

Lotus Notes – Release 8

Course Outline

Duration: 1 Day

What is Lotus Notes

The Workspace

Navigation buttons

Database icons

Displaying your database icons

Title only

Title and number of unread documents

Title and server name

Tabbed pages

To create a new tabbed page

To name a tabbed page

To move a database icon to a new tabbed page

Bookmarking

Favorite Bookmarks

Opening Favorite Bookmarks

Adding a database to Favorite Bookmarks

Removing a database from Favourite Bookmarks

Working in a database

To open a database

Use Twisties

To read a document

Closing a Lotus Notes Window (Task)

Searching

To use quick search in a view

To search for documents that contain a particular word or phrase (anywhere)

Tips when Searching

Refining your Search using Operators

To Perform an Advanced Search

Adding a Notes database to your Workspace

To add a database from the File menu to a bookmark

To remove a database from your Workspace

To remove a database from your Bookmarks

Lotus Notes mail

To open your mail database

To create and send a mail message

To create a phone message

Drafting a message

To save a message as a draft

To send a drafted message

Reading messages

To refresh your mail database

To sort the messages in a mail folder or view

- To open and read a message
- To move to the next message
- Deleting mail messages
- Restore a deleted email
- Deleting emails from your Sent Folder
- Printing a message
- To check your Printer Setup
- To print a message
- To Print Preview a message
- To print a list of emails (view)
- To reply to a message
- To forward a message
- To attach a file to a message from Lotus Notes

Attaching a linked Notes document to an email message

- To attach a Notes link

Managing your email folders

- To create a folder
- To delete a folder
- To move a message that you're reading into a folder
- To move a message into a folder in the View Pane

Using Personal Address books

- To create contacts in your Personal Address Book

Creating a mailing list/group

- To create a mailing list/group

Utilities

- To change your Notes password
- To change the letterhead in your messages
- To notify people automatically when you are out of the office
- To cancel the automatic notification 64

Preferences

- To Spell Check all Emails before you send
- To Add a Signature to the end of your Mail Messages
- To access user preferences
- To specify how your Trash is emptied
- To automatically save messages that you send
- To change your email notification

Rules Folder

- Creating a Rule
- Modifying a Rule
- Deleting a Rule

Using the Lotus Notes calendar

- To access the calendar
- To navigate around the calendar
- Adding an entry to your calendar
- To add a calendar entry
- Adding repeating calendar entries
- To create a repeating calendar entry
- Displaying and editing a calendar entry
- To open/edit a calendar entry
- To close a calendar entry
- Moving and deleting calendar entries
- To move a calendar entry to a new date

To delete a calendar entry
Changing repeating calendar entries
To move/edit repeating calendar entries
To delete repeating calendar entries
Printing your calendar
To print a Calendar in different formats
To print a list of selected days from your calendar
Letting others use your calendar
To access your delegation profile
Adding another user's mail/calendar database to your workspace
To add another user's mail/calendar database to your workspace
Using Calendar Invitations
To create an invitation
Responding to meeting invitations
To accept or decline an invitation
To delete an invitation (safely) once you've responded to it
Changing a meeting - after it has been scheduled
To reschedule a meeting (as the Chairperson)
To accept or decline an invitation after it has been scheduled
To accept an invitation (previously declined)
To decline an invitation (previously accepted)
Scanning your colleagues' calendars for "free time" for meetings
To find free time for meetings
Tracking responses to an invitation
To track responses to an invitation

To confirm a meeting
Other ways of responding to invitations
To send a counter-proposal for an alternative date/time
To accept a counter proposal
To decline a counter proposal
To tentatively accept an invitation
To delegate an invitation
Removing invitees from an invitation list
To remove an invitee from the invitation list
To cancel an invitation

Customising your calendar

To access your Calendar Preferences

Group Calendars

Adding/Removing Members to your Group Calendar

To Delete a Group Calendar

The To Do view

To access the to do
Assigning tasks
To assign a task to yourself
To assign a reminder to a task
To assign a task to someone else
Actioning tasks
To Action an assigned task
Managing tasks
To edit a task
To mark a task complete
To delete a task
To update the status of tasks