

Lotus Notes 8.5 User Essentials PLUS Pack

Version 1.0

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Part #NCUE85+-1.0, updated for IBM Lotus Notes 8.5 Standard configuration.

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Description

The *Lotus Notes 8.5 User Essentials PLUS Pack* isn't a "course" in the traditional sense, in which you are taken through a structured sequence of concepts and experiences. Instead the *PLUS Pack* is a collection of standalone, advanced topics that you will want to learn about after you have taken the *Lotus Notes 8.5 User Essentials* course.

You may want to include some of the *PLUS Pack* topics to enhance the *Lotus Notes 8.5 User Essentials* course, or come back later to learn more about particular aspects of Notes on an as-needed basis.

Course goals

In this course you will learn advanced concepts and skills related to these areas:

- Mail
- Calendar
- Sametime
- Document Editing
- Search
- User, Application, Document, Workstation Security
- Notes as an Internet Client
- Notes User Interface and Tools.

While most of the subjects in this course apply to both Notes Standard and Basic configurations, all the screens and commands demonstrated in this course are from the Notes Standard configuration.

Audience

This course is designed for Lotus Notes users who have mastered the content of the *Lotus Notes 8.5 User Essentials* course.

Course design

This course combines concept presentations, demonstrations, and exercises to guide you as you experience the most widely used Notes features and core applications.

Data disk

There is no data disk for this course, as you work with applications included with Notes.

Please consult the *Set Up* document for this course to make sure the correct environment is in place before starting the course.

Font conventions

This course follows these font conventions:

- *Italic* - Bookmark, view, form, and document names, and new terms introduced in the text
- **Bold** - Notes menu options, Notes application names, command button names (whether Notes or developer defined), page names, field labels, tabs, tools, and accelerator keys
- **Courier**- user input, sample values, code examples
- **Helvetica** – URLs , HTML, and JavaScript code examples.

1 Mail

Topics

This module contains these Topics:

- Mail Preferences and Options
- Search for Addresses
- Stationery
- Message AutoSave
- New Mail Notification and Notes Minder
- Mail, Calendar, and Contacts Delegation
- Mail Rules
- Local Message Archive
- SwiftFile

Notes

Mail Preferences and Options

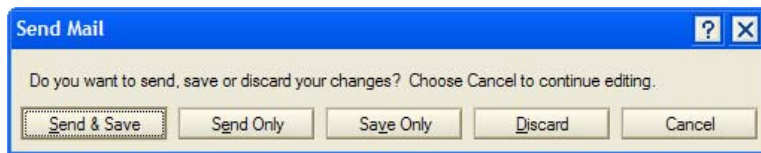
Introduction

This Topic describes the optional things you can do when sending an email message, including how to set several Preferences that make it easier to set the same options every time.

Always keep a copy of sent messages

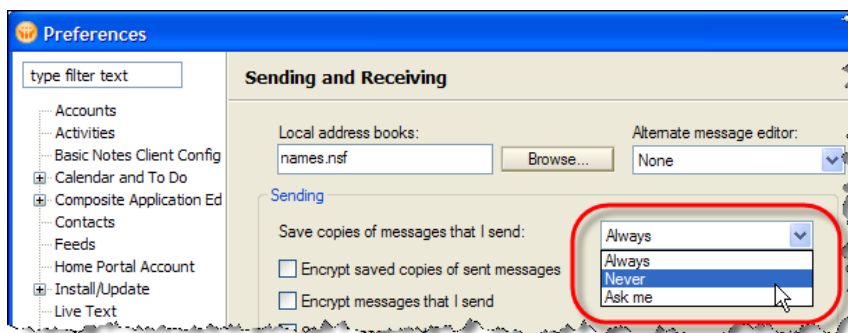
Keeping copies of messages you send may be helpful later. Saved messages can also be edited and sent to the same or other people.

When you press **Esc** to send a message, you are prompted to send and save, or just send or save the message:



Notice that by default the **Send & Save** button is highlighted, and if you just press **Enter**, that is the action that is taken. Or, you can click one of the other buttons or press the **Alt** key and press the accelerator letter (e.g. “**e**” for **Send**) to pick that option.

If you want to set **Send Only** as the default button, choose **File – Preferences** and select the **Mail\Sending and Receiving** page to set this option:



Select **Never** to set **Send Only** as the default button on the Send Mail dialog box.

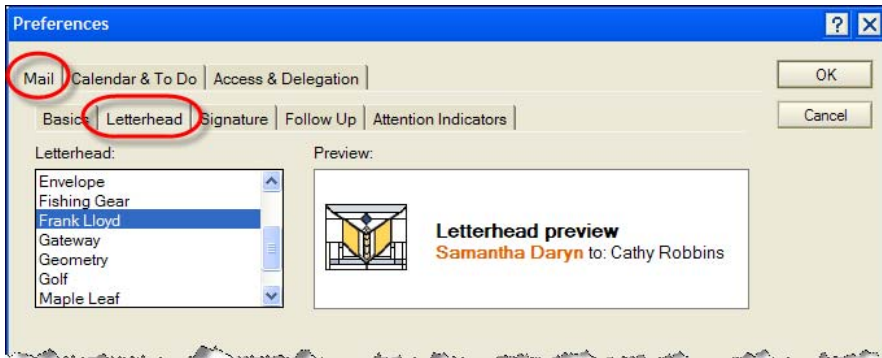
Click **OK** to save the setting.

Note: This preference also applies to what happens when you click the **Send** action button when you are ready to send a new message.

Use Letterhead

Letterhead provides a personal touch to your mail.

To change the letterhead you use, click the **More** action button in your *Inbox* and choose **Preferences**. Click the **Mail\Letterhead** tab and select a letterhead that you like.

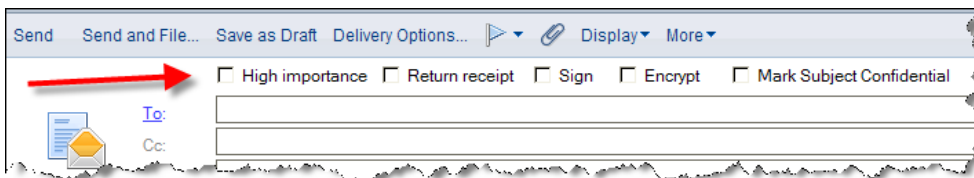


Click **OK** to save the setting.

Just remember that only other Notes Mail users will be able to see the letterhead; Internet mail or Domino Web Access users won't see it.

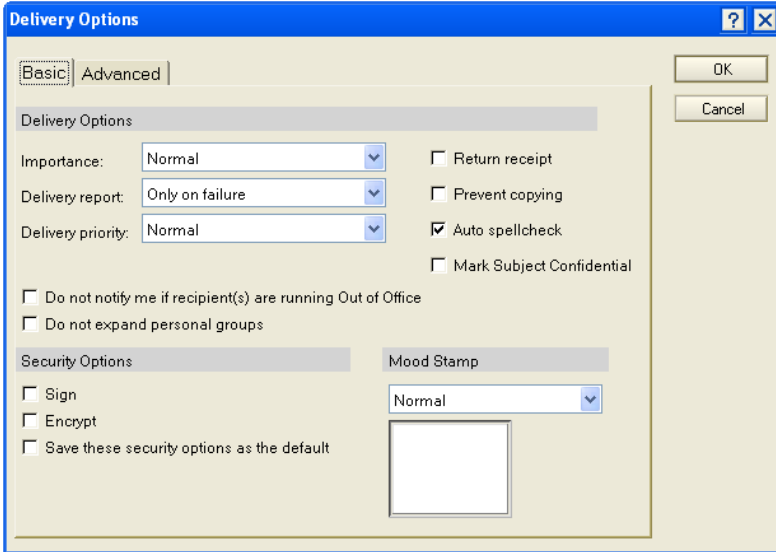
Delivery options

Before you send a new message, you can change its delivery options. Click the **Display** action button and choose **Additional Mail Options** to see the basic delivery options at the top of the message:



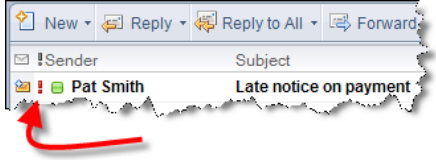
Check the delivery options you want to set for this message.

For more delivery options, click the [Delivery Options...](#) action button. This screen capture shows the Delivery Options dialog box:

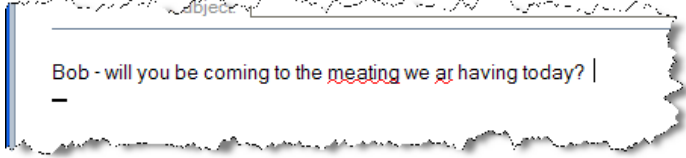
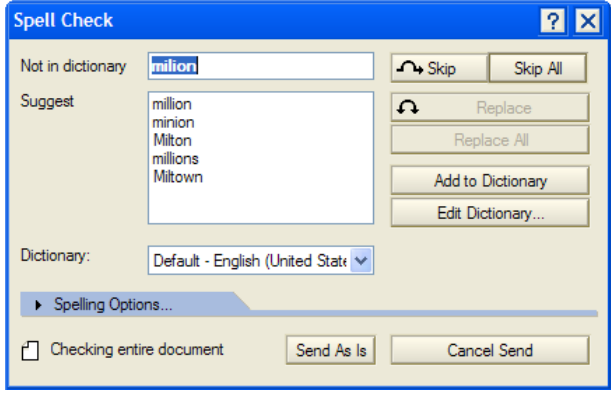



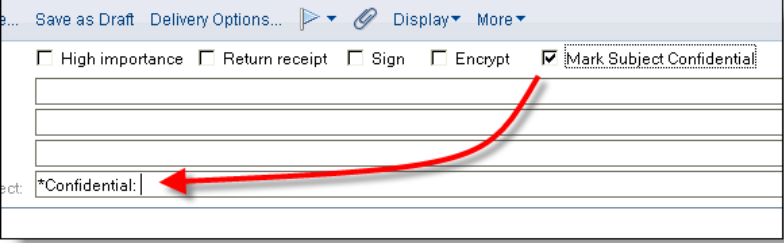
Note: Depending on what kind of email software the recipient is using, some of the delivery options will not work. Of course, all options work when you send the message to other Notes Mail users in your organization.

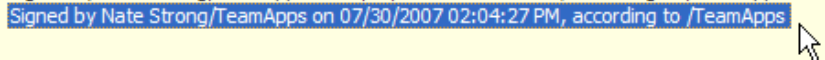
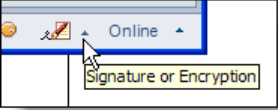
This table describes the options you can set on the **Basic** tab of the Delivery Options dialog box:





| Option | Description |
|------------|--|
| Importance | <p>Sets the importance of the message. If set to High, the recipient sees a red exclamation point next to the message in the <i>Inbox</i>:</p>  <p>Otherwise, this setting has no other functional value except that you can create a Rule that automatically processes messages you receive by importance. You should not overuse this option, as other people will learn to distrust your sense of importance and disregard your messages.</p> |

| Option | Description |
|-------------------|--|
| Delivery report | <p>Sends a delivery report back to you indicating whether the message was successfully delivered (or not) to the recipient(s). By default this means you will only receive an error report, but you can also receive a delivery confirmation. A delivery confirmation only means that the message was delivered to the recipient's Mail; it doesn't mean the person actually read the message (that is the role of a return receipt).</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note: Getting a failure report or delivery confirmation is guaranteed only with other Notes Mail users.</p> </div> |
| Delivery priority | <p>This setting is a relic of the past when Domino Servers connected to each other over slow phone lines, and to save money only did so on a set schedule.</p> <p>Most messages should be left set at Normal priority. Within your company network, messages are delivered immediately. If the message is outward bound, your message will be delivered the next time the Domino Server connects.</p> <p>If the Domino Servers in your company do in fact connect on a predefined schedule, the delivery priority setting does determine in part when your message will be delivered:</p> <ul style="list-style-type: none"> • High tells the Domino Server to connect immediately to the remote network to transfer your message, regardless of when it is scheduled to connect. • Low should be selected for messages that contain large attachments so they can be delivered after-hours when there is less network traffic. |
| Return receipt | <p>Sends a return receipt back to you if the recipient(s) opened your message. It doesn't mean that they actually read it or understood it, but they at least opened it.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note: Getting a return receipt is guaranteed only when corresponding with other Notes Mail users. Even then it is possible for recipients to block the function, as some users consider receipts an invasion of their privacy.</p> </div> |

| Option | Description |
|-----------------|--|
| Prevent copying | <p>Prevents the recipient (if another Notes user) from copying text from the message or from forwarding the message to other users.</p> <p>This is not really a security measure, as the recipient can always take a screen capture of the message contents.</p> |
| Auto spellcheck | <p>More likely than not you will use instant spell check (Edit - Instant Spell Check), which puts a squiggly red line under the misspelled words as you type, for example:</p>  <p>Right-click the error to see any spelling suggestions, add the word to your personal dictionary, or skip over the error anywhere it is found in the document.</p> <p>But it doesn't hurt to take one more look at spelling before the message is sent.</p>  <p>When you spell check a memo, the addresses are not included in the check.</p> <p>Unlike the Notes document spell checker, this one has Send As Is and Cancel Send buttons, which stops the spell check process and either sends the message or returns you to the memo for more editing.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note: You can, at any time—not just when sending the memo—click the  tool to perform a spell check.</p> </div> |

| Option | Description |
|---|--|
| <p>Mark Subject Confidential</p> | <p>Simply adds the word “Confidential” to the subject line, for example:</p>  |
| <p>Do not notify me if recipient(s) are running Out of Office</p> | <p>Out-of-Office notification automatically sends an email to senders when you are away for some length of time.</p> <p>In many instances you need to know if the recipient of an important message you sent is not in the office to read it (assuming, of course, that the person enabled Out-of-Office notification before leaving).</p> <p>But in other cases it really doesn't matter. Enable this option to NOT receive an Out-of-Office message from recipient(s).</p> |
| <p>Do not expand personal groups</p> | <p>Suppose that you have a Group defined in Contacts. Normally when you address a message to the Group, all of the names are listed in the <i>Address</i> field when you press F9 or save or send the message. When the recipients receive your message, they can see who else received the message.</p> <p>But for particular groups and for particular messages, you may not want the recipients to see who else has received the message. Enable this option to NOT expand the group list. Only the group name will appear in the <i>Address</i> field.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note: If you reply to a reply to your original message (that displays a Group name in an <i>Address</i> field), you must choose this delivery option again to prevent the list from being expanded again. Keep in mind, though, that you won't be able to Reply to All to a message that was sent by another person. Because the Group name is from his/her Contacts, your copy of Notes cannot expand the list. (Unless, of course, you happen to have the same Group name in <i>your</i> Contacts, in which case it is possible that the wrong list of people may receive the message!)</p> </div> |

| Option | Description |
|--------|---|
| Sign | <p>Adds your digital signature to the message to validate that it was you who sent the message and that the message was not tampered with in transit.</p> <p>When opened, recipients see the signature in the Status Bar, for example:</p>  <p>They also see the Signature/Encryption area turn color:</p>  <p>Click the icon to see more details about the sender's signature to verify that it is someone you trust.</p> <p>This signature is different than adding your text signature, which is covered later in this Topic.</p> |

| Option | Description |
|---|--|
| <p>Encrypt</p> | <p>Encrypts the contents field so only the recipient can read it.</p> <p>Recipients see that Notes decrypted the message contents (in the Status Bar) and also see the Signature/Encryption area turn color and change to:</p> <ul style="list-style-type: none"> •  if encrypted •  if both signed and encrypted. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: By default, encryption can only be used if the recipient is another Notes user and is in your company. If the recipient uses:</p> <ul style="list-style-type: none"> • Notes but is NOT in your company, you can obtain each other's Public Key (do this under File – Security – User Security – Your Identity – Your Certificates then click the Other Actions button and choose Mail, Copy Certificate (Public Key)) • Internet mail, you must be given a digital certificate from your Domino administrator; then when you trade emails that have been signed, you can accept/trust each other's digital certificates into your Contacts. Once you have the other person's certificate, you can then send encrypted messages to him/her. </div> |
| <p>Save these security options as the default</p> | <p>When you choose to sign and/or encrypt a message, set this option so that all future messages are also signed and/or encrypted.</p> |
| <p>Mood Stamp</p> | <p>Adds a single “mood stamp” from a set of images to convey your feelings. (The mood stamp also appears in the view as a small icon.) This is the mood stamp for “Good Job!”:</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="text-align: right;">Subject: Report on progress</p> <hr/> <div style="display: flex; align-items: center;">   </div> </div> |

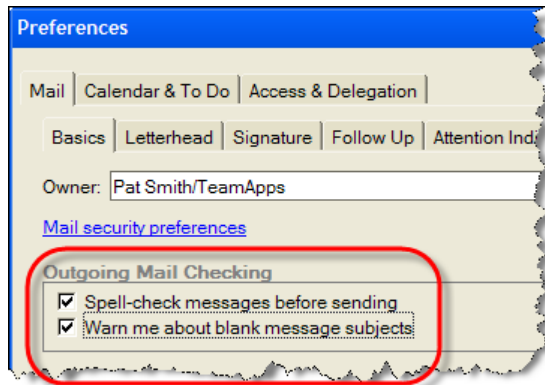
Outgoing mail checking

There are actually two things you want Notes to do before a message is sent:

- **Check your spelling.** One of the delivery options you saw above is to spell check your message before sending it. You can set a preference to enable this option for *every* message that you send.
- **Warn you if you left the Subject blank.** Not entering a Subject for a message is a bad idea for several reasons:
 - It annoys recipients, forcing them to open the message to know if it is important. It also makes it harder for messages to be processed using Rules, which often scan the Subject field for matching words and phrases.
 - Many spam filters reject messages with empty Subjects as unsolicited junk mail.

Both preferences are set as Mail Preferences. To set these preferences, open your *Inbox* and click the [More](#) action button. Select **Preferences**.


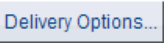

Click the **Mail** tab and then the **Basics** tab. Scan down and select the option to spell check every memo:



Click **OK** to save the settings.

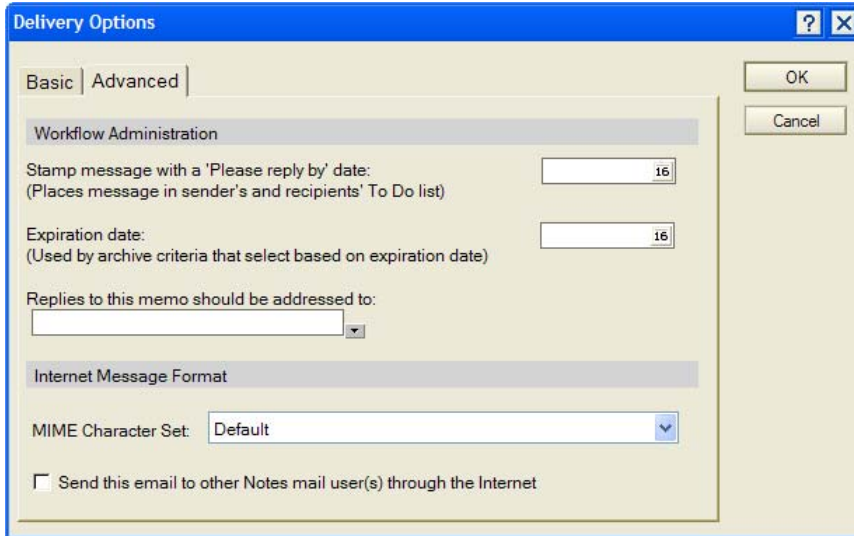
Exercise: Mail delivery options

Follow these steps to send a memo to your colleague with a variety of delivery options set:


| Step | Action |
|------|--|
| 1 | From the Home Page, open Mail . |
| 2 | Click the  New action button. |
| 3 | Address the memo to your colleague. |
| 4 | Enter a subject and some text to the content area of the memo. |
| 5 | Click the  Delivery Options... action button. |
| 6 | Set Importance to High . |
| 7 | Set Delivery Report to Confirm delivery . |
| 8 | Select Return receipt . |
| 9 | Select Auto spellcheck . |
| 10 | Select Sign to attach your electronic signature to the message. |
| 11 | Select an appropriate mood icon. |
| 12 | Click OK to accept the delivery options. The mood stamp is added to your message. |
| 13 | Click the  Send action button to mail the message. The spell checker processes the content fields and the message is sent. |
| 14 | Open the <i>Inbox</i> folder and wait for the Delivery Report to arrive. |
| 15 | When you receive a message from your colleague, notice that the view shows an exclamation point, indicating High importance. |
| 16 | Open the message from your colleague. Notice the message in the Status Bar when you open the message. |
| 17 | Close the message. Look in the <i>Inbox</i> folder for the Return Receipt generated when your colleague opened the message you sent. |

Advanced delivery options

The **Advanced** tab in Delivery Options lets you set less frequently used delivery options:



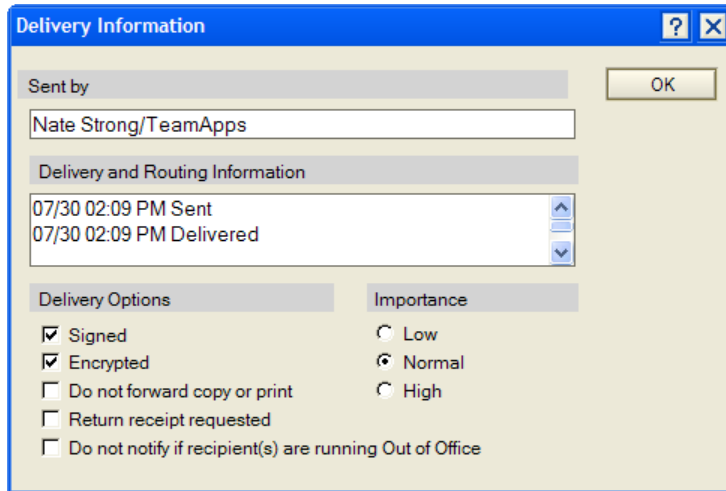
This table describes the options you can set on the **Advanced** tab of Delivery Options:

| Option | Description |
|---|---|
| Stamp message with a 'Please reply by' date | <p>Lets the recipient know that a response is needed by a certain date:</p> <div data-bbox="505 1247 837 1325" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p> Nate Strong to: Pat Smith Please respond by 08/03/2007</p> </div> <p>This also adds your memo to the other user's To Do list!</p> |
| Expiration date | <p>The expiration date is tied to when obsolete messages are archived (or deleted) when you configure Mail Archiving.</p> <p>Although you (as a message recipient) can set the expiration date at any time, this delivery option lets the sender set the expiration date so that the message is obsolesced in the recipient's Mail (assuming of course that the recipient has enabled Mail Archiving).</p> |

| Option | Description |
|---|---|
| <p>Replies to this memo should be addressed to:</p> | <p>Displays a different reply recipient in the letterhead:</p> <div data-bbox="505 344 930 432" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Meeting ideas ■ Nate Strong to: Pat Smith Please respond to Fred Adams/TeamApps</p> </div> <p>When the recipient replies to the message, the <i>Address</i> field uses the Reply to value instead of the sender's address. This is useful when you are working on behalf of another person or want to advance the message through a series of readers.</p> |
| <p>MIME character set</p> | <p>When sending Internet mail, the MIME (Multipurpose Internet Mail Extensions) character set selection affects how the message is converted to the recipient's language. MIME is a standard way of attaching files to mail messages so they can be displayed when received. Contact your Domino administrator to determine the choice that is best for the recipient.</p> <p>The default setting for messages you send to Internet addresses is found in the <i>Location</i> document in your Contacts.</p> <p>The default setting for messages that you receive (through the Domino Server) is found in your <i>Person</i> document in the company's Domino Directory.</p> |
| <p>Send this email to other Notes mail user(s) through the Internet</p> | <p>If you know that the recipient uses Notes (but works for a different company), select this option to retain message fidelity and the full set of delivery options that would otherwise be stripped out if treated like ordinary Internet mail.</p> |

Delivery Information

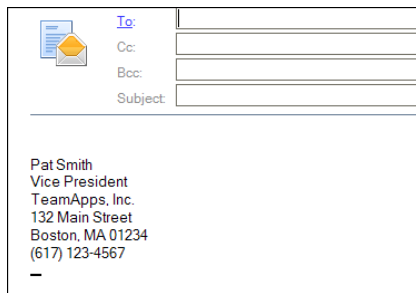
While reading a message you can determine which delivery options were set by the sender. Open the message and click the [More](#) action button. Select **Delivery Information**. The Delivery Information dialog box opens:



Here you can see which delivery options were set. In addition you can use the **Delivery and Routing Information** field to determine exact times the message was sent and delivered to your *Inbox*. Scroll down to see routing information, that is, which Domino Servers were involved in the message transfer.

Text signature

Rather than typing your contact information at the bottom of every message you send, you can have Notes do it for you:



Open your *Inbox* and click the [More](#) action button. Select **Preferences**.

Click the **Mail** tab and then the **Signature** tab. Enter the text you want to appear at the end of every message you send:



Tip: Add a blank line or two before your signature text to provide a bit of space between it and the body of your message.

You can also have Notes import a text, HTML, JPEG, Bitmap, or GIF image file every time you create a new message.

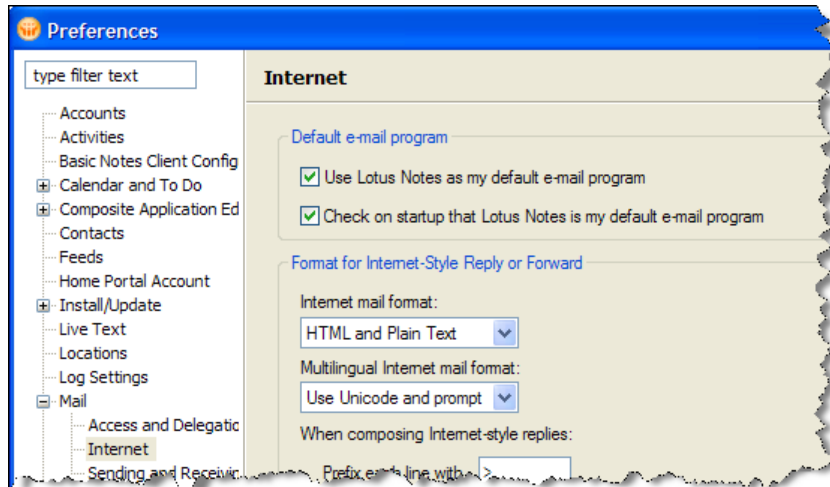
If you don't choose the **Automatically append a signature...** option, you can still manually insert the signature from the [More](#) action button when creating a message. That way your quick casual messages to well-known colleagues won't be bogged down with all your contact information and you can add it only when needed.

Click **OK** to save your signature.

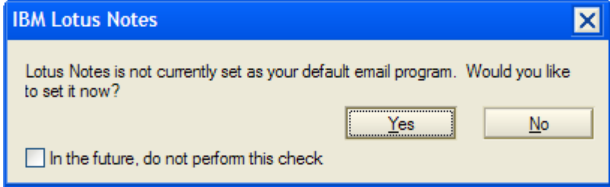
Note: Your Domino administrator may also insert "disclaimer text" or a confidentiality agreement underneath your signature that you will not be able to delete.

Internet mail preferences

There are a few options that pertain only to messages you send to Internet mail addresses. Choose **File – Preferences** and select the **Mail\Internet** page to set these two options:



This table describes the Internet mail preferences you can set:

| Option | Description |
|------------------------------|--|
| <p>Default email program</p> | <p>The default email program on your computer is launched when you click a MailTo: link on a Web page.</p> <p>When you start Notes for the first time, you may be prompted to make Notes your default email program:</p>  <p>Click Yes if you want Notes as your default email program and select the check box to avoid seeing this message again.</p> <p>The two check boxes in Preferences allow you to set Notes as your default email program and to suppress being prompted at start up.</p> |

| Option | Description |
|----------------------|--|
| Internet mail format | <p>Messages sent to Internet mail recipients can be formatted (fonts, images, tables) and are converted to HTML so that most email software can show your message in its original layout. But if a recipient isn't using email software that can read HTML, your message will look bad. So better not to use any formatting and to send it only as Plain Text.</p> <p>For the most flexibility, choose HTML and Plain Text or Prompt when sending.</p> |

Send phone message

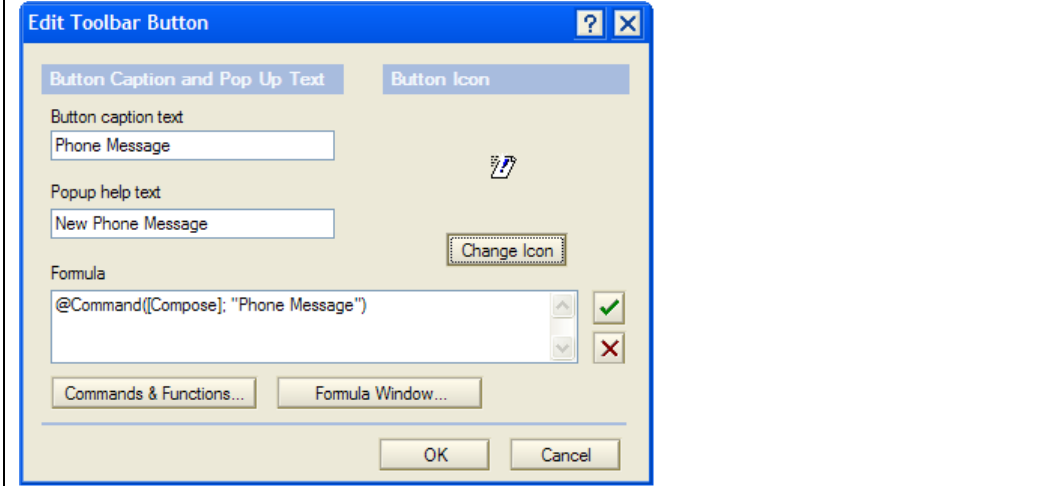
If you happen to take a phone call for someone, you can use the built-in Phone Message instead of a Message.

To create a Phone Message, choose **Create - Special - Phone Message**.

The screenshot shows the 'While You Were Out' form in Lotus Notes. At the top, it displays the sender information: 'From: Pat Smith/TeamApps on 07/30/2007 02:50 PM'. Below this are fields for 'To:', 'cc:', and 'bcc:'. The main form area is titled 'While You Were Out' and contains several input fields: 'Contact:', 'of:', 'Phone:', and 'FAX:'. Below these fields is a list of checkboxes for call status: 'Telephoned', 'Will Return', 'Please Call', 'Left Package', 'Will Call Again', 'Please See Me', 'Returned Call', 'Urgent', and 'Was In'. At the bottom of the form, there is a 'Message:' field.

The Phone Message has all the features of a Message, with the addition of the phone message details.

Tip: If your job involves sending lots of phone messages, you can create a Tool on the Toolbar that composes a “Phone Message.” For example:



Note: The Phone Message is available to other Notes Mail and Domino Web Access users only; users of other email software will not see the special form but instead will see only the **Subject** and **Body** fields found in a typical memo.

Notes

Search for Addresses

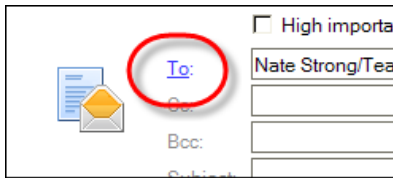
Introduction

Messages that are incorrectly addressed will never reach the intended recipients.

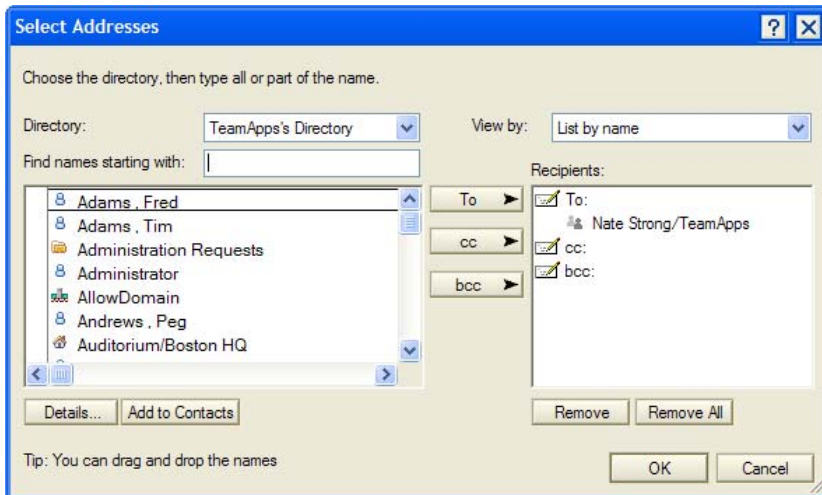
This Topic covers how to search for addresses in various directories, including LDAP (Lightweight Directory Access Protocol) directories in your company or on the Internet. It also tells you how to deal with addresses that Notes finds ambiguous.

Select addresses

If you do not know a recipient's address enough to use type-ahead addressing, click the **To:** link to help you fill in the *Address* fields by picking from the directories you have access to:



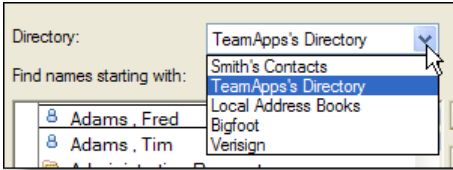
This opens the Select Addresses dialog box:

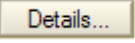
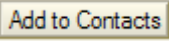
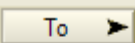
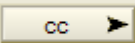
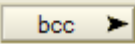
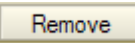
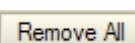


Follow these steps to use the Select Addresses dialog box:

| Step | Action |
|------|---|
| 1 | Select a directory. You can select your personal Contacts as well as your company's Directory. |
| 2 | Select one or more names on the left. |
| 3 | Click the desired address field name button (To: , cc: , or bcc:). |
| 4 | Click OK . The names appear on the memo in the corresponding <i>Address</i> fields. |

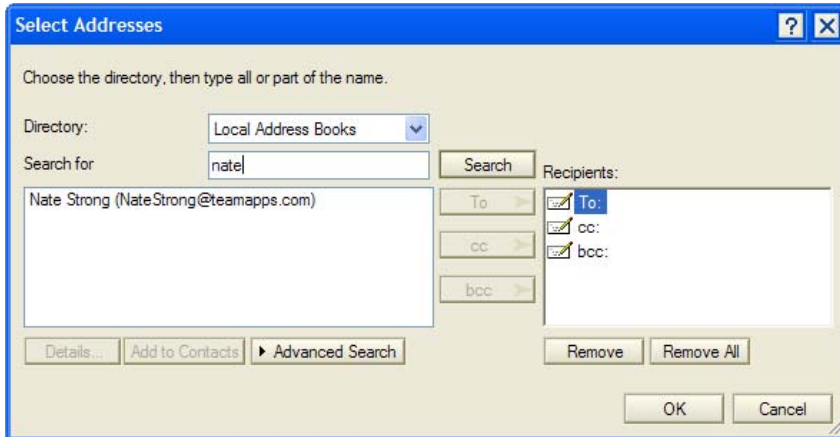
This table describes the options in the Select Addresses dialog box:

| Option | Description |
|--------------------------|---|
| Directory | <p>Select which directory you want to use to look up email addresses:</p>  <p>The first two directories are your Contacts and the company Directory on the Domino Server. Both list people by last name.</p> |
| Find names starting with | <p>Start by entering the <i>last name</i> of the person to whom you want to address mail.</p> <p>As you type, the list of names scrolls down to names that start with the matching characters.</p> |
| Name list | <p>Lists the people (👤) and groups (👥) you can mail to. Click the name(s) you want to add to an <i>Address</i> field.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note: Although listed, you typically cannot mail to servers (🖨), resources (🖥), rooms (🏠), groups of servers (🖨), Deny Access groups (🚫), or mail-in databases (📁).</p> </div> |

| Option | Description |
|---|--|
| View by | Lets you see the list of names in different ways, such as by name, Notes name hierarchy, corporate hierarchy, or by language. |
|  | Shows you the selected person or group document in the directory so you can confirm whether this is the right recipient name. |
|  | Copies the selected address from the directory to your personal Contacts . This is useful if you want to enter nicknames for people or are a mobile user and want address verification while you are disconnected from the server. |
|    | <p>Copy name(s) selected from the Name List to the corresponding <i>Recipients</i> fields on the right.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Tip: You can drag a name from the name list to the <i>Recipients</i> fields and drop them.</p> </div> |
| Recipients | <p>List of names for each <i>Address</i> field.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Tip: Click on the field name and use the keypad - and + keys to collapse and expand the list under each address.</p> </div> |
|   | Allow you to remove selected or all names from the Recipients list. |

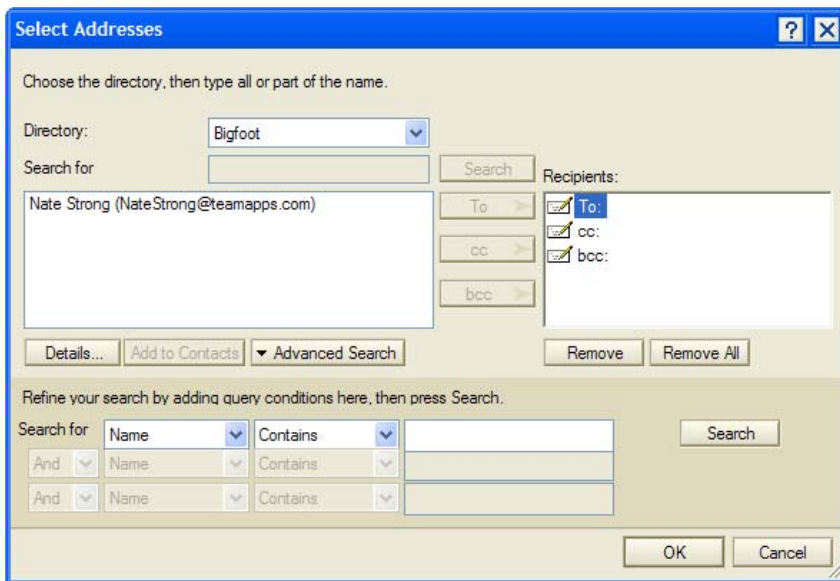
Search for names in LDAP directories

Some address books let you perform an extended search of names, for example, Local Address Books or LDAP directories. BigFoot and Verisign are listed but are no longer valuable to use; more likely your company's own LDAP directory can be searched. When you switch to one of these directories, the dialog box changes to this version:



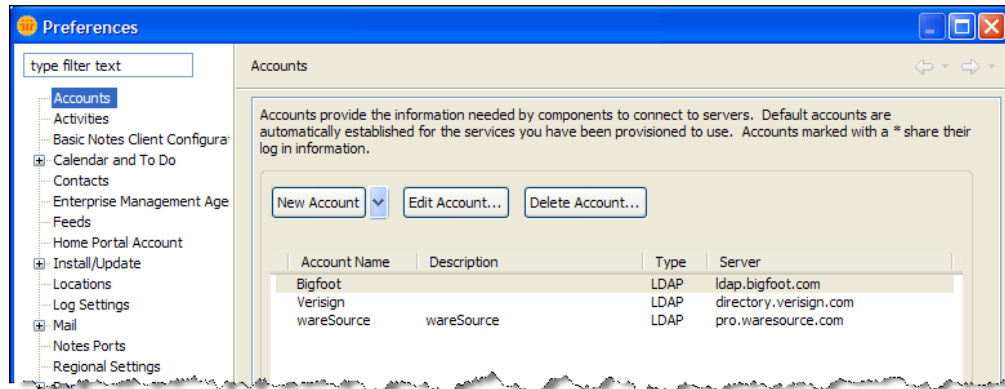
When you select one of the searchable LDAP directories, you can search for a person with only the first few characters of the person's first or last name.

Or, you can click **Detailed Search** to open a search tool to search for the person using other information, including multiple search conditions, for example:



This is especially useful if you searching very large directories and want to zero in on a particular name quickly.

Note: To use other Internet directories, you must create an *Account* document (LDAP) in *Contacts* for each directory. You can manage your *Account* documents in Preferences on the **Accounts** page:

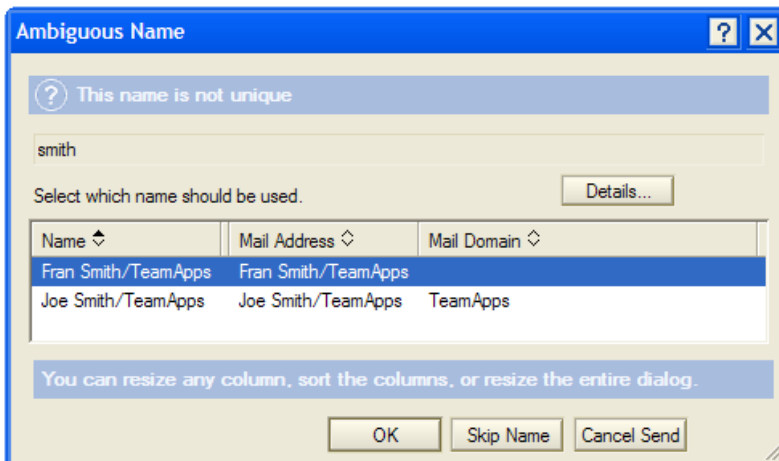


Your Domino administrator will most likely create these for you.

Ambiguous Names

When you attempt to send a message to people in your company, you won't be allowed to do so unless the recipient's email address can be found in the company's Domino Directory.

If you send a message to another person in your company and only fill in a partial name in any of the *Address* fields, you will be alerted if Notes can't determine a unique recipient name. You will be prompted to select from a list of similar-sounding names, for example:



Select the appropriate name and click **OK** to send the message.

If you decide not to send the message to the person, click **Skip Name**.

If you want to cancel sending the message altogether, click **Cancel Send**.

Notes

Stationery

Introduction


If you find yourself routinely sending the same email to different people, it makes sense to create a template, or boilerplate message, called *stationery*. You can create an entire library of standard emails to save a great deal of typing (or cutting and pasting).

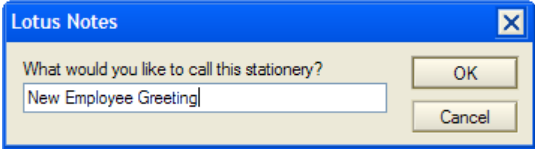
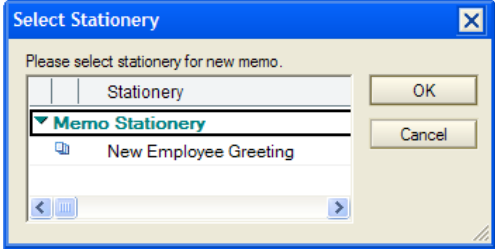
You can use the message created from the stationery as a starting point, making changes as needed to fit a particular audience or purpose.

Message Stationery

Message Stationery uses standard email fields and can be used for Internet mail recipients as well as Notes Mail recipients.

Follow these steps to create and use Message Stationery:

| Step | Action |
|------|---|
| 1 | Open Mail . |
| 2 | Expand the Tools category in the Folder/View Navigator and select the <i>Stationery</i> view:  |
| 3 | Click the arrow on the New Stationery action button and select Message . |
| 4 | A document that looks like a <i>Message</i> form opens. |
| 5 | You can add values to the <i>Address</i> , <i>Subject</i> , and <i>Body</i> fields (in most cases you will leave the <i>Address</i> fields blank so you can set them later when you actually use the stationery). You can even set the delivery options. |

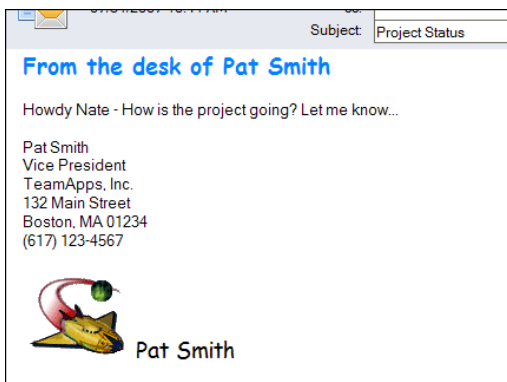
| Step | Action |
|------|--|
| 6 | <p>Click the Save action button.</p> <p>When prompted, enter a unique name for the new stationery, for example:</p>  <p>Repeat the previous steps to create as many types of Message Stationery as you want.</p> |
| 7 | <p>To use the Message Stationery, you can either:</p> <ul style="list-style-type: none"> • Work in the <i>Stationery</i> view and click the New action button. You will be prompted for which stationery you want to use:  <p>Select the stationery you want to use and click OK.</p> <ul style="list-style-type: none"> • Work in any other folder or view and click the More action button and choose New Message with Stationery. <p>The Message Stationery opens. Fill in the missing information (such as the address) and send it just like any other message.</p> |
| 8 | <p>To edit the stationery, select the one you want to change in the <i>Stationery</i> view and click the Edit action button. When done, you must click the Save action button (or Discard Changes to cancel).</p> <p>To rename the stationery, select it from the <i>Stationery</i> view and click the Rename action button.</p> |

Personal Stationery

Whereas Message Stationery is highly functional across any email system, Personal Stationery is used mostly to add personal touches to the email you send to other Notes and Domino Web Access users in your company.

Note: Because Personal Stationery uses non-standard email fields, it can NOT be used for Internet mail recipients.

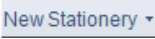
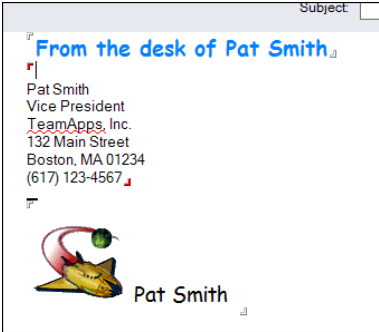

This screen capture shows an example of what a message using Personal Stationery could look like to the recipient:





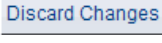



“From the Desk of Pat Smith” and the signature (with spaceship graphic) have been added to this user’s Personal Stationery.

Caution: Unlike letterhead, which is efficient from a network and Domino Server disk perspective, Personal Stationery can dramatically increase system overhead if you include any graphics, attachments, or embedded objects. As such, your Domino administrator may disable this feature in your **Mail**.

Follow these steps to create Personal Stationery:

| Step | Action |
|------|--|
| 1 | Open Mail to the <i>Stationery</i> view. |
| 2 | Click the  action button and choose Personal . |
| 3 | A document that looks like a <i>Message</i> form opens. |
| 4 | <p>Working in the first field (a Rich Text field), enter the header of your Personal Stationery.</p>  <p>The field with the red brackets is where the message body will be entered when you create a message using the stationery. If you want to enter default text into the field, you can do so here.</p> <p>Working in the last field—also a Rich Text field—enter the footer of your Personal Stationery. This is a good place to put a bitmap of your signature (or use a script font to save disk space).</p> |
| 5 | <p>Click the  action button and name the new stationery.</p> <p>Repeat the previous steps to create as many types of Personal Stationery as you want.</p> |

| Step | Action |
|------|---|
| 6 | <p>To use the Personal Stationery, you can either:</p> <ul style="list-style-type: none"> • Work in the <i>Stationery</i> view and click the  New action button. You will be prompted to select which stationery you want to use. • From any other folder or view, click the  More action button and choose New Message with Stationery. <p>In either case, you will be prompted with a list of stationery to choose from.</p> |
| 7 | <p>To edit the stationery, select the one you want to change in the <i>Stationery</i> view and click the  Edit action button. When done, you must click the  Save action button (or  Discard Changes to cancel).</p> <p>To rename the stationery, select it from the <i>Stationery</i> view and click the  Rename action button.</p> |

Notes

Message AutoSave

Introduction

Savvy computer users have learned to press **Ctrl+S** to save their work as they go, whether working on a document in Microsoft Word or writing a long Message in Notes. In spite of this precaution, application errors, power outages, computer crashes, and network glitches always seem to cause problems at the least suspected times and you end up losing your unsaved work.

To help limit lost work due to calamity, *AutoSave* automatically saves all the documents you have open in Edit mode every few minutes. Then if Notes or your computer crashes, you can recover any unsaved documents as they existed when AutoSave last saved them.

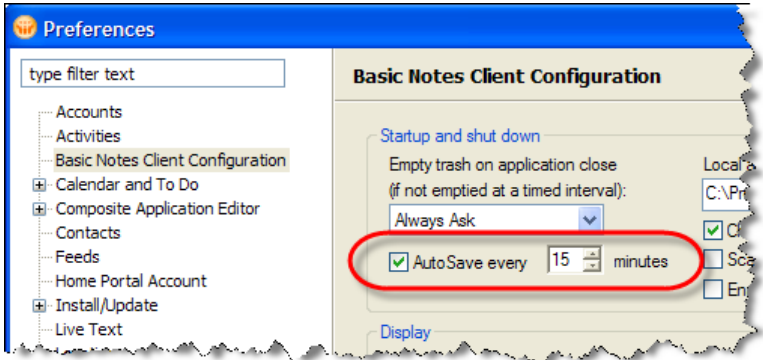
Note: AutoSave is a general Notes feature that can be part of any application design, but it has only been added to the *Mail* template and only to the *Message*, *Reply*, and *Reply With History* forms. Accordingly we are covering AutoSave as a feature in **Mail**. As this feature becomes more popular, you will see more and more applications support AutoSave both in the standard Notes applications and in custom applications.

Enable AutoSave in Notes

AutoSave is not on by default; you must enable it in Notes before it will protect your unsaved work.

Follow these steps to enable AutoSave in Notes:

| Step | Action |
|------|--------------------------------------|
| 1 | Start Notes and enter your password. |
| 2 | Choose File – Preferences . |

| Step | Action |
|------|--|
| 3 | <p>Select the Basic Notes Client Configuration page.</p> <p>Select the AutoSave option and set the number of minutes to wait between automatic saves:</p>  <p>Determining the optimum time interval is a tradeoff between performance and safety. If more frequent than the default 15 minutes, less work will potentially be lost but you must wait a moment while an open document is being saved.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: Your Domino administrator (via a <i>Desktop Settings</i> policy) may control whether or not AutoSave is enabled and may also set the AutoSave interval.</p> </div> |
| 4 | <p>Click the OK button to save your preference.</p> <p>Restart Notes for the change to take effect.</p> |

When AutoSave runs

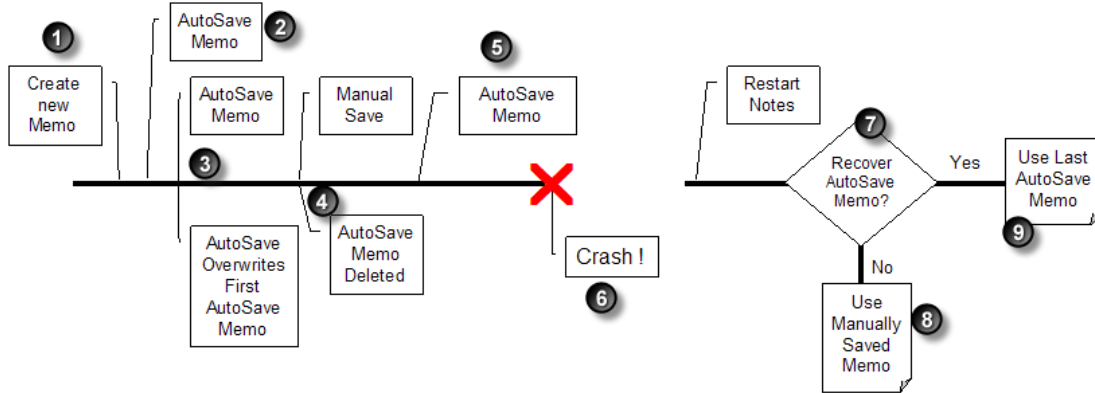
When you are working on one or more documents in Edit mode and it comes time for AutoSave to run, two things happen:

- A copy of the document in its current state is created in a local application named *AutoSave* (even if you haven't manually saved the document yet).
- The Status Bar displays this message when the document is autosaved:



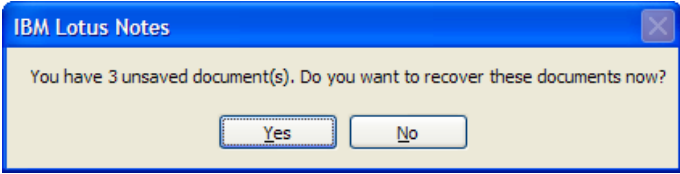
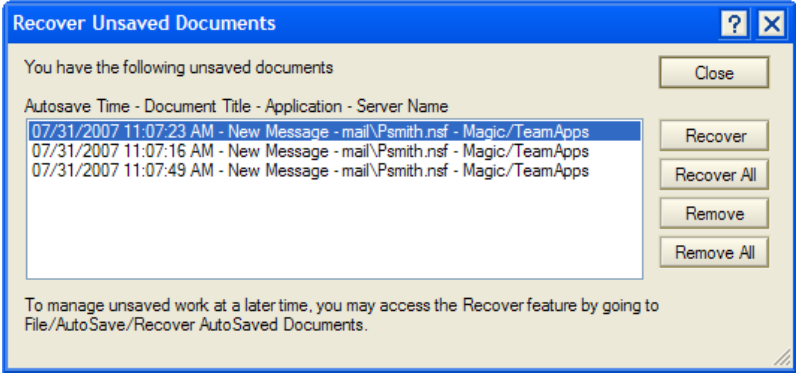
AutoSave timeline

This diagram shows a typical timeline of creating a new Message and recovering after a computer crash:



This table describes the sequence of events using a new Message as an example:

| Event | Description |
|-------|---|
| 1 | Assume that you have AutoSave enabled and the interval is set to five minutes. You create a new Message. |
| 2 | After five minutes of working on the Message, AutoSave creates a copy of the current Message—even though you haven't saved the Message yet—in the <i>AutoSave</i> application. <div style="border: 1px solid black; padding: 5px;"> <p>Note: There is generally no reason to open the <i>AutoSave</i> application. It doesn't contain any useful views and no forms, so you won't be able to edit any of the documents stored there.</p> </div> |
| 3 | As you continue working on the Message for another five minutes, AutoSave overwrites the first Message in the <i>AutoSave</i> application with the current version that you have on screen. |
| 4 | You decide to press Ctrl+S to save the Message. When you save the Message, the copy of the Message in the <i>AutoSave</i> application is removed because the Message has been saved in Mail . |

| Event | Description |
|-------|--|
| 5 | <p>As you keep working on your Message for another five minutes, AutoSave copies the current Message to the <i>AutoSave</i> application.</p> <p>Keep in mind that the old saved version of the Message is still saved in Mail; the version with the latest changes that has not yet been manually saved is the one copied to the <i>AutoSave</i> application.</p> |
| 6 | <p>Oh no! Your computer crashes and you have to reboot.</p> |
| 7 | <p>When you restart Notes, you are prompted to recover any unsaved documents from the <i>AutoSave</i> application.</p>  |
| 8 | <p>If you click Yes, the documents copied to the <i>AutoSave</i> application appear in this list of documents that had not been saved at the time of the crash:</p>  <p>The third document is the Message you were working on before the crash.</p> |

| Event | Description |
|-------|--|
| 9 | <p>The general procedure is to recover documents one at a time. Select the document(s) you want to recover and click Recover. The document opens in a new tab on your screen where you must choose either to:</p> <ul style="list-style-type: none"> • save the recovered document, which overwrites the one in the working application • discard it, in which case the original document in the working application is retained. <p>In either case, the copy of the document in the <i>AutoSave</i> application is removed. The Recover Unsaved Documents dialog box stays open until you close it.</p> <p>If you click either of the Remove buttons, the document is removed from the <i>AutoSave</i> application but the document is NOT opened for editing in a new tab.</p> |
| 10 | <p>You decide that the work you did since saving the Message in Event 4 isn't worth keeping, so you choose NOT to recover the Message from the <i>AutoSave</i> application.</p> <p>When you do this, the copy of the Message is removed from the <i>AutoSave</i> application.</p> |
| 11 | <p>Or, you decide that you want to recover the version of the Message that was last copied to the <i>AutoSave</i> application. The Message from the <i>AutoSave</i> application is opened on screen.</p> <p>When you save the Message on screen (the one from the <i>AutoSave</i> application), the original Message in Mail is overwritten.</p> <p>If you decide at the last minute NOT to save the recovered Message on screen, the original Message in Mail remains intact.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: You can reopen the Recover Unsaved Documents dialog box at any time to see if there are any documents to recover. Choose File – AutoSave – Recover AutoSaved Documents.</p> </div> |

If you never saved the document: Scenario 1

Consider this scenario:

- You are working on a document and a copy of it is automatically saved to the *AutoSave* application (or you choose **File – AutoSave – AutoSave Now**).
- Before you can manually save the document, your computer crashes.
- After Notes restarts you are prompted to recover the document but you decide not to recover the document.

In this scenario, the copy of the document is removed from the *AutoSave* application and because it was never saved to the working application, it is gone forever.

If you never saved the document: Scenario 2

Consider this scenario:

- You are working on a document and a copy of it is automatically saved to the *AutoSave* application (or you choose **File – AutoSave – AutoSave Now**).
- You close the document but decide not to save it. (No crash is involved in this scenario.)

In this scenario, even though a draft copy of the document was copied to the *AutoSave* application, because you didn't save the new document when you closed it, the copy of the document is automatically removed from the *AutoSave* application. And because you never saved the document to the working application, it is gone forever.

Manually run AutoSave

AutoSave runs when the configured interval time occurs, say every 15 minutes. When AutoSave runs, it copies all documents open in Edit mode to the *AutoSave* application.

Instead of waiting for 15 minutes (or whatever interval you set), you can manually AutoSave just the currently open document. To do this, choose **File – AutoSave – AutoSave Now**.

New Mail Notification and Notes Minder

Introduction

New messages are continuously delivered to **Mail** even though you may not be using Notes or even have your computer turned on. The messages will be waiting for you when you open **Mail**.

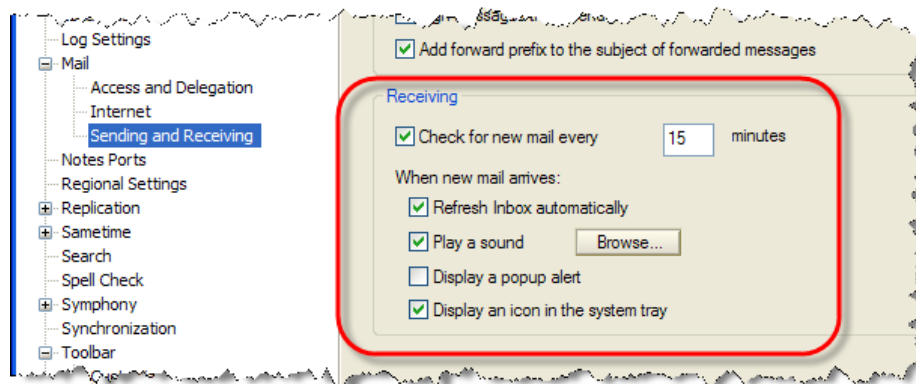
If your job requires a quick response to new messages, you can configure Notes to actively notify you when new email arrives in your *Inbox*.

If you don't want to leave Notes running but still want to be notified when new messages arrive in your *Inbox*, you can start the Notes Minder application.

Polling interval and alerts

By default, every 15 minutes Notes looks to see if you have any new messages since the last time it checked. Also by default Notes doesn't use any overt means to let you know when new messages arrive.

How and how often Notes notifies you are controlled in Preferences on the **Mail\Sending and Receiving** page:



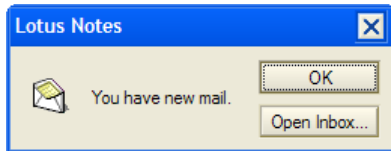
If your job requires a quick response to new messages, you may want to reduce the polling interval to something less than every 15 minutes. Remember, though, you can open **Mail** at any time to find new messages that have been delivered since the last time you checked.

To avoid becoming obsessed with checking for new messages, many people disable notification altogether or increase the number of minutes to every hour to avoid being interrupted when new mail arrives. They choose instead to read mail when it is convenient for them.

Note: Your Domino administrator may exercise control over new mail notification, so you may not have a choice in the matter. This is done to reduce network traffic and to minimize the load on Domino Server resources.

While you are setting the mail polling interval, you may also want to enable other notification methods:

- **Refresh Inbox automatically** is what keeps the *Inbox* current after new messages are delivered (and you aren't switching to other folders, which will force a refresh).
- **Play a sound.** If you have a sound card and speakers, the sound will be played when Notes checks for new messages and there are, in fact, new messages. Your computer beeps if it cannot play the sound.
- **Display a popup alert.** Instruct Notes to display a popup:



Click **OK** to dismiss the popup or **Open Inbox** to go to your *Inbox* folder. This is the most intrusive notification method.

- **Display an icon in the system tray.** Have the Windows System Tray display the new mail indicator:



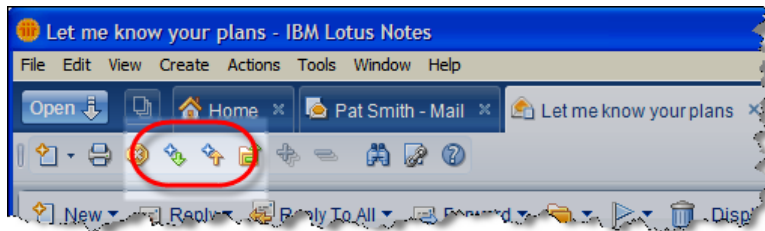
Double-click the icon to open your mail.

As you experience each method, you will discover which one works best for you.

Read next/previous message

While you are reading a message, you can open the next or previous message in the folder or view by pressing **Enter** or **Backspace**. If you reach the end of messages to open from the underlying folder or view, you are returned to the folder or view.

Or, while you are reading a message, you can jump to the next or previous *unread* message using the Next Unread (**F4**) and Previous Unread (**Shift+F4**) tools:



You may need to widen the Navigate View toolbar to see these buttons (or pull it down to create a second line of toolbars or hide the Address toolbar).

These tools can be used while:

- in a folder or view to jump to the next/previous unread message
- reading a message to jump to the next/previous unread message.

Notes Minder

Like most people, you may have Notes running all the time so you can see and hear new mail notifications (and reminders to attend meetings).

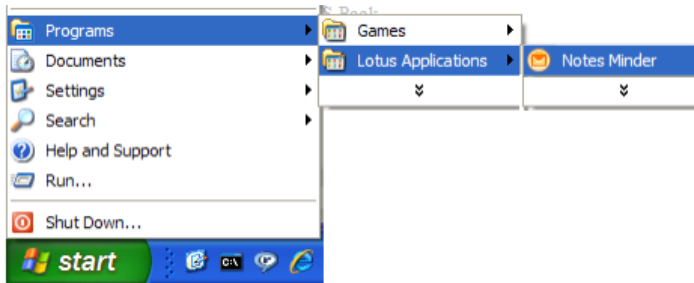
But Notes is a large program, and you may need to free up memory to perform other tasks.

As an alternative to running the full Notes program, you can start the smaller Notes Minder program (either manually or as a Startup program), to let you know when there are new mail messages. You can then launch Notes as needed to open messages for reading.

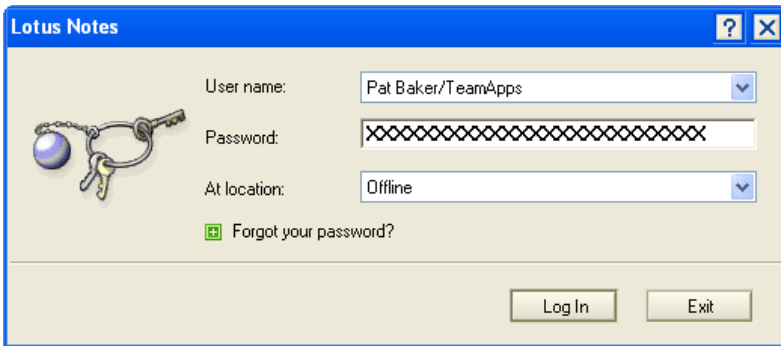
Start Notes Minder

Before starting Notes Minder, you would typically exit Notes. Otherwise, you will be notified twice when new mail arrives: once by Notes Minder, and another time by Notes.

To start Notes Minder:

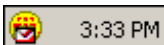


You are prompted for your Notes User ID password.



New mail notification

Notes Minder displays a system tray icon when it is running and changes the icon when action is required. For example, when you have new mail, the icon changes to display a flashing red envelope:



Depending on what is going on, the Notes Minder system tray icon changes to various shapes:

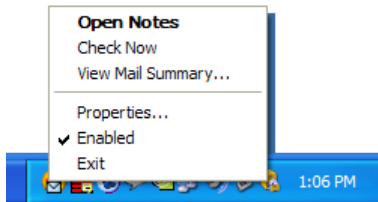
- **Lightning bolt** ⚡. Notes Minder is checking your *Mail* for new messages.
- **White envelope** ✉. Notes Minder is active but there are no unread messages in your *Inbox* folder.
- **Flashing Red envelope** ✉. You have unread messages in your *Inbox*.

- **Red X** ☒. Notes Minder cannot connect to the Domino Server where your **Mail** is stored.

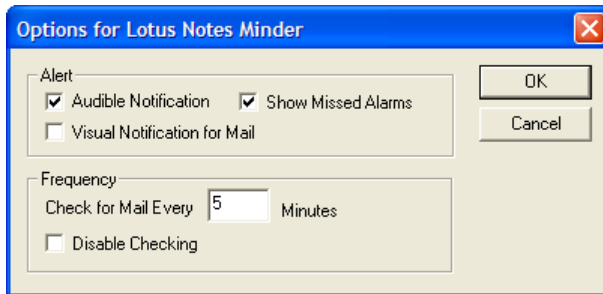
Notes Minder actions

You can perform several actions using the Notes Minder system tray icon:

- Double-click the icon to launch Notes.
- Right-click the icon for more options:



Choose **Properties...** to configure Notes Minder:



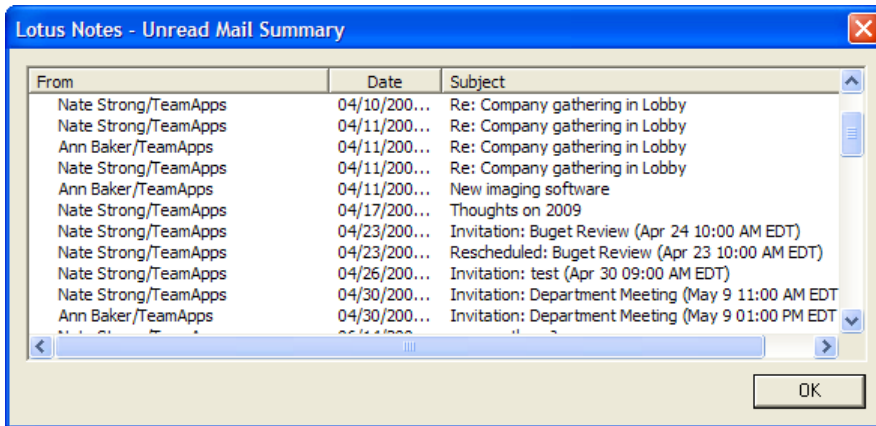
Visual notification of new messages

Because it is easy to misread or ignore the Notes Minder system tray icon, the best notification method is the one enabled when you select the **Visual Notification for Mail** option:



Click **Goto Mail** to launch Notes to your **Mail**.

Click the **View Summary** button to open a summary of new messages:



You can double-click any of the messages to launch Notes to open the message. (When done reading the message in Notes, you can exit Notes and Notes Minder will continue to monitor your *Inbox*.)

If none of the messages looks interesting, click **OK** to close the unread mail summary.

