Department of Human Resources and Employee Relations
HR Services & Organizational Development

LOTUS NOTES 8.5

Making Lotus Notes Work For You

Microcomputer Training Centre

YORK UNIVERSITÉ UNIVERSITY

redefine THE POSSIBLE.

Making Lotus Notes Work For You!

A Joint Training Venture developed by:

- Microcomputer Training Centre
- University Information Technology (UIT)

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Lotus Notes

Making Lotus Notes Work For You!

HOW TO KEEP MY MAILBOX TIDY AND ORGANIZED 3

How To Organize My Mail With Folders 3

What To Do When I Get Mail 5

What To Do When I Get Mail With Attachments 6

What To Do With Attachments 7

Replying Without Attachments 10

HOW TO CLEAN UP MY MAILBOX OR ARCHIVE 11

Why Should I Clean Up My Mailbox or Archive? Quotas 11

Deleting Mail 11

Deleting Sent Mail 12

Deleting Messages With Large Attachments 13

Deleting Folders 14

Deleting My Old Calendar Entries 15

Emptying My Trash Folder 17

Reclaiming Space From My Housekeeping (Compacting of Your Mailbox) 18

MISCELLANEOUS 18

Selecting Multiple Messages 18

Setting Your Email Signature 20

Exporting Messages 22

Archiving 23

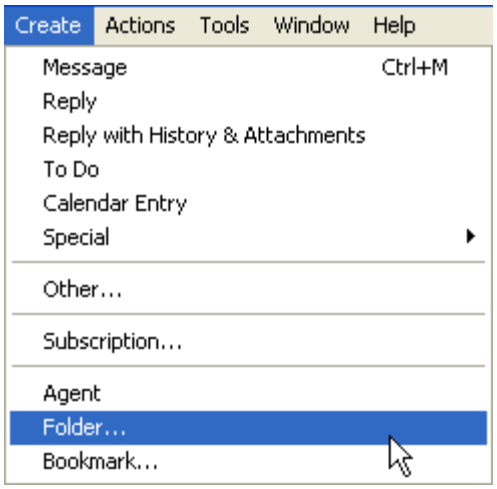
How To Keep My Mailbox[1] Tidy And Organized

How To Organize My Mail With Folders

The fewer emails you have in your Inbox, the faster Lotus Notes will respond. To achieve this, you can create folders to organize your email and therefore reduce the number of messages in your Inbox. The other primary benefit to this is so that you know where to find your old messages when you need them.

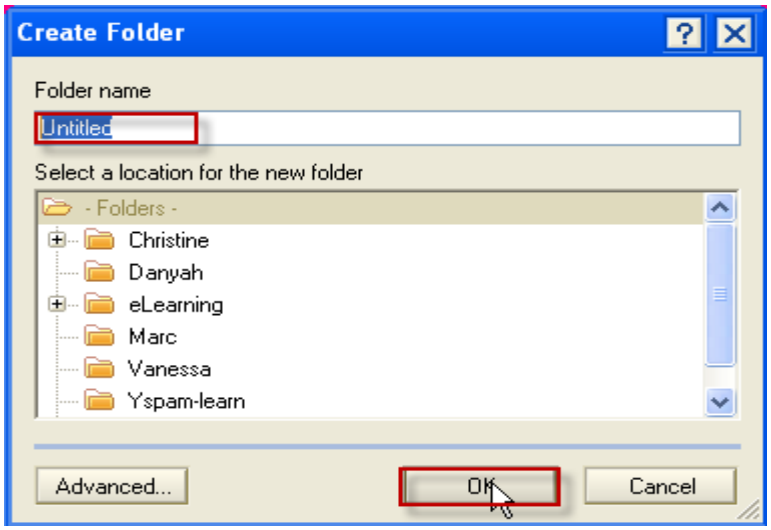
To create a folder:

1) Select ***Folder*** from the ***Create*** menu.

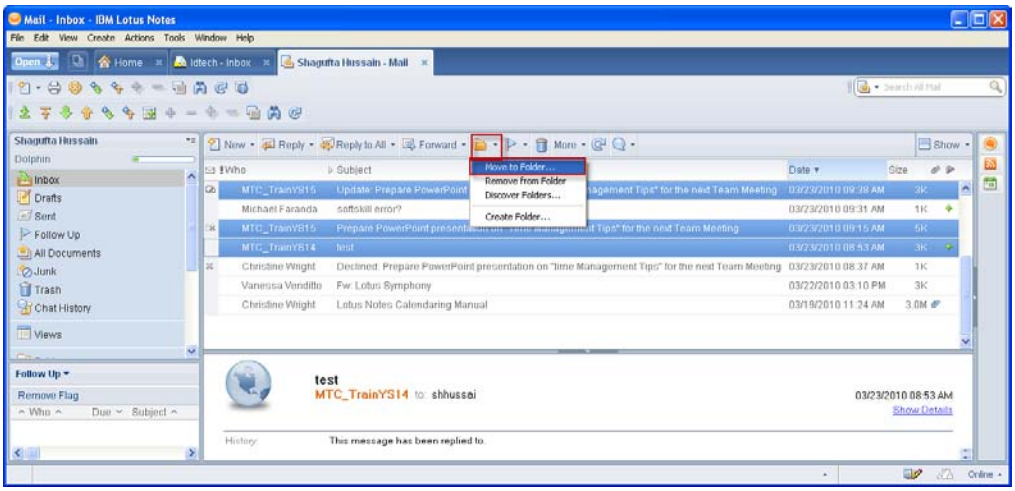


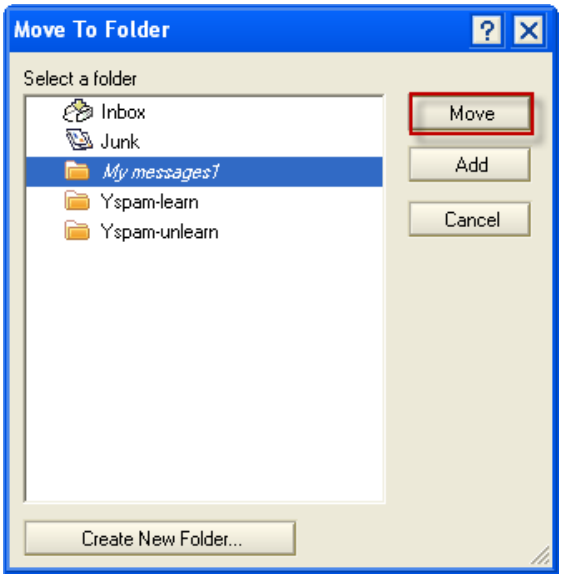
[1] Your mailbox consists of your Email (All messages in every folder including the Trash), your Calendar and To Do.

2) Type in the folder name and click ***Ok***.



Once you have your folders created, just drag and drop emails into the relevant folders or select the emails you wish to move, use the ***Folder* Icon** button above your list of emails and select ***Move to Folder…*** to organize them.





You can also do the same for multiple emails at once. Please see Selecting Multiple Messages.

What To Do When I Get Mail

Once you have read an email and read it you should do one of the following:

- Delete the email
- Move it to a folder (if you need to keep a record)

This will help to ensure the number of messages in your Inbox is kept to a minimum. Your Inbox will also become a list of items that need action. You will immediately know what needs your attention.

What To Do When I Get Mail With Attachments

Once you have read an email and read it you should do one of the following:

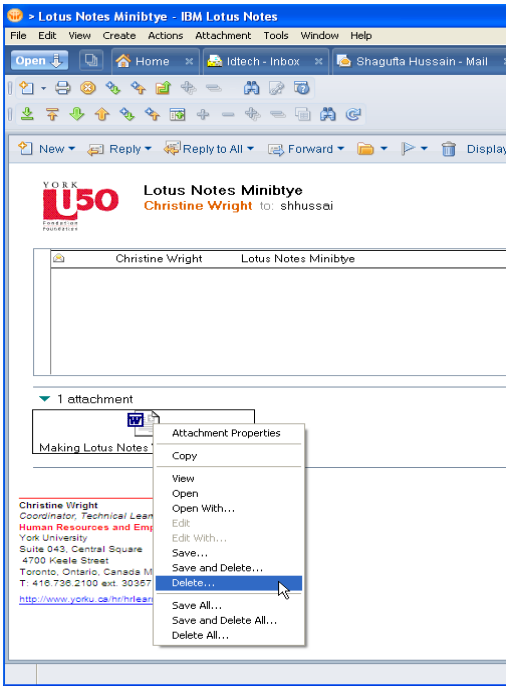
- 'Delete' the email
  "I don't need the email or the attachment."
- 'Delete' the Attachment and 'Move' the email 'to a folder'
  "I don't need the attachment but I need the email for future reference."
- Save the attachment to a network drive for your department, 'Delete' the attachment from the email and 'Delete' the email
  "I need the attachment for work but I don't need the email"
- Save the attachment to a network drive for your department, 'Delete' the attachment from the email and 'Move' the email 'to a folder'
  "I need the attachment for work and I also need the email for future reference"

NOTE: If you want to keep an attachment that is of a personal nature, DO NOT save it to a network drive. Please 'Save' such attachments locally to your ***My Documents*** folder or forward the attachment to your personal email. Once that is done 'Delete' the attachment or the email.

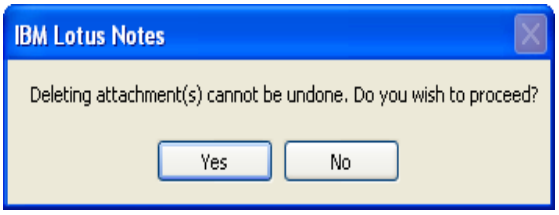
What To Do With Attachments

Deleting Attachments & Keeping The Email

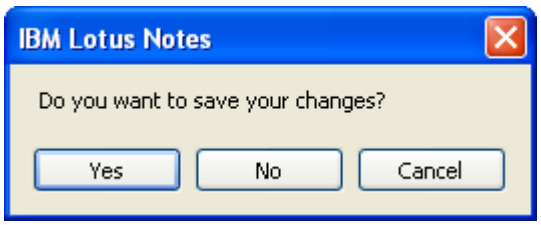
1) Right click on the attachment and select ***Delete…***



2) When prompted for confirmation, click ***Yes***.



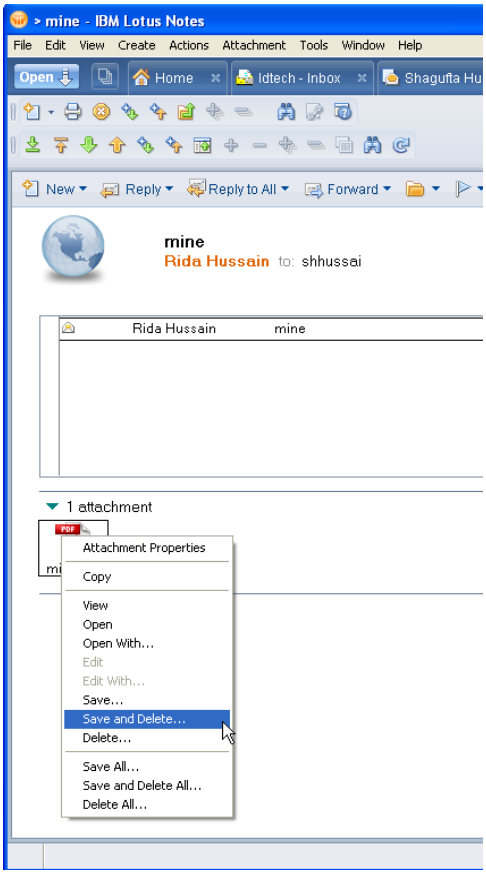
3) When you close the email you will get prompted to save. Click ***Yes***.



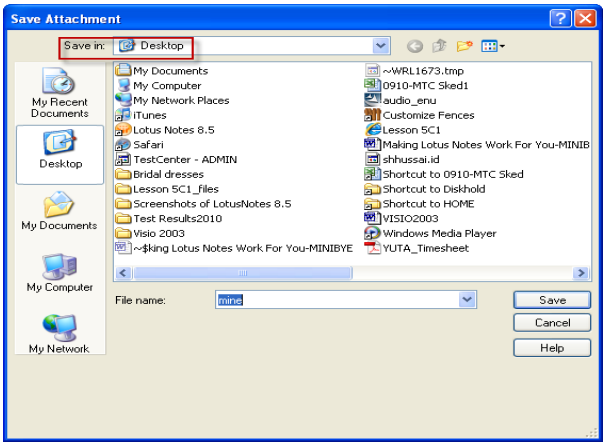
4) Move the email to a folder for future reference.

Saving Attachments Outside of My Mailbox

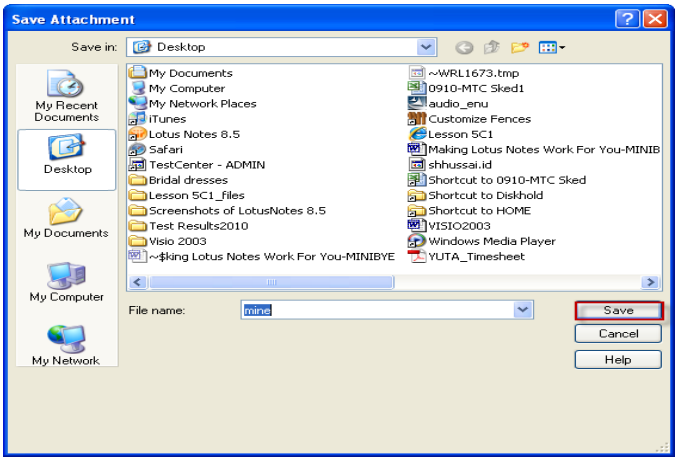
1) Right click on the attachment and select ***Save and Delete…***



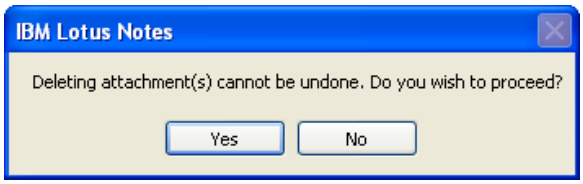
2) Select the location you want to save the attachment to from the ***Save in:*** drop-down box



3) Browse to the folder you wish to save the attachment in by double-clicking on the relevant folders in the list
4) Once you are in the desired destination folder, click on ***Save***.



5) When you close the email you will get prompted to save. Click ***Yes***.



6) Delete the email if it is no longer needed OR Move the email to a folder for future reference.

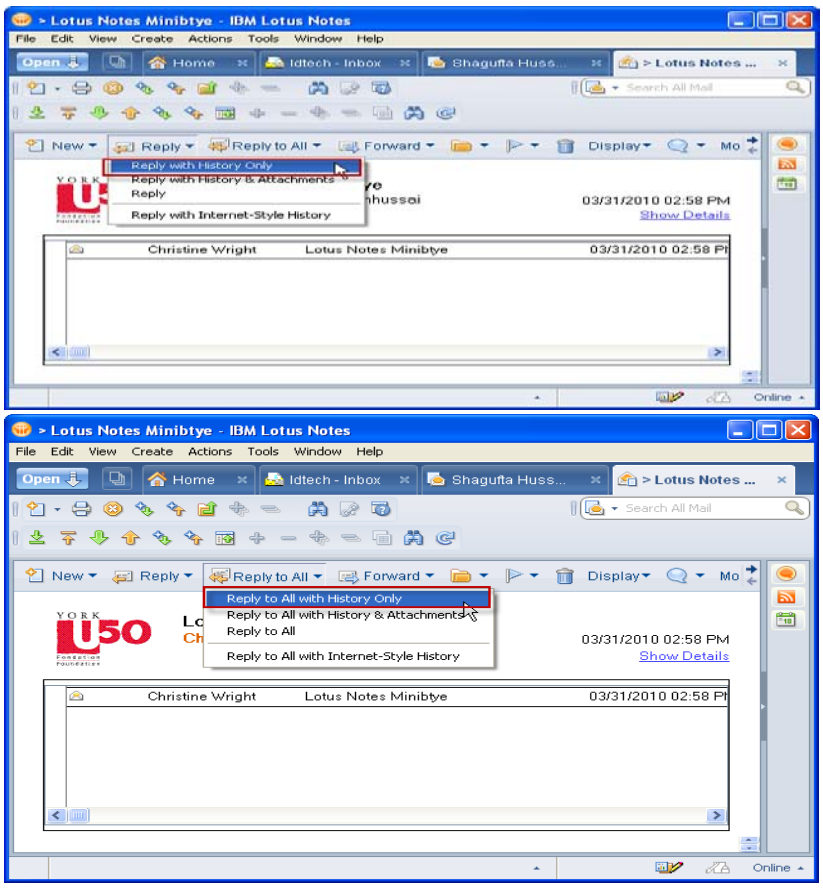
NOTE: If you want to keep an attachment that is of a personal nature, DO NOT save it to a network drive. Please save such attachments locally to your ***My Documents*** folder or forward the attachment to your personal e mail. Once that is done 'Delete' the attachment or the email.

Replying Without Attachments

This will prevent the consumption of space within your own mailbox as well as the destination mailbox by omitting unnecessary attachments.

1) Click on the ***Reply*** or the ***Reply To All*** button above your email

2) Select ***Reply with History Only***



NOTE: This is especially useful when there is a chain of replies to an email that has an attachment. In this case all the replies in your sent folder and in your Inbox would contain the attachment. If the attachment is 1MB in size and you replied 10 times to 9 replies from the sender you end up with 20MB (1 original message + 10 responses in your Sent folder + 9 replies back from the other person) of space consumed in your mailbox.

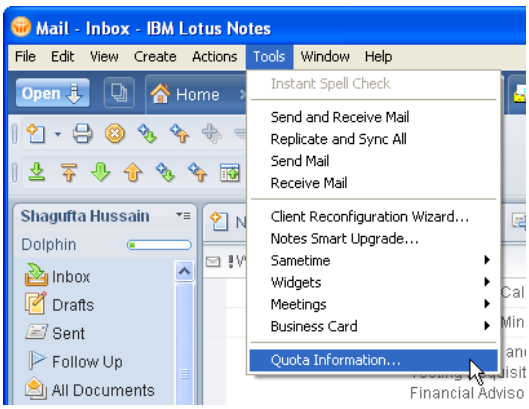
How To Clean Up My Mailbox or Archive

Why Should I Clean Up My Mailbox or Archive? Quotas

The more mail in your mailbox the slower your email will be due to the increasing load on your mailbox. Just like a word file that keeps growing in pages, it takes longer to load and manage.

Quotas are set at 500 MB for your Mailbox. Note: your mailbox consists of your email (all messages in every folder including the Trash), your Calendar and To Do list. No quota increases are granted – clean up or use the Archival system. If you are over quota the system will send you an email every 4 hours. When you are over quota both Mail and Calendaring functionality will be limited. If you are approaching quota you will receive the system will send you an email every 24 hours.

You can see the current size of your mailbox by click the **Tools** menu then go down to **Quota Information…**



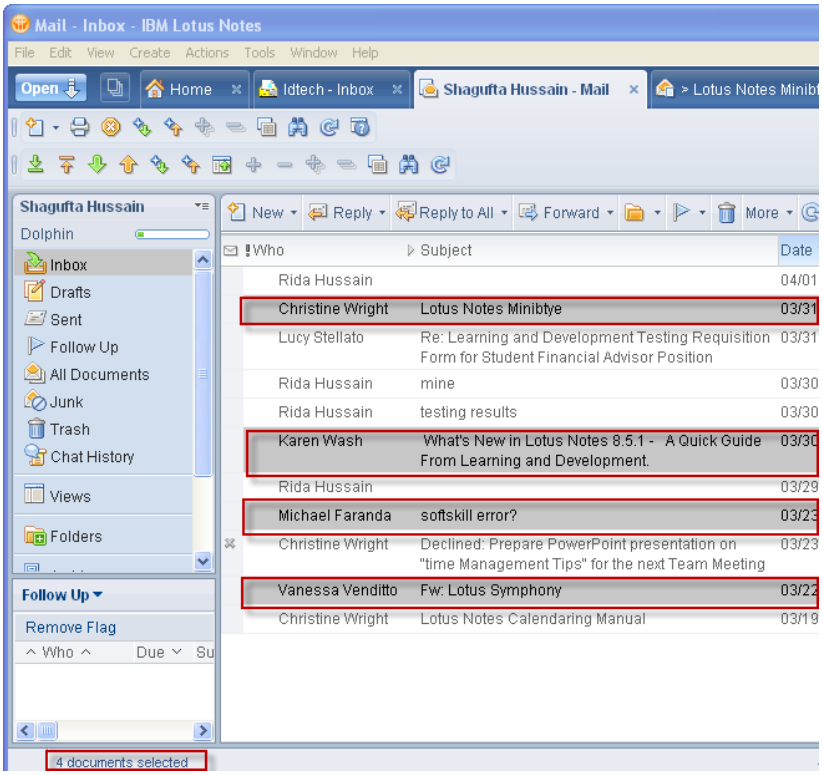
Deleting Mail

1) Select the mail messages you wish to delete.

2) Press the Delete button on your keyboard, or click on the Trash icon or right click and scroll down and click on ‘Delete’.

You can select multiple messages to be deleted at once. Please see Selecting Multiple Messages.

NOTE: If you have a large number of messages to delete it's best to delete less than 300 messages at one time. The number of selected messages is displayed in the lower left corner of the Lotus notes window.



Deleting Sent Mail

Lotus Notes saves a copy of every email you send and keeps it in the ***Sent*** folder, attachments and all. As you can imagine, the ***Sent*** folder will consume a lot of space over time. It is a good practice to periodically delete sent emails you no longer require. Also, be especially mindful to delete sent mail that has large attachments as described above. You may have years of old emails that are no longer needed in your Sent folder. Use the method above to select and delete messages in your Sent folder or request an Archival set up.

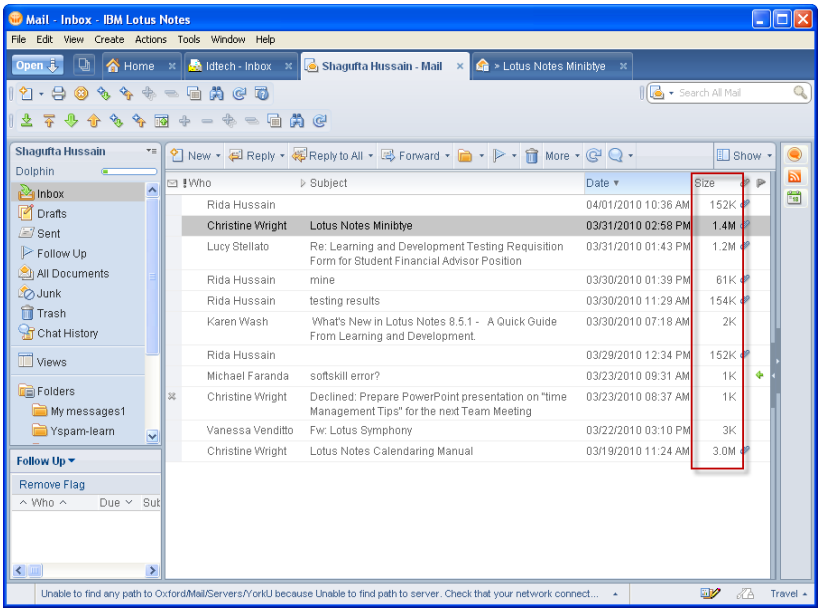
NOTE: Just as in the Deleting Mail section please do not delete more than 300 messages at one time. The number of selected messages is displayed in the lower left corner of the Lotus notes window.

Deleting Messages With Large Attachments

Attachments can easily consume the majority of space in your mailbox. Because of this, management of your attachments is particularly important. You should go through each of your folders and determine what to do with the attachments therein. Please see sections *What To Do When I Get Mail With Attachments* and *What To Do With Attachments* for instructions on how to manage attachments. You can sort the emails in a folder by size and deal with the largest ones first. At this point you could select multiple messages (see section Selecting Multiple Messages) and delete them or deal with them individually. Here is how:

1. Click on the folder you want to work on in the left pane.

2. Sort the emails on the right by clicking on the ***Size*** column header. If this column is not visible click on 'Sort by default", top right corner and then highlight '(hidden) Size'. This will sort it in descending order of size.



NOTE: Be sure to do this in each of your folders.

NOTE: Just as in the Deleting Mail section please do not delete more than 300 messages at one time. The number of selected messages is displayed in the lower left corner of the Lotus notes window.

Deleting Folders

IMPORTANT: You must delete all emails in a folder before deleting the folder.

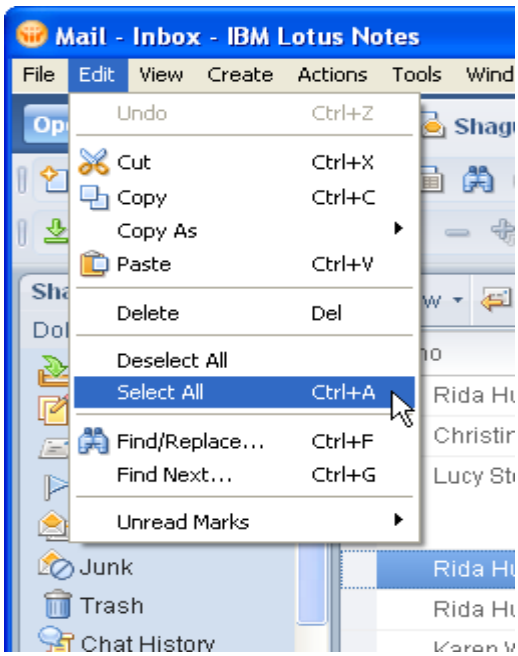
Please think of a folder in Lotus Notes as a receipt that tells you where you parked your car (email). If you lose (delete) the receipt (folder) it does not mean your car (email) has vanished. You can also walk all over the parking lot (mailbox) and eventually find your car (email) without the receipt (folder).

To delete all messages in a folder:

1) Click on the Folder in the left pane.

2) Click on any email in the right pane.

3) Press **Ctrl** + **A** on your keyboard OR Click on the ***Edit*** menu and select ***Select All*** to select all messages in the folder.

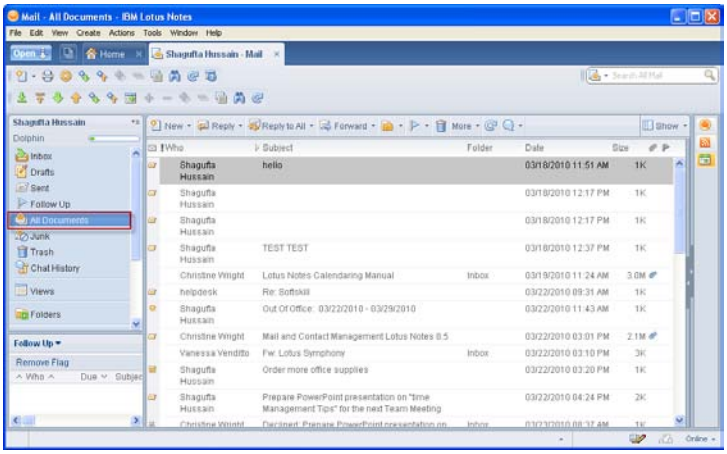


4) Press **Delete** on your keyboard.

If you deleted a folder before deleting all the messages only the folder name would have been removed. All the emails remain in your mailbox. The only way to remove the email is to list all the messages in your mailbox regardless of folder and comb through to find the ones that belonged to that folder and delete them.

To list all messages regardless of folder:

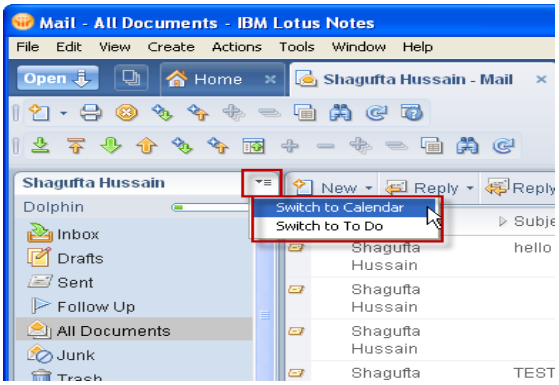
1. Click on ***All Documents*** in the left pane. All your messages will be listed on the right.



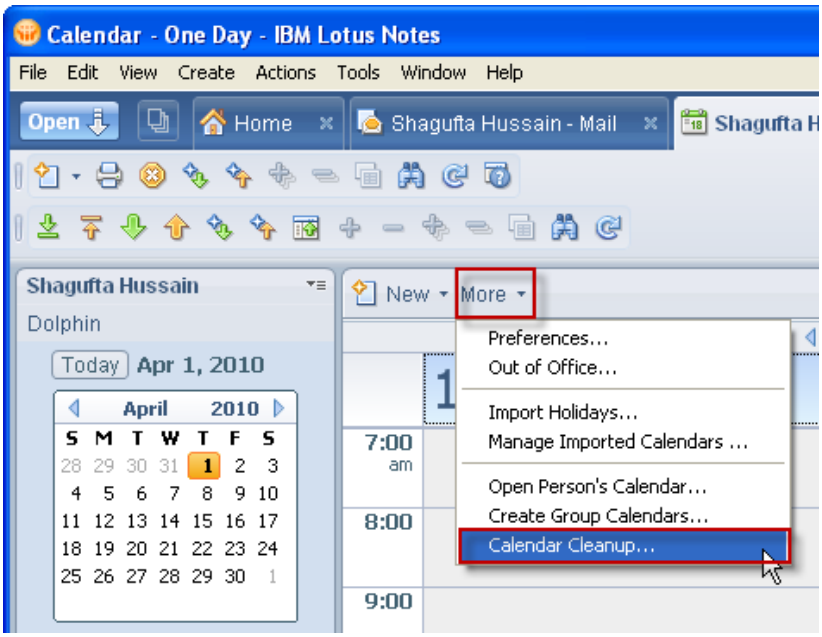
Deleting My Old Calendar Entries

To delete old calendar entries:

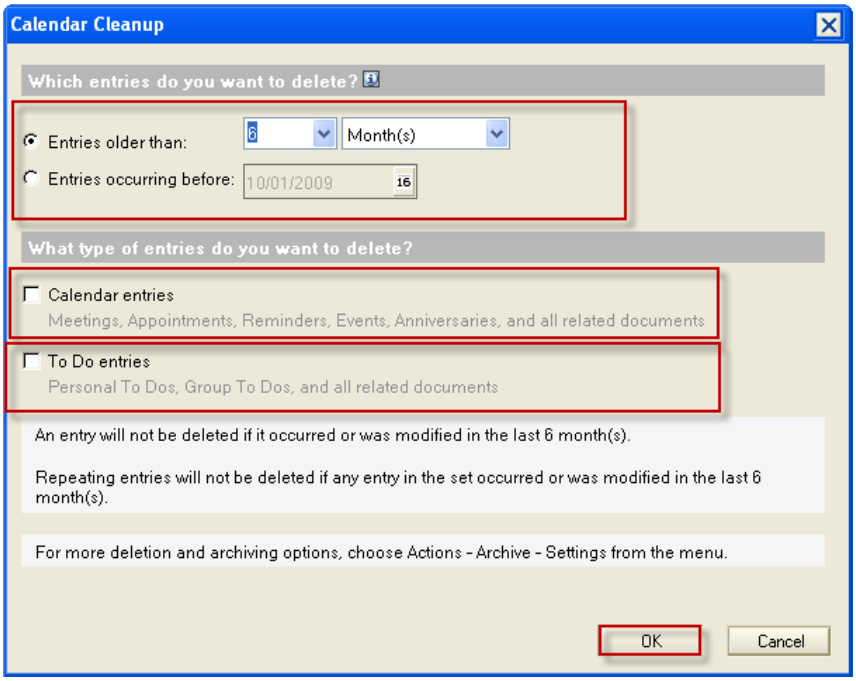
1) Open your Calendar



2) Click on the More menu and select "Calendar Cleanup…".



3) Specify the age threshold for entries to be deleted.



4) Select “Calendar entries” and “To Do entries”.

5) Click “OK”.

Emptying My Trash Folder

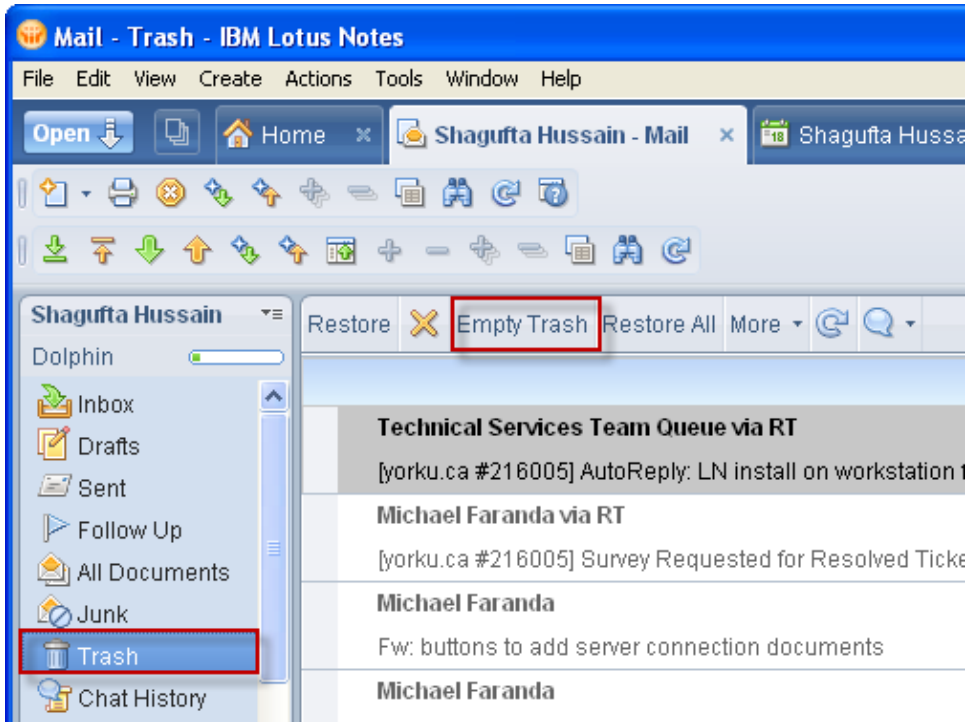
Deleting emails does not mean they are out of your mailbox just yet. They go to your Trash folder. This is so you can recover deleted emails just in case you accidentally deleted something you did not intend to.

Once you are sure that the items deleted are indeed worthy of deletion, you should empty the trash. This will allow the space to be reclaimed and your mailbox size will be reduced once the server compacts your mailbox.

To empty the trash:

1) Click on the ***Trash*** folder on the left.

2) Click on the ***Empty Trash*** button.



Reclaiming Space From My Housekeeping (Compacting of Your Mailbox)

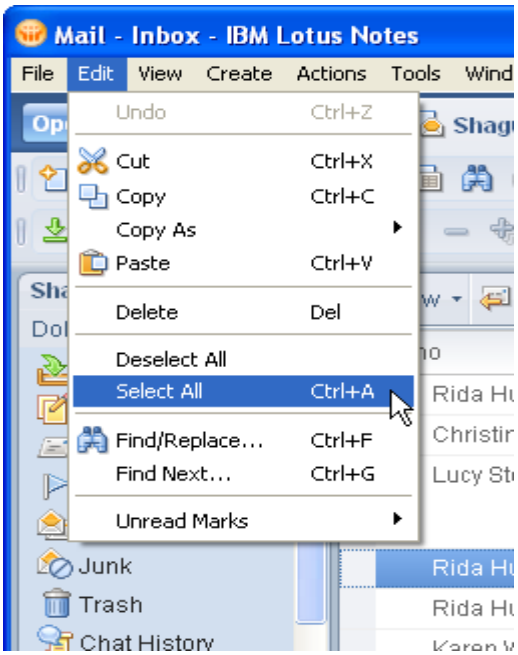
After you have deleted emails/attachments and you have emptied your trash your mailbox size will not immediately decrease. The "free space" created from emptying your trash is reclaimed by Lotus Notes in its compacting process. Compacting occurs automatically every Friday for mailboxes that have 10% or more "free space".

Miscellaneous

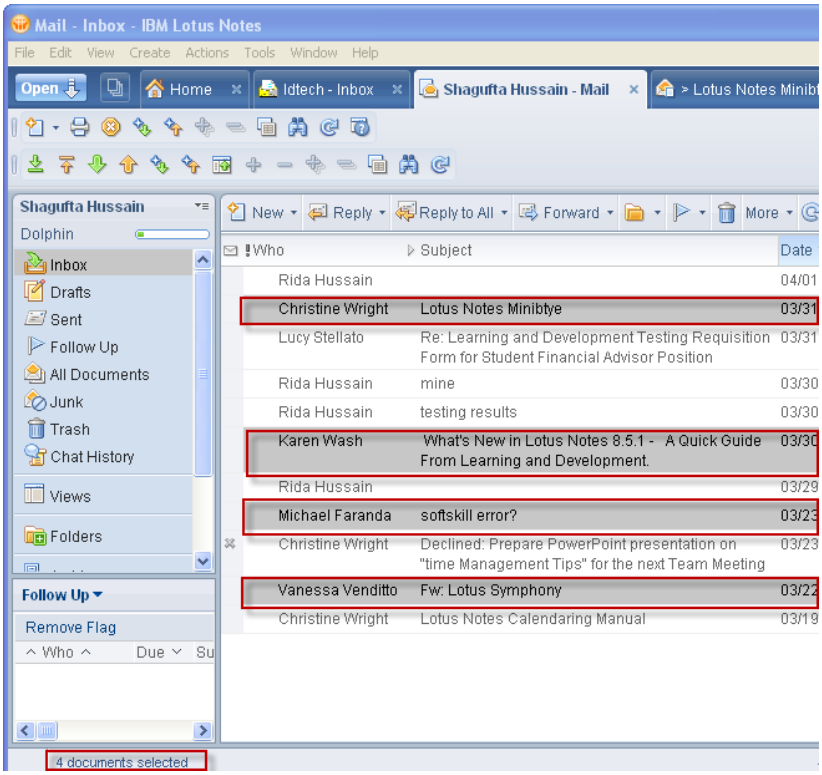
Selecting Multiple Messages

Please pay careful attention to this section as it will assist you in doing many of the things described in this document in a more efficient and less time consuming manner. This is useful when deleting or moving several messages at once.

To select all messages in a folder, open the folder then press **CTRL+A** OR go to the ***Edit*** menu and click on ***Select All***.



You can also select multiple emails at once by individually clicking in the white area just to the left of the email to select it (a checkmark will appear for each of the selected messages).



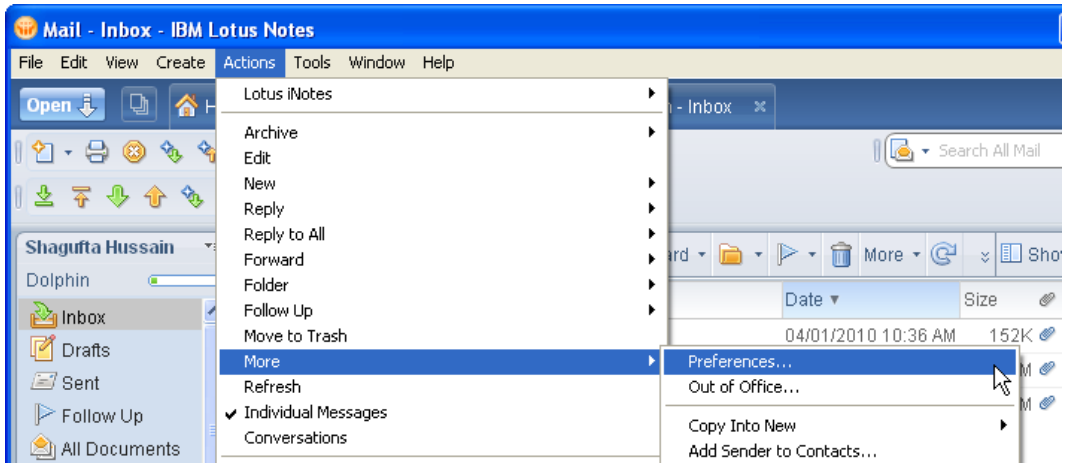
To select several consecutive mail messages click and drag up or down in the white area to the left of your message list (checkmarks will appear for the selected messages). You can also achieve the same result by clicking on a message then holding down the shift key while pressing the up or down arrow on the keyboard.

Setting Your Email Signature

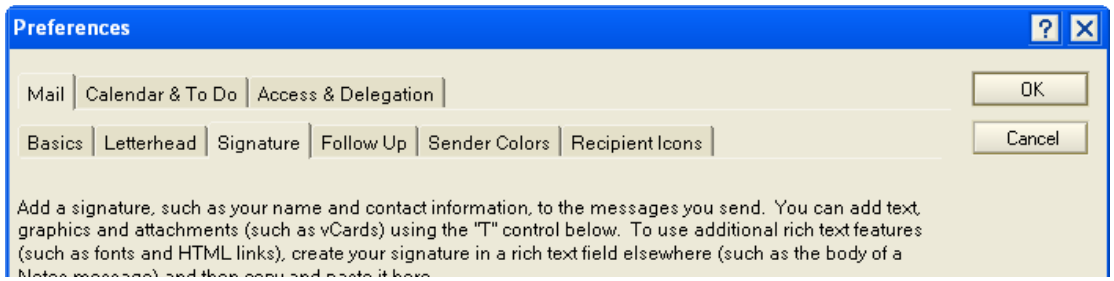
An email signature is a short bit of information that gets appended to the end of every email you send. Because it is on every email you send, the signature needs to consume as little storage space as possible. We recommend that only text based content be included in your signature. Typically, people use this to provide their name and contact information.

To set your email signature:

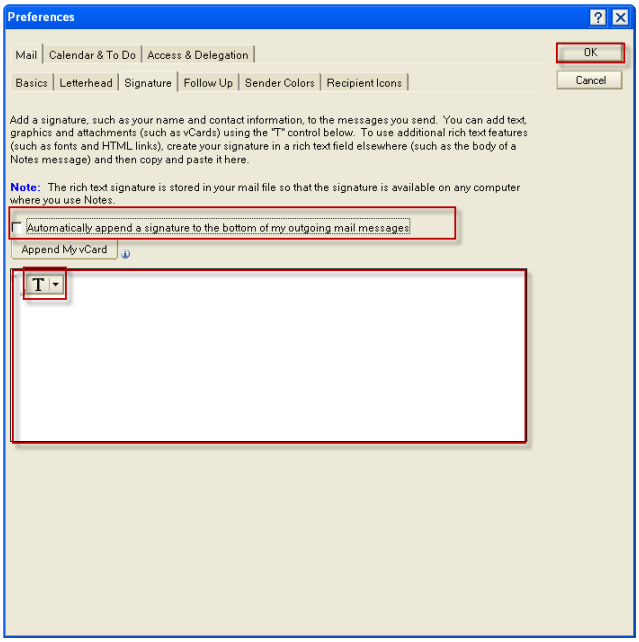
1) From the ***Actions*** menu, select ***More*** and click on ***Preferences…***



2) Click on the ***Signature*** tab.



3) Check the box for ***Automatically append a signature to the bottom of my outgoing email messages***.



4) Make sure **T** (Text) is selected.

5) Type your signature in the space provided and click ***OK***.

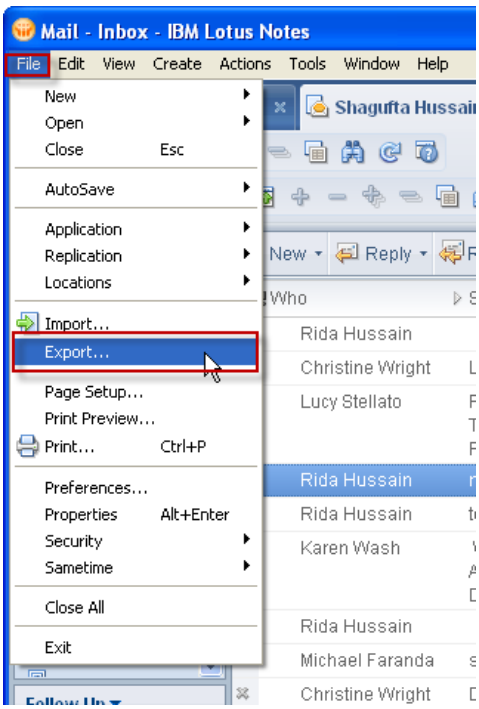
NOTE: It is possible to have a more elaborate signature, however this is not recommended. This would involve creating a separate file on your computer in HTML (Web) format. This signature will only be usable from the computer that this HTML file is stored on and is not available from webmail. An HTML signature will greatly increase the storage space used by each and every email you sent, especially if an image is included.

Exporting Messages

You can save an individual message or multiple messages to a single text file on your computer by using the export function.

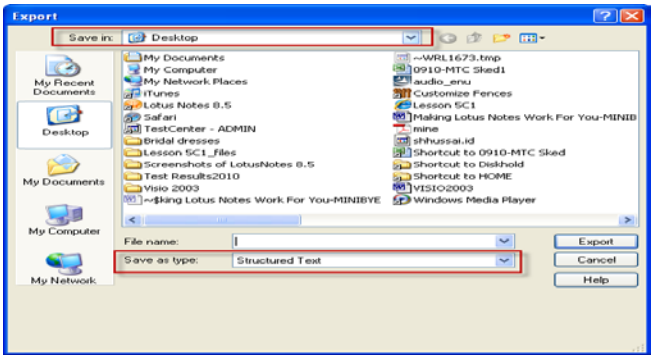
1) Select the message(s) you wish to save

2) From the ***File*** menu Click on ***Export…***

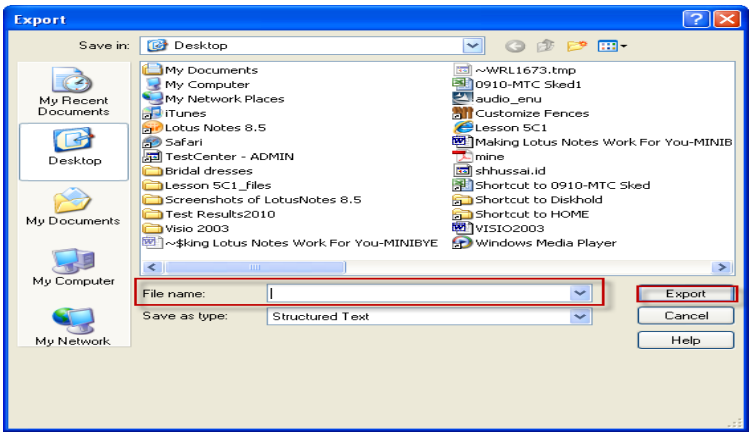


3) Enter a File name and leave the ***Save as type:*** "Structured Text "

4) Select the Location you wish to save it to in the ***Save in:*** drop-down box.



5) Browse to the folder you want to save the file in using the list.
6) Provide a File name and Click on ***Export***.



You will be able to open the resulting saved file with Notepad or any other text editor application.

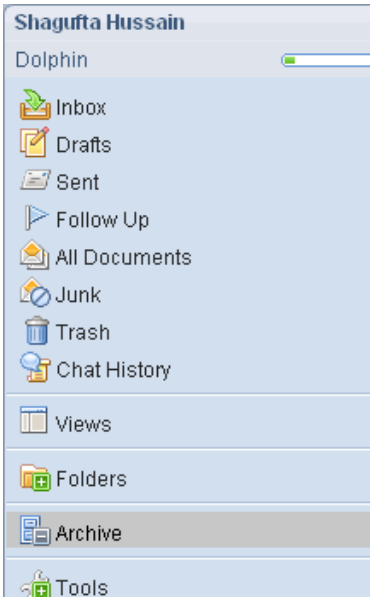
Archiving

Your archive mail file quota is 4GB. Archiving may be requested for all mailboxes. 365 days is the standard archiving policy but upon request, can be set to either 180 or 90 days. This means, all messages older than xxx days will be moved out of your mailbox folder structure and placed into your archive with an identical f older s tructure. These messages can easily be accessed by opening your archive.

This will help to keep your primary mailbox small, speedy and efficient.

To open your archive via the Lotus Notes Client:

1) Click on ***Archive*** in the left pane.

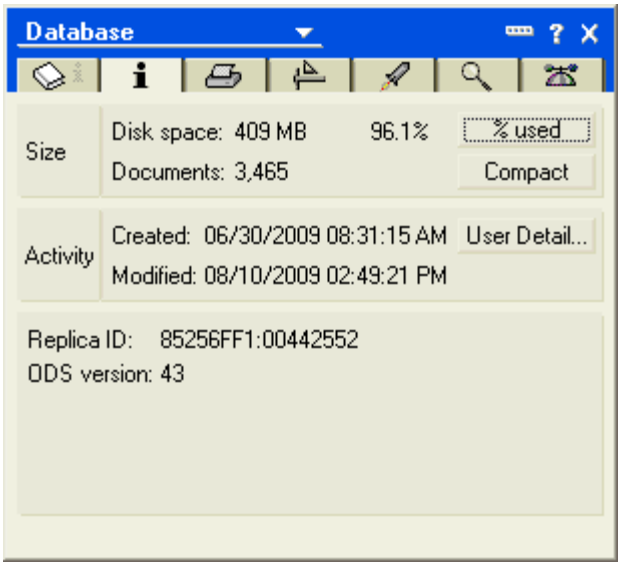


(2) Click on Archive Criteria – XXD - XXX

Archive Quota

Go to File ➢ Application ➢ Properties;
Then click on the Information Tab, and you will see Disk Space used...then click on the percentage used; then multiply the disk space by the % used to get the size

i.e. 409 * .961 = 393 MB



To open your archive via the Web:

Open an Internet browser and go to the address cashel.notes.yorku.ca/archive/a_<your email username>.nsf . Please substitute your actual email username for <your email username> in the address given. For example, If your email is jchue@yorku.ca the address for your archive will be cashel.notes.yorku.ca/archive/a_jchue.nsf .

To download this manual or the Lotus Notes Webmail version of this manual, please visit:

http://computing.yorku.ca/files/2012/02/LN85_Lotus_Notes.pdf