong person, have forgotten the attachment, or just should not have sent it! We can recall a message that we have sent and saved. This is useful if we sent a message when it was still not ready to be sent, or if we want to edit the content of a sent message and resend it. Be aware that some organizations may have disabled this feature and the **Recall Message** button will not be available to us.

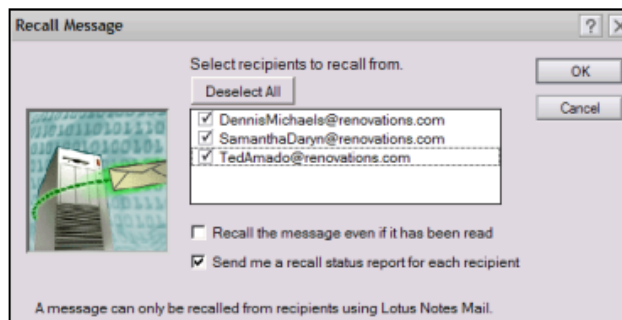
How to recall a message

If we find that we have sent a message that we need to recall, follow the steps given here:

1. In our mail, open **Sent** or All Documents.
2. Select the message that we want to recall.
3. Above the message list, click the **Recall Message** button or alternatively the recall option is available by clicking the **More** button and then **Recall Message...** option. Remember if this button does not get displayed, then the IT Department has potentially disabled this feature.

A rectangular button with a yellow-to-orange gradient background and the text "Recall Message..." in black.

4. If the message was sent to more than one recipient, select the recipients to recall the message from, by checking or unchecking the names displayed.



5. To recall the message from a recipient even if the recipient has already opened or previewed it, select **Recall the message even if it has been read**. Note that many IT Departments allow messages that have *not* been read to be recalled, so that even though this option is available to be selected, it will not recall the message if this option is not allowed. This is an optional step.

6. (Optional) To suppress recall status reports, check the **Send me a recall status report for each recipient** option. Recall status reports confirm whether or not a message is recalled successfully.
7. Click **OK**.



For a message recall to work, both we and the message recipient must be using Lotus Notes 8 client, mail template, and mail server. The message recipient must have the basic mail preference **Allow others to recall mail sent to me** selected. If messages are being sent externally from our organization, message recall is not possible as message recall only works internally within an organization.



If we were prompted to save the message when we clicked the **Send** button and we selected **No**, we will not be able to recall that message as it has not been saved in our Sent view or All Documents.

Spell check

Spelling is not my forte and I have to confess I love the spell check feature and use it all the time. There are quite a few options that we can set for how we want the spell check feature to operate. First, we can set a preference to spell check all our messages, we can then set our default dictionary, how we handle numbers and case, and we can select additional dictionaries. There is also the option to enable the instant spell check that identifies misspelled words as we type.

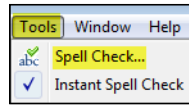
Enabling spell check for messages

We can have Lotus Notes automatically spell check all messages before sending them, or we can alternatively manually check for spelling mistakes in a message. We can also enable the instant spell checker that shows misspelled words as we type. We discussed the Instant Spell check in *Chapter 5, Mastering Lotus Notes Mail*; in this chapter we will look at the other spell check options.

Performing a manual spell check

Create a message to test the steps given next:

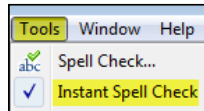
1. With the message open, select the text in the body of the message that we want to check the spelling of.
2. Select **Tools | Spell Check...**. When Notes doesn't recognize a word, Notes displays the **Spell Check** dialog box.



Performing spell check as we type (Instant Spell check)

Create a message to test the steps given next:

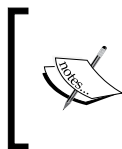
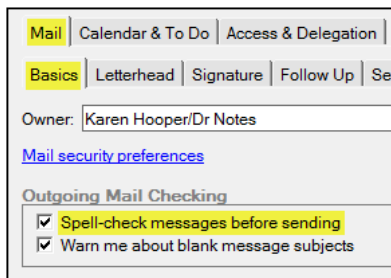
1. While the message is open, select **Tools | Instant Spell Check....** When Notes doesn't recognize a word, the word will be identified with a red squiggly line underneath.
2. Right-click on the misspelled word; we will see alternative suggestions for spelling as well as options to add the word to the dictionary or skip it.



Performing an automatic spell check

In this case, Notes checks the spelling when we send the message.

1. Select **File | Preferences**, click **Mail**, and then click the **Basics** tab.
2. Select **Spell-check messages before sending**.
3. Click **OK**.



We can enable the Instant Spell Check and the option to spell check messages before sending automatically. This will show us misspelled words as we type as well as prompts to correct any that we have missed when we send the message.

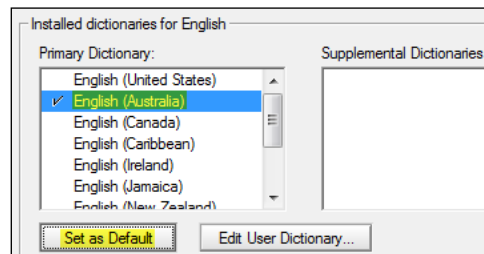


We shouldn't forget to add our signature to the dictionary. If we don't, every time we send a message and we have the spell check option enabled, it will spell check our name and whatever we have added to our signature. Select the button **Add to Dictionary** in the **Spell Check** dialog box if parts of your signature are picked up by the spell checker.

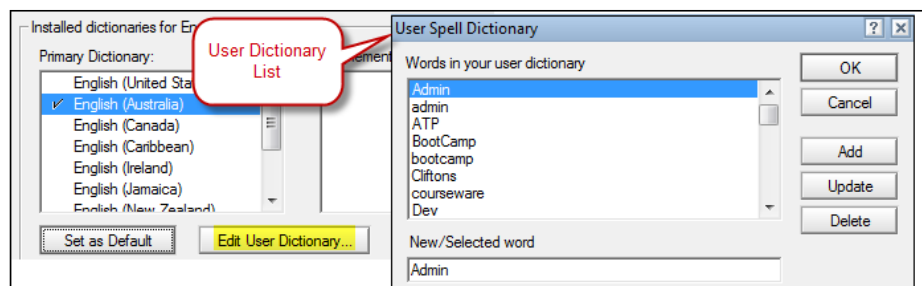
Setting spell check preferences

As mentioned, there are different spell check options that we can select to customize the spell checker.

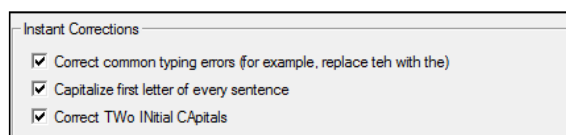
1. Click **File | Preferences**.
2. Click **Spell Check**.
3. Set any of the following options:
 - Select the language dictionary from the **Primary Dictionary** list, and then click **Set as Default**.



- Select the **Supplemental Dictionaries** option, wherein we may see supplementary dictionaries that we can select. This will need to be installed by our IT Department.
- The **Edit User Dictionary** option lists all the words we have added to our dictionary such as our name, company name, product names, and abbreviations we use. We can edit this dictionary from within Preferences or from within the Spell Check dialog box when prompted. From within this area, we can **Add** a new word by typing in the **New/Selected word** field and then clicking the **Add** button. We can also select a word such as **Admin** in the diagram and change the spelling and then click the **Update** button. Finally, we can delete a word in our user dictionary by selecting a word in the list and then clicking the **Delete** button.



- There is an **Ignore words that contain numbers** option. This is a great option for those who work with part or model numbers for products where the part or model numbers that contain letters and numbers. We can also set **Ignore words that are in uppercase**.
- We also have an option for multi-language documents—**Keep on the fly dictionary changes until next language tag change**.
- **Selecting Enable Instant Spell checking** option highlights misspelled words with a red squiggly line underneath them.
- Under **Instant Corrections**, we can select the typical typing errors we want corrected automatically.



4. Click OK.



The Instant Corrections is only available in Lotus Notes 8.5.1 English language clients.

Out of Office

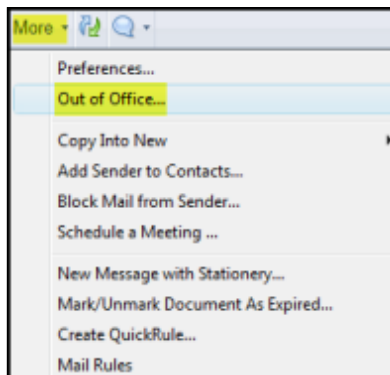
Whenever we take annual leave, or we are away from the office, it is important to enable our Out of Office. When a colleague or customer sends us an e-mail, they get notified that we are not available with dates of when we are away, and more importantly, when we will be back in the office. In Lotus Notes 8.5, the notification of our absence is sent immediately.

I actually use my Out of Office not just for when I am on leave. I will enable it if I am training for the day as usually I can't get to my e-mails until later that day or the next day. I also enable it when I go to conferences or other business outings. We can edit our Out of Office to send a customized message for each occasion that we are away. The notification service sends replies only between the leaving and returning times we specify and sends one reply to each sender.

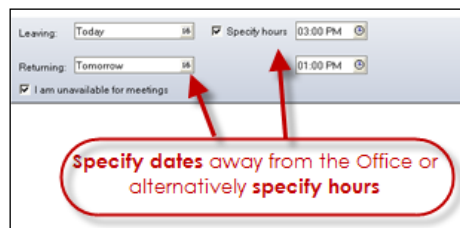
Enabling the Out of Office feature

The following are steps to enable this feature:

1. From within Mail or Calendar, click the **More** button and then select **Out of Office...**



2. Enter the **Leaving** date and the **Returning** date. If we are leaving for less than a day, check **Specify hours** and enter the hours that we will be away. Depending on our organization's server configuration, we may or may not be able to select hours and may only be able to select dates. Check **I am unavailable for meetings** to show others that we are not available at these times for meetings and other related activities.



- On the **Standard Notification** tab, edit the **Subject** field if required, and select **Append return date to subject** so the sender can clearly see when we are returning. In the **Additional body text**, add any further details such as the occasion for our absence or contact details of a person who is filling in for us while we are away. To clear this field, we can click the **Reset Defaults** button above the **Subject** field and add new details.

Standard Notification | Alternate Notification | Exclusions

Specify the contents for the out-of-office notification.

Reset Defaults

Subject: Kate Strong is out of the office (returning 06/30/2007 01:00 PM)

☒ Append return date to subject

Body: I am out of the office from 06/29/2007 03:00 PM until 06/30/2007 01:00 PM.

You can append your return date to the Subject

- If you want to send an alternative notification select the **Alternate Notification** tab to send an alternate out of office notification to certain people, or to people from certain domains (such as @sampledomain.com). Specify the people and domains in the **To** field. Then specify the contents of the alternate notification.
- Click the **Exclusions** tab to cancel the out of office notification when certain conditions are met if required. Specify the conditions we require in the relevant fields. There is an option here to prevent replies from going to messages received from the Internet. Check **Do not automatically reply to mail from Internet addresses** if this is our preference.

To cancel the out-of-office notification when certain conditions are met, specify the conditions below.

Reset Defaults

☐ Do not automatically reply to mail from Internet addresses.

A message is sent by any of these people or by members of any of these groups:

Sent by:

A message is addressed to any of these groups:

Addressed to:

A message subject contains any of these exact phrases:

Add Phrase

Remove Phrase

- Click **Enable and Close** or, if we have already enabled the out of office notification but changed some out of office settings, click **Save and Close**.

Enable and Close Save and Close Cancel

How to disable the Out of Office feature (if necessary)

By default the Out of Office feature will automatically disabled itself; however, in some organizations, we will be required to disable the Out of Office manually as it has not been enabled to run as a service. If we do need to disable it ourselves, the Out of Office will send us a reminder to do so.

1. Open mail or calendar.
2. Above the message list, click **More | Out of Office**.
3. Click **Disable and Close**.

 **Duration of absence:**
The shortest time is one hour. The minimum day is one. We cannot have 1 day and 4 hours. We must select either time or dates.

 We can allow a delegate of our mail to enable the Out of Office notifications. In the **Access & Delegation** section of our mail file preferences, select the **Mail, Calendar, To Do and Contacts** components and then give access to **Read, edit, and create any document, send mail, enable Out-of-Office** or higher.

Junk mail

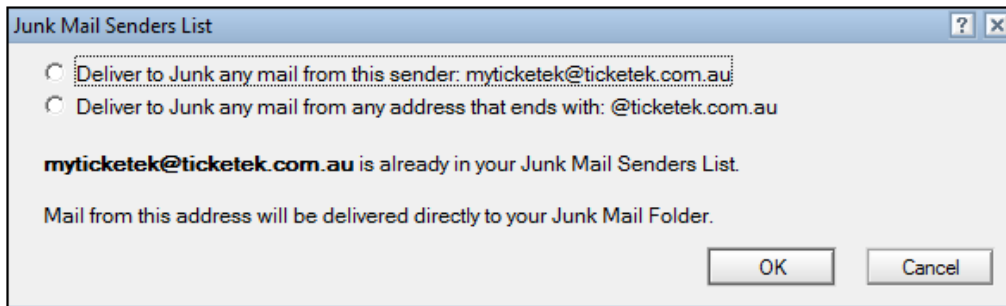
Many times we receive unwanted e-mails. We can block these e-mails by adding them to the Junk; this function is called **Block Mail from Sender**. This feature allows us to filter incoming messages and move those from specific senders directly to Junk so that they bypass our inbox. We can use this function in all mail views and folders except for **Sent, Rules, Stationery, and Follow Up**. Mail in Junk will need to be deleted manually.

Managing junk mails

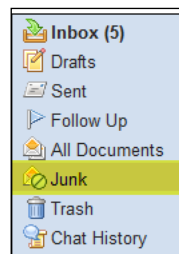
Follow the steps below to add mail to Junk.

1. Open mail, select a message from a sender whose messages we want to add to Junk.

- From within the inbox, click the **More** button and select **Deliver Sender's Mail to Junk**. The **Junk Mail Senders List** dialog box will open as shown in the next screenshot. Select if we want to block the mail from the individual sender or mail from any address that ends with the sender's domain.



- Click **OK**. The messages from this sender will now go directly to **Junk** located in the side navigator as highlighted here:



- To unblock, from within **Junk**, select the **Manage Junk Mail Senders List** button; this opens the **Junk Mail Senders List** dialog box and we can select a name to remove or click the **Remove All** button. We can delete the e-mail in **Junk** however the sender's details will remain in the **Junk Mail Senders List**.



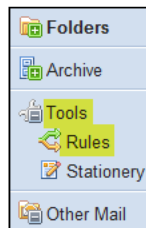
We can also manage Junk mail from the Rules folder, which we will look at in the next section.

Rules

Often our inboxes get inundated with messages and it can be quite overwhelming. A way to prevent this is to manage our mail with rules. We can use mail rules to act automatically on new messages we receive that meet certain conditions. We can create a rule that checks for messages from a certain sender or that contains a certain subject and automatically move the messages to a certain folder, send copies of the messages to someone, or delete unwanted messages before we ever see them in our inbox. For example, I subscribe to several websites and I have set up rules to move the incoming newsletters from these websites directly to a folder so that they bypass my inbox.

The mail rules we create are stored in the **Rules** folder in our mail file. We can go there to add new rules as well as edit the ones we've created. We can edit rules, change their order so that one rule has priority over another, turn them off when we don't want to use them, or delete them entirely.

We can access **Rules** in the side navigator under **Tools**.



There is a **Quick Rule** option, which is an abbreviated set of the most commonly used rule configurations that can quickly be applied – hence the name **Quick Rule**.

The following table explains some of the **Quick Rules** and **Rules** settings for our reference:

Condition	Definition
Contains	Contains looks for a partial match. For example, if we have selected the rule to act on messages that contain sales in the subject, it will act on a message that has <i>sales conference</i> as well as <i>sales enquiry</i> in the subject field.
Does not contain	We will need to be careful with this as the setting is the complete opposite to the contains condition and is usually used in conjunction with <i>contains</i> or <i>is</i> .
Is	Is looks for an exact match. In our sales example, it will only act on messages with sales and sales only in the subject.
Is not	Is similar to does not contain but it looks for an exact match.

Creating a quick rule

Follow the steps next to create a quick rule:

1. Open mail and select a message that we would like to apply a quick rule to.
2. Select **More | Create QuickRule**.
3. As the Quick Rule is based on information in the selected message, we will see values in the **Sender**, **Subject**, and **Domain** fields. We can edit these values if necessary. The fields could be empty if, for example, we select a message that doesn't have text in the subject field.
4. There are three steps to complete the rule. With each condition we can specify any of the following states for each field value—**contains**, **does not contain**, **is**, and **is not**.
 - i. We first need to select the condition to match. There are three conditions to configure—**Sender**, **Domain**, and **Subject**. We can select one of these conditions or all three.

1 Select the conditions to match		
☐ When Sender	contains	specialoffer@myerone.com.au
☐ When Domain	is	myerone.com.au
☐ When Subject	contains	Your fantastic choice of offers and rewards

- ii. We need to decide when to take action—on one or all selected conditions.

2 Decide when to take action
☒ When at least one of the selected conditions is met
☐ When all of the selected conditions are met

- iii. **Choose an action to perform:**

- **Move to Folder:** We will need to select the folder we want the messages to be moved to.
- **Change importance to High:** This option adds the red exclamation mark icon to messages to indicate the message is of high importance.
- **Do not accept message:** This deletes the message. Note the message is not stored in **Trash** and cannot be restored.

3 Choose the action to perform
☒ Move to Folder
☐ Change importance to High
☐ Do not accept message

5. Click **OK** to save the configurations. The new quick rule is created and stored in the **Tools | Rules** folder. The new quick rule acts on incoming messages, but existing messages in the inbox that meet the conditions of the rule are not affected.

If the Quick Rules do not give enough options, we can create a rule.

Creating a rule

Rules have many more options to configure and are quite powerful as there are further actions we can select from and more configurations including exceptions.

1. In the side navigation pane of mail, go to **Tools | Rules** or alternatively click the **More** button and then select **Mail Rule**. This will open up the **Rules** folder.
2. In the **Rules** folder, click **New Rule**.
3. In the **New Rule** dialog box, there are two areas that we need to configure. In the first area, we need to specify conditions. Rules have several conditions that we can configure.

Condition to check	Options	Additional options
Sender	Contains, does not contain, Is & Is not	
Subject	Contains, does not contain, Is & Is not	
Body	Contains, does not contain, Is & Is not	
Importance	Contains, does not contain, Is & Is not	High, normal, low
Delivery priority	Contains, does not contain, Is & Is not	High, normal, low
To, cc, bcc & To and cc	Contains, does not contain, Is & Is not	
Body or Subject	Contains, does not contain, Is & Is not	
Internet domain	Contains, does not contain, Is & Is not	
Size	Is less than, is greater than, is, is not	
Form	Contains, does not contain, Is & Is not	Note: an example of a form is the memo form

Condition to check	Options	Additional options
Blacklist, whitelist	Contains, does not contain, Is & Is not	
All documents	None available	



The **all documents** condition lets us perform an action on all messages that arrive in our mail while the rule is enabled. For example, we might select **all documents** and specify sending a copy of all e-mails we receive to an alternate e-mail address while we are out of the office.

4. Once we have added one condition, we can add further conditions and/or exceptions.

5. We can, at any time, **Remove** or **Remove All** conditions using the buttons on the right-hand side of the screen.



Do not use quotation marks when adding text we want to check against. Text is not case sensitive.

6. Once we have entered the conditions, the next step is to **Specify Action**. Rules have several actions available and we can add more than one. The actions available are listed here:

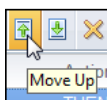
Action	Options	Additional options
Move to folder	Select the folder to move to	
Copy to folder	Select the folder to copy to	
Send copy to	Full or header only	Enter names to send to
Set expiry date	Number	Day(s), week(s), month(s), year(s)

Action	Options	Additional options
Change importance to	High, normal, low	
Stop processing	None available	
Delete (don't accept message)	None available	


Send copy to is a great option for allowing another person to manage our mail while we are out of the office. They receive a copy of the message and we still receive the original mail.

7. Click **Add Action**.
8. Click **OK** to close the dialog box; the rule is now enabled.

As we can see from the options, rules are quite extensive. Once created, rules act in the order they appear (top to bottom) in the **Rules** folder. We can change the order of the rules by using the buttons at the top of the **Rules** folder by moving them up or down.



We can edit or disable a rule at any time as well as delete the rule if it is no longer required.

Mail size indicators and quotas

In some organizations, mail administrators may set a quota to assist in managing the size of people's mail. If a quota is set and our mail becomes larger than the set limit, we will see warning messages letting us know we have exceeded our quota. In addition, new mail sent to us may be delayed, and we may not be able to save sent mails until we have reduced the size of our mail to below our quota. If quotas are enabled, we will see an indicator in the top left-hand side of our mail as shown in the next screenshots.

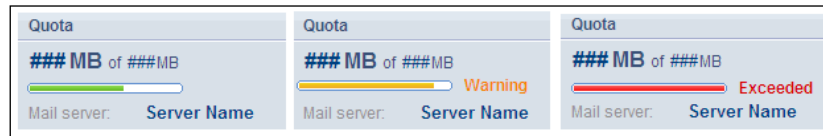
When we access our mail stored on a server, the Mail Quota Status indicator is displayed as a thermometer.



When we access a local replica, the Mail Quota Status indicator displays as an envelope overlapped by a thermometer:



Hovering over either indicator displays a summary consisting of a thermometer, the current mail database size and quota, and the mail server name:



Hints on reducing the size of our mail

Managing mail can be a chore. Following are some tips that may help reduce the size of our mail.

- **Delete mail:** Sort individual mail folders and views by size to identify and delete the largest messages no longer required a great place to do this is in All Documents as it encompasses all Sent, filed and received messages. After deleting messages, make sure that you go to the Trash folder and empty the trash.
- **Archive mail:** If archiving is enabled, archive messages that are no longer active. Archiving is discussed later in this chapter.
- **Change preference for saving sent mail:** If our preference for saving sent mail is set to **Always**, we may be saving many sent messages unnecessarily as every message we send is saved in our mail. Consider changing the setting to **Always prompt**, so we will be prompted each time we send a message as to whether we want to save it. If we select No, the message will not be accessible in our mail. If we select the Send and File option when sending messages the message will automatically be saved.
- **File attachment settings:**
 - Use the **Reply with History only** option that removes the attachments but keeps the original text when we reply to messages containing file attachments.
 - To prevent receiving large attachments in messages, we can create a rule to specify if the size (in bytes) **is greater than** (the number we choose) then delete.



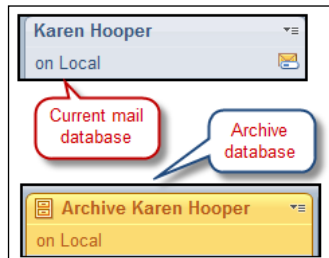
Archiving

Archiving, as mentioned above, is a great solution for assisting in decreasing the size of our mail. When we set up archiving it creates a copy of our current mail application and stores it locally on our computer. It creates a new directory in Windows Explorer called Archive. If we ever need to take a backup of the archive application, we will find it in the IBM\Lotus Notes\Data\Archive directory in Windows Explorer if the naming conventions have been kept as the default.

We can access the archive database from our mail file in the side navigator as shown here:



To open our archives, expand **Archive** in the side navigator and then select the archive we want to open. In the above screen shot the only archive available is **Mail 2008**. Once opened, the archive application is almost the same as our current mail excluding all the e-mails! It does look slightly different as the archive application is a yellow color and has a different title as we can see in the next screenshot:

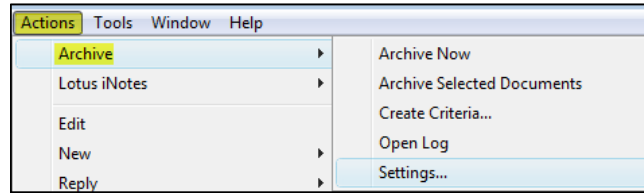


Before we can archive, we must configure the archive settings, which we will go through shortly. We can have more than one archive database. Some people have an archive database for each year. Others prefer to only have one archive database. A consideration for how many archives we have would be size. If we want to back up our archive applications, we might need to control the size, therefore requiring us to have more than one.

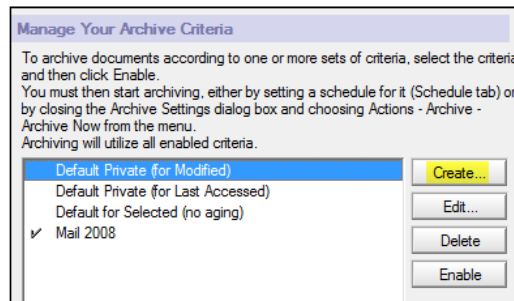
Setting up archiving

Setting up archiving is quite simple, follow the steps given next:

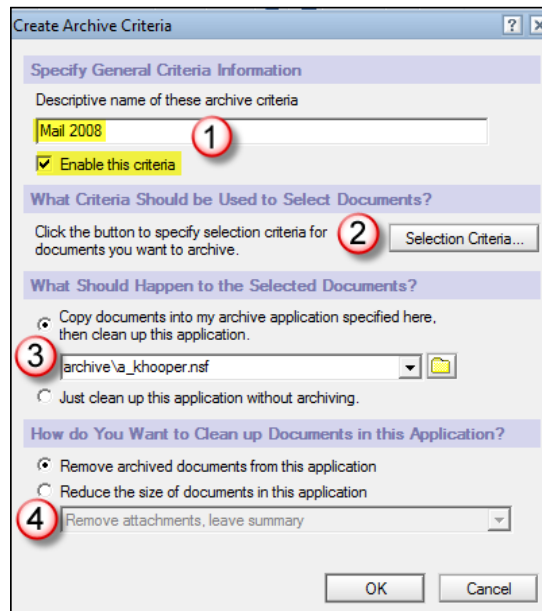
1. Access the archive menu choices under **Action | Archive | Settings....**



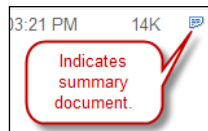
2. Click the **Create...** button on the right-hand side.



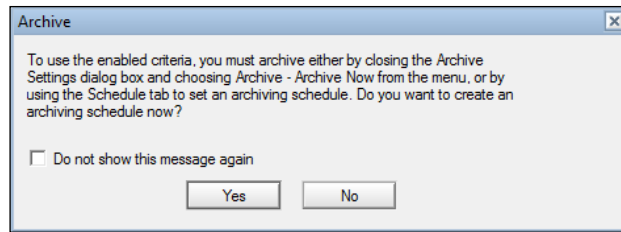
3. This will open the **Create Archive Criteria** dialog box. From within here, we have four sections that need to be complete:



- i. Give a descriptive name for the archive database and check **Enable this criteria**. Enabling the criteria shows the link to the new archive in the mail side navigator as per our example, **Mail 2008** in the screen shot earlier.
- ii. Click the **Selection Criteria...** button to determine how often and which documents we want to archive. The default is **Not modified in more than 365 days**. We can change these options.
- iii. We then need to decide **What should happen with the selected documents**. The default is to **Copy documents into my archive application specified here, then clean up this application**. The other option is to **Just clean up this application without archiving** however this is not recommended as there is no way to retrieve the deleted documents if there is a need to.
- iv. Finally, **How do you want to cleanup documents in this application** gives two opportunities. The first choice is to completely remove the document from our current mail so that we will be able to access the document only from the archive application. The second choice is to leave a subset or summary of the document in the current mail application. This ensures we will see the archived document in our current mail file with a blue summary icon on the archived document, which represents that the document has been archived, and either the attachment has been removed or the attachment has been removed and 40KB of text remains in the original message. The great feature about this option is that we can open the archived document in our current mail file and select **Actions | Open Archived Document**; this opens up the original message that has all the original data which is now stored in our Archive application.



4. Click **OK** to close. We will then be prompted with the information that to use the enabled criteria we must archive either by selecting the option to **Archive Now** under the **Action\Archive** menu or clicking the **Yes** button to schedule archiving. A schedule will automate archiving at the time we allocate.



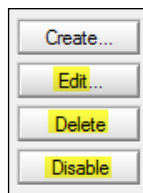
If we select not to schedule archiving by clicking on the No button, then we will need to manually archive some documents before the archive application is created.

There are four ways to archive:

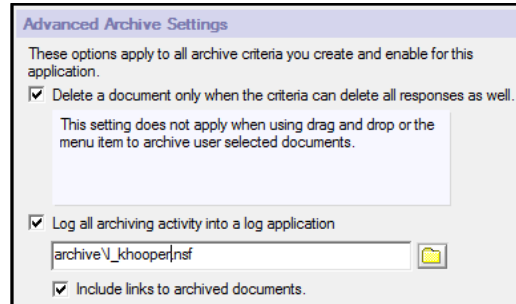
- **Actions | Archive | Archive Now:** This will archive documents that meet the archive criteria.
- **Actions | Archive | Archive Selected Documents:** This archives any documents we currently have selected.
- Let schedule archiving archive according to the archive criteria.
- Drag-and-drop documents into the archive database in the side navigator.

 **Recently Archived folder:** We can easily find our recently archived messages by opening the **Recently Archived** folder in our archives. An archived message's subject line says **(Archived)** and the header includes the date on which the message was archived, which is very handy.

At any time we can **Edit**, **Delete**, or **Disable** our settings for each database by selecting the **Actions | Archive | Settings**.



In the Archive settings, we will see an **Advanced** tab as shown in the next screenshot:



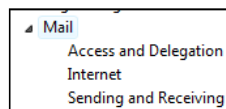
In this area, by default, archiving will delete documents only if it can delete all responses as well. An example of a response is a reply to an e-mail. By keeping this option checked, we will always be able to show the whole conversation.

There is also an option to **Log all archiving activity into a log application** option. This will give a report each time archiving occurs and can include links to the actual documents archived. The log is a separate application and is stored in the path listed in the **Advanced** tab.

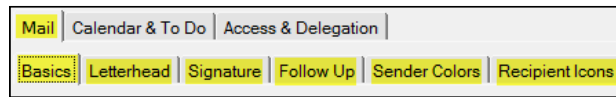
Mail preferences

Throughout this chapter and the chapter before, we have set many mail preferences to configure our mail in a particular way. For example, we may have enabled the spell check to automatically check spelling when we send a memo. We also may have set up Sender Colors so that messages from certain people will be highlighted in a different color. Mail preferences can be accessed from the **File | Preferences | Mail** menu or by clicking the **More** button from within Mail and selecting **Preferences**.

Accessing mail preferences from the **File | Preferences | Mail** option gives us more areas to configure as we can set **Internet** options as well as **Sending and Receiving** preferences.



Accessing preferences from within mail using the **More** button and then selecting **Preferences** gives us the following tabs to select from:



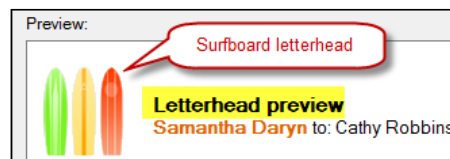
Letterhead

Throughout the chapter, as I have mentioned, we have learned how to configure most of the preferences listed on each tab in the previous screenshot. On the **Basics** tab, we had options on to we enable the spell check along with view and folder management. On the **Signature** tab, we could set up our signature to append to each memo that we send. The **Follow Up** and **Sender Colors** tabs allowed us to configure our **Quick Flag** options and color code our messages from particular senders.

The preference we have not looked at is the Letterhead. We may have noticed that when we create a message, the header of the memo will typically contain a graphic as in the following example that has the maple leaf:



We can change this graphic by going to mail preferences and clicking on the **Letterhead** tab and browsing the different letterhead options. For each graphic that we select, to the right there is a preview screen. One of my favorites is the surfboards. We have an option to select **No Letterhead** if we prefer.

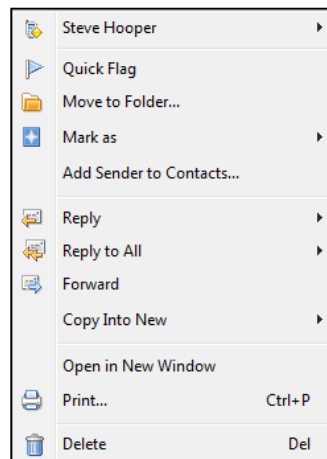


Letterhead is visible only within our organization. When a message is sent externally, the letterhead is removed or sent as an attachment. Don't forget the **No Letterhead** option if we prefer to not have the letterhead become an attachment when sending to external people.

Context menu (right-click menu)

The context menu has shortcuts to often used features such as:

- **Quick Flag:** Adds a flag to a message
- **Move to Folder...:** Allows us to file messages into folders
- **Mark as:** This gives the option to mark as Read or Unread
- **Add Sender to Contacts...:** Creates a contact of the sender in our contacts
- **Reply:** Provides reply options to the sender of the message
- **Reply to all:** Provides reply options to the sender of the message as well as those in the cc as well as bcc fields
- **Forward:** Forwards the message including history and attachments
- **Copy Into New:** Gives the option to copy the message into another message, a calendar entry, or a To Do
- **Open in New Window:** Opens the currently selected message in a new window
- **Print...:** Opens the print dialog box
- **Delete:** Moves the message to Trash



Adding tables and sections

Tables can be added to messages and documents as well as sections as described next.

Tables

Tables can be a great tool to enter data into. We can use the tab key to move from one cell to another. When I create stationery in Mail, I often use tables as I find them easier to layout my message.

The following is an example of a table that we can create in Lotus Notes. When we create a table, we can see a Table menu where we can select table properties. From within the table properties, we can select colors for the cells, cell border size and style, give a border effect such as the Drop Shadow, and even create animated tables.

Product	Part Name	Part #	Cost per unit
	Buck Rogers Rocket Brown	100-012-AA	\$1,500.00
	Planet Green	100-012-BB	\$1,550,055.00
	Slip Stream Pink	100-012-CC	\$500.00.00
	Space Package	100-012-CC	\$2,051,555.00

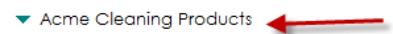
Sections

Sections help organize text within documents. For example if I was adding Policy information to a Lotus Notes document, I may want to organize the text into different paragraphs. I can then add those paragraphs to sections which will collapse the text into a heading. When the person wants to read the contents of that paragraph, they click on the heading, which expands the section. This summarizes the document and allows people to quickly identify the paragraph that is of interest to them.

Sections are either expanded or collapsed. We can also create a section within a section. The following screenshot shows the Acme Cleaning Products section being expanded.



1 Section with title bold and a border style



2 Section expanded with default title and border style.

Acme Cleaning Products
When it comes to chemical cleaning products Ac
cleaners, disinfectants, air fresheners and odour g
cleansers, furniture polish, solvents, stainless steel c
oven and grill cleaners and even anti-bacterial h



3 Section collapsed with title bold and tab border style.

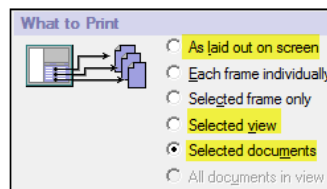
Printing documents

In Lotus Notes we can print documents and views.

1. To print, first we need to select the documents we want to print, then select **File | Print** or press *Ctrl+P*.
2. Select the printer and click the **Settings** button to select duplex options, among other things.
3. In the **What to Print** window, we can determine how we want the print to be displayed. I recommend selecting each option and clicking the **Preview** button to view.
4. The **Quality** tab allows us to select our preferred options.
5. The **Copies** option lets us select the number of copies we wish to print.

What to Print section

In the Print dialog box there is a **What to Print** section as shown in the following screenshot:



You can select any of the following options:

- **As laid out on screen:** This will print everything that you see on the screen.
- **Selected view:** This will print the documents as they are listed in the view. As in the example below, the Date column and the Topic column will be printed:

Date ^	Topic
14/04/2010	2 iPad (Karen Hooper)
	don't think it will sell (Karen Hooper 14/04/2010)
	love the idea (Karen Hooper 15/04/2010)

- **Selected documents:** This will print each document selected on individual pages.



Don't forget to preview what we are about to print.

Summary

In this chapter, we have explored the available mail tools in Lotus Notes. Many of these tools have been created to assist us in working more efficiently. For example, flagging or marking a message for follow up can assist with managing your inbox, using stationery can save time by having ready-made e-mail templates ready to go, the simple trick of adding our signature to our personal dictionary in the spell checker can save being prompted with the spell checker each time we send a message, and so on. Rules are also very powerful and are a great tool. Hopefully advantage of these tools and put them to work!

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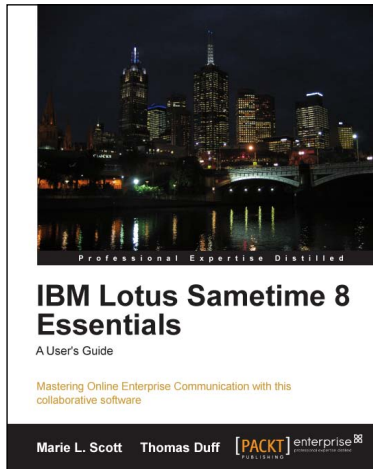
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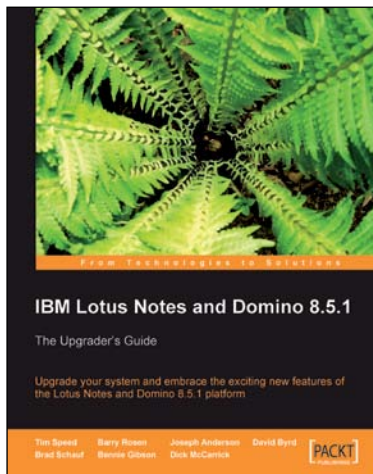
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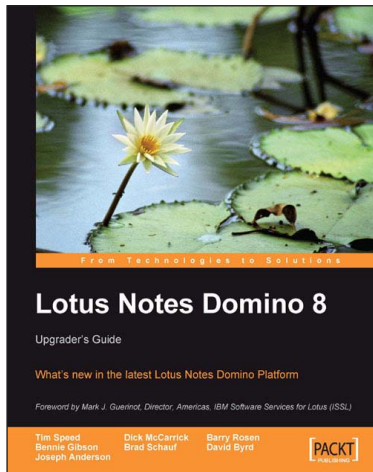
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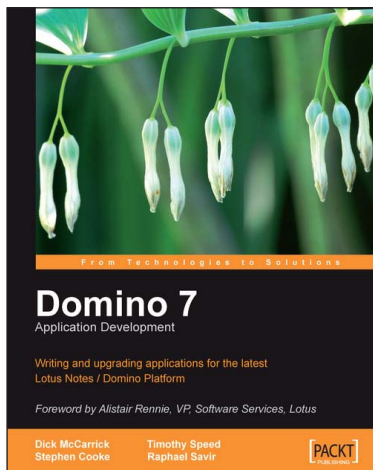
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