effectiveedge

Setting up the EDGE in Notes 8

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-Adding Contacts

-Creating a Group List

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Overview of Changes in Notes 8

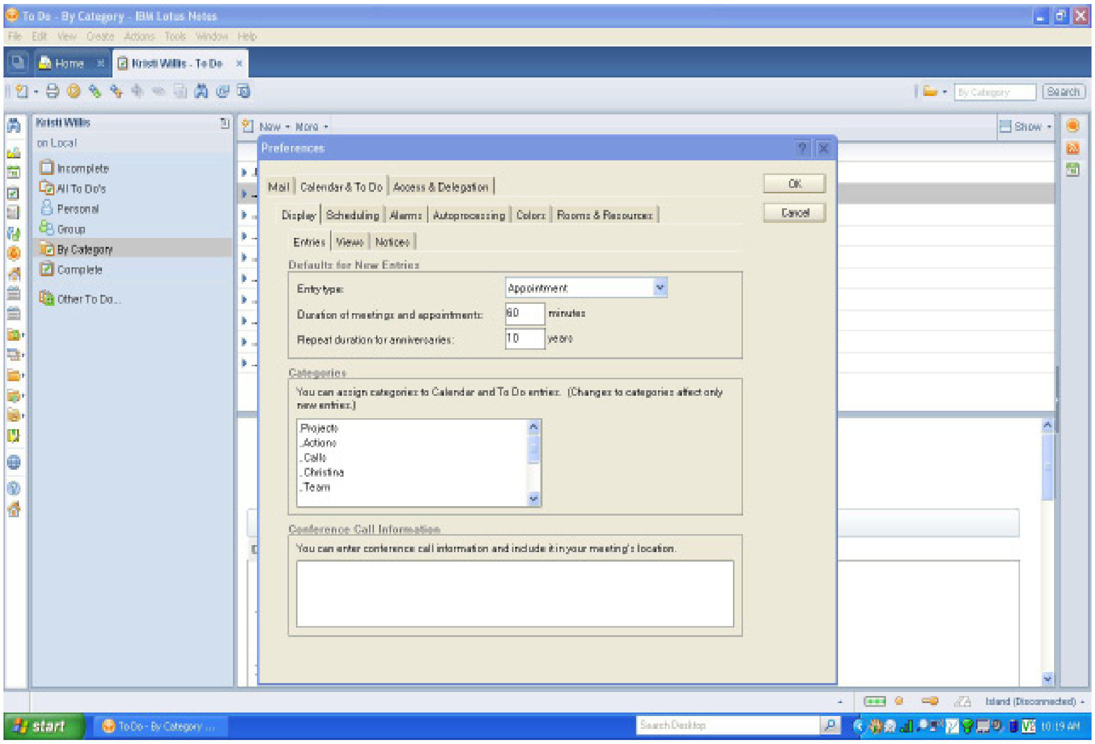
Lotus Notes 8.0 offers much of the same core functionality as the previous versions of Lotus Notes, but also includes some helpful new changes to the interface. This document illustrates the new features that you use as part of your EDGE system. Following are some of the key interface changes:

- The Bookmark Bar has been replaced by the Open List. You can view your Notes applications and previously bookmarked items by clicking on the Open button. You can also dock the Open List so that it appears on the left hand side of your screen like the Bookmark Bar did. Steps to dock the Open List appear on page 5 in this guide.
- The Home Page has replaced the Welcome Page option. To create a Home Page view, see page 17 in this guide.
- Lotus Notes 8.0 also includes a shortcut bar called the Sidebar that appears on the right-hand side of the screen. The Sidebar gives you additional shortcuts to access your daily calendar and other tools in Lotus Notes.
- Like many other windows applications, the new version of Notes allows you to open different documents in their own window. If you would like to turn on this functionality, choose File, Preferences from the main menu and click on the Windows and Themes option.
- How you select documents has also changed. Lotus Notes now supports the ability to select multiple documents in a window. If you would like to select a range of documents, click on the first item and then hold down the SHIFT key on the keyboard while you click on the last item in the list. If you would like to select non-contiguous items in a list, click on the first item, hold down the CTRL key on the keyboard and click on the next item. Repeat this process until you have selected all of the items you would like to highlight in the list.
- Lotus Notes has also integrated all of the application preferences in one location. You can now change any of the Notes preferences by choosing File, Preferences from the main menu. You still have the option of changing application specific preferences by choosing More, Preferences from the application's Action bar.
- A major change to the Calendar application includes the ability to view unprocessed invitations on your calendar. In previous versions of Notes, you could only see unprocessed meeting invitations in the inbox. In Notes 8.0, you can see the invitations you haven't responded to on the calendar itself. If you have been invited to a meeting but have not yet accepted or declined, the meeting will be visible on that day in the calendar. Follow the steps on page 6 to turn on this feature.

Overview of Changes in Notes 8 (continuted)

- Lotus Notes 8.0 also provides significant enhancements to your ability to follow an e-mail conversation across multiple e-mails, regardless of where they are stored. The first method allows you to view a mail thread from your inbox by clicking what they call a “twisty,” a right pointing triangle () that will appear next to the Subject. When you click on the twisty, Lotus Notes will display all of the messages in the thread, regardless of where they are stored.
- Notes 8.0 also provides you the ability to view messages in a Conversation by grouping e-mails in a topic together rather than showing each individual e-mail. To turn on the Conversations view, click the Show button on the Inbox Action bar and choose Conversations. The number of messages in a conversation will appear to the right of the subject. When you click on the twisty next to the subject, Lotus Notes will display the messages in the Conversation.
- When working in Conversation mode, you can file or delete an entire conversation by acting on the top level message in the thread.

How to Set Up Categories for the To Do List



ITO SET UP NEW CATEGORIES:

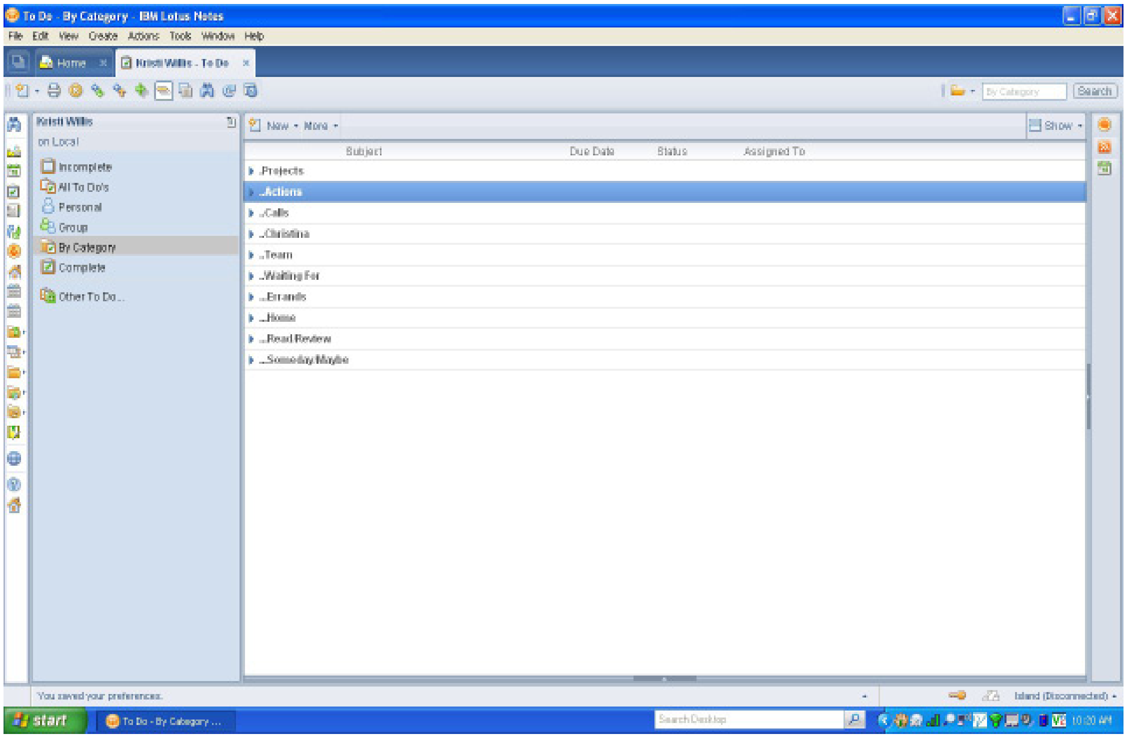
1. Click the Open button and choose To Do.
2. Choose More, Preferences from the Action bar.
3. Click the Calendar & To Do tab.
5. On the Entries tab, type in each new category in the Personal Categories text box.
6. When all categories have been entered, click OK to close the Preferences dialog box.

Suggested Standard Category List

.Projects
..Actions
..Calls (Optional)
..Team
..Waiting For
..______(Insert your Manager's Name in the blank)
...Errands
...Home
...Read/Review (Optional)
...Someday/Maybe

Note: A category will not appear in your To Do list until you have at least one To Do assigned to a category.

Recommended To Do List View in Notes



Recommended To Do View for Lotus Notes

TO DOCK THE OPEN LIST:

1. Choose View, Dock the Open list from the menu.
2. Choose View, SideBar, Thin from the menu.

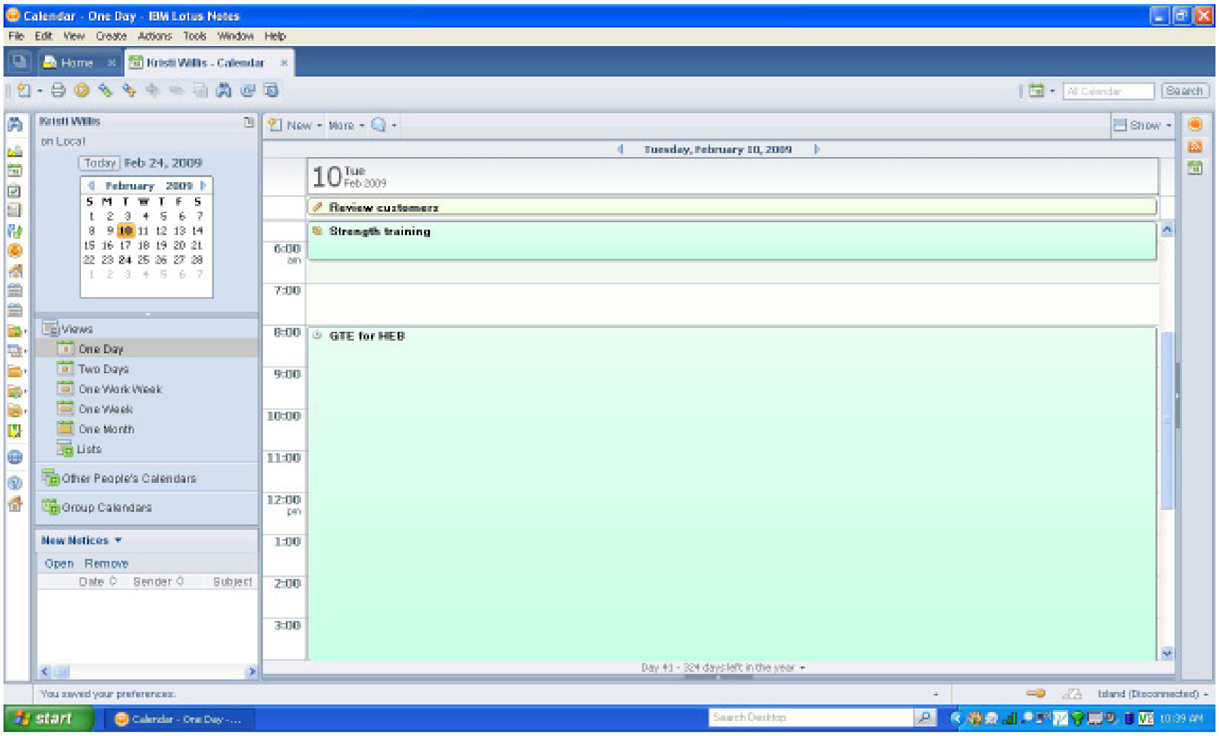
HOW TO SET UP THE VIEW ABOVE:

1. Click the To Do icon on the Open list.
2. Click the By Category option in the Navigator pane to view the To Dos by Category.
3. Click the Collapse All button on the tool bar (or press Shift -) to collapse all categories.

HOW TO CATEGORIZE A TO DO:

1. Double-click on the To Do to open the item.
2. Click the Category link.
3. Check mark the appropriate category.
4. Choose OK to close the Category dialog box.
5. Click the Save and Close button on the Action bar to save the changes to the To Do.

Recommended Calendar View in Notes

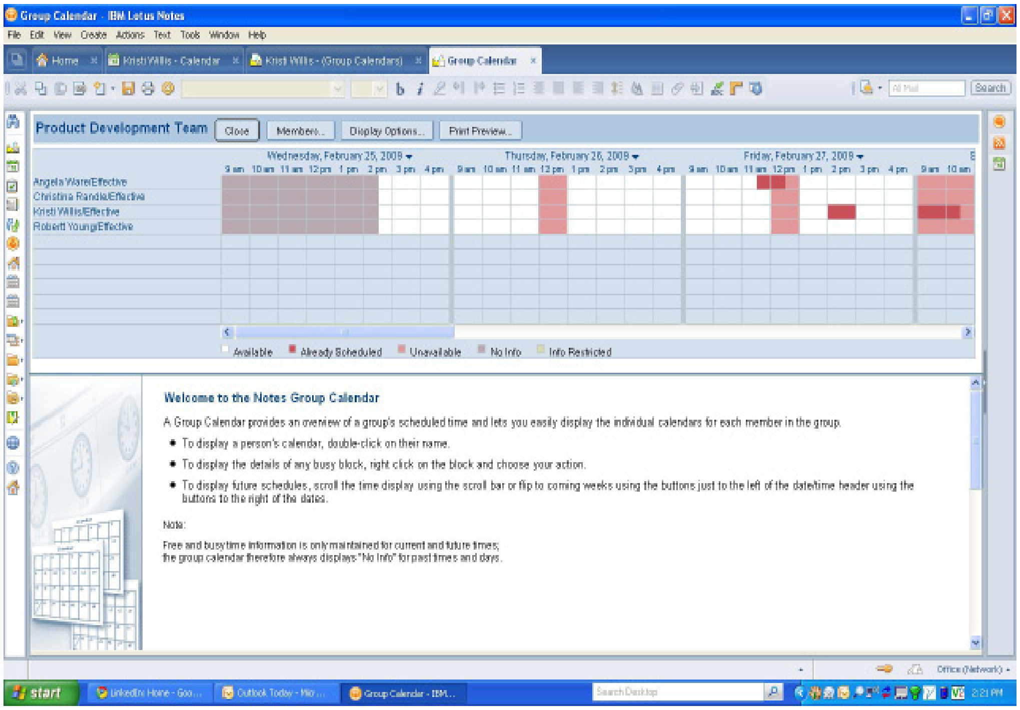


Recommended Calendar View for Lotus Notes

HOW TO SET UP THE VIEW ABOVE:

1. Click the Calendar icon on the Open list.
2. Click the One Day View from the Views list.
3. Choose More, Preferences from the Action bar.
4. Click the Views tab. Check mark the "Display new (unprocessed) notices" option, check mark "Process cancelled meetings automatically" option, and uncheck the "Display To Do entries" option.
5. Click the Notices tab. Check mark "Remove meeting notices from inbox after I process them," "Display unprocessed meeting notices in New Notices Mini-View," "Don't display calendar documents in the All Documents mail view," and "Don't display meeting invitations in the Sent mail view."
6. Click the Mail tab, then click the Basics tab. In the View and Folder Management section, change the "When I delete any document in the Sent view" to "Remove without deleting" and the "When I delete a calendar document from any Mail view or folder."

Creating a Group Calendar



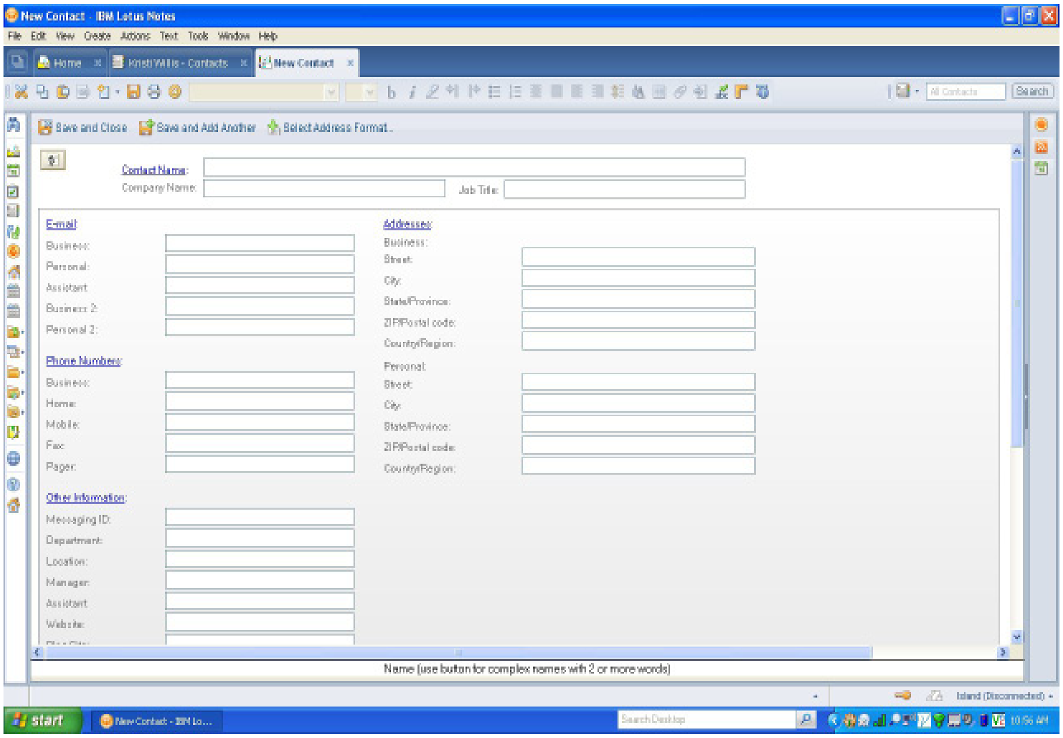
TO CREATE A GROUP CALENDAR:

1. Click the your Calendar icon on the Open list.
2. From the Action bar, choose More, Create Group Calendar or click the Group Calendar option in the Navigation Pane and choose Create Group Calendars.
3. Click the New Group Calendar button on the Action bar.
4. Enter a title for the Group calendar.
5. In the Members box, click the down triangle in the bottom right corner to select the users you want to include in the group.
6. Choose OK to save the Group Calendar.

TO VIEW A GROUP CALENDAR:

1. View your Calendar.
2. Click on the Group Calendars icon in the Navigation Pane, click on the group calendar you want to view.

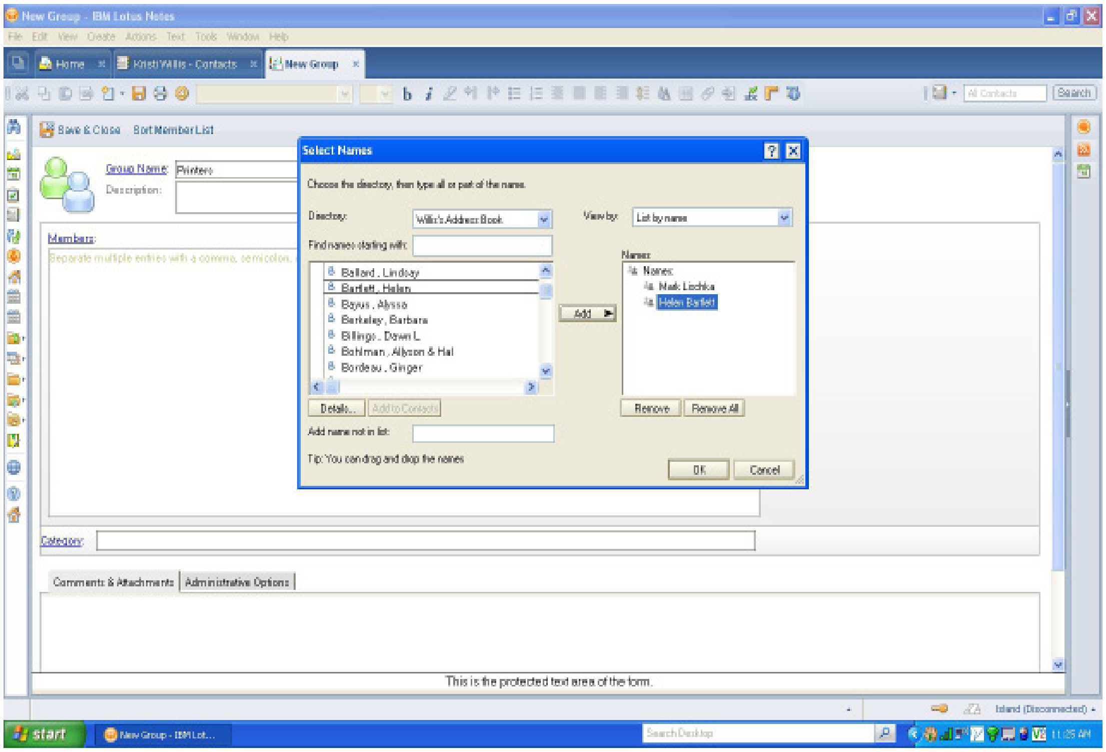
Adding Contacts



TO CREATE A CONTACT:

1. Click the Contacts icon on the Open list.
2. Click the New button on the Action bar.
3. Enter the appropriate contact information. You can click on the section heading (Email, Phone Numbers, etc.) to add other detailed information about the contact.
4. Click on the Comments tab to add notes to the contact record.
5. Click the Save and Close button to save the contact.

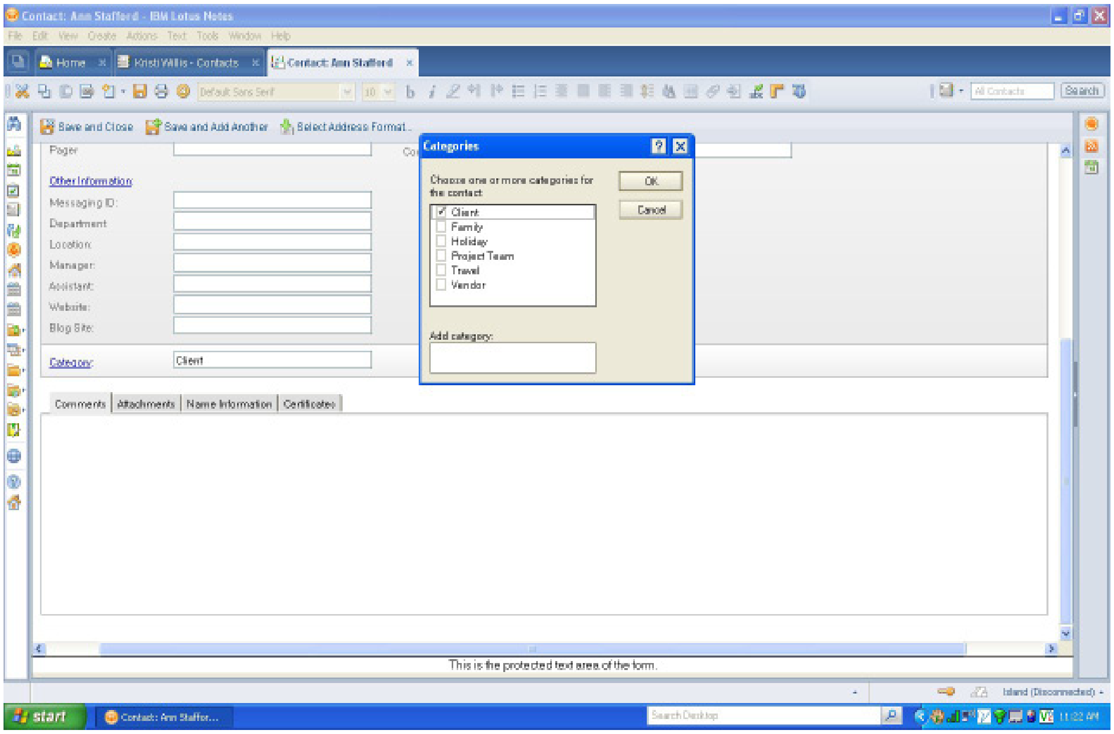
Creating a Group List



TO CREATE A GROUP LIST:

1. Click the Contacts icon on the Open list.
2. Click on Groups in the Navigation pane on the left hand side of your screen.
3. Click on the New button and choose Group from the drop-down menu.
4. Enter a Group name.
5. Click on the Members link to select the members of the group.
6. Select the Directory you want to use from the Directory drop down list.
7. Click on the user name and click the Add button to add them to the Names box. Repeat the steps until you have added each new member to the list.
8. Click OK to close the dialog box.
9. Click Save and Close to save the list.

Creating Categories for Contacts

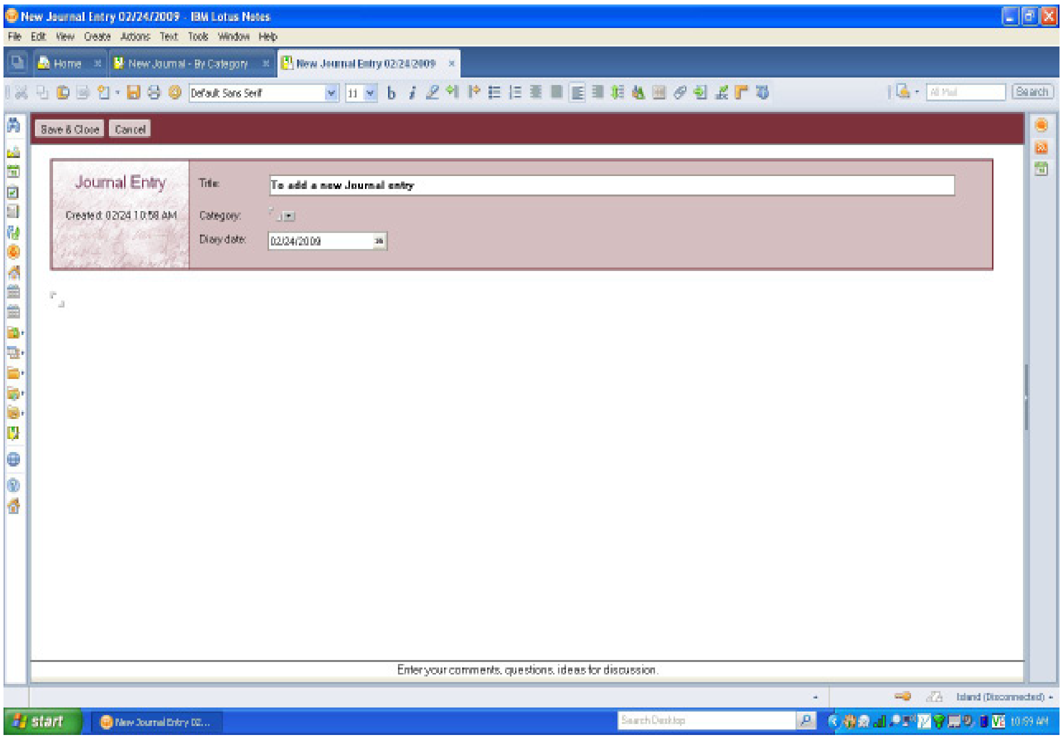


TO CREATE CATEGORIES FOR CONTACTS:

1. Click the Contacts icon on the Open list.
2. Double-click to open the contact to which you want to assign a category.
3. Click the Edit button.
4. Click on the Category link.
5. Enter a new category in the Add Category text box or checkmark an existing category.
6. Choose OK to assign the category to the contact.
7. Click Save and Close to save the Contact.

Note: Unlike the Calendar & To Do contacts, you cannot create a master category list that you use at a later time. In the Contacts you create the categories as you go.

Adding Personal Journal Items



TO CREATE A PERSONAL JOURNAL:

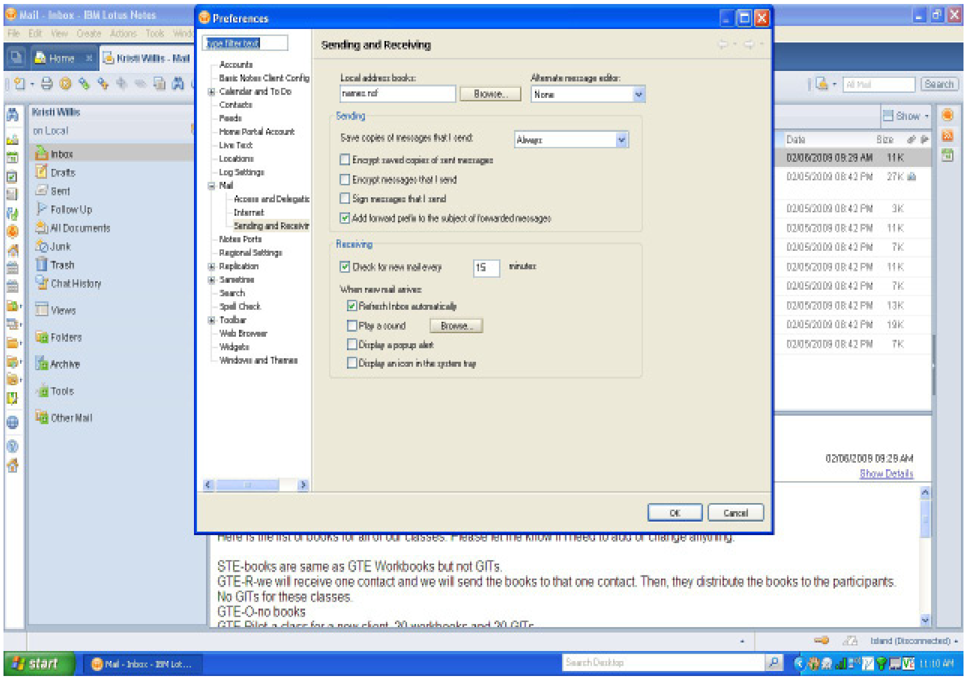
1. Chose File, Application, New from the main menu.
2. Enter a title and select where you want the file stored. From the Template list, choose Personal Journal and choose OK.
3. Close the About Journal window.

TO ADD PERSONAL JOURNAL ITEMS:

1. Click the New Journal Entry button on the Action bar to create a journal item that has a diary date. To create a blank journal document, click the New Clean Sheet button on the Action bar.
2. Enter your journal information and choose Save and Close to save the information.

Note: To create an icon for you Journal on the docked Open list, drag the Journal tab to a blank spot on the Open list.

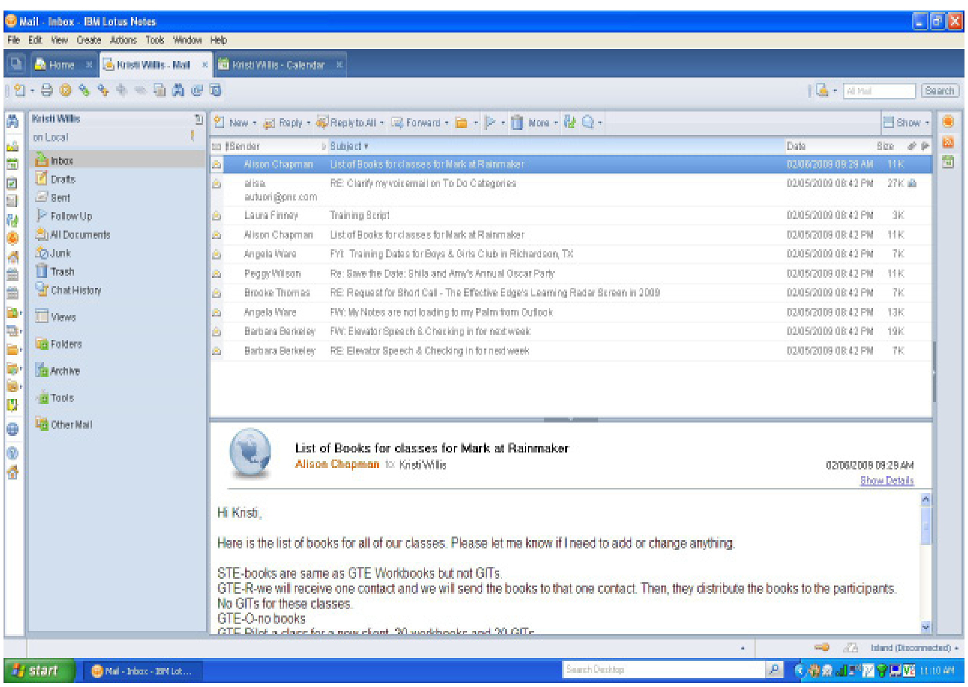
E-mail Options to Remove E-mail Distractions



Reset your E-mail options to
remove E-mail distractions.

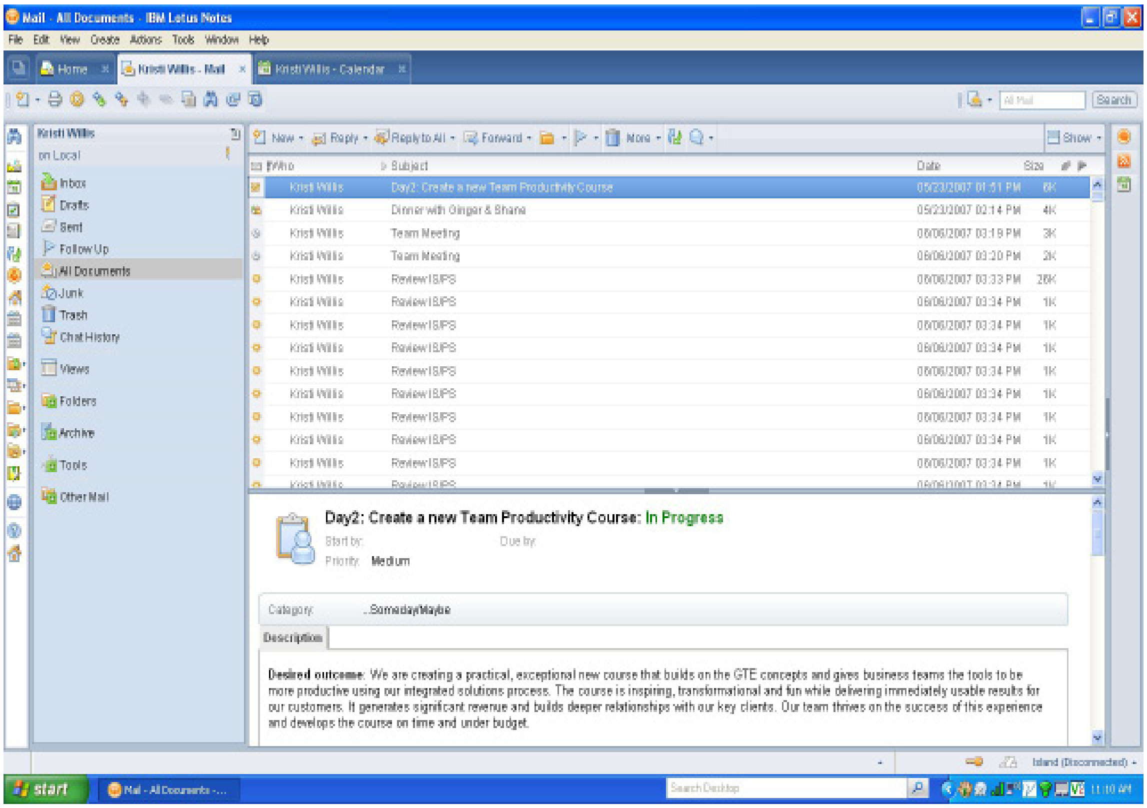
- Click on File.
- Click on Preferences.
- Click on the Mail option.
- Click on the Sending and Receiving option.
- Uncheck the options:
  Play a sound
  Show a pop-up alert
  Show an icon in the system tray
- Click OK to save and close.

Setting up Preview Pane



- Click the Inbox icon on the Open list to view your E-mail inbox.
- Click the up triangle (p) on the Preview command at the bottom of the screen to view the Preview Pane.

All Documents View



TO VIEW ALL OF YOUR DOCUMENTS:

1. Click the Inbox icon on the Open list.
2. Click the All Documents option in the navigation pane on the left.

Creating and Managing Archive Folders

Your system administrator may set a maximum mailbox limit for your Notes account on the main mail server. Our first recommendation is to manage your mailbox size to keep it within this limit. However, if you have a large amount of mail that you need to store, an **Archive** folder may be the best solution. Archive folders are separate files that are not part of the main mailbox and can be created to manage information that needs to be removed from the server mailbox due to this size limit. With Archive folders, you can create folders within the file and move information manually to store it in the file.

TO CREATE AN ARCHIVE FOLDER:

1. Click on the Inbox icon on the Open list.
2. Choose Actions, Archive, Settings from the menu.
3. Click the Criteria tab and click the Create button to select the settings for how you want to archive the database.

   a. Enter a name for your archive.

   b. Check mark Enable this Criteria.

   c. Click the Selection Criteria button and change the criteria settings to match your needs. Choose OK.

   d. Set the archive file location in the "What Should Happen to the Selected Documents" section.

   e. Choose the "Remove archived documents from this application" option.
4. Choose OK to save the changes.
5. Choose Actions, Archive, Archive Now to perform the first archive.

Note: To ensure that you do not lose any information, consider saving this file on an internal drive that is backed up. Check with your IT department to determine the best approach and your personal back up needs.

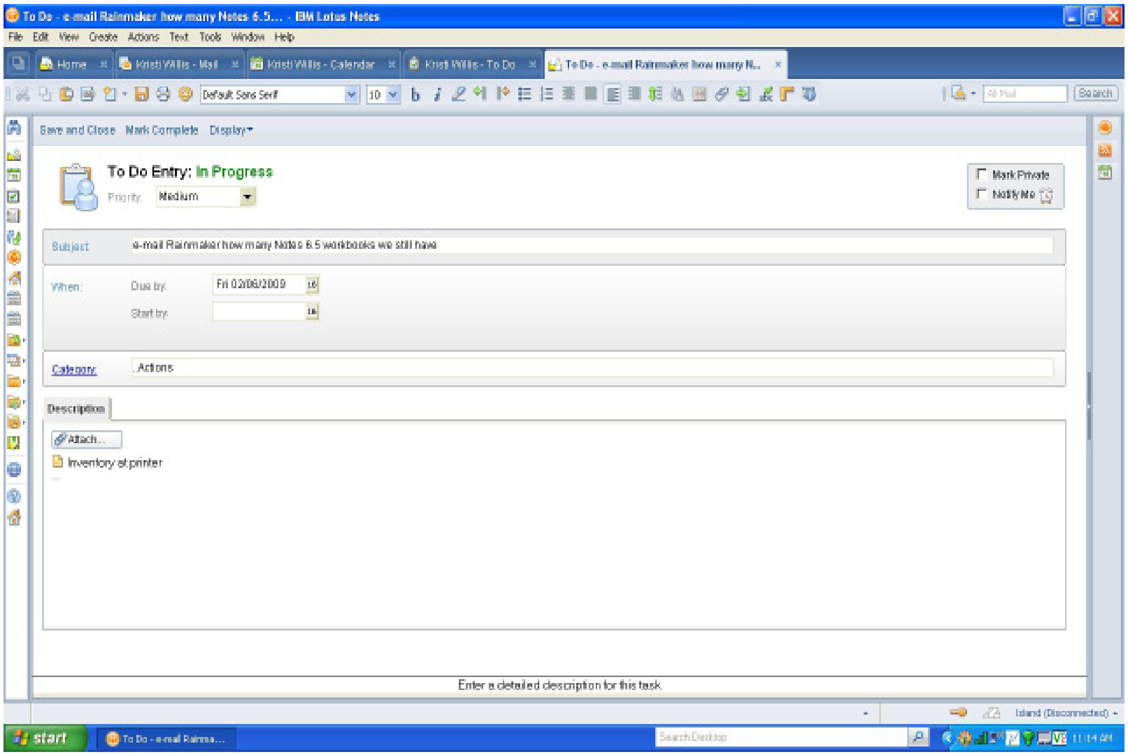
TO ARCHIVE AN ITEM:

1. Select document you want to archive.
2. Choose **Actions, Archive** from the menu.
3. Select **Archive Selected Documents.**
4. Choose the appropriate archive file and select **OK.**

TO VIEW THE ARCHIVE FILE:

1. View the e-mail Inbox.
2. In the Navigation Pane, click on the Archive option.
3. Select the Archive folder you want to view. Notice that the label on the Document tab and the Document title both indicate that you are now in the Archive view.

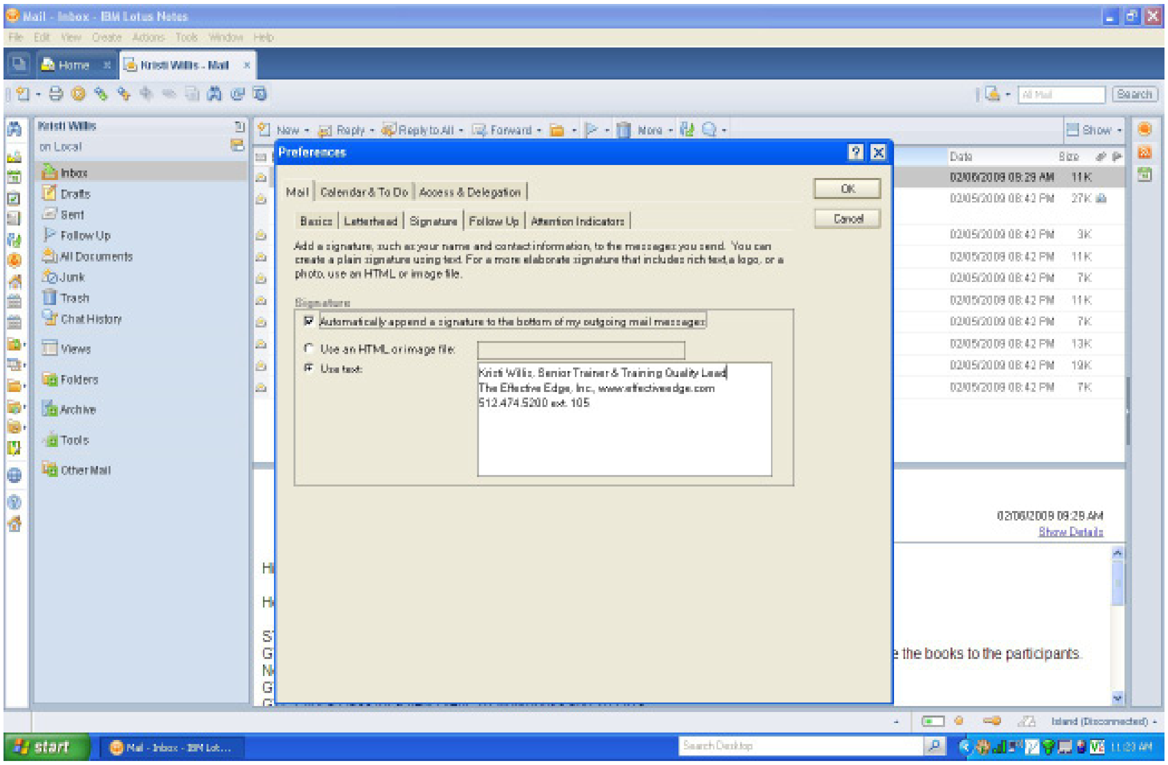
Inserting a Link to an E-mail



HOW TO INSERT AN EMAIL LINK TO AN E-ACTION:

1. Right-click on the e-mail in the Inbox
2. Choose Copy as Document Link from the pop-up menu.
3. Open the Calendar or To Do item in which you want to add the e-mail link.
4. Right-click in the Description text box of the Calendar or To Do item and choose Paste from the drop-down menu. Type a descriptive label next to the link icon so that you can easily identify it. When you double-click on the link, Notes will open the e-mail for you.
5. Click Save and Close to save the action item.
6. File the e-mail that you copied into an email folder. Do not delete the e-mail or the link will no longer work.

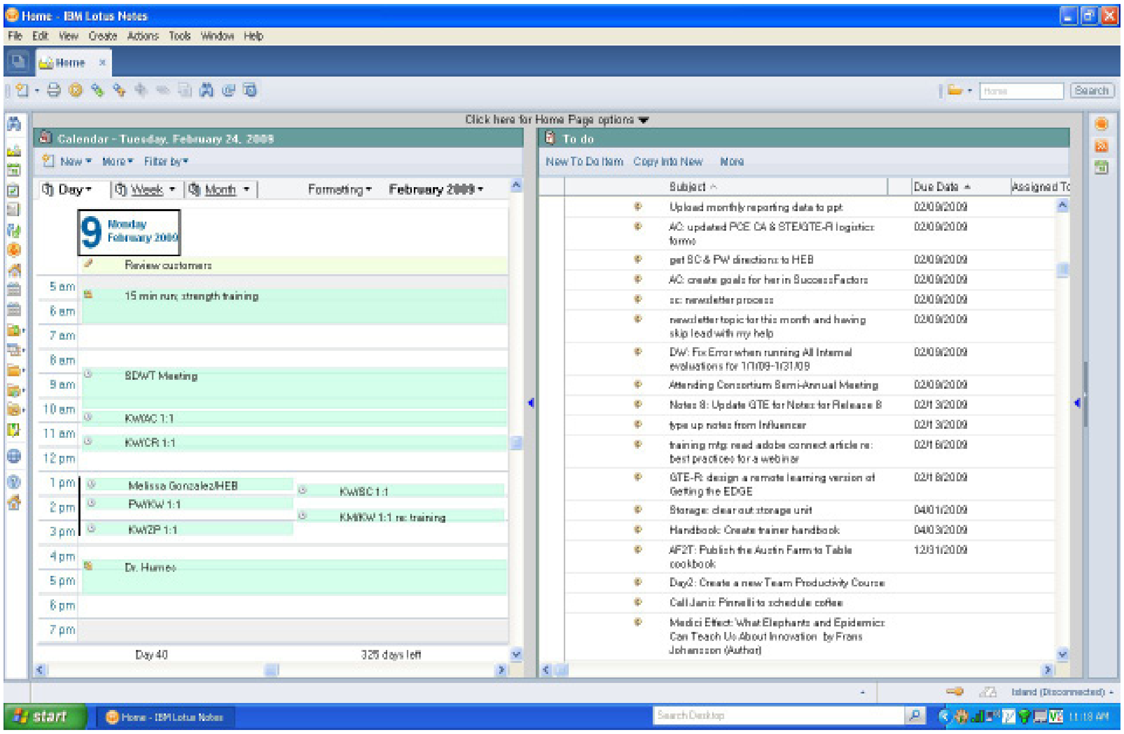
How to Create an E-mail Signature



TO CREATE AN E-MAIL SIGNATURE:

1. Click the Inbox icon on the Open list.
2. Click on the More button to choose Preferences.
3. Click the Mail tab.
4. Click on the Signature tab.
5. Check mark the "Automatically append a signature to the bottom of my outgoing mail message" option if you want Notes to add the signature for you.
6. Select the Text option and enter the signature in the Signature text box or if you already have a signature created as a file on disk, choose the HTML or Image File option and select the appropriate file name.
7. Choose OK to save your signature and close the dialog box.

Creating a Home Page



INSTRUCTIONS TO SET UP A HOME PAGE

1. Click on the Home tab.
2. Click the down triangle (□) next to the Click here for Home Page Options command.
3. Click Create a new Home Page. In the Give your page a name box, enter Home View. Click Next.
5. Select the Frames option. Click Next.
6. Check mark the Calendar and To Do List options. Uncheck mark the Inbox option.
7. Uncheck mark the "Include preview pane" option. Click Next.
8. Select the image of the side-by-side (vertical) frame layout. Click Next.
9. Select the Calendar option for the left pane and the To Do option for the right pane. Click Next.
10. Check mark the "Show action bar button" option. Uncheck the "Display the launchpad option." Click Next. Click Finish.
11. Scroll to the right in the To Do window until you can see the Category column. Click on the column title and drag the column to the left so that it appears next to the Due Date column. Click on the Due Date title to sort by Due Date.