

# **Lotus Notes 8.5 User Essentials**

Version 1.0

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

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## Description

During this course you will learn how to use the core applications included in Lotus Notes 8.5, including **Mail**, **Calendar**, **Contacts**, **To Do**, and **Notebook**. This course teaches you how to perform the most common tasks in the Notes Standard configuration.

The application you will use the most is **Mail**, as it is a key personal and business application. You will learn how to use the **Calendar** to organize your time and track your tasks in the **To Do** application.

You will keep track of people in **Contacts** and keep information in your **Notebook**. As you use the core Notes applications, you will recognize a common pattern that builds your competence and confidence in using almost any Notes application such as a **Discussion**, which you will join at the end of the course.

Because Notes incorporates Sametime instant messaging, you will also know when people are online so you can chat in real time.

Beyond the technical aspects of using Notes, you will learn the “best practices” of how to use Notes to become a more effective communicator and collaborator.

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## Course goals

In this course you will learn how to:

- navigate in the Notes Standard configuration user interface
- launch the core Notes applications from the Home Page and from bookmarks
- set user and **Mail** preferences to customize your working environment
- send and receive email messages that include formatted text, tables, images, Web links, and file attachments
- find and read new email messages
- take action on email messages, which may mean to mark for follow up later, respond to now, forward, copy into a new meeting or to do, or block the sender from sending future messages
- configure Out-of-Office notification to respond to email messages when you are away
- change the sort order of messages, use full text search to find message content, group messages by mail thread, and organize messages into folders

- add people and groups to your **Contacts** application
  - use the **Calendar** application to schedule appointments and meetings
  - keep track of your tasks in the **To Do** application
  - use the **Notebook** application to save important information
  - know when other people are online and communicate with instant messages
  - participate in a shared **Discussion** on a Domino server.
- 

## **Audience**

This course is designed for new Lotus Notes users who can:

- start and stop software applications in Microsoft Windows
  - use Microsoft Windows Explorer to find and organize files
  - create, format, and print documents using word processing software such as Microsoft Word
  - use Microsoft Internet Explorer to browse Web pages and manage a list of favorite bookmarks.
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## **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.

This course in no way teaches you everything about how to use Lotus Notes. We recommend our follow-up course *Lotus Notes 8.5 User Essentials PLUS Pack*, from which you can learn more about particular aspects of Notes on an as-needed basis.

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## 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.

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## Font conventions

This course follows these font conventions:

- *Italic* - Bookmark, view, page, 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), field labels, tabs, tools, and accelerator keys
- **Courier**- user input, sample values, code examples
- **Helvetica** – URLs , HTML, and JavaScript code examples.

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## Accelerator keys

This table lists the most commonly used accelerator keys:

<b>Work Anywhere</b>	
<b>Ctrl+O</b>	Opens a Notes application.
<b>Ctrl+M</b>	Creates a new email message.
<b>Esc</b>	Leaves a document, view, or dialog box (you will be prompted to save any work).
<b>F1</b>	Displays context sensitive help (if available).
<b>Alt+B</b>	Expands the <b>Open</b> button.
<b>Ctrl+Shift+L</b>	Displays a list of all shortcuts.
<b>Ctrl+A</b>	Selects all the documents in a view or all text in a field.
Left mouse button	The default mouse button for click and double-click. Single-click opens a bookmarked application. Double-click opens a document (or selects a word in edit mode).
Right mouse button	Opens a quick menu for the selected object.  If double-clicked is the same as <b>Esc</b> (must be enabled in Preferences).
<b>Ctrl+F5</b>	Logs off of all Notes Servers immediately. (Do this when you leave your desk so no one else impersonates you.)
<b>Alt+Enter</b>	Opens an object's properties, for example Text properties.

<b>Navigation Bar Equivalentents (work almost anywhere)</b>	
<b>Ctrl+Home</b>	Takes you to the top of a view or document.
<b>Ctrl+End</b>	Takes you to the bottom of a view or document.
<b>Ctrl+Break</b>	Interrupts many Domino Server actions that have seemingly locked Notes.
<b>F9</b>	Refreshes the legacy workspace, view, or document.

<b>Work Only in a View</b>	
<b>Insert</b>	Toggles a document as read or unread.
<b>Enter</b> <b>Backspace</b>	<b>Enter</b> opens the document selected in a view; <b>Enter</b> again opens the next document in a view without returning to the view. <b>Backspace</b> opens the previous one.  Doesn't work if the application opens documents in Edit mode when you open them (e.g. Notebook).
<b>Ctrl+E</b>	Puts the selected document into Edit mode (assuming you are the document Author).

<b>Work Only in Document Edit Mode</b>	
<b>Ctrl+Right/Left</b>	Moves insertion point a word at a time.
<b>End/Home</b>	Moves insertion point to end or beginning of line.
<b>Shift+End</b>	Highlights entire line of text.
<b>Ctrl+S</b>	Saves a document while in edit mode.
<b>Ctrl+K, Ctrl+J</b>	In a Rich Text field, opens the Font dialog box, Paragraph dialog box.
<b>Ctrl+U, Ctrl+I, Ctrl+B, Ctrl+T</b>	Sets underline, italic, bold, and "normal" font attributes.
<b>F2/Shift+F2</b>	Enlarges or reduces point size of selected text in a Rich Text field.
<b>F8/Shift+F8</b>	Indents the paragraph.

# Topic 1: Start Lotus Notes

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## Introduction

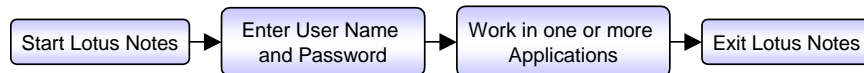
Lotus Notes is a software environment that allows you to open a variety of core and custom applications.

In this Topic you will learn that Lotus Notes comes in two configurations, Basic and Standard. The fundamental features and the core applications are shared by both configurations, but this course will show them only in the Standard configuration.

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## Pattern of using Notes

The pattern of using Notes can be summarized by this flow chart:



After you start Notes, you open various applications to do your work, and when finished, exit Notes.

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## Core applications included in Notes

Notes includes several core applications that you are probably already familiar with if you have used other email packages such as Microsoft Outlook:

Application	Use this application to...
Mail	Send and receive electronic mail from other people in your company or from anyone on the Internet.
Calendar	Schedule appointments and meetings.
Contacts	Keep a list of people you regularly keep in touch with so you can have access to their email addresses, phone numbers, addresses, etc. One click lets you send a message or schedule a meeting with any of your contacts.  You can also use your company <b>Directory</b> or search the Internet directories for names and email addresses.

Application	Use this application to...
To Do	Keep a list of tasks you don't want to forget and mark them complete when finished with them.
Notebook	Save stray pieces of information in this handy place.
Sametime Instant Messaging	See if someone is currently working in Notes and if so, send an instant message to start a chat session.

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### Public and custom applications

All the core applications listed above are *personal* applications and security measures are in place to make sure only you can access them.

Using Notes you can also open *public* applications that are shared by everyone in your company (or specified groups of people), for example your company **Directory** or a company-wide discussion to share ideas for new products or services. All public applications are stored on a Domino Server.

Custom applications can also be created and may be simple, such as an online policies and procedures manual, or complex, such as an expense approval or a customer relationship management system.

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### Applications are integrated by Notes

There are at least two advantages to having applications open in the Notes environment:

- All the core applications pretty much work the same, so you don't have to relearn every application to use it. If you learn how to use the **Mail** application, for example, you will have no problem using the **Notebook** application or most custom applications for that matter.
- The applications are integrated, so you can do things like turn an email into a calendar entry or right-click on the message sender's name to start chatting using Sametime Instant Messaging.

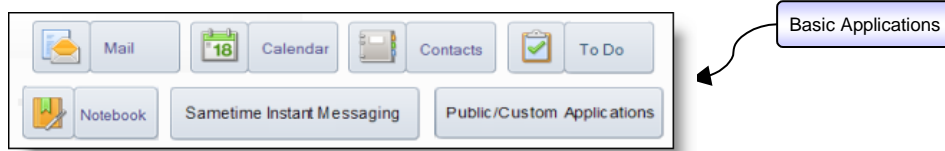
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## Notes Basic and Standard configurations

Lotus Notes comes in two configurations, Basic and Standard. Most features and the core applications are included in both configurations but there are significant differences in both appearance and additional applications you get with Notes Standard configuration.

### Basic configuration

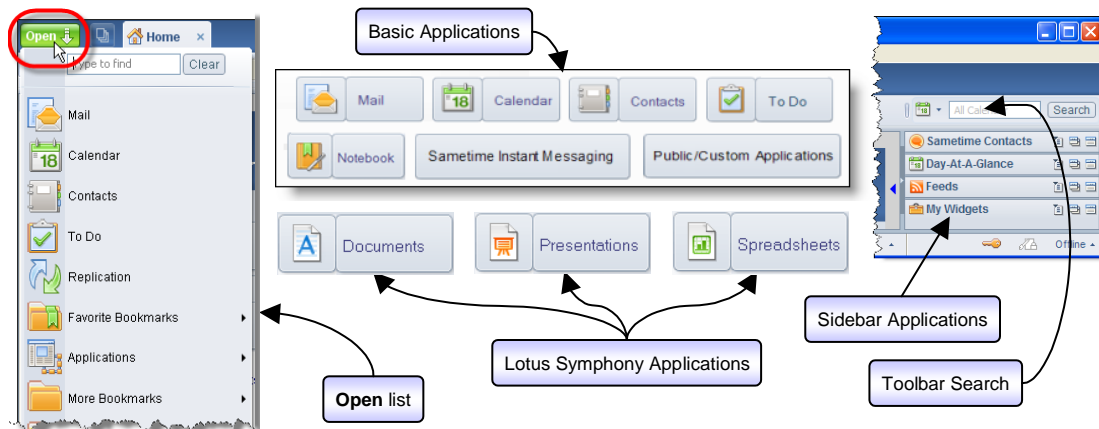
The Lotus Notes 8.5 Basic configuration includes these core applications:



The Basic configuration only runs on Windows XP and Vista systems and is designed for older computers that don't have much memory or free disk space.

### Standard configuration

The Lotus Notes 8.5 Standard configuration includes even more features and applications in addition to the core applications:




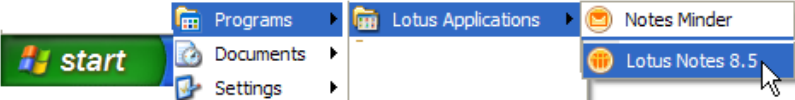
The Standard configuration runs on Windows, Linux, and Macintosh systems and requires a late-model computer.

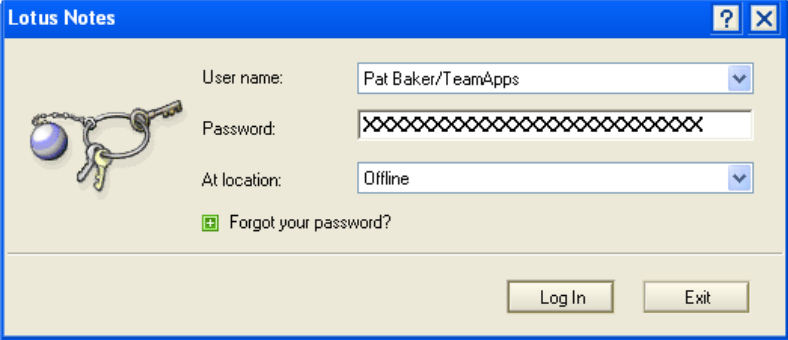
This course focuses on the core applications, which although virtually identical in both Notes configurations, we will only show them only using the Standard configuration.

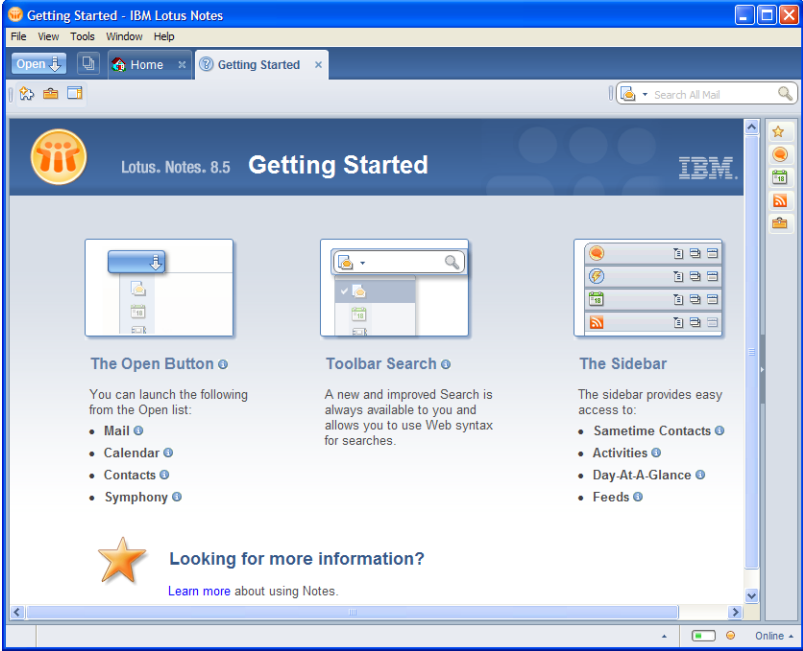
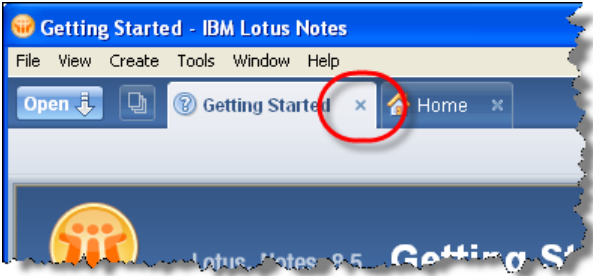
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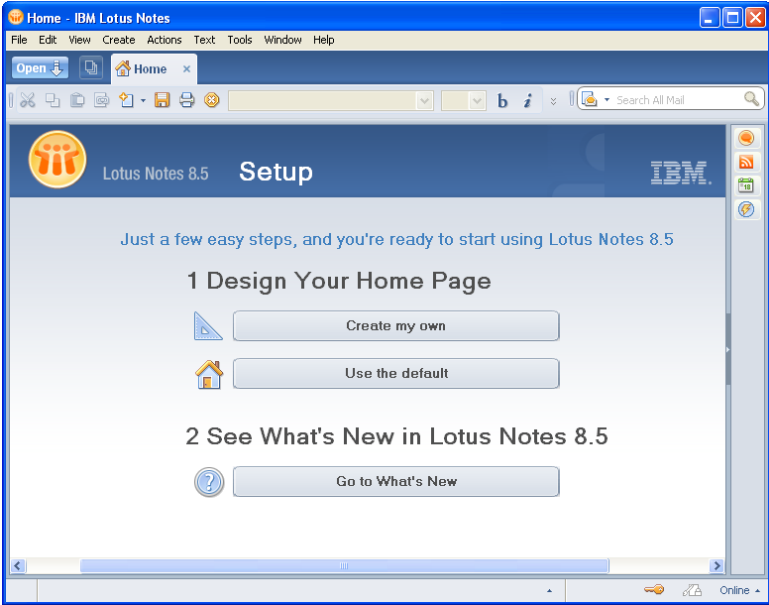

## Exercise: Start Lotus Notes

Follow these steps to start Lotus Notes:

Step	Action
1	<p>We assume in this course that you are using Windows.</p> <p>Start your computer and if necessary, log into Windows.</p>
2	<p>By default, the Notes shortcut is installed on the Windows Desktop. Double-click the Lotus Notes icon:</p>  <p>Or, you can start Notes from the Windows <b>Start</b> button under <b>Programs\Lotus Applications</b>:</p>  <p><b>Note:</b> The exact <b>Start</b> button menu path may be different on your computer.</p>
3	<p>Notes is password protected, and most likely you will be given a fake user name and password to use only in this class. If so, write them down here:</p> <p>Notes User Name: _____</p> <p>Notes Password: _____</p>

Step	Action
4	<p>As Notes starts up, you will be asked for your Notes user name and password.</p>  <p>If your user name is not selected, choose your name from the list. Leave “Online” as the location type if you are connected to the network.</p> <p>If the computer has multiple users, you must first choose your Notes user name and/or a new location (such as <b>Offline</b> if using Notes on a disconnected laptop) before entering your password.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Note:</b> If you are not prompted for your Notes password, don’t worry. Your Notes administrator has enabled a new feature that automatically logs you into Notes using your Windows password. If you are still required to enter your Notes password, be aware that there may be a new procedure for recovering your forgotten password. Click <b>Forgot your password?</b> for instructions on what to do if you forget your Notes password.</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> If Notes is configured to use Sametime Instant Messaging, you will be prompted for your Sametime user name and password if different from your Notes user name and password.</p> </div>
5	<p>What happens next depends on:</p> <ul style="list-style-type: none"> <li>• whether you have Notes Basic or Standard configuration installed</li> <li>• if you are starting Notes for the first time after a new installation and setup or those “once only” tasks have already been completed</li> <li>• if the Domino administrator has customized the Notes Home Page.</li> </ul> <p>We will assume that Notes has already been set up for you and that you will be using the default configuration.</p>

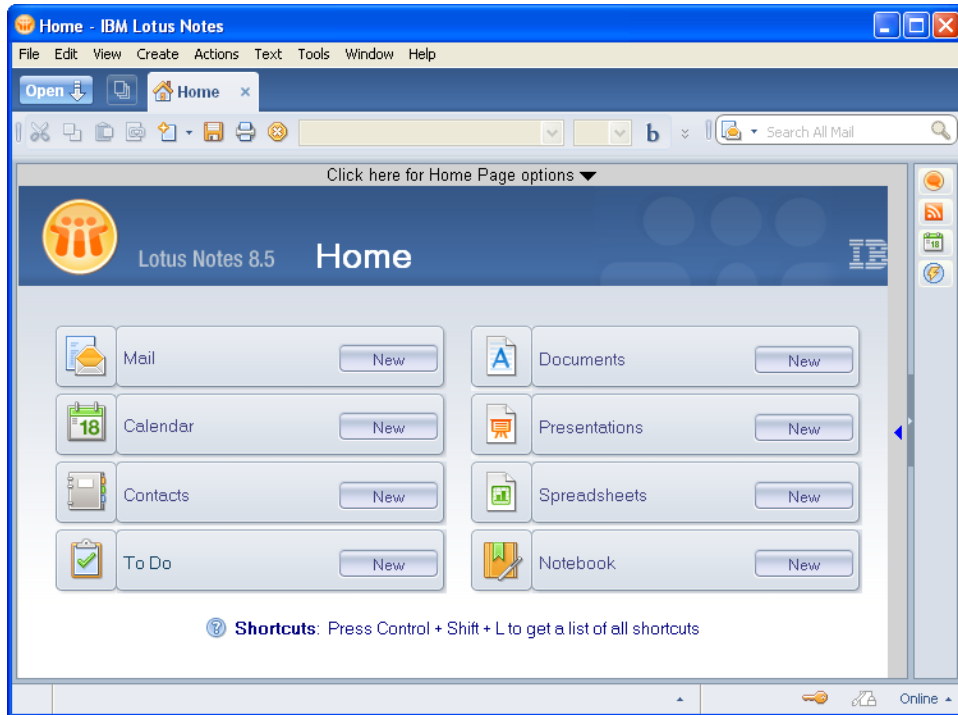
Step	Action
6	<p>If you are starting Notes for the first time, the Getting Started page opens:</p>  <p>This page lets you know more about Notes before you continue.</p>
7	<p>Everything you open in Notes opens in a window tab, as seen in the <b>Getting Started</b> page in Step 6. Click the <b>x</b> on the <b>Getting Started</b> tab to close that tab:</p>  <p>You can always open the <b>Getting Started</b> tab later from the <b>Help</b> menu.</p>

Step	Action
8	<p>If you have not already created a custom Home Page (and your Domino administrator has not created a custom Home Page for you), you will be asked to setup how Notes appears when you start it:</p>  <p>Click the  <b>Use the default</b> button to use the default Home Page (you can create your own Home Page later).</p>
9	Notes opens to the default Home Page.

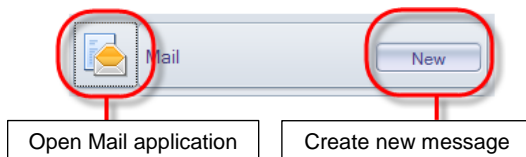
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## Default Home Page

Here is the default Home Page:



The Home Page lists the core Notes applications as a series of eight bars, with each bar having two buttons, for example **Mail**:

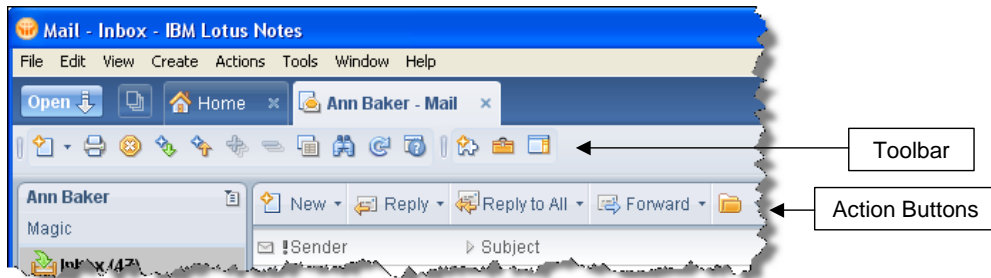


- The button on the left with the picture opens the application (in a new window tab).
- The  button creates a new document in that application, in this example a new email *Message*.

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## Toolbar

The toolbar appears below the window tabs and has buttons that are shortcuts to commonly used menu commands.



The pre-defined tools are context-sensitive to what you are doing in Notes; that is, they become active/inactive as you move around.

When you are in a place where you can cut and paste text, for example, the cut, copy, and paste tools become active:



There are actually a number of toolbars you can enable. To add or remove a toolbar, right-click any toolbar and choose **Toolbar** to pick which tools you want to appear. Choose **Toolbar Preferences** to customize the tools.

**Note:** The rightmost tool buttons may be off the right side of the screen if the Notes window is not maximized.

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## Action buttons

After you open an application you'll see a second row of buttons called *action buttons*. These buttons also provide shortcuts to keystrokes or menu commands, but only apply to the application open in that window tab.

When you create a new *Message*, for example, the action buttons allow you to do things with the document, such as to Send it:

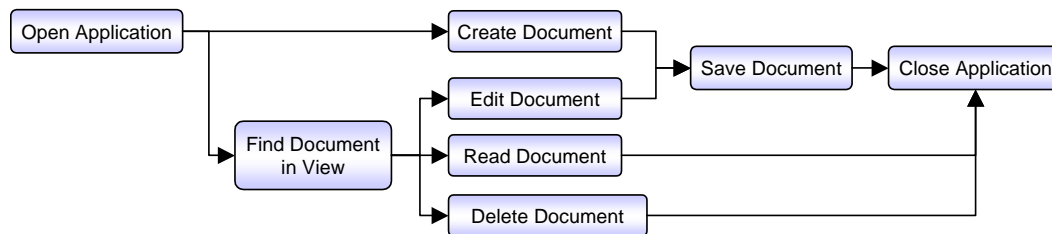


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## Pattern to use core applications

We stated earlier that all the core applications pretty much work the same way.

In fact, the same pattern of using *any* of the core applications can be summarized by this flow chart:



You open an application, do work on what Notes calls *documents* (create, edit, read, delete), and then close the application.

A *document* is what Notes calls anything you create and save in an application using a form. An email *Message* is a document, a *Calendar Entry* is a document, a *Notebook Entry* is a document.

You open an application to create its particular type of document, and when done, you save the document. Depending on the application, there will be unique requirements in the form that is used to create the specific type of document. If working in the **Mail** application, for example, you must add an email address before you can send the document to another user.

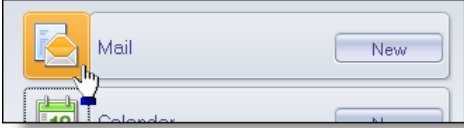
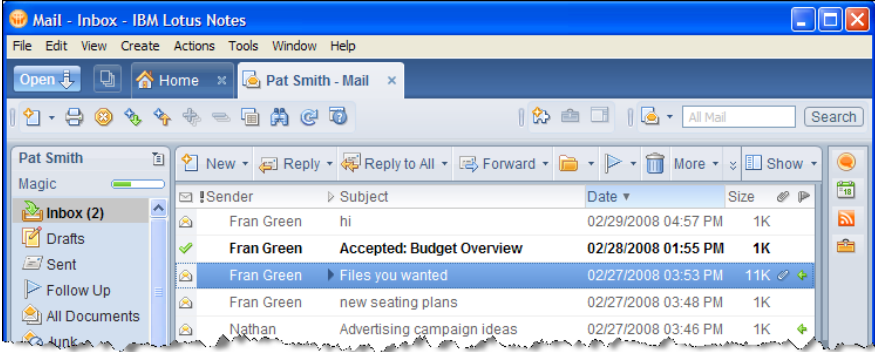
When working with saved documents, you find them in the application from lists of documents (views and folders), then read, edit, or delete the documents.

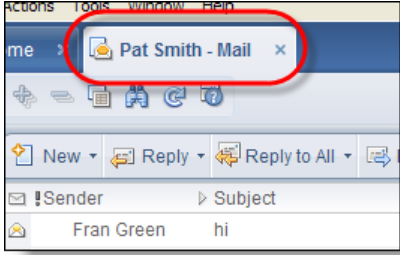
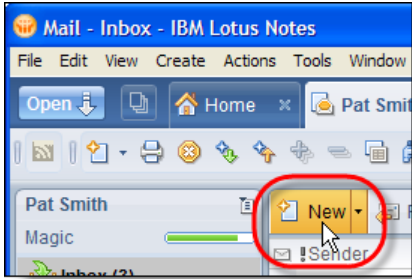
You will see this same pattern repeated throughout this course as you use all the core applications.

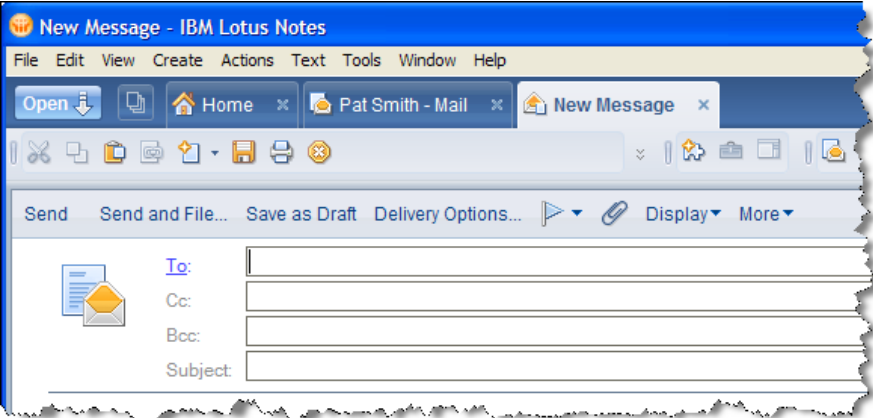



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## Open core applications

Let's see how the "pattern" to use a core application is put into practice. We'll use the example of the **Mail** application.



Step	Action
1	<p>To open the <b>Mail</b> application, click the button on the left side of the <b>Mail</b> block:</p> 
2	<p>The <b>Mail</b> application opens to the <i>Inbox</i> folder:</p>  <p>When you receive new messages they appear in the <i>Inbox</i> folder.</p>



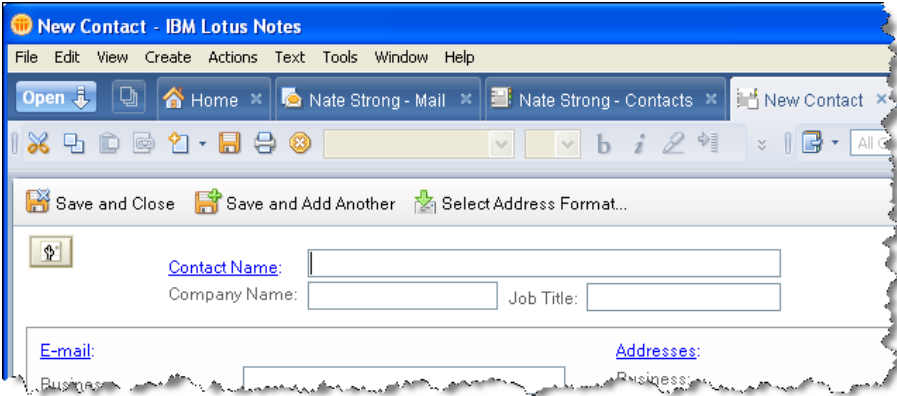
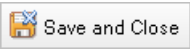
Step	Action
3	<p data-bbox="423 281 1284 352">Notice that anything opened in Notes is by default opened in a new window with its own window tab:</p>  <p data-bbox="423 684 1292 793">You will often find that you have several documents from several applications open at once; just click the window tab to switch to the page name on the tab.</p> <div data-bbox="423 821 1317 898" style="border: 1px solid black; padding: 5px;"> <p data-bbox="435 827 1289 898"><b>Tip</b> You can drag a window tab to a new location on the tab bar to change the tab sequence.</p> </div>
4	<p data-bbox="423 934 1243 1005">To create a new <i>Message</i> in the <b>Mail</b> application, click the <b>New</b> action button:</p>  <p data-bbox="423 1360 615 1392">Action buttons</p>



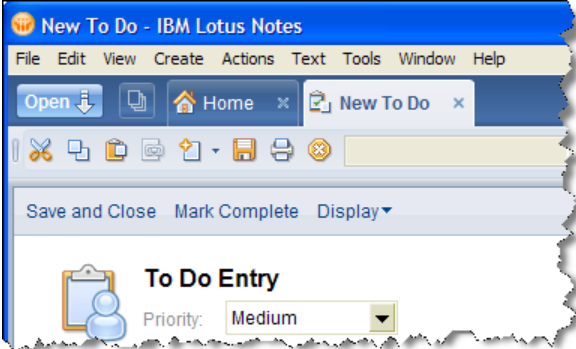


Step	Action
5	<p>A new <i>Message</i> opens in a new window tab:</p>  <p>Presumably you would enter the recipient's email address (or use the <b>Contacts</b> application or your company <b>Directory</b> to select one), add a Subject and a Body, and then click the  action button to send the message. After the message is sent, the window tab closes automatically.</p>
6	<p>For this demonstration, abandon the new <i>Message</i> and click the  on its window tab to close it.</p>
7	<p>Then click  on the window tab to close the <b>Mail</b> application.</p> <p>You are back to the Home Page where you started.</p>

### Exercise: Open core applications

Follow these steps to open several core applications from the Home Page, create a new document, and close the applications:

Step	Action
1	<p>If necessary, start Notes.</p> <p>You should be looking at the Home Page.</p>
2	<p>Let's open the <b>Mail</b> application first.</p>  <p>Click the  button to open the <b>Mail</b> application.</p>

Step	Action
3	<p>The <b>Mail</b> application opens.</p> <p>We'll leave it open while we work elsewhere in Notes.</p>
4	<p>Click the <b>Home</b> window tab.</p>
5	<p>Now you will open the <b>Contacts</b> application.</p> <p>Click the  button to open the <b>Contacts</b> application.</p>
6	<p>The <b>Contacts</b> application opens.</p>
7	<p>Click the  action button (<i>Contact</i> is the default document type or click the arrow to select another type) to create a new Contact.</p> <p>(In the Basic version, the button is named <b>New Contact</b>.)</p>
8	<p>A new <i>Contact</i> form opens.</p>  <p>Presumably you would enter information about the person and when finished, click the  action button to save the document.</p> <p>For now, just click <b>×</b> on the <b>New Contact</b> window tab to close it without saving the document.</p>
9	<p>Click <b>×</b> on all the open window tabs until just the <b>Home</b> window tab is showing.</p>

Step	Action
10	<p data-bbox="423 285 1268 354">On the Home Page, click the  button in the <b>To Do</b> block to create a new To Do:</p>  <p data-bbox="423 489 1167 558">This creates a new To Do without first opening the <b>To Do</b> application.</p>  <p data-bbox="423 974 1299 1129">Presumably you would enter information about the To Do and when finished, click the  action button to save the document. To view the new To Do you would have to actually open the <b>To Do</b> application.</p> <p data-bbox="423 1163 1234 1232">For now, just click  on the <b>New To Do</b> window tab to close it without actually saving the document.</p>

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## Bookmarks and the Home Page

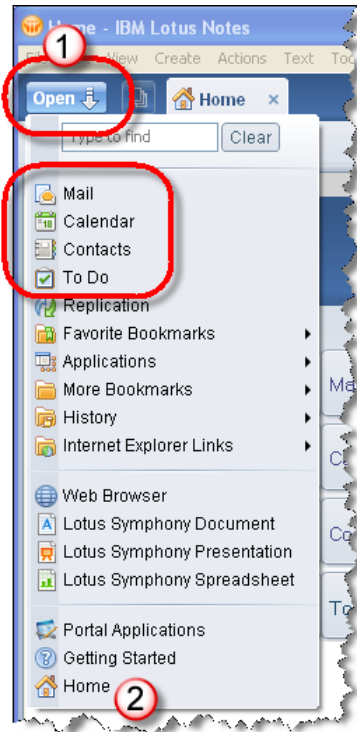
It isn't always convenient to return to the Home Page every time you want to open a core application. Another way to open core applications is to use the application bookmarks that are on the Open List.

No doubt you are very familiar with using bookmarks and folders in a Web browser so adapting to Notes bookmarks will come easy.

It is also possible to close the Home Page, so it is a good idea to learn how to re-open it from its bookmark.

Let's see how to open core applications and how to restore the Home Page using bookmarks.

To expand the Open List, click the **Open** button ①. The first four bookmarks open the core **Mail**, **Calendar**, **Contacts**, and **To Do** applications:




To restore the Home Page, click **Home** ②.

**Tip:** To keep the Open List open so it looks like the Bookmark Bar in the Basic configuration, choose **View – Dock the Open List**. Repeat the command to return to using the **Open** button.

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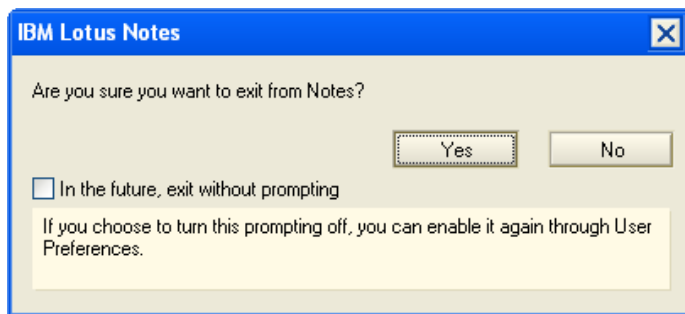
## Exit Notes

As with any Windows application, to exit Notes you can either:

- choose **File – Exit**
- click the **Close** button  in the upper right corner of the window.

Don't worry if you have any unsaved documents open, as Notes will prompt you to save them before it closes.

Notes will also prompt you to confirm that you want to exit:



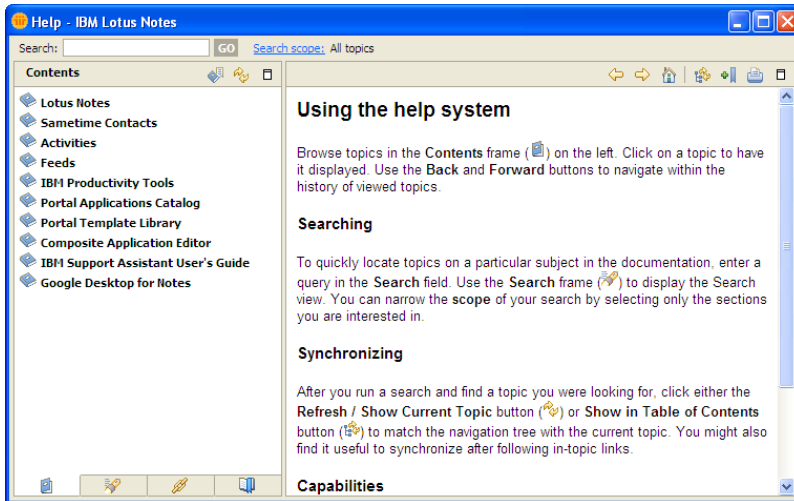
This prevents you from accidentally closing Notes.

Click **Yes** to exit Notes.

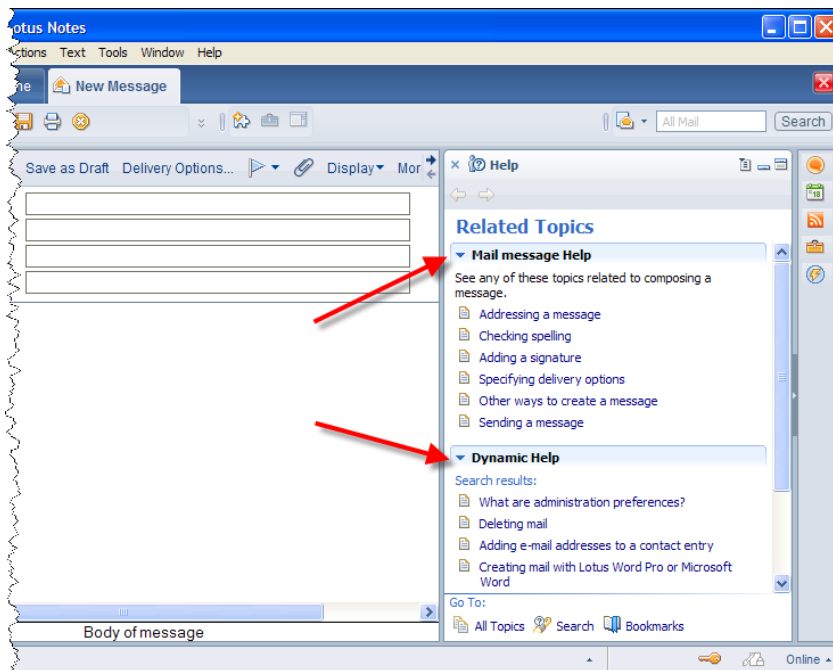
**Best Practice:** It is very likely that you will leave Notes running in the background the entire workday so that you will be notified when new messages arrive in the *Inbox* or when people want to chat with you using Sametime.

## Help

Help contains topics that span Notes, the Sidebar Applications, and more:



But look what happens when you press **F1** (or choose **Help – Dynamic Help**). Notes opens a Help frame to the left of the Sidebar. For example, while creating a new message, we pressed **F1**; the Help frame opens to tell more about how to create a new message:

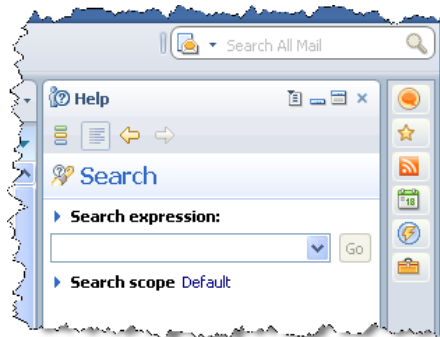



Notice that you will see a list of topics in the first section under **Related Topics**. You can click any of these to read more about the topic.

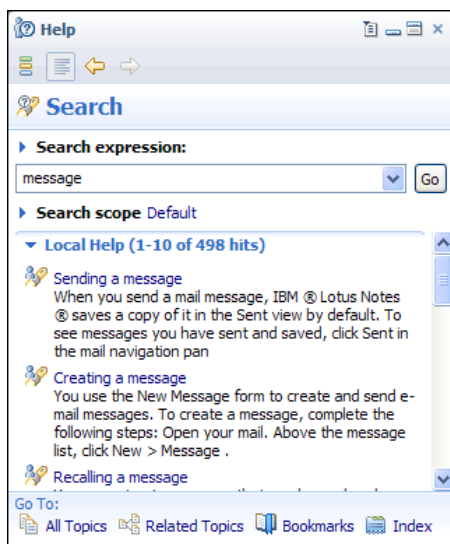
You will also see a list of topics under **Dynamic Help**. If you leave the Help frame open and switch to another window tab, the contents under **Dynamic Help** refresh automatically to explain the current task (press **F1** again to refresh the list of Related Topics).

## Help – Search

This command opens a search box at the top of the Help frame:



Enter a search phrase and press **Enter** or click the  button to see a list of topics (and a brief description to help you find the help you need):

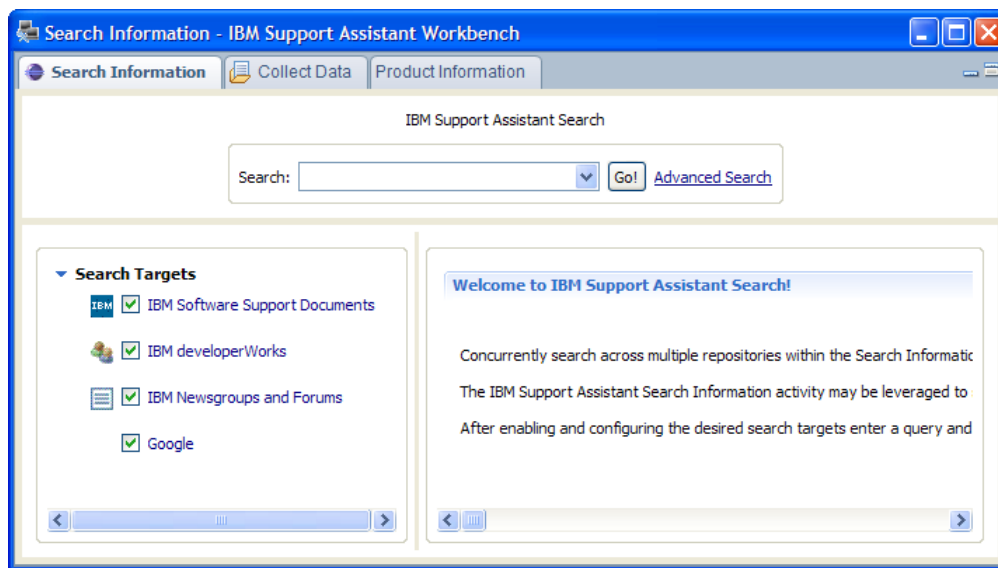


To change which places are searched for help, click **Search scope** and then click **Advanced Settings**. You can, for example, restrict the search to just Lotus Notes topics and then save the search scope. Or expand the search scope by adding a URL to a remote resource such as an IBM Info Center or a Web Search.

## Help – Support

There are several options you can choose:

- **View Log and View Trace.** These are the troubleshooting tools your Domino administrator may ask you to open if you are having problems with Notes, and specifically with Eclipse (which provides the overall interface for Notes). For Notes-specific log information, you still open the *<Your Name>Log* application (**LOG.NSF**).
- **IBM Support Assistant.** This launches a new Web site at IBM dedicated to Lotus Notes:



While you can hunt around <http://www.lotus.com/> to find some of the same information, this makes it easier to find information that is not otherwise in the Notes Help system.

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## Preferences

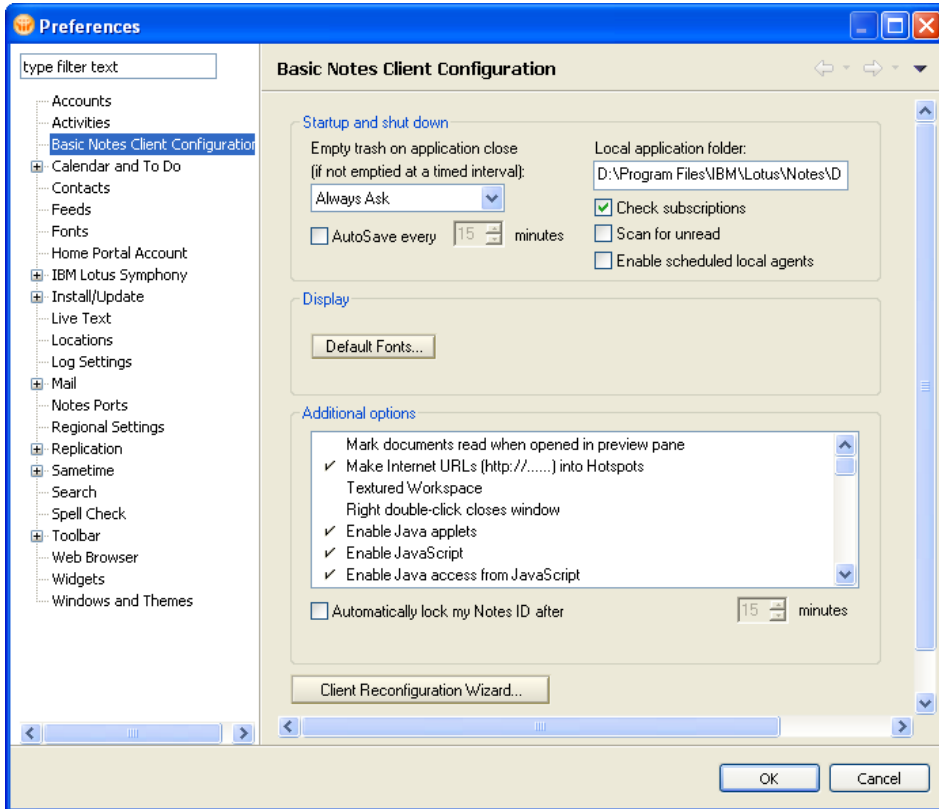
We don't have time in this course to go over all the ways in which Notes can be customized. We'll assume that Notes is set up correctly and you don't have to change anything to use it.

On occasion we will mention that setting a user preference can alter how a particular feature works.

We'll limit our discussion to the three main places where you can set preferences, User Preferences, Security Preferences, and Application Preferences. (Though we will admit that it isn't always clear about where a particular preference is set because there is overlap between features and their particular preferences.)

## User Preferences

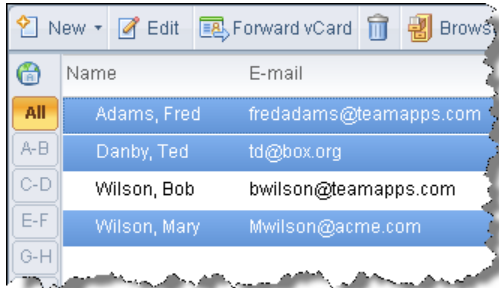
General Notes, Sametime, and Symphony Application operating behavior is configured with User Preferences. Choose **File – Preferences** to open the User Preferences dialog box.



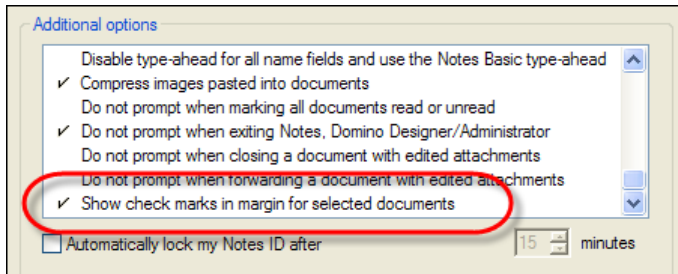
User Preferences attempts to consolidate many user preferences into one place, albeit on many pages of preferences opened from the navigation pane on the left. Here are several examples of User Preferences for Notes:

- Notes can automatically lock itself after a specified number of minutes of inactivity so that if you walk away from the computer, you don't need to worry that someone else will use your identity.
- Whether or not you want Notes to display the “Are you sure you want to exit Notes?” prompt shown above when you go to exit Notes.

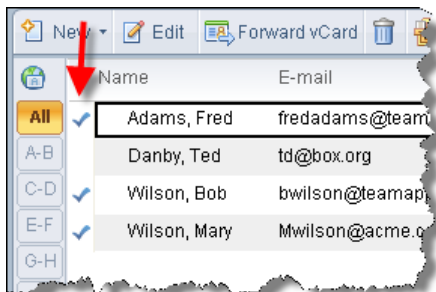
- You can select ranges of documents using the standard operating system keys (**Shift** and **Ctrl** in Windows). By default Notes highlights the selected documents with a blue background, for example:



But if you want to return to the classic Notes “check mark” method to indicate selected documents, open Preferences to the **Basic Notes Client Configuration** page and choose this Additional option:



Restart Notes for the change to take effect. Now a mouse click, a spacebar, or **Shift+Up Arrow/Down Arrow** will mark selected documents with ✓, for example:



**Warning:** Generally speaking most preferences can be changed without consequence and can be easily changed back. There are three Preferences that can potentially make Notes inoperable if you change them to an incorrect value:

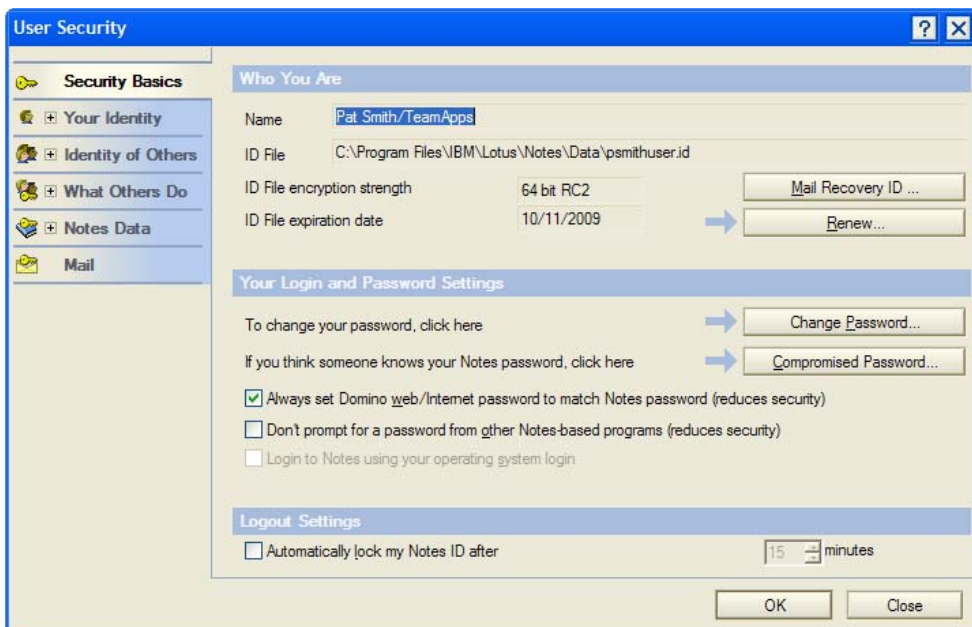
- **Basic Notes Client Configuration.** The **Local application folder** must be set to the folder path name that contains important files like your Notes User ID (ends in **.ID**), **Contacts** application file (**names.nsf**), and Bookmarks file (**bookmark.nsf**). If the Contacts file cannot be found in the local application folder, Notes won't start!
- **Mail\Sending and Receiving.** The **Local address books** field can have multiple file names (separated with commas), but the first one must be **names.nsf**. If not, Notes won't start!
- **Notes Ports.** If you don't have the correct network communication port enabled (typically **TCP/IP**), Notes won't be able to communicate with Domino Servers over the network. Disable the ports you don't need to save time opening applications.

Do not change these preferences unless told to do so by computer support personnel.

## Security Preferences

Choose **File – Security – User Security** to control the security-related preferences of Notes.

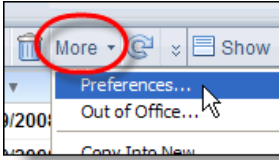
An example of a security preference is to change your Notes password.



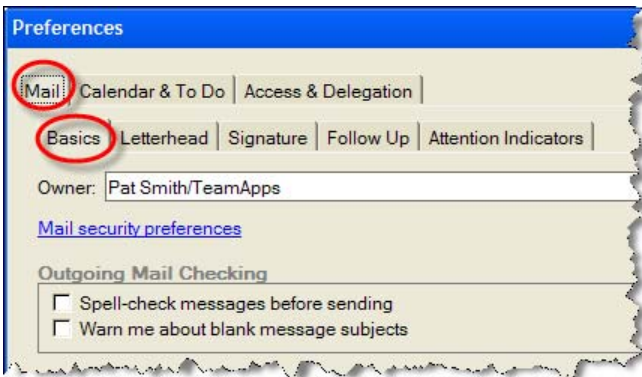
Click the **Security Basics** tab on the left and click the **Change Password** button.

## Application Preferences

Each application may also have its own preferences, for example the **Mail** application, which has an extensive list of preferences for **Mail**, **Calendar**, and **To Do** that can be opened from the **More** action button:



Choose **Preferences** to open Mail Preferences:



An example of a Mail preference you can set is to automatically add your contact information to the bottom of every new message that you create (name, phone number, etc.).

Another example of a Mail preference is to always spell check messages before sending.

You will also find Application Preferences in the **Calendar** application.

**Warning:** The only Mail preference that you should never change is the **Owner** name on the **Mail\Basics** tab (unless told to do so by your Notes support personnel).

The Owner must be set to your fully distinguished name (for example **Firstname Lastname/Organization**) or you will lose control over your ability to use several key features in the **Mail** application.

## **Administrator control over preferences**

Historically, users have been responsible for setting all their own preferences, but more and more Domino administrators are setting policies that override your preferences to both reduce confusion and make it easier for them to support Notes.

There is a range of administrator control over user preferences. Control may be limited to setting default options that you can change, or may lock down your Notes preferences so you cannot change them. Depending on the preference, you may find that it has a lock symbol next to it or that it is grayed out, meaning the Domino administrator has taken control over that preference and you cannot change it.

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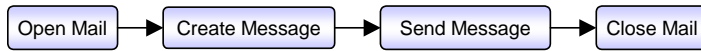
## Notes

## Topic 2: Send an Email Message

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### Introduction

The pattern of using the **Mail** application to create and send a message can be summarized by this flow chart:





In this Topic you will open the **Mail** application, create a message and send it to a colleague, and then close the **Mail** application.

(In the next Topic you will find a message that was sent to you, then read and reply to it.)

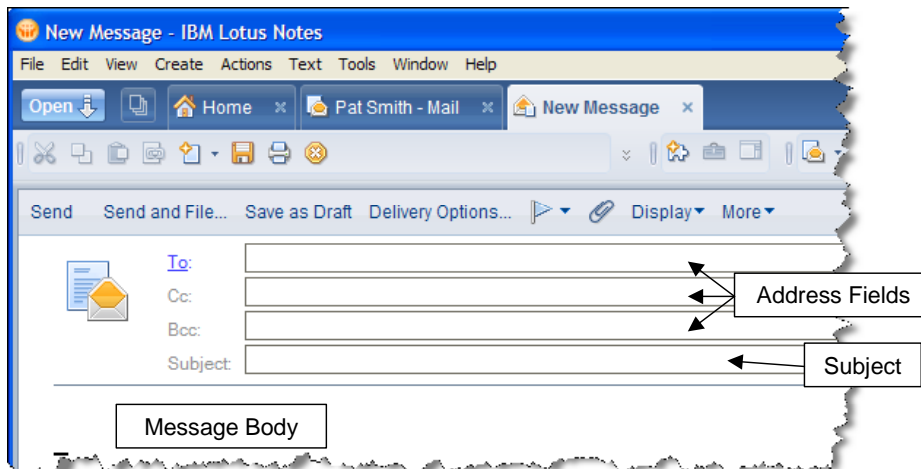
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### Create message

There are several ways to create a new *Message*, including:

- Click the  button in the **Mail** block on the Home Page.
- Open the **Mail** application and click the  action button. **Message** is the default document type, but you can click the arrow to select another type. (In the Basic version, the button is named **New Message**.)

A new *Message* opens:



The following sections describe how to address and send a message.

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## Address fields

The address fields tell Notes where to deliver the message:

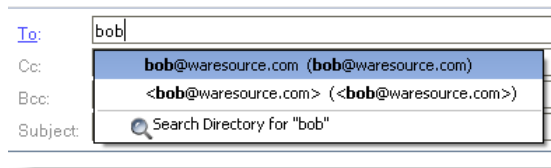
Field	Recipient
To	<p>One or more names/addresses of the primary message recipient(s). If more than one name/address, separate the names with a comma, semi-colon, or carriage return.</p> <p>Messages addressed to other Notes users are typically addressed in the form “First Name Last Name/Organization Name,” for example:</p> <p><b>Pat Smith/TeamApps</b></p> <p>Messages to people outside your company use Internet email addresses, for example:</p> <p><b>twilliams@act.com</b></p> <p>You can also use group names that are stored in the <b>Contacts</b> application or your company <b>Directory</b>.</p> <div data-bbox="451 1094 1317 1430" style="border: 1px solid black; padding: 5px;"><p><b>Best Practice:</b> The number of emails most people receive is overwhelming. So before you add more than one or a few names/addresses to a message, be sure that they will, in fact, be interested in what you have to say. Be especially careful when using group names from your company <b>Directory</b>, as the groups can potentially contain dozens, hundreds, or thousands of email addresses. The worst thing that can happen to you is people will start blocking all email from you, so even if you have something important to say, they will no longer receive your messages.</p></div>
cc	<p>Carbon Copy. Message is also sent to these recipients, but it is only for their reference, an “FYI” with no response expected back to you.</p> <p>When you use cc, all of the recipients will see the addresses of the other people you sent the message to.</p> <div data-bbox="451 1703 1317 1850" style="border: 1px solid black; padding: 5px;"><p><b>Best Practice:</b> Use cc sparingly, as it often leads to confusion about who is responsible for taking action. If you do use cc, you may want to point out why other people are receiving a copy of the message.</p></div>

Field	Recipient
Bcc	<p>Blind Carbon Copy. Message is also sent to these recipients but the addresses of the other people in bcc are not visible to the other recipients.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Best Practice:</b> Unlike using cc, bcc protects the privacy of all the recipients. So if you legitimately need to send an email to a large number of people, put all their names in this field instead of the cc field.</p> </div>

## Type ahead addressing

As you start to type a first or last name or an email address into an *Address* field, Notes attempts to fill in the rest of the name. Once matches are found you are shown a list of names to pick from. You can start by typing the first or last name.

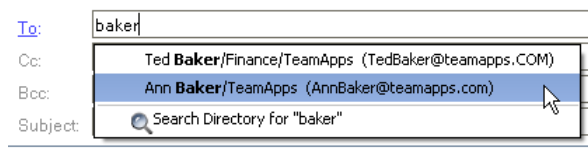
Notes lets you pick the address from a list of addresses:



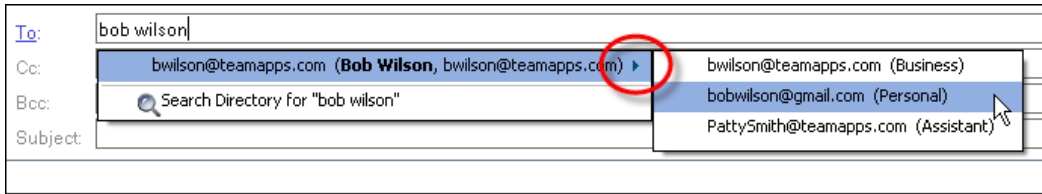
These addresses come from the *My Contacts* and *Recent Contacts* views in the **Contacts** application.

Click on a name to add it to the *Address* field you started typing into.

If you haven't used the address recently, click **Search Directory** and Notes will look in the **Contacts** application and your company **Directory** for matching names to pick from:



If you have entered multiple email addresses for a person in **Contacts**, there will be a right arrow; hover over the arrow (or press **Right-Arrow**) to display the alternate addresses:



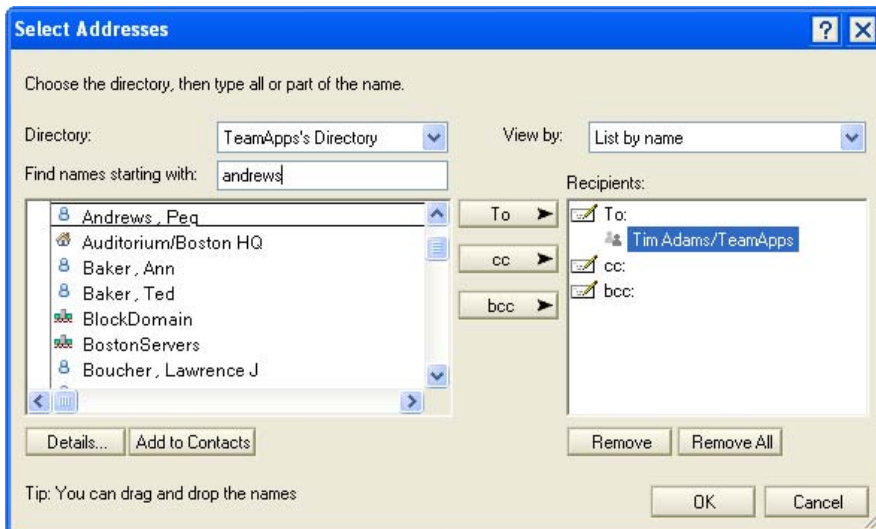
In this example you have created a *Contact* for Bob Wilson that has his work and personal email addresses as well as his assistant's email address. Choose the appropriate address for the message you are sending.

**Note:** The addresses you have used recently are automatically saved to a new view in **Contacts** named appropriately *Recent Contacts*. You can go to that view to initiate new messages and Sametime chats with people you have recently communicated with. If you do not want recipient addresses saved to *Recent Contacts*, open **Contacts**, click the **More** action button and choose **Preferences**. Select the option “**Do not automatically add names to the Recent Contacts view**” and click **OK** to save the change.

## Select addresses

Addressing email requires absolute precision or the message will never get to the intended recipient(s).

If you do not know how to spell a recipient's name or want to have control over what directories are searched, click the To link. This opens the Select Addresses dialog box:



Follow these steps to use the Select Addresses dialog box:

Step	Action
1	<p>Select a directory.</p> <p>You can search for names in the <b>Contacts</b> application, the company <b>Directory</b>, or several other directories.</p>
2	<p>The directory lists people (👤) and groups (👥) you can select.</p> <div data-bbox="423 617 1317 842" style="border: 1px solid black; padding: 5px;"><p><b>Note:</b> Although listed, you typically cannot send messages to servers (🖨️), resources (🖥️), rooms (🏠), or groups of servers (🖨️) such as LocalDomainServers). You may be able to send messages to a Mail-In application (📧) if you know ahead of time that you are allowed to do so. You definitely cannot send messages to “deny access” groups (🚫).</p></div>
3	<p>Select one or more names on the left (click the mouse in the margin to the left of the names).</p> <p>To find a name, start typing the last name of a recipient in the <b>Find names starting with</b> field to scroll down to the name.</p>
4	<p>Click the desired <i>Address</i> field name button (To, cc, or bcc).</p> <p>Notice that any names you had already added to the <i>Address</i> fields back in the message are displayed in the fields.</p>
5	<p>Click <b>OK</b>.</p> <p>The names appear back in the message in the corresponding <i>Address</i> fields.</p>

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## Subject field

The Subject of a message is used to identify the message in every folder and view, both for you and the recipients.

**Best Practice:** An effective Subject helps the recipient decide whether or not to open your message. It should be a short yet descriptive phrase. Some useful ways to start a Subject are keywords like “Request:,” “FYI:,” “RE:,” and “Need:.” If the message is indeed urgent or important, then use “Urgent:” or “Important:.” (But don’t overuse these two words, or people will know to ignore your messages!)

It is bad practice to leave the Subject blank 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 blank Subjects as unsolicited junk email.

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## Message body

The area below the Subject is the message body, where you type the contents of your message.

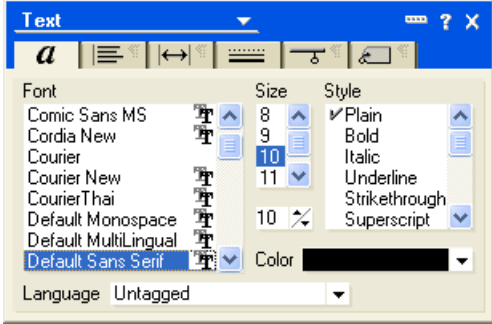
If you have content created by another software package that is mostly text, you can either:

- paste material copied to the clipboard into Notes
- import the saved file using **File – Import**; Notes can import a number of common file types including word processing, spreadsheet, image, and HTML files.

**Best Practice:** How you write the message depends for the most part on your relationship with the recipient and the purpose of your email. If you know the recipient and write often, you can use more casual language. For everyone else, you should use a more formal “business correspondence” approach:

- Use a generic salutation such as “Hello – .” This gets around problems that arise from other types of salutations like “Dear Mrs. Jones” (is she really married?), “Bob –” (too informal and possibly insulting to some cultures to use a first name), or “Good Afternoon –:” (you wrote the email in the afternoon, but the person received it in the morning).
- Explain who you are and why you are writing to the person.
- If you expect the person to take some kind of action, make that very clear and position the request at the top of the message.
- Don’t use slang, text message abbreviations (IMNSHO;-), or type in all capital letters. Almost every company has an email policy that forbids the use of racist, sexist, libelous, and offensive language, and forbids sharing confidential information with unauthorized people.
- Be clear and concise, using headings to separate ideas and help the person quickly scan your message.

You can use various tools to format the message body:

Feature	How To
Formatted text	<p>Use the toolbar buttons or right-click in the message body and choose <b>Text Properties</b> to open Text properties:</p>  <p><b>Best Practice:</b> While you can spend a lot of time formatting messages, it probably isn't worth the effort. If you are sending a message to other Notes users, you can liberally enter formatted text, tables, images, etc., into the message body. If you are sending a message over the Internet, however, the fidelity of the message formatting cannot be assumed; it may all be converted to plain text. Best to keep the formatting as simple as possible!</p>
Table	<p>Click where you want the table to appear and choose <b>Create – Table</b> to add a table.</p>
Image	<p>Click where you want the image to appear and choose <b>Create – Picture</b> to add an image.</p> <p><b>Best Practice:</b> Images significantly add to the bulk of a message and should be included only if absolutely necessary. Many people have quotas on the overall size of their mail and too many images will quickly fill that quota. (A single image uses as much space as dozens or even hundreds of plain text messages.) A better approach is to send a URL to a Web page that contains the image, or if the recipient is inside your company, a Notes Document Link to a document in an “attachment application” (a Discussion application will work just fine) or a Quickr Content Library that contains the image.</p>

Feature	How To
Web links	<p>If the recipient has access to something on your company Web server, then by all means send a link to it rather than repeating the content in the message.</p> <p>Notes recognizes many types of URLs when you save and send a document as long as you type the protocol at the beginning of the link, for example:</p> <p><a href="http://www.yahoo.com">http://www.yahoo.com</a></p> <p>Other protocols recognized by Notes include https://, ftp://, and mailto:user@domain.</p> <p>Most email software packages recognize the links and the recipient can click them to reach the resource.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Best Practice:</b> Always put a link on its own line. If the URL is longer than one line, go to this URL to create an abbreviated URL that you can paste into a message:</p> <p><a href="http://tinyurl.com/">http://tinyurl.com/</a></p> </div>
File Attachment	We'll cover how to attach files to a message below.

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### Multi-level undo

So you are typing along in your message (or any document for that matter) and accidentally delete something. Then delete something else.

Notes lets you undo multiple deletes or operations in any document, including messages (up to 50 levels).

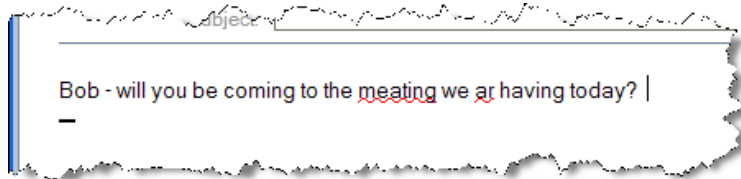
And, you can undo other operations as well, including many table operations, like when you accidentally delete a row or a column.

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## Spell checking

Correct spelling is essential. By default, Notes is configured such that:

- Spelling is checked instantly as you type, and a red squiggly underline is put under the misspelled words, for example:

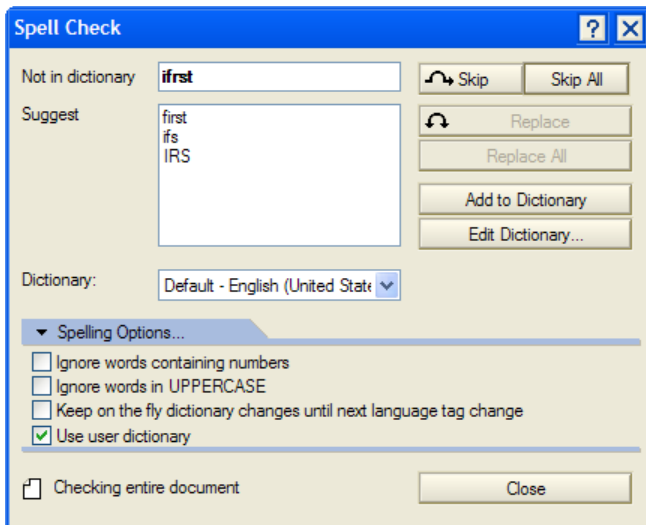


Right-click the error to see any suggestions, add the word to your personal dictionary, or skip over the error anywhere it is found in the document.

- The message will be spell checked again before it is sent.

It is not a good idea to disable either of these features.

At any time, choose **Tools – Spell Check** to check the spelling of the entire message. The advantage of using Spell Check is that you can set the Spelling Options and change your dictionary:



**Note:** To set the default dictionary, install a custom dictionary, or edit words in any dictionary, choose **File – Preferences**. Open the **Spell Check** page to set all your spell check preferences and to enable/disable Instant Spell checking.

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## Send message

Once you have addressed a message and typed in the Subject and message body, you are ready to send it.

**Best Practice:** Before you actually send a message, you should double-check the address(es) to make sure they are correct and necessary.

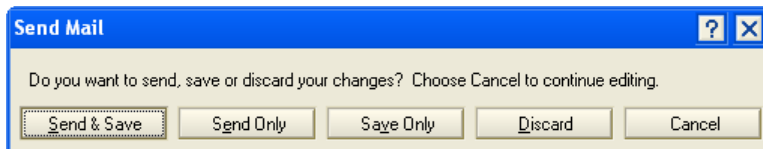
Generally speaking, once you send a message, you cannot stop it from being delivered. So this is a good time to re-read the message to make sure it is clearly written and is spelled correctly. If you have promised to send a file, make sure you have attached it (and if large, zipped it first).

Stop and think. Is email the best way to communicate? Will you regret sending the message? Have you said something that you wouldn't dare say in person? Because it is easily saved, printed, and forwarded, does your message contain information that you don't want shared? Are there legal implications of putting this information into a message, such as sharing company secrets to unauthorized people or violating company email policy?

If you have any doubts, save the message as a draft so you can reconsider sending it later.

There are several ways to send a message:

- Press **Esc**, which opens the Send Mail dialog box:



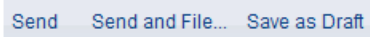
You can elect to:

- send and save a copy of the message

**Best Practice:** It is a good idea to save a copy of important messages for reference later. You can't always guarantee that the recipient will "reply with history" so you know what you originally said. You can always delete your copy of the message later, or configure Notes to automatically archive old messages to save space.

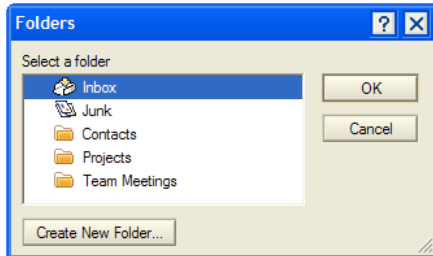
- just send it without saving a copy in your **Mail**
- just save it (as a Draft in the *Drafts* folder)
- discard the message without sending or saving it
- cancel the send operation and return to the message for more work.

- Click one of the action buttons to send and/or save the message:



By default, the **Send** action button also saves a copy of the messages you send.

**Send and File** opens the Folders dialog box, which allows you to create new folders and select the folder to which the message will be saved:





In this example, we created two folders, *Marketing Proposals* and *Personal Mail*. To save the message to one of the folders, we would select the folder name and click **OK**.

**Best Practice:** Use folders to organize your messages! We'll talk more later in the course about how to keep messages organized using folders.

### Exercise: Create and send message

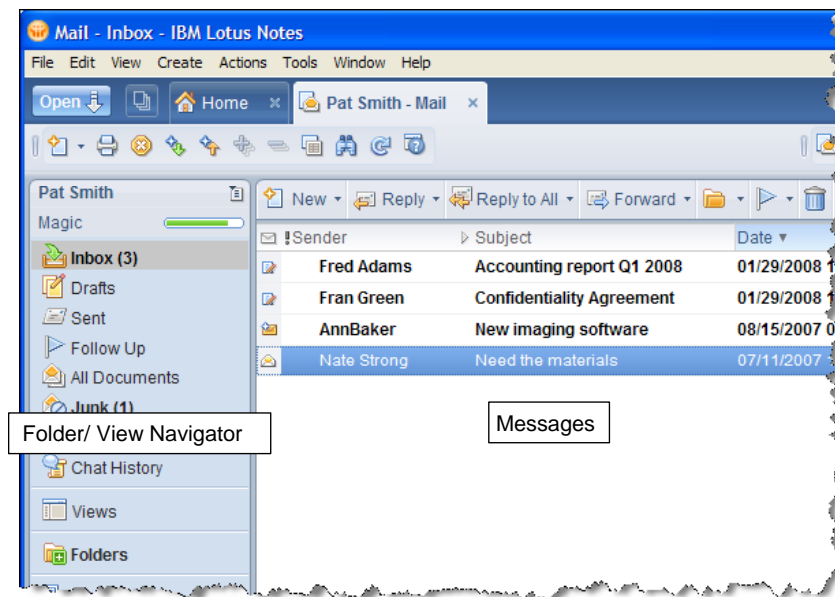
Follow these steps to create a message and send it to a colleague in the class:

Step	Action
1	If it is not already open, the <b>Mail</b> application. You can send messages from any folder or view.
2	Click the  <b>New</b> action button.
3	Click the <b>To</b> link to open the Select Addresses dialog box. Select your colleague's name for the To field.
4	Click <b>OK</b> to close the Select Addresses dialog box.
5	Add text to the Subject and message body of the message.
6	Click the  <b>Send</b> action button to send and save the message.

Step	Action
7	Create and send another message, this time addressing it to the <b>Participants</b> group. This group includes everyone in the class.  <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <b>Note:</b> You will read messages you receive in the next Topic.           </div>

### Where is the message you sent or saved?

When you first open the **Mail** application, you are shown the *Inbox* folder, where messages you have *received* appear:



None of the messages that you sent and saved will appear in this view.

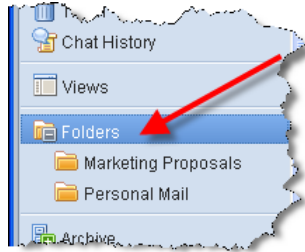
To find the saved messages, use the Folder/View Navigator to switch to different:

- folders (*Inbox*, *Follow Up*, *Trash*, and any folders you create)
- views (*Drafts*, *Sent*, *All Documents*, and any views you create).

Although folders and views both display messages, the difference between them is that you can drag messages from another folder or view and drop it into a folder, whereas views automatically select which documents to display.

If you sent and/or saved a message, it will appear in various places:

- If you used **Send and File** when you sent the message, look for the message in the folder you selected in the Folders dialog box:



- If you chose **Save Only** or **Save as Draft**, you only saved the message without sending it. It will appear under **Drafts** in the Navigator. You can return to the message to work on it more before sending it.
- If you chose to send the message, it will appear in the:
  - *Sent* view, which is the opposite of the *Inbox*; it only displays messages you have sent.
  - *All Documents* view, which displays messages that you have both sent and received. This is perhaps the most useful view as you can see all messages in one place and see how they are related.

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## File attachments

You can attach any type of file (text, image, sound, zipped, executable, etc.) to the message body of a message. This allows you to send the file in its native format to one or more recipients.


File attachments are used when you want the recipient to have a copy of the original file that they cannot obtain otherwise over the network.

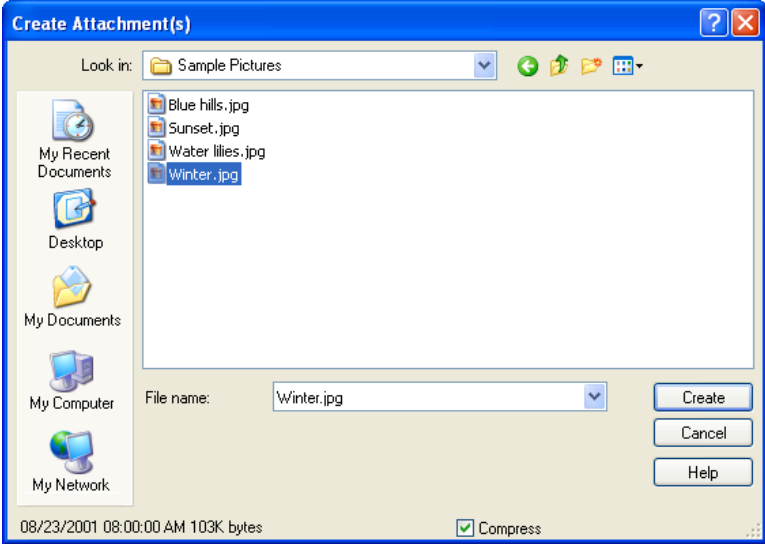

**Best Practice:** Just because you can easily attach a file to a message, however, it may not always be the best thing to do:

- As with images, attached files significantly add to the bulk of a message (sometimes even more so!) and should be included only if absolutely necessary. Send a link to the file that has first been saved to a Web or ftp server or to a document in a shared application instead. You will see later in the course how to use a simple **Discussion** application for this purpose.
- People are rightly concerned that an attached file may contain a virus, and it is possible that the file will be stripped out of the email or quarantined for inspection before the recipient can open it. Emails containing certain file types may also be rejected entirely, and often without notice.
- Just because you have the software to create a file doesn't mean that the recipient has the software to use the file. For recipients with Notes, they can use the built-in file viewer that comes with Notes for the more common file types, but other email software doesn't typically have this feature.
- One of the **WORST** things you can do is write the message body content in a word processing document and then attach the file to your message. Why not just create the contents in Notes in the first place? Or at least copy the material you created in Word to the clipboard and paste it into a message.

If in doubt about your recipient's interest and ability to receive an attached file, you should contact that person for permission before you send the email.

Follow these steps to attach a file to a message that you will send to your colleague:

Step	Action
1	Open the <b>Mail</b> application.
2	Create a new <i>Message</i> .
3	Address the message and type in a subject.
4	Tab down to the message body and place your cursor where you want the attached file icon to appear.
5	Choose <b>File - Attach</b> or click the  action button. <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p><b>Note:</b> If the cursor is not in the message body, the <b>Attachment</b> tool will be grayed out.</p> </div>


Step	Action
6	<p>The Create Attachment(s) dialog box opens:</p>  <p>Select the file(s) you want to attach. In this example, a file named <b>winter.jpg</b> is selected.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> Use your <b>Shift</b> key to select a range of files while clicking with your mouse or <b>Ctrl</b> to select multiple non-sequential files.</p> </div>
7	<p>Click the <b>Create</b> button to attach the file to the message body.</p> <p>A copy of the file is now stored in the message, for example:</p> 
8	<p>Send the message.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> The Domino administrator may have set a maximum size for attached files, capped the overall size of the <b>Mail</b> application, or configured the Domino Server to delay routing of large messages until after hours. These steps are designed to conserve server disk space and network traffic. In this case, you won't be able to attach large files to messages. (Or your messages may not get sent during business hours.)</p> </div>





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## Exercise: Attach file

In this exercise you will create a file using another application and attach the file to a message.

Follow these steps to send a message with an attached file to your colleague:

Step	Action
1	Start either Paint or WordPad.  Choose <b>Start - Programs - Accessories</b> and then either <b>Paint</b> or <b>WordPad</b> .
2	Create a simple file and save it to a folder that you will remember, such as to the Desktop, for example: <ul style="list-style-type: none"><li>• <b>MyFile.BMP</b> (Paint)</li><li>• <b>MyFile.DOC</b> (WordPad).</li></ul>
3	Exit the application.
4	Open the <b>Mail</b> application.
5	Switch to the <i>All Documents</i> view.
6	Create a new <i>Message</i> .
7	Address the message to your colleague.
8	Enter any subject you desire.
9	Tab down to the message body and either: <ul style="list-style-type: none"><li>• choose <b>File – Attach</b></li><li>• click the  action button.</li></ul> The Create Attachment(s) dialog box opens.
10	Navigate to the folder where you saved the Paint or WordPad file.
11	Select the file and click <b>Create</b> .
12	Send the message.

Step	Action																				
13	<p data-bbox="431 281 1300 352">Notice in the view that the attached file is identified with the size of the file (in thousands of bytes) and a paperclip:</p>  <table border="1" data-bbox="431 384 1252 552"> <thead> <tr> <th>#Who</th> <th>Subject ▲</th> <th>Date</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>Pat Smith</td> <td>Company gathering in Lobby</td> <td>04/05/2007 02:44 PM</td> <td>1K</td> </tr> <tr> <td>Pat Smith</td> <td>How is the project going?</td> <td>04/05/2007 02:23 PM</td> <td>1K</td> </tr> <tr> <td>bob</td> <td>Logo</td> <td>04/09/2007 01:38 PM</td> <td>107K </td> </tr> <tr> <td>Ann Baker</td> <td>Specifications for Widgets</td> <td>04/06/2007 12:00 PM</td> <td>1K</td> </tr> </tbody> </table>	#Who	Subject ▲	Date	Size	Pat Smith	Company gathering in Lobby	04/05/2007 02:44 PM	1K	Pat Smith	How is the project going?	04/05/2007 02:23 PM	1K	bob	Logo	04/09/2007 01:38 PM	107K 	Ann Baker	Specifications for Widgets	04/06/2007 12:00 PM	1K
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bob	Logo	04/09/2007 01:38 PM	107K 																		
Ann Baker	Specifications for Widgets	04/06/2007 12:00 PM	1K																		

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## Re-send message

There is nothing to disallow you from editing an existing message you have already sent and sending it again. You may want to do this, for example, if you want to change the addresses and send the message to other people, or if you have made changes to the original message and want to re-send it to the original recipients.

Be sure to change the subject slightly so the recipient knows that you haven't sent a duplicate message by mistake.

You can also edit, re-address, and re-send a message that you have received from another person.

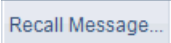
**Note:** Keep in mind that the re-sent message will *not* replace the original message in the recipients' mail, but will be an additional message.

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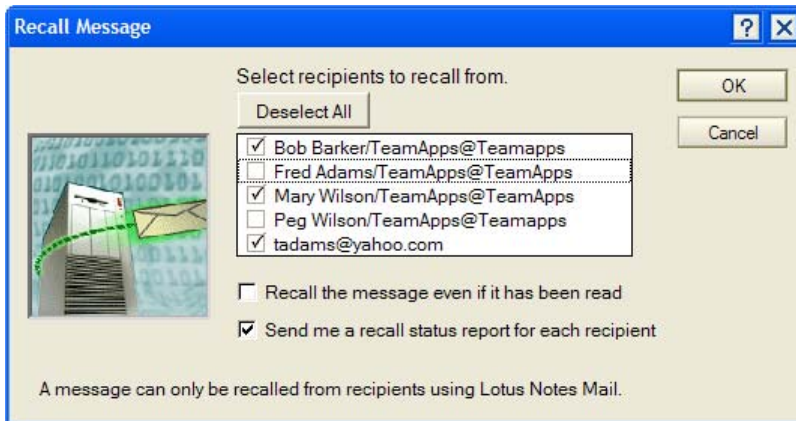
## Recall message

In general once you click the  action button a message is sent and you cannot get it back.

To attempt the recall of a message you have sent, first select only one message in the *Sent* folder or *All Documents* view. Then use the Recall Message command from any one of these places:

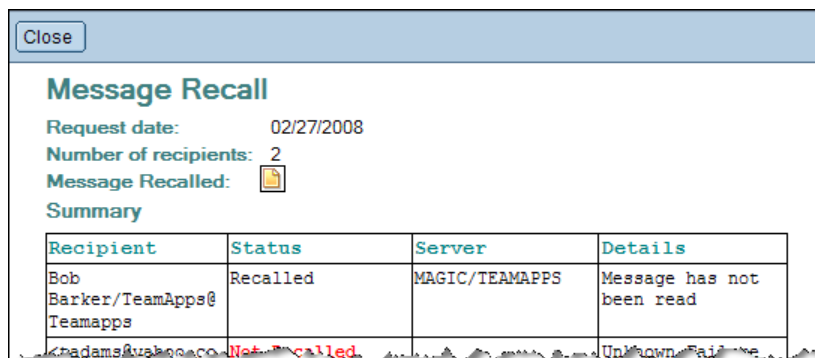
- right-click the message and choose **Recall Message**
- in the *Sent* view click the  action button.

Any of these choices opens the Recall Message dialog box:



There are three options for the recall:

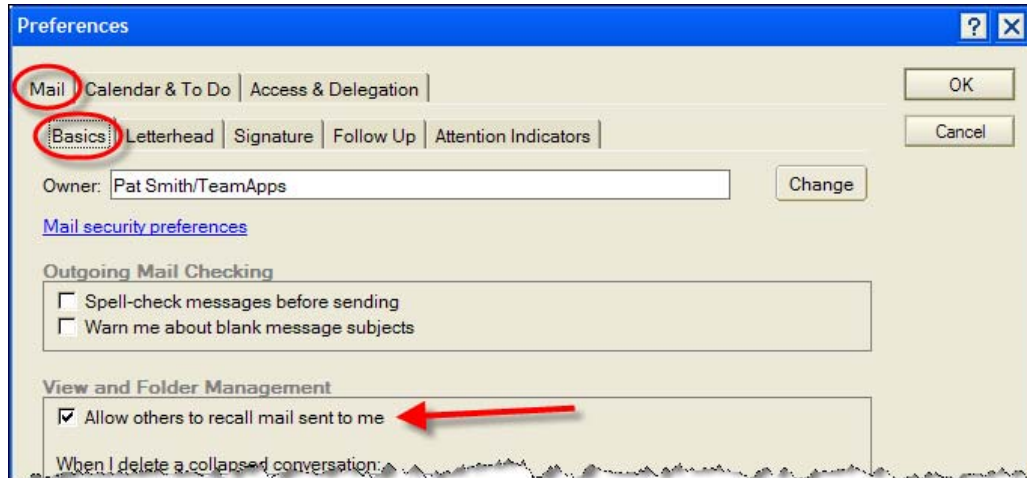
- Select recipients. If the message was sent to multiple people, it can be recalled from everyone or just the people you select.
- Recall the message even if has been read by the recipient (though at this stage what is the point?).
- Send a report back to you (the sender) about the success of the recall from each recipient, for example:



This example shows that the message was successfully recalled, and fortunately, the recipient had not yet read it. Whew!

## Prevent others from recalling messages to you

While message recall is a powerful feature for message senders, a single Mail Preference (click the [More](#) action button and choose **Preferences**) set by the recipient can disallow other people from recalling messages sent to them:



This setting is enabled by default, so you must deselect it if you don't want other people to recall messages they have sent to you.

**Note:** The Domino Administrator must also enable message recall on the server. It is off by default.

## Caveats

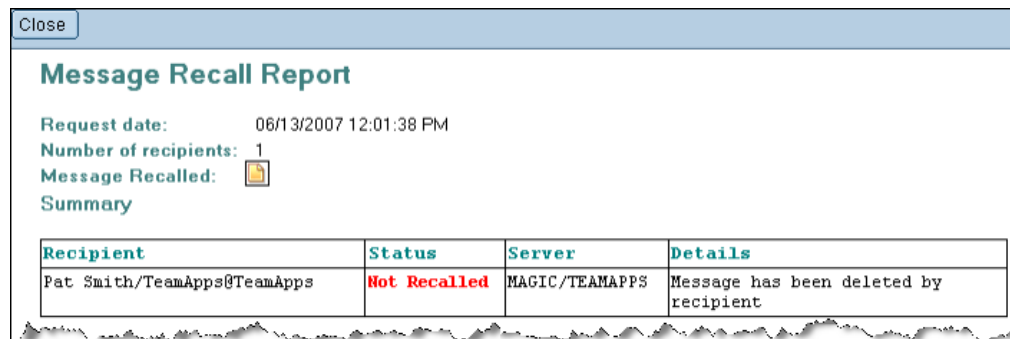
There are several caveats to using message recall:

- It only works for messages you send, not meeting invitations or To Do assignments.
- Messages that have been deleted by the recipient but not yet removed from *Trash* can still be recalled.
- It only works for messages you have sent to other Notes mail users (not to Internet mail users). Messages sent to iNotes users can be recalled (as long as they are using the R8+ **Mail** application design on a Domino 8+ Server), but iNotes users cannot themselves recall messages.
- Signatures are checked, so you can only recall messages that you have sent and only ones sent from your **Mail** application. As such, if you have delegated your mail to an assistant, that person won't be able to recall messages that you have sent.

- The Domino administrator must enable message recall on the Domino Server. It is off by default.
- As you saw above, the recipient may disallow messages from being recalled.
- Messages can only be recalled once. Why is this?

If you have successfully recalled a message, you can still edit and send the original message again. This is often what you'll be tempted to do when you accidentally hit "send" before you have finished your thoughts or want to add some more information or recipients to the message.

The problem with resending the edited message after the original version has been recalled is that you cannot then again recall the same message. You only get one chance to recall a message. If you try to recall the message a second time and requested a report for the second recall attempt, you will receive this failure message:



The Details column says the "message has been deleted" because when the Router deleted the message for the first recall, it left a deletion stub (for the purpose of replication in the event the recipient has multiple replicas of their mail, perhaps on clustered servers).

When the Router attempts to deliver the resent message a second time, it must change the UNID to be different than the one used by the deletion stub (from the original message). So when you try to recall the original message, the recall request specifies the UNID of the original message, which no longer exists in the recipient's mail.

The solution? If you have recalled a message and want to make edits and send it again, use the "Copy into New Message" feature instead of editing the original message. Then you will be able to recall your revised second message if you need to.

