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From Microsoft Outlook to HCL Notes

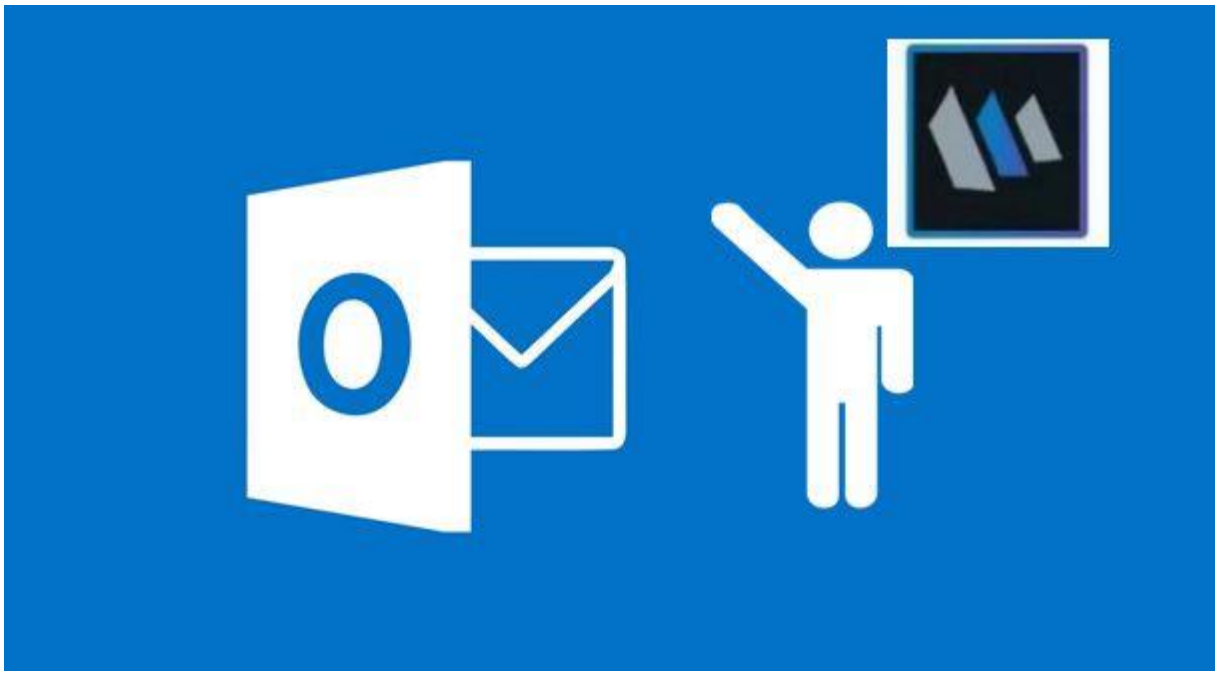

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Table of Contents

Author 5
Introduction 6
Prerequisites 6
Microsoft Outlook 7
Mail 7
Calendar 8
Contacts 9
To do 10
Summary 10
Notes client settings and functions 11
Open documents in new windows 11
Preview pane 11
Shortcuts 12
Shortcut buttons 12
Bookmarks 13
Spell checking 15
Turn on spell checking 15
Using spell checking 15
Rich text formatting in HCL Notes 17
Mail 19
Creating a new email 19
Sorting email folders and views 20
Newest mail on top or bottom 20
Sorting email by column 21
Group by Date 21
Unread mail only 22
Search for emails 22
Flag an email for follow up 23
Turn an email into a meeting or To do 24
See your calendar while using your email 25
Quick rules 25
Mail signature 27
Creating the signature 27

Different signatures 29
Mail conversations 30
Notifications 31
Out of office 31
Spellchecking your email 33
Spellchecking while writing 33
Spell-checking before sending 33
Prevent sending emails with blank Subject line 34
Formatting email text 35
Set default email font 35
Add another email account 36
Calendar 37
Share your calendar 37
Add a shared calendar to your calendar 38
Colour code calendar entries 39
Change calendar views 42
Period views 42
Summary or timeslots 43
Week numbers 43
Find available time 44
Check one person's schedule 44
Check the schedule for meeting participants 44
View Invitee Status 45
Contacts 45
Add contact 45
From Mail 45
From Contacts 45
Create contact group 46
Recent contacts 47
To do 47
Create a To do 47
Mark a To do as completed or incomplete 49
Conclusion 49
Resources 49

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Bio

Hogne Bø Pettersen has developed solutions with and used HCL Notes and Domino since 1997. He is an expert in the use and adoption of social collaboration tools and is frequently used as an instructor. He was an IBM Champion and then HCL Ambassador from 2016 – 2022 and is also working with HCL Connections, HCL Sametime, Microsoft Outlook, Microsoft SharePoint, Microsoft 365 and Microsoft Teams. He is also a semi professional photographer and journalist. If you ask nicely, he will also tell you all about the HCL Connection plugins for HCL Notes, Microsoft Office and Microsoft Outlook.

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Introduction

While Notes is so much more than just an email, calendar, and contacts application, these features are nevertheless some of the most important features of the client.

Outlook is the email and scheduling client with the largest user base. This means that if you get new employees in your company, they were most likely Outlook users in their previous position. If you are using Notes for email and calendaring, there will be a period of adjustment for the employee.

In the past 15 years I have held several user training sessions for users moving from the world of Outlook to the world of Notes. This whitepaper is therefore built on my long experience with the usual questions and challenges.

This document will hopefully help you make the transition smoother and make it easier for the employee to adapt to working with Notes. To this end I have included tips on how you can set up the client to mimic Outlook behaviour (like opening everything in new windows).

In addition, I have described how you use a lot of the functions that Outlook, and Notes have in common, but that might be a bit different in Notes.

I also think this document will be of great help to users who have used Notes for years.

Prerequisites

While there are really no prerequisites for using this document, a basic understanding of email and electronic scheduling will come in handy.

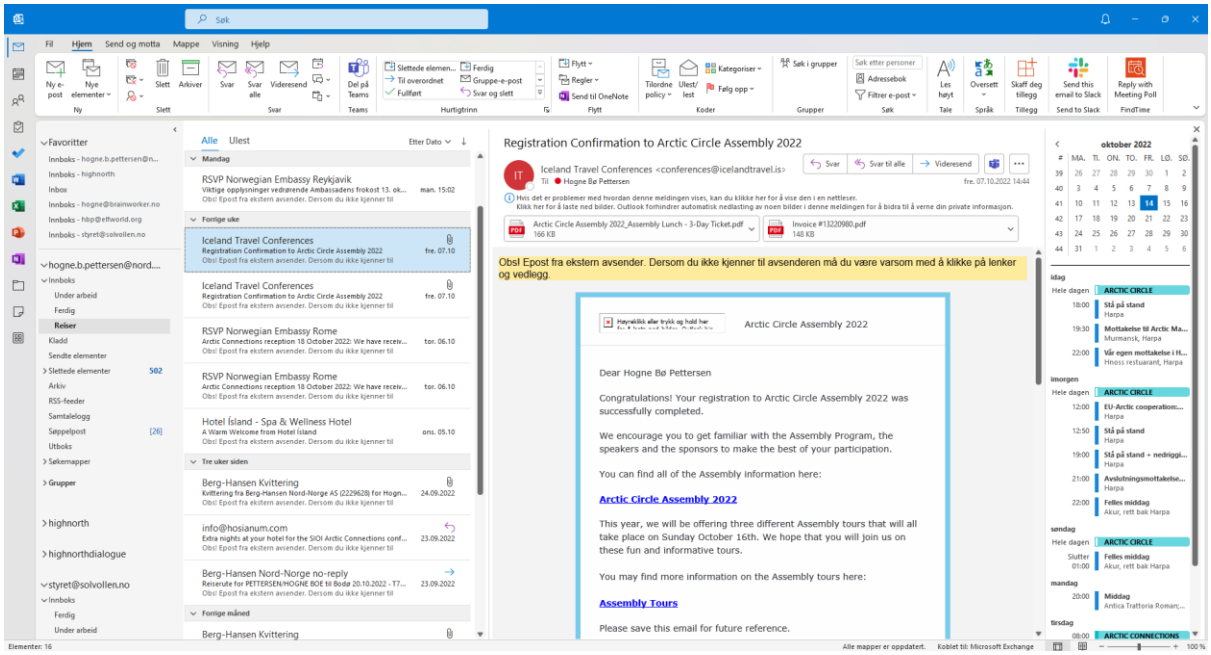
Also, it would be a good idea to give your users an overview of Notes and how you are using Notes and Domino inside your organisation.

Other than that, the users should have no trouble following this document, especially if they are already familiar with Outlook or Notes.

Microsoft Outlook

Before we start going through the Notes client, I will give a brief overview of the of the same functionality in the Outlook application in Windows.

Mail



The picture above shows the email interface in Outlook. You have a menu at the top for various actions you can perform: Creating new emails, replying to received emails, creating mail rules, and a lot of other mail-related functions. You can also change how emails are listed and sorted in the various folders. You can also choose whether to:

- Hide the left side menu
- Show the preview pane and, if so, where to display it
- Show the right sidebar, and if so, what it should contain.

To the left, below the top menu, you have the menu for mail accounts and folders. In Outlook you can add several mail accounts that will be listed in the left menu, and you can then work with the folders belonging to each account.

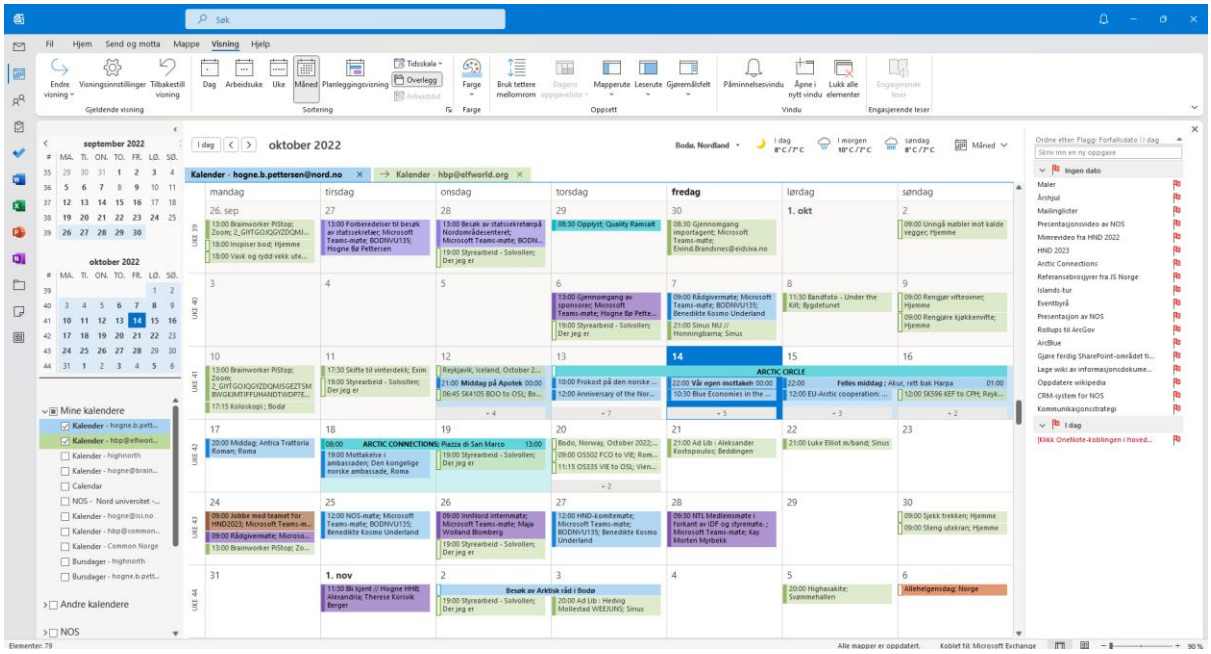
To the right of the left menu, you find all the emails in the currently selected mail folder. You can perform various actions on them by right clicking and choosing from the menu items that will appear. You can also mark an email and use the functions in the top menu.

In the picture above, the preview pane is to the right, but it can also be set to show at the bottom. Here you can see the email you have marked in the folder. You can also reply to emails in the preview panel, just like in Notes.

Furthest to the right you have a sidebar where you can add a view for your calendar, for primary contacts (which can be connected to Teams), To do items and so on. This is customizable and you can set this to fit your needs via the top menu.

To open the mail part of Outlook you click on the envelope icon in left side menu.

Calendar



Just as in Notes, you have a calendar in Outlook. In the top menu you can create new meetings, appointments, and reminders. If you have Microsoft Teams configured, you can also create Teams meetings. You can also choose various calendar views (daily, weekly, work week, monthly and others) and whether to display the right sidebar and what it should contain. You can even turn on and off the preview pane or choose to show it below the calendar entries instead of to the right (in the photo above it's turned off).

In the left side menu, you see a small calendar showing this month and the next one. Click on the dates to set focus to them. Any meeting you create will be set to that date (which you can change). Below the mini calendars You can add and turn on and off the calendars of all email accounts you have connected to your Outlook. You can also do this with other people's calendars (if they have shared them with you), group calendars (Teams and SharePoint) and external calendars that are open to the outside world.

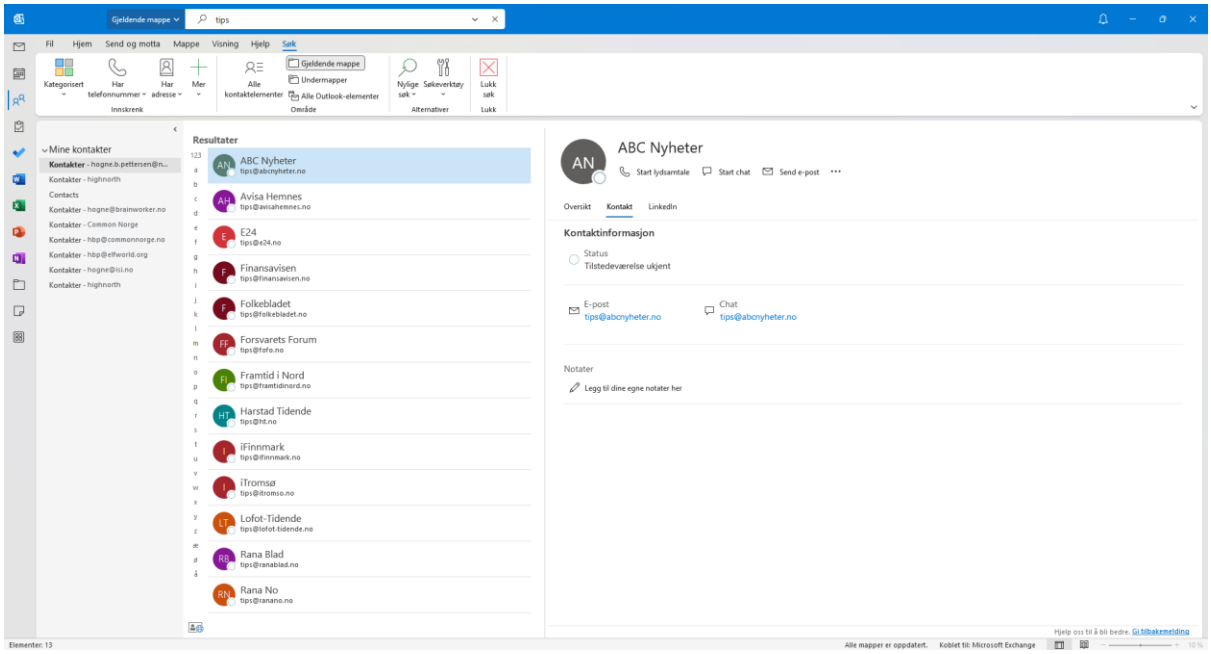
In the main calendar field, you see all the calendar entries for any given day, week, or month you have chosen. You can navigate back and forth via arrows. By right clicking on a calendar entry, you get a menu where you can do many actions like replying, cancelling, colour code and many more things. You can also choose whether you want all the calendars you have set up should overlap each other, or if they should be displayed side by side.

If you decide to turn on the preview panel it will either show to the right of the calendar, or beneath it, depending on your choice. The preview panel displays the currently selected calendar entry.

Furthest to the right you have a sidebar where you can add a view for your calendar, for primary contacts (which can be connected to Teams), To do items and so on. This is customizable and you can set this to fit your needs via the top menu.

To open the calendar part of Outlook you click the calendar icon in the left side menu.

Contacts



You also have a personal Contacts functionality in Outlook, which works similarly to the Contacts application in Notes.

In the top menu you can create new contacts, as well as contact groups where you can collect several contacts to make it easier to send email to many people at once. You can also choose various ways to display your contacts or groups and you can select whether to display the right sidebar or not, and what it should contain. Like with calendar and email you can choose whether you want to show the preview pane or not, and if it should be at the bottom or to the right.

In the left side menu, you can choose which contact list you want to show. Each of your email accounts have their own contact list.

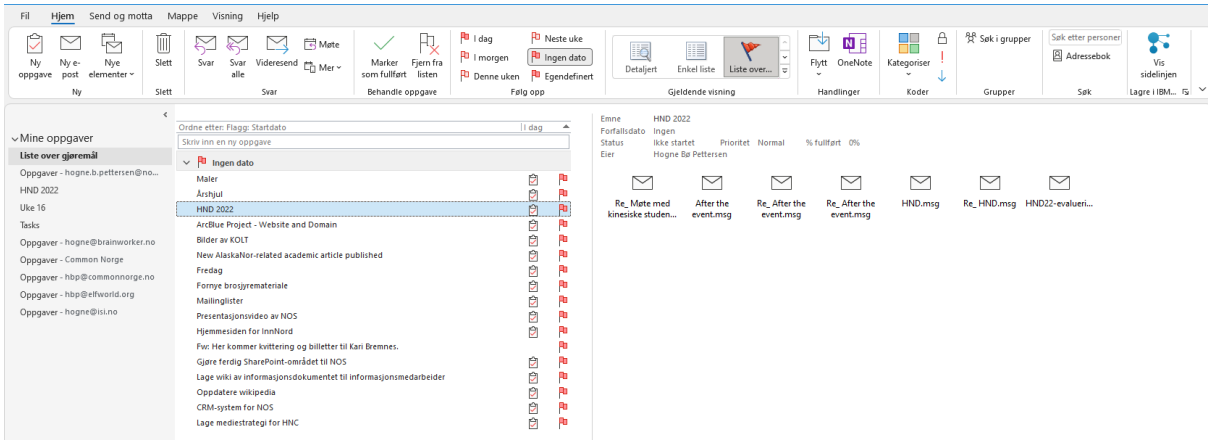
To the right of the left menu, you see all your contacts listed. You can sort them in various ways. By right clicking on a contact, you get a menu where you can do many actions like assigning a task, creating a calendar entry and a few other things.

If you have turned on the preview pane, you see it to the right of the contact list or beneath it. The currently selected contact or contact group is displayed there and you can then edit it or perform other actions on it within the preview pane.

Furthest to the right you can have a sidebar where you can add a view for your calendar, for primary contacts (which can be connected to Teams), To do items and so on. This is customizable and you turn it on and off and set it to fit your needs via the top menu.

To open the Contacts part of Outlook you click the person icon in the left side menu.

To do



Both Outlook and Notes have a To do app/function. Here you can set up tasks that you can assign to yourself or others. You can also right click an email and turn it into a task, or just drag it down to the To do icon at the bottom of the left side menu. The tasks can have a due date and be set to various priorities. You can do this by using the top menu or right clicking on a task.

In the top menu you can change how tasks are displayed, create new tasks, create emails, and choose whether the left side menu, preview pane or right sidebar should be displayed and what they should contain.

The left menu gives you the option to choose whether to see all tasks, regardless of which email account they have been created with, or if you want to see completed tasks for each mail account.

To the right of the left side menu, you see the list of tasks. Which tasks depends on what you have chosen in the left side menu.

The preview pane can be turned off or on, and if it's turned on you can set it to the right or bottom of the tasks list. When you click a task, the contents are displayed in the preview pane.

Just like with email, calendar, and contacts you can choose to display the right sidebar panel, where you can add calendar, contacts, and other functionality.

To open To Do you click the check box icon at the bottom of the left side menu

Summary

This gives you a general idea of the functionality of Outlook, as a comparison point for HCL Notes. Since this is a manual for HCL Notes, we will of course take a much deeper dive into the Notes Mail, Calendar, Contacts and To do apps than we did in Outlook.

Notes client settings and functions

In this section, you learn how you can set up the Notes client to behave as much like Outlook as possible. In addition, you learn general functionality in Notes that will be available no matter what Notes application or database you are using.

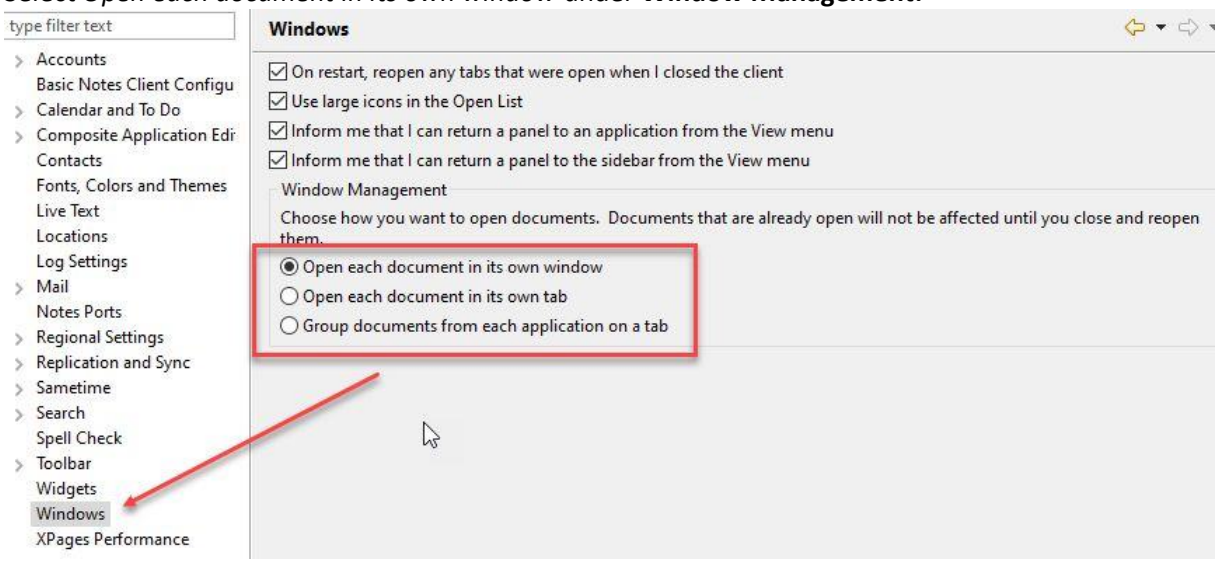
Open documents in new windows

In Outlook, any document that you create or open will appear in its own window. This is of course possible in Notes as well.

1. Go to the menu **File** and choose **Preferences**.

2. Click on **Windows** in the **Preferences** screen.

3. Select *Open each document in its own window* under **Window Management:**



4. Click **Apply** and then **OK.**

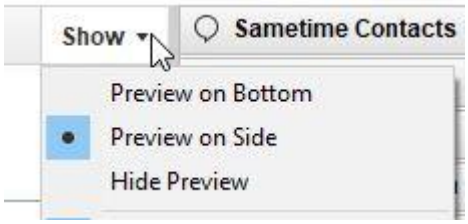
5. Every window and document will from now be opened in its own window.

PS! You can also open any Notes document in a new window at any time by right clicking on it in the view or folder and choose **Open in New Window**.

Preview pane

As in Outlook, you can choose whether you want to use a preview pane for your email, calendar and to do entries, and whether to display it at the bottom or to the right.

Click the **Show** button at the upper right, above the mail, calendar or to do folder you are currently working with:

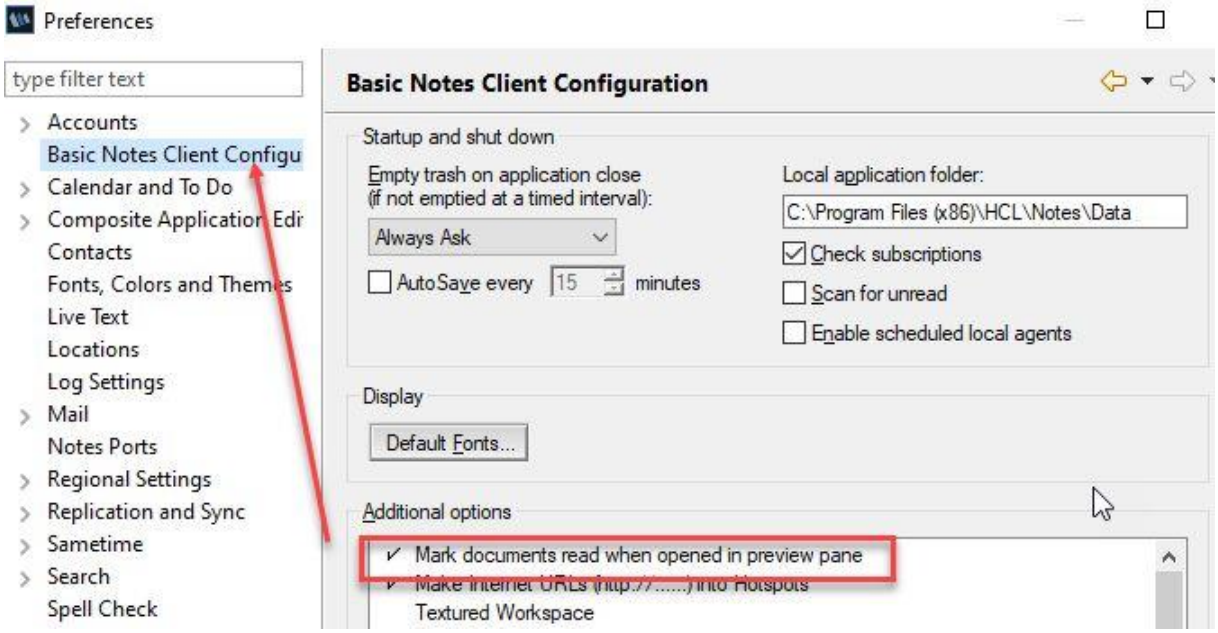


You can also control whether you want the email or document to be marked as read or not when it's been displayed in the preview pane:

1. Go to the menu **File** and choose **Preferences**.

2. Click on **Basic Notes Client Configuration** in the left side menu.

3. In the big **Additional Options** field, check *Mark documents when opened in preview pane* if you want the emails or documents to be marked as read after being displayed in the preview pane. If you do not want that, uncheck this option:



4. Click **OK.**

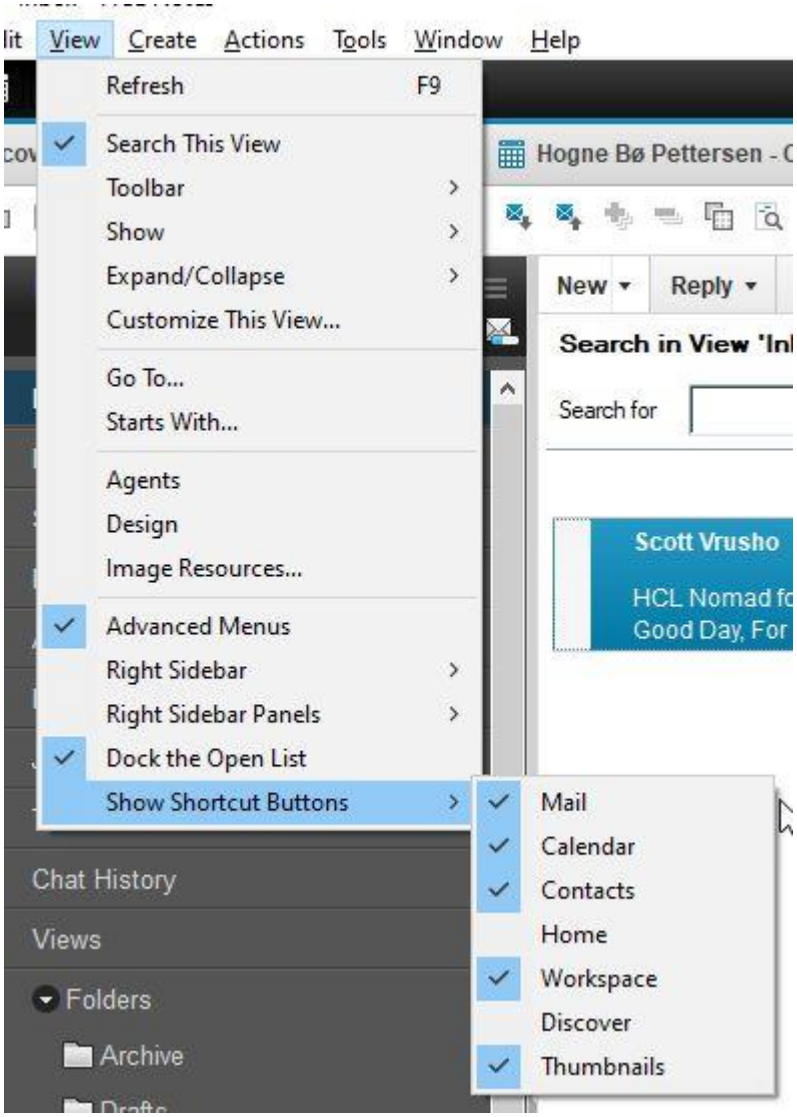
PS! You can also mark a read document as unread, or an unread document as read, by hitting the **Insert** button on your keyboard

Shortcuts

In Outlook you have shortcut icons for the mail, calendar, and To do in the lower left corner. In Notes you have several ways to get shortcuts for M**ail**, C**alendar,** and **Contacts**:

Shortcut buttons

Click on **View -> Show Shortcut Buttons** and choose **Mail**. Then repeat this for **Calendar** and **Contacts**:



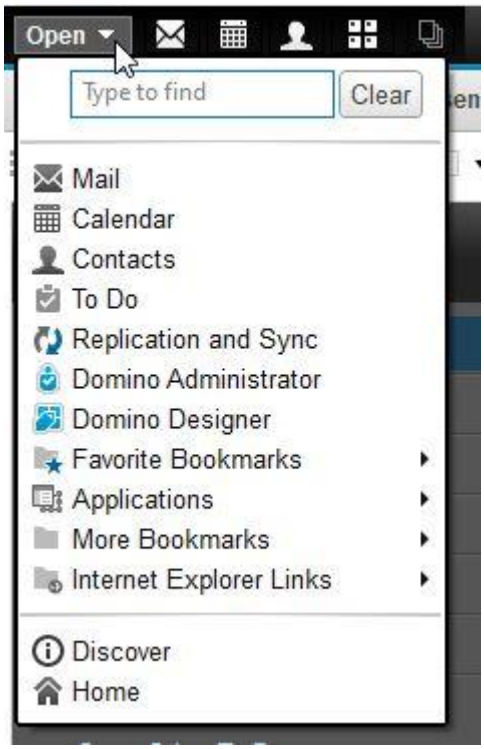
You will now see these shortcut buttons under the menu line:

Unfortunately **To do** is not available as a shortcut button.

Bookmarks

However, **To do** is available as a bookmark, together with **Mail**, **Calendar** and **Contacts**.

You find these bookmarks under the **Open** button:



You can pin the bookmarks under the **Open** button to be permanently visible by right clicking on the **Open** button and choose **Dock the Open List**. You can also choose **Use Large Icons**. Now **Mail**, **Calendar**, **Contacts** and **To do** will have permanent shortcuts to the left in the Notes client:

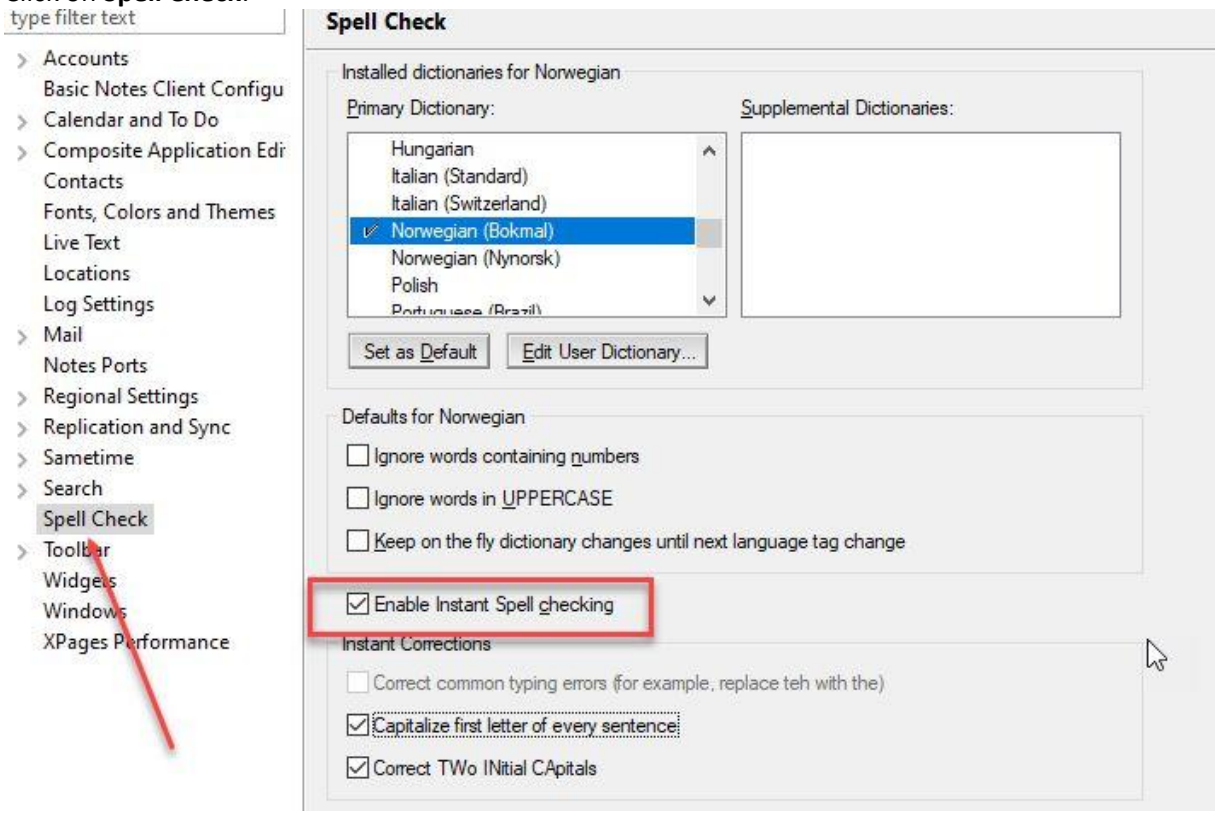
Spell checking

Spell check can be done in any rich text field, both in emails, calendar and to do entries, and documents in other Notes applications.

Turn on spell checking

1. Go to the **File** menu and choose **Preferences**.

2. Click on **Spell Check**:



3. To activate spell checking, click on **Enable Instant Spell** checking.

4. You can choose the default language from the list **Primary Dictionary** (if it is not there, contact your administrator to have it installed), by clicking on it and then clicking on the button **Set as Default**.

5. Set any other settings you want and click **OK**.

Using spell checking

After turning it on, you can spell check text in any rich text field. Notes underlines spelling errors with a red line:

The spell check in Notes is not as advanced as in Outlook but it is still very helpful.

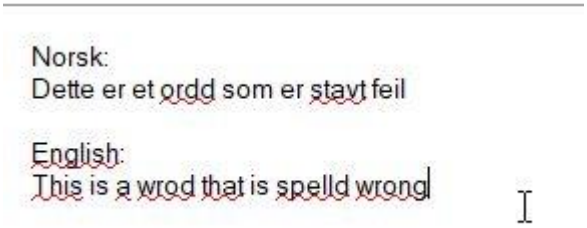
Spell checking several languages at once

Outlook automatically detects what language you write in while spell checking. So if you change from Norwegian to English and both of these languages are installed on your computer, it will change the spell checking to the language you are currently writing in.

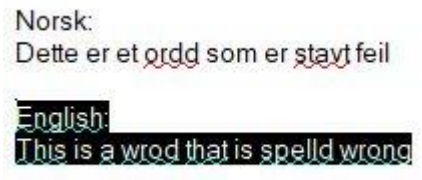
Notes does not do that. If you want to spell check in another language than the default language, you manually change to the language you want to use for spell checking.

Here is how you can spell check more than one language at once in Notes:

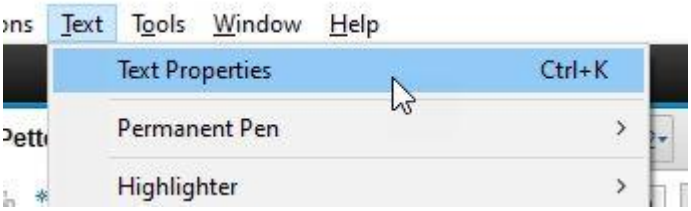
1. Write the text:



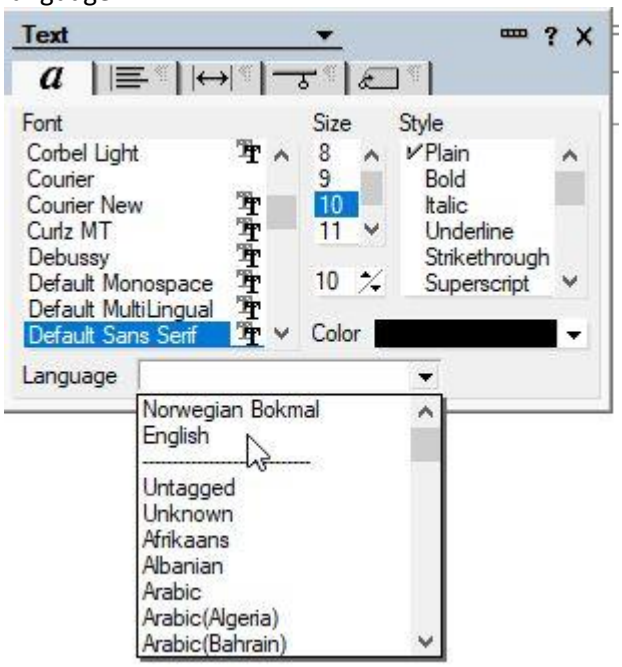
2. Highlight the text you want to spell check in a different language from the default language:



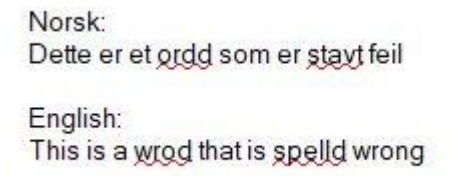
3. Hold down the **CTRL** key on your keyboard and hit the **K** key. Or go to the menu **Text** and choose **Text Properties**:



4. In the popup window, go to the **Language** field at the bottom and choose the desired language:



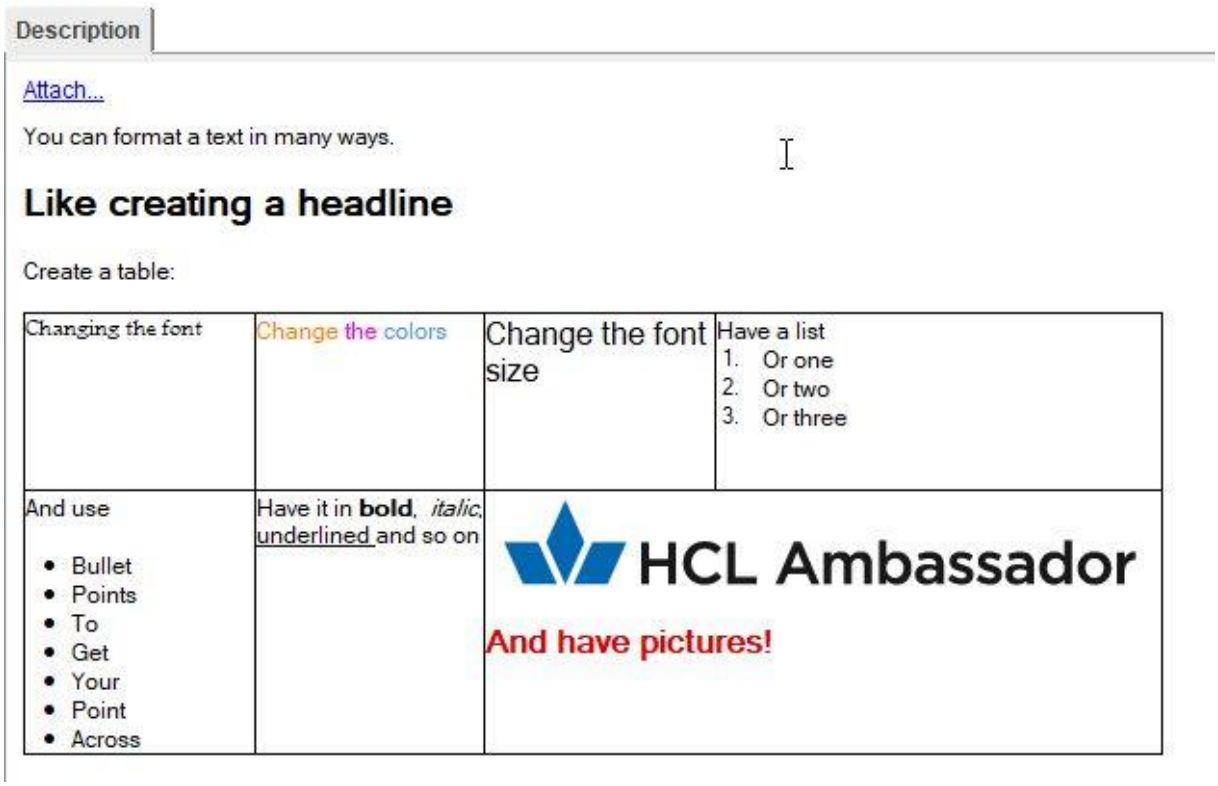
5. The language will now be changed for the highlighted text:



Rich text formatting in HCL Notes

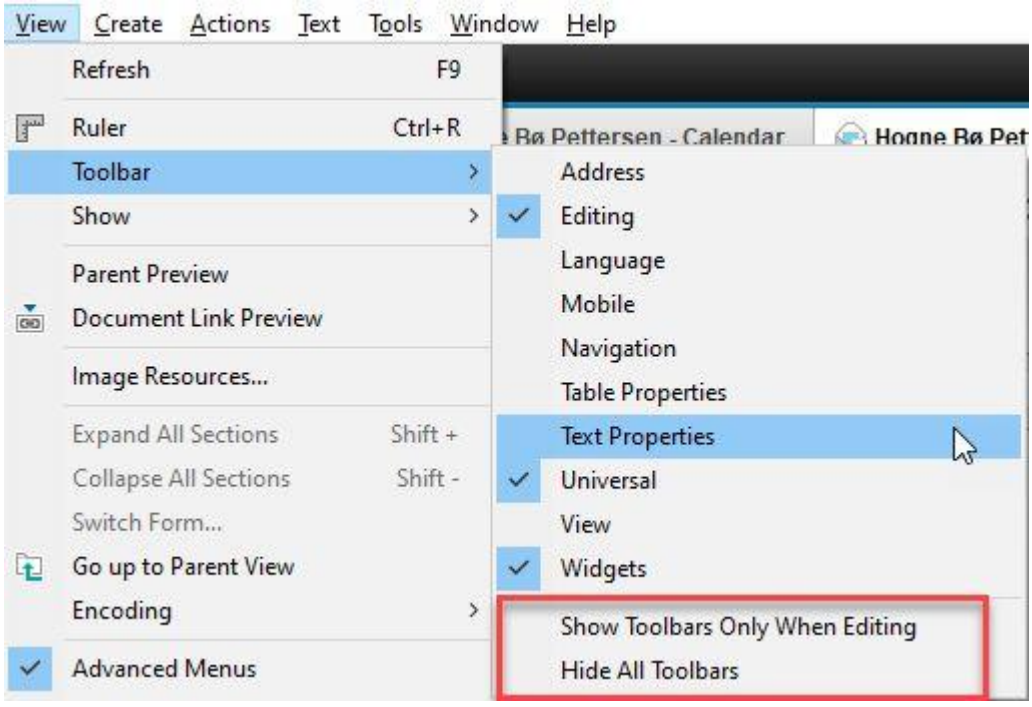
Rich text fields are fields in Notes where you can format the text with colours, photos, tables, different types of fonts and so on. The email body field (where you write the message text) is one example of a Notes rich text field. Rich text fields are also in calendar and To do entries and they can also be in any Notes applications and databases that you use.

You can format the text in a rich text field in most of the ways that you are used to:



There is a toolbar for all these formatting options above the document, under the row showing all your open windows and documents:

If you cannot see this toolbar, it could mean that it's either turned off, or that you aren't in a rich text field right now. You can check this in the menu **View -> Toolbar**:



Make sure **Text Properties** is checked. If you choose **Show Toolbars Only When Editing**, the toolbar will only show up when you are in a rich text field. If **Hide All Toolbars** is checked, all toolbars will be hidden all the time.

Mail

In this section you will learn how to use the mail application in Notes efficiently. You will see how you set your signature, how you can use different signatures, how to spell check, how to flag emails for follow up, how to sort and search your mail folders and more.

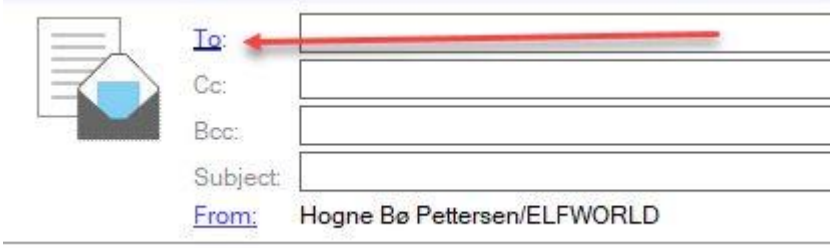
Creating a new email

Creating emails in Notes is very similar to how you do it in Outlook.

1. Click **CTRL** + **M** to create a new email (or click the **New** button if you are in mail folder). You can do this even your mail application is not even open in Notes.

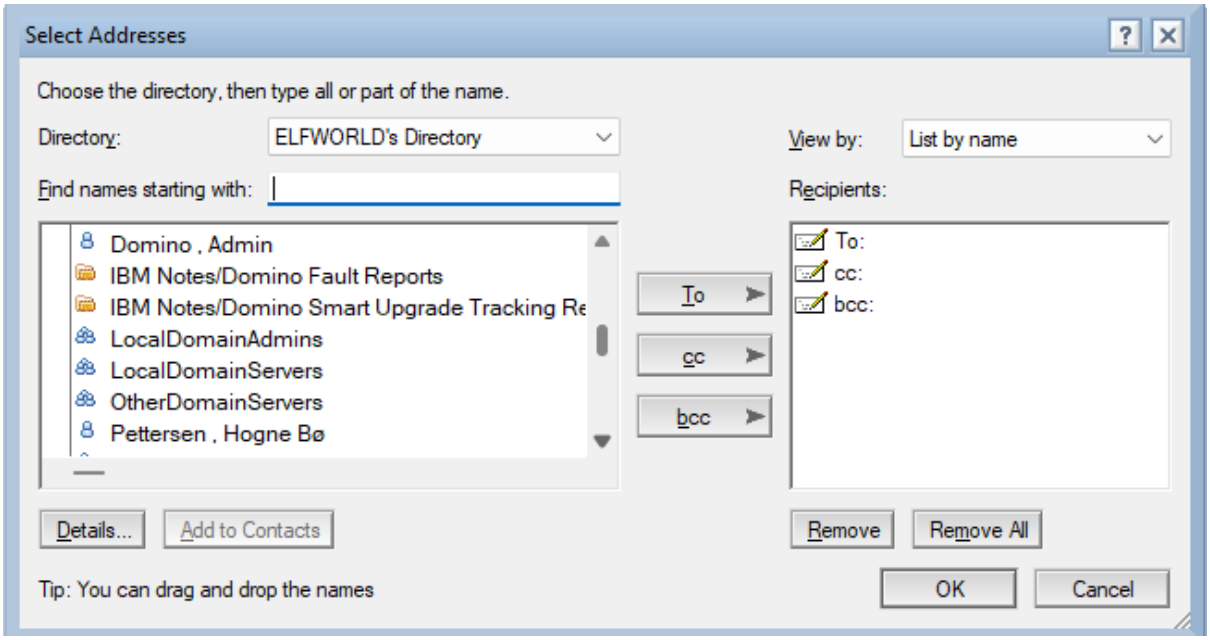
2. To add email addresses, you can simply start typing the name or address in the **To**, **Cc** or **Bcc** field (if the **Bcc** field isn't displayed, click on the button called **Display** above the mail form and choose *Bcc*).

   If the email address or name of the person you are sending the email to doesn't show up

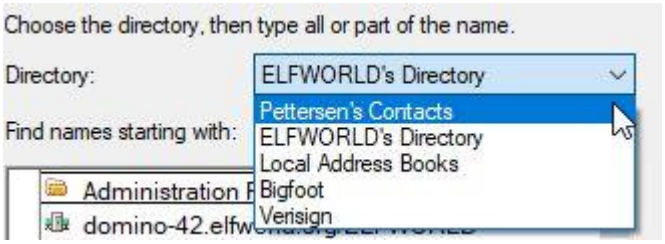


   you can click on **To**:

   a) You now see this popup:



b) You can now select people from your company directory. If you want to add people from your personal Contacts, select your Contacts application in the **Directory** pull down field:



c) You can use the **Find names starting with** field to type the beginning of a person's name to find the person you are looking for if you do not want to scroll through the list.

d) Use the buttons to the right of the address field to add people and addresses to the **To**, **Cc** or **Bcc** fields.

e) Click **OK**.

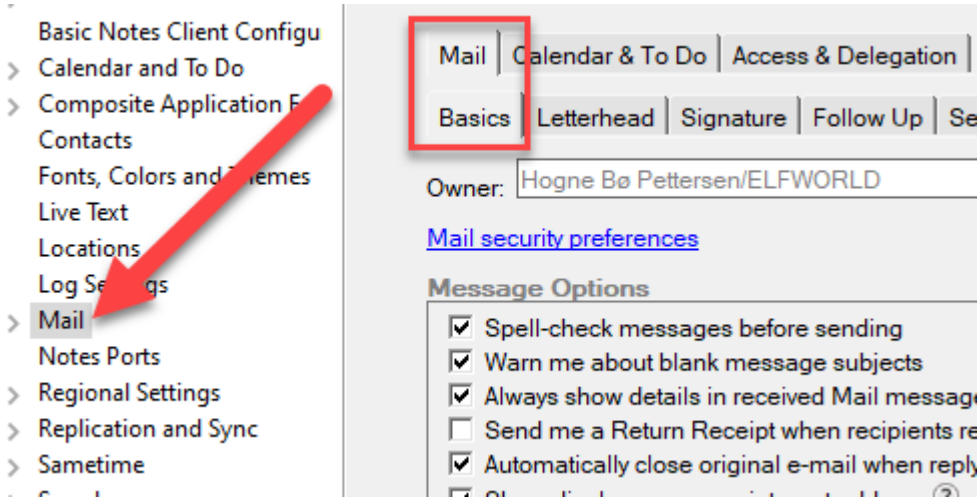
3. You can now write your email. To add attachments, you can simply drag and drop files into the email.

Sorting email folders and views

Newest mail on top or bottom

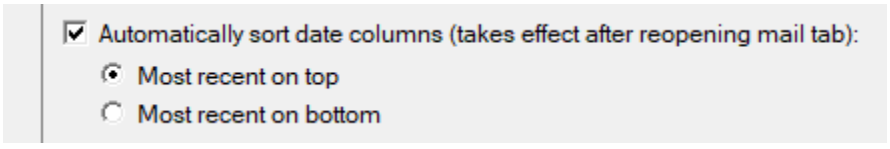
To make sure the newest email is always on top or bottom in your inbox or other mail folders do this:

1. Go to **File -> Preferences** and choose **Mail**:



2. Click the tab **Basics**

3. Scroll to the bottom and choose your setting here:

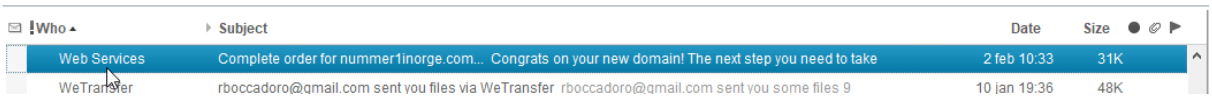


4. Click **OK**

5. Close Mail and re-open it again

Sorting email by column

You can sort your email folders by clicking on the column names at the top:



Click **Who** to sort by sender alphabetically or **Subject** to sort by subject alphabetically. Click once more to go back to the standard sorting

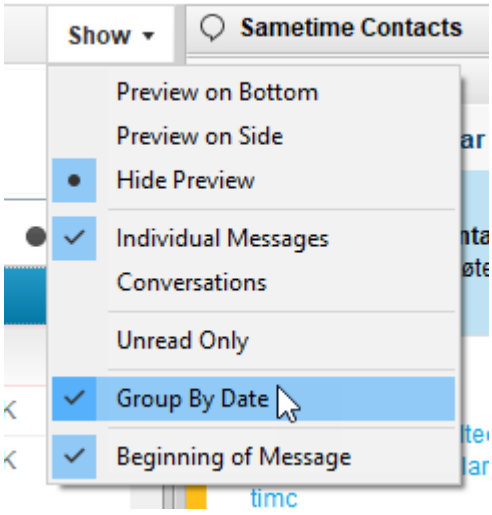
If you click **Date** you switch between having the newest email on top or at the bottom

If you click **Size** once, the largest emails are on top. If you click once more, the largest emails are at the bottom. If you click a third time, the folder goes back to the standard sorting.

Clicking on recipient icon, attachments, or flagging sorts the folder based on these. If you click once more, it goes back to the default sorting.

Group by Date

Just like in Outlook you can group emails by date as well. Click on the **Show** button in the upper right of the folder and choose **Group By Date**:



All emails in that folder will now be grouped like this:

To see the emails under any given date, click on the twisty to the left to expand the list.

If you click the **Date** column to change the sorting, the grouping will reflect this. However, if you click any other sorting, the **Group by Date** sorting is paused until you sort the folder by date again.

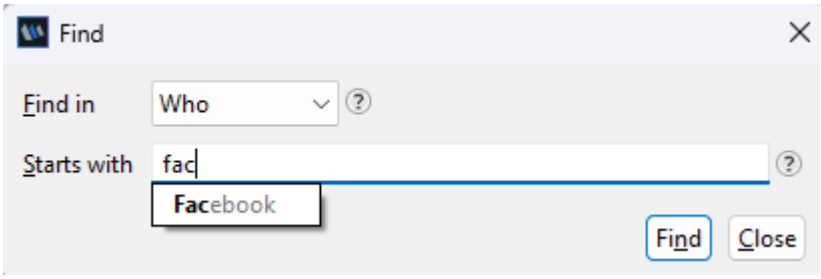
Unread mail only

You can also choose to see unread mails only inside a folder. Click on the **Show** button in the upper right of the folder and choose Unread Only. Read mails are no longer displayed until you turn this off again. All sorting options work.

PS! If you have a preview window, and it's set to mark an email as unread after being previewed, it disappears from the folder when you move to the next email. Do not panic, just turn off **Unread Only**.

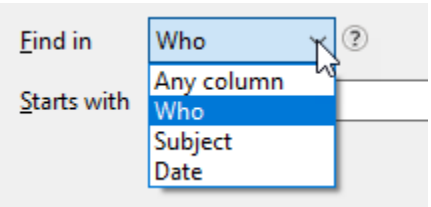
Search for emails

To search for emails in Notes, simply click inside the folder you want to search and start typing:



In the example above the folder was sorted by **Who** when I started typing. You can see this by the fact that *Who* is listed in the **Find** in field.

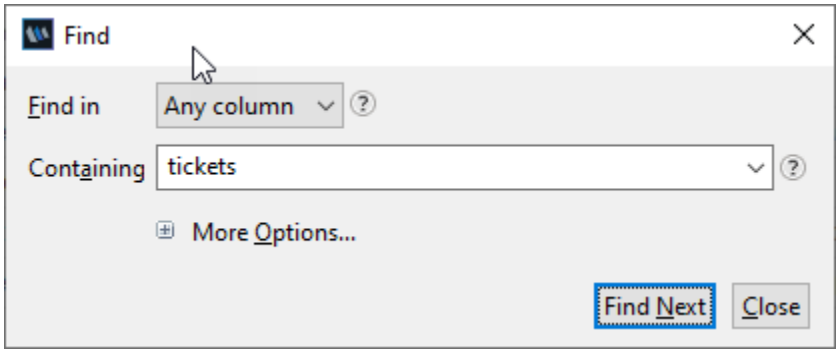
You can change this by clicking on the pulldown list:



If you change this to **Subject** or **Date**, the folder is re-sorted in the background.

After choosing the column you want to search, you simply write what you want to search for and click on the **Find** button. If any email has your search expression in the start of the selected column's value, it will take you to that email.

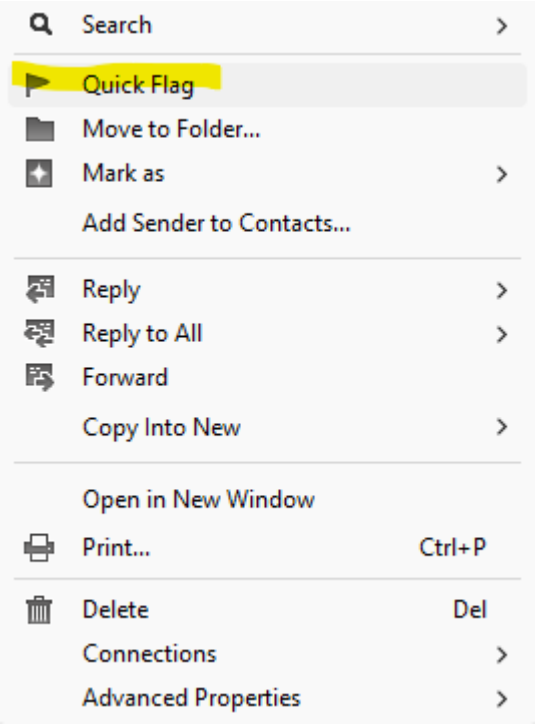
If you choose *Any column* you can search for any expression in any column. It does not even have to start with that expression:



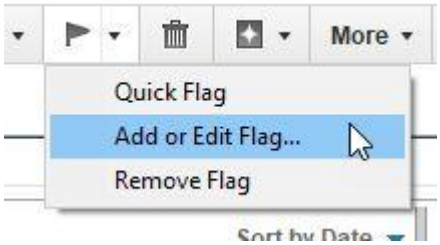
The example above finds any email containing the word *tickets* in either **Who** or **Subject**, even if the column value started with another word. Example: It would find both *Tickets for you*, *Your tickets* and *Bus tickets*.

Flag an email for follow up

You can flag an email for follow up simply by right clicking on the email and selecting **Quick Flag**:



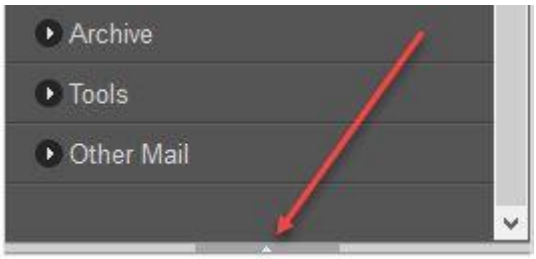
You can also mark one or more emails and then hit the flagging button above the folder:



Under **Add or Edit Flag...** you can set due dates and a lot of other settings. Read all about flagging of emails in [this blog posting].

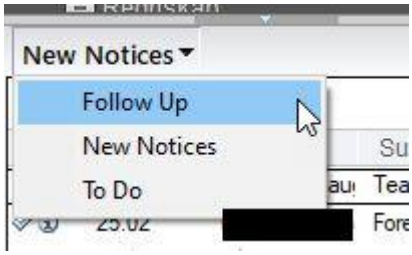
You can see a view of all your flagged emails if you click on **Follow Up** in the left side menu in your email. You can also see them constantly listed in the left side menu by scrolling down to the bottom of the left side menu.

Click on the small arrow:



PS! If you have Notes V11 or newer, you do not need to look for this small arrow. You can just expand the menu item called **Show Mini View**.

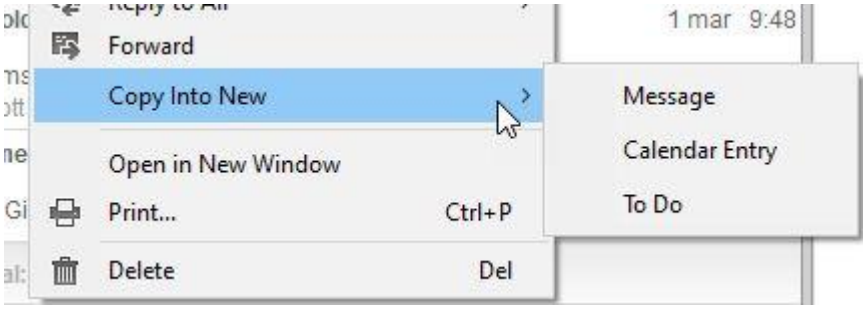
After clicking on the arrow, you can choose **Follow Up** in the pulldown menu that appears:



Now the list of emails you have flagged will be displayed in the left menu.

Turn an email into a meeting or To do

To turn an email into a calendar entry, such as a meeting invite, or a To do, right click the email and choose **Copy Into New**:

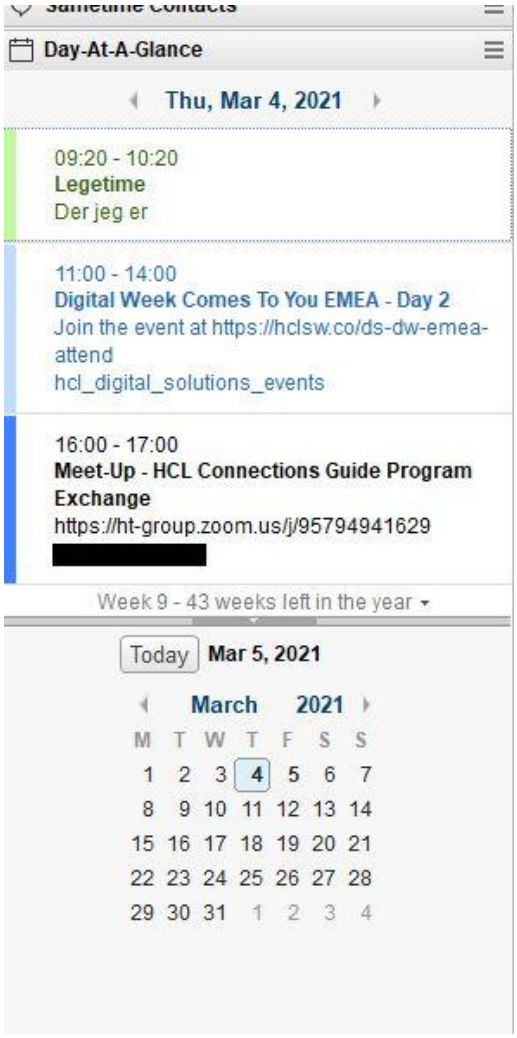


If you click **Calendar Entry** you can choose what kind of calendar entry it should be. A pop up appears, and if you select *Meeting*, it prepares a new meeting document. Notes automatically populates the invite fields with all the people in the **To**, **Cc** and **Bcc** fields.

See your calendar while using your email

In Outlook you must actively choose to display your calendar in the right sidebar. In Notes, it's always there for you, and unlike Outlook it also shows entries from any imported calendars (Outlook only displays your main calendar).

Simply click **Day at a Glance** in the right sidebar panel to see all your appointments for today:



You can click the arrows to navigate from one day to the next, and you can navigate through the months in the calendar underneath the calendar entries.

To get back to today, click the **Today** button.

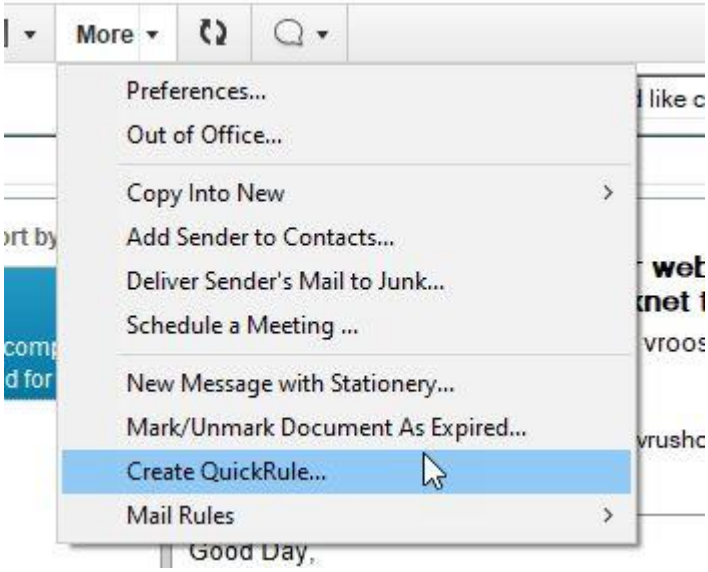
PS! If the right sidebar panel isn't visible, just click **CTRL** + **9** on the keyboard.

Quick rules

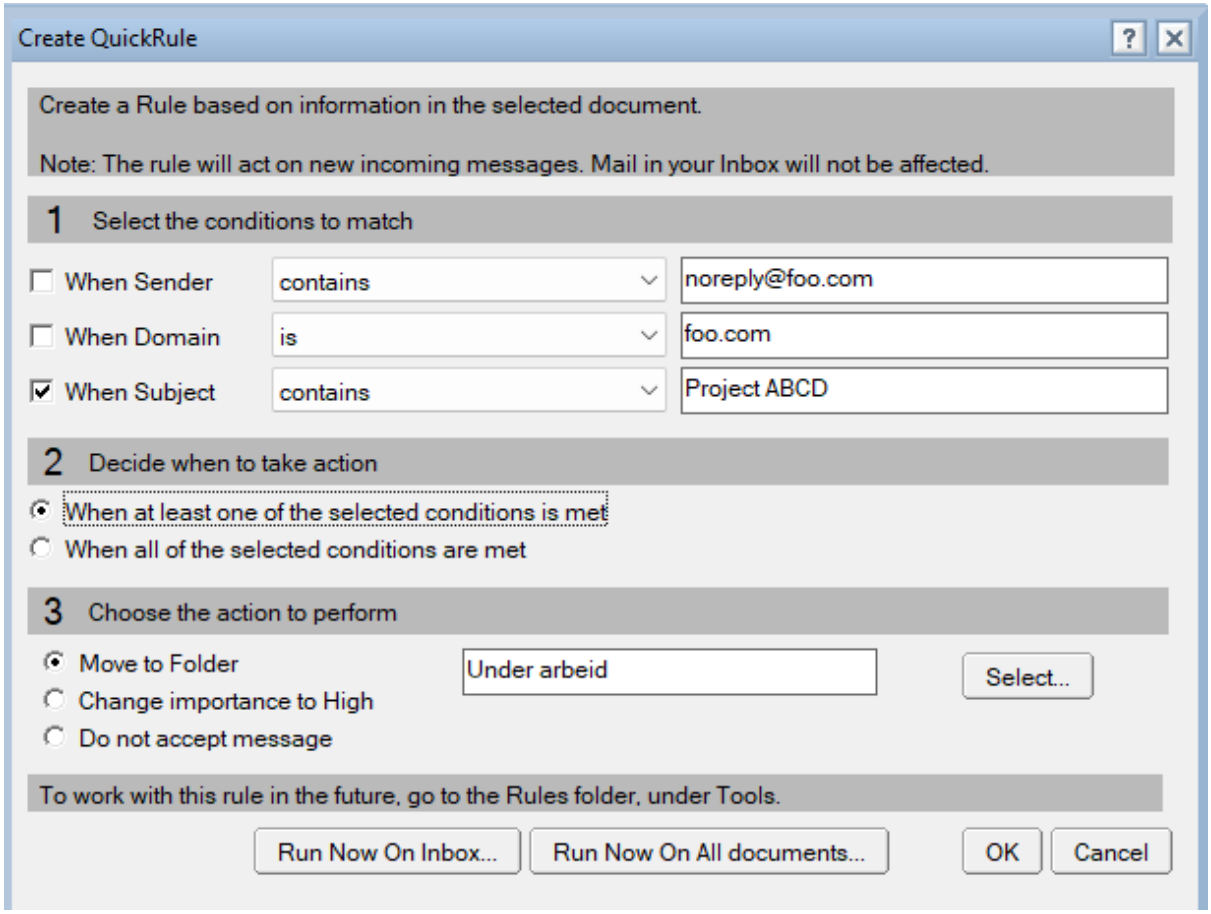
Like in Outlook, you can create quick rules based on the currently selected email:

1. Click the email you want to create a rule from.

2. Click the **More** button above the folder and choose **Create Quick Rule...**:



3. You will then get a popup window where you can choose what should trigger the rule:



In the example above I have set it to the following:
Under **1** I have set the condition to match the displayed Subject.

Under **2** I have chosen that at least one of the selected conditions under 1 should be met.

This is not necessary here since I have only selected one condition, but you do have the option for selecting more than one.

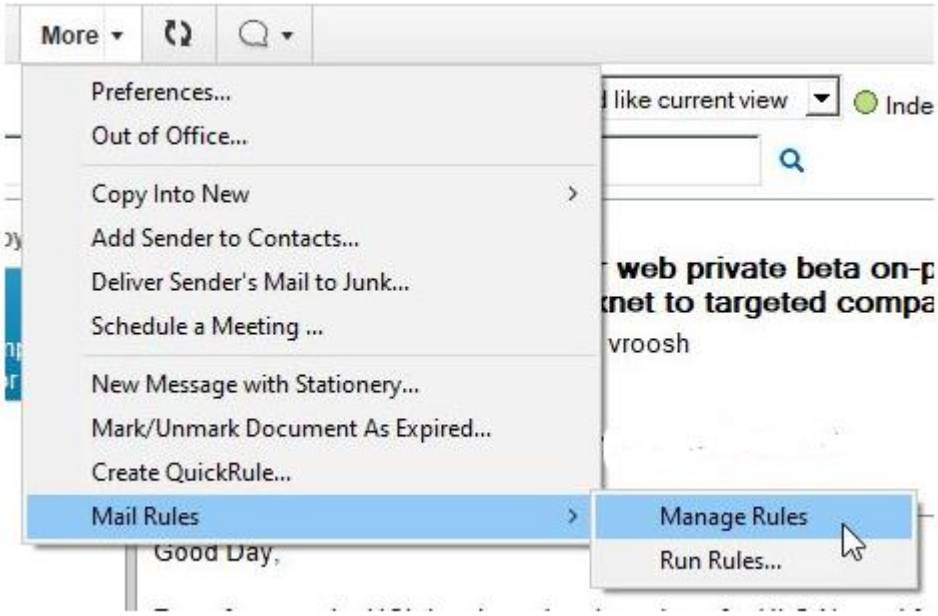
Under **3** I have selected that emails matching this rule should be automatically moved to the folder *Under arbeid*. You choose a folder by clicking on **Select...** and you can also create new folders in the popup window that will appear

4. ***Bonus tip if you have Notes V10 or newer***: If you want this rule to be triggered on emails that already are in your inbox, you click on **Run Now on Inbox...**.If you want it to trigger on matching emails no matter what folder they are in you click on **Run Now On All documents...**.

5. Click on **OK** when finished

From now on all emails with that subject are automatically moved to the selected folder.

You can administer your rules, as well as create even more complex rules, by clicking on the **More** button and then selecting **Mail Rules -> Manage Rules**:



Mail signature

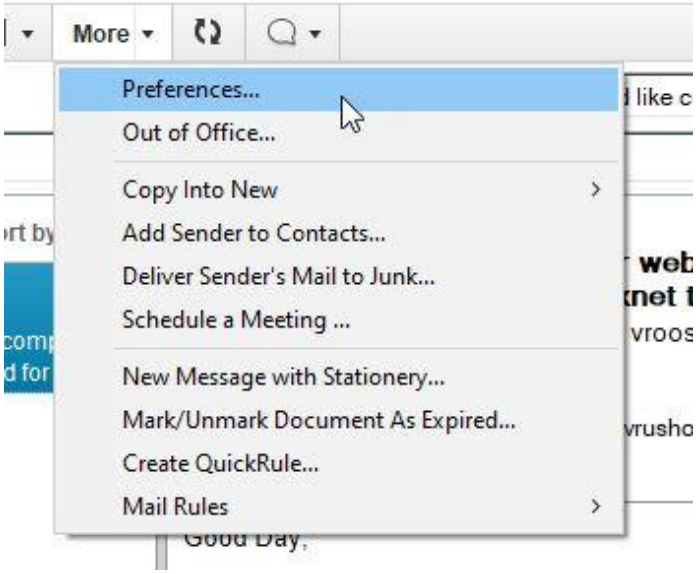
You can create email signatures that are automatically added to the bottom of your emails. You can set up different signatures for whether it's a new email, reply or pure text email.

Creating the signature

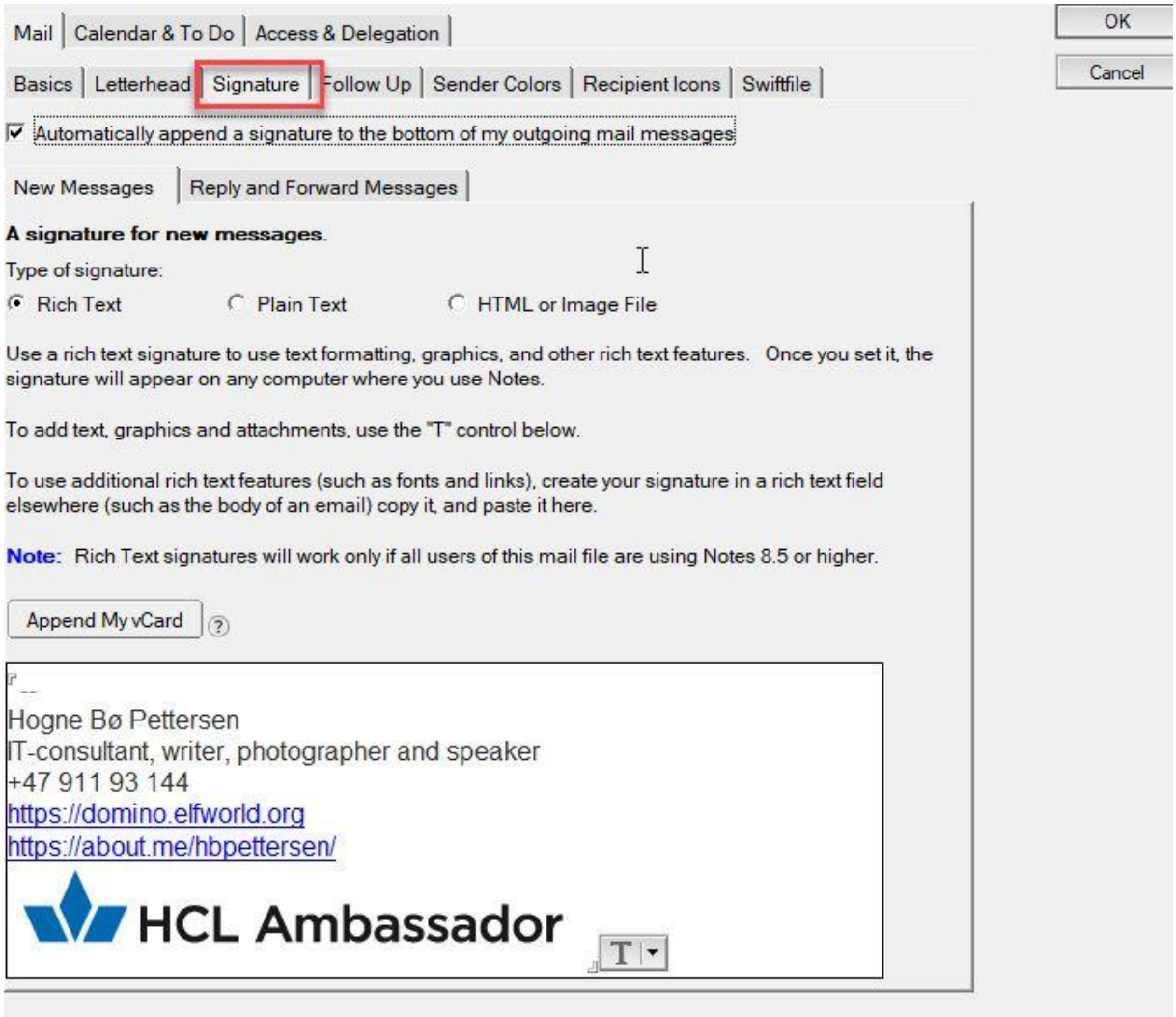
You create your email signature like this:

1. Open any folder in your email.

2. Click the **More** button above the folder and select **Preferences...**:



3. You will now be taken to the **Mail** preferences window. Click on the **Signature** tab:



4. Check **Automatically append a signature to the bottom of my outgoing mail messages** to make sure the signature is always added to your emails.

You have the following signature types:

Rich Text: Here you can add formatted text, hypertext links and images (like in the image above).

Plain Text: Here you can add nothing but a pure text signature. This will be added whenever you send an email as pure text, or you manually select it before sending an email.

HTML Image or file: If you choose this, you will be asked to upload an image file or an HTML (web) file.

5. Some people like to have a different signature when they reply to, or forward, a message. You can therefore click on the tab **Reply and Forward Messages**, where you will get these options:

Default: If you choose this, it will use the same signature you set for **New Messages**

Rich Text: If you choose this you get a rich text field where you can create a totally different signature with formatted text, hypertext links and images

Plain Text: If you choose this you can create a different pure text signature

HTML or Image File: You can upload a different image or HTML file to use as a reply or forward signature

6. Click **OK** when finished

The signature is now always added to your emails.

Different signatures

In Outlook you can have different signatures for different purposes and email accounts. This is not possible in Notes, but what you can do is create image or HTML files with alternative signatures. Add them to a folder on your PC or network drive.

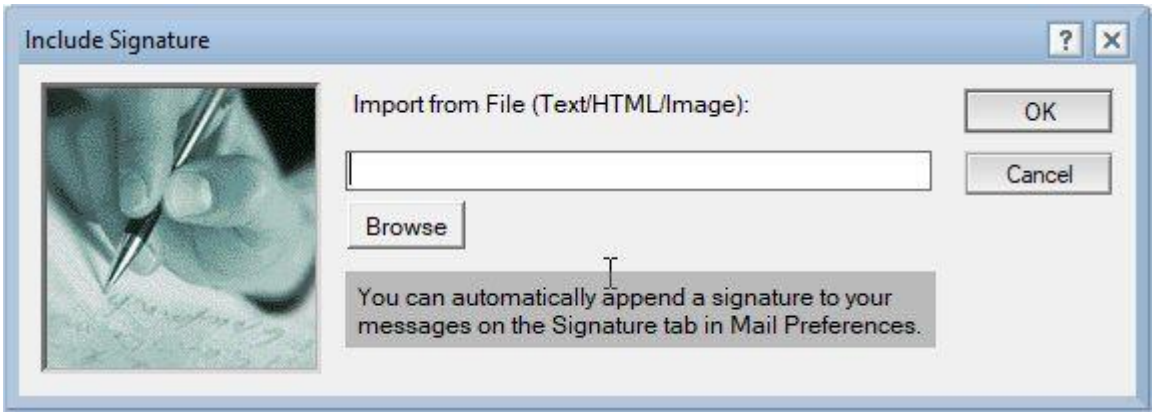
If you want to use an alternative signature, you do it like this:

1. Create a new email or reply to an email.

2. Place your cursor just above your standard signature (***this is important!***).

3. Click the **Signature** button and choose **New Signature from File...**:

4. Your standard signature will now be removed from the email, and you will see this popup window:



5. Click **Browse** to find the signature file.

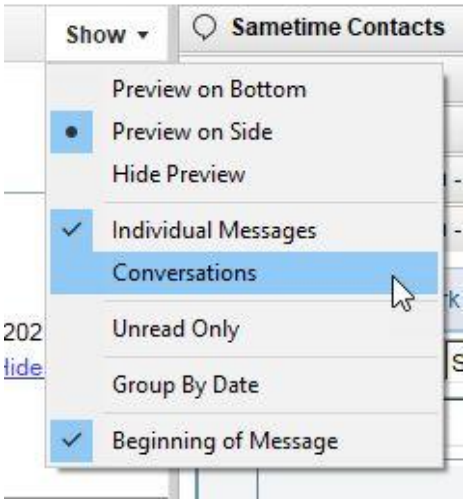
6. Click on **OK**.

7. The signature will now be added to your email, instead of the standard one.

Mail conversations

Just like in Outlook, you can in Notes choose whether you want the emails in a folder to be displayed as conversation threads.

You do this by clicking on the **Show** button in the upper right corner of the folder, and choose **Conversations**:



Notes does have a functionality here that Outlook does not have.

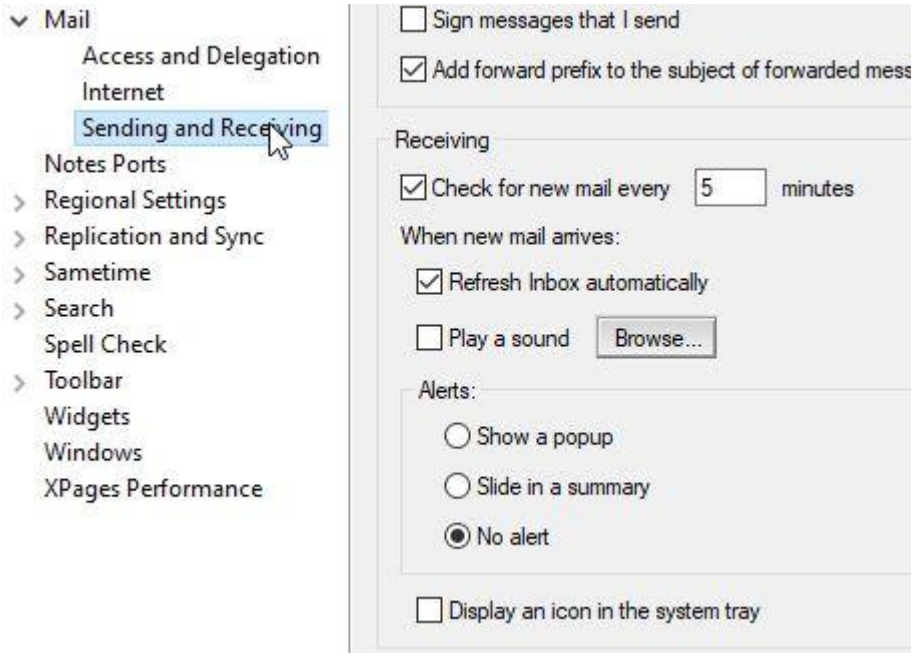
Whenever you click on an email that is a part of a conversation thread, even if the entire folder is set to display *Individual Messages*, you still get a twisty to the left of the email:

If you click this, you can still see the entire conversation, even if the folder is set to display individual messages only.

Notifications

Like in Outlook a sound plays, and popup notifications and/or slide in summaries, and an envelope icon appear in the taskbar when a new email arrives.

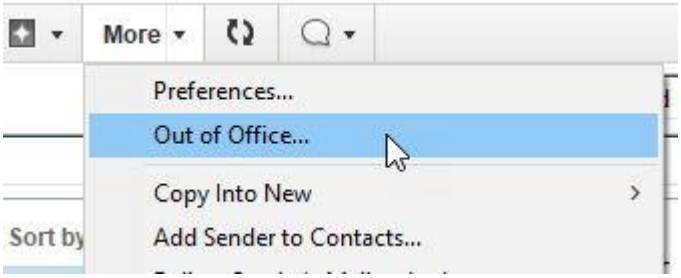
You can control these notifications by clicking on **File -> Preferences** and then expand **Mail** and choose **Sending and Receiving**. Under the section called **Receiving** you can choose what notifications, if any, you want:



Out of office

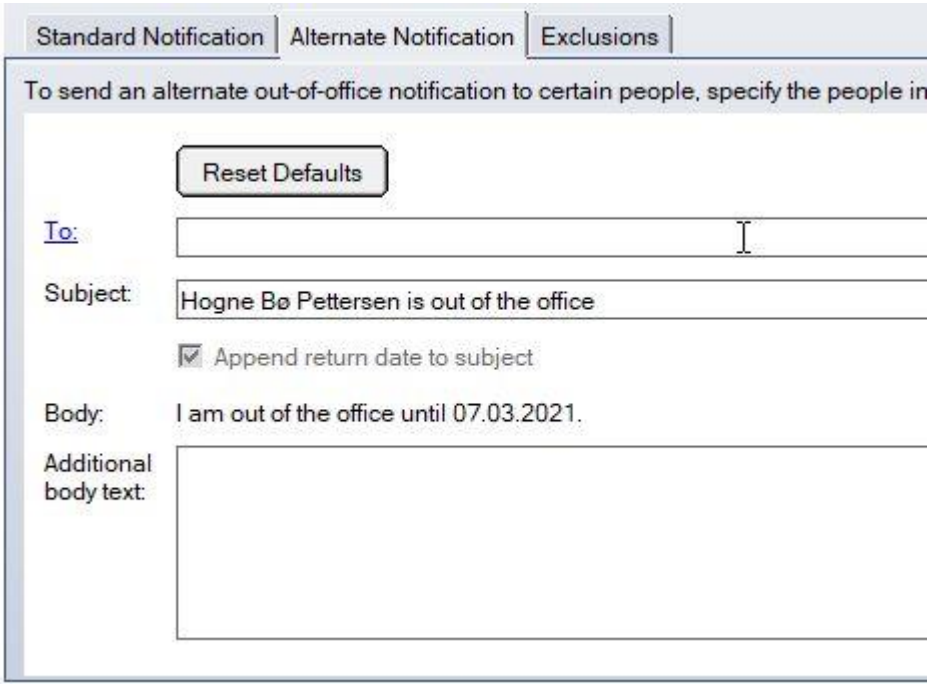
Like Outlook, Notes gives you the ability to set up an automatic reply that should go out to people who send you an email. In Outlook it's called **Automatic Replies**, while in Notes it's called **Out of Office**:

1. Click the **More** button above the folder and choose **Out of Office...**:



2. You now get the **Out of Office** form in Notes. Here you can set the date for when you are leaving, whether you are available for meetings (people will see you as busy when checking your schedule if you choose not to be), a subject for the automatic reply and the mail message itself.

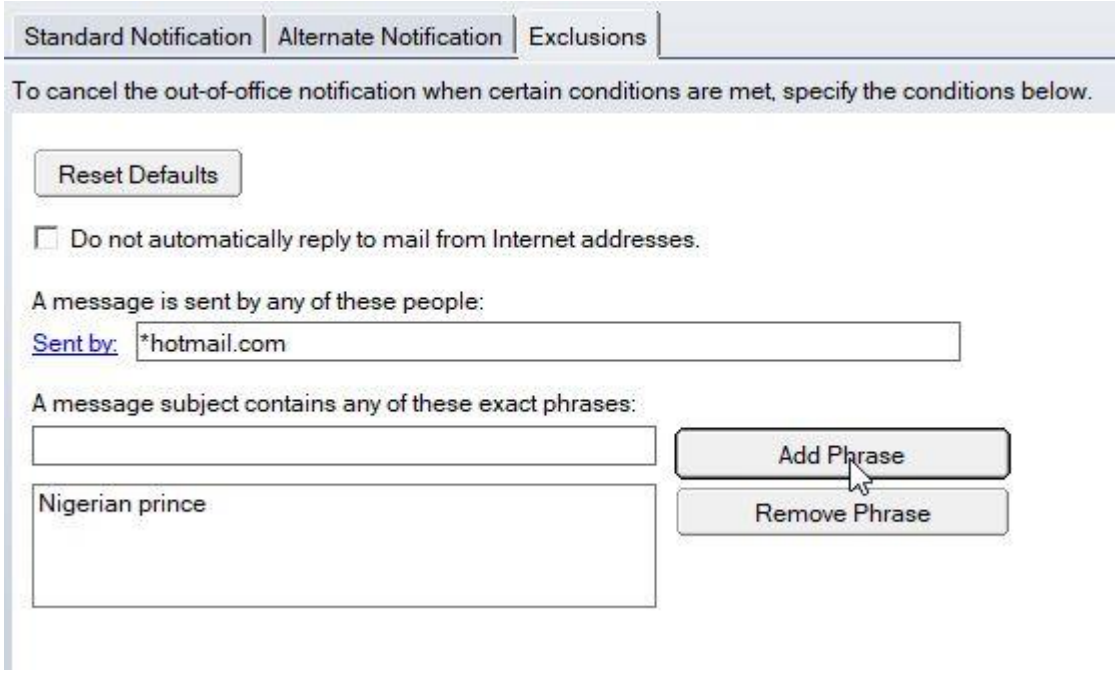
3. You can also set an **Alternate notification**:



By clicking on **To**, you can choose people from your personal contact list, as well as the corporate directory, who should receive an alternate notification.

You can also add emails directly in the field to the right of the **To** function. You then set an alternate subject and message text.

4. You can also set up who should ***not*** get an Out of Office message from you under **Exclusions**:



   In this example I have set that any email sent from *hotmail.com* you should not get an automatic reply. I have also added that any message containing the phrase *Nigerian prince* in the subject should not get a reply either. You add a phrase by entering it in the field **A message subject contains any of these exact phrases** and then click on **Add Phrase**. To remove a phrase, click on it in the big square, and then click on **Remove Phrase**.

5. When you are finished, you can click **Enable and Close** at the top to activate the Out of Office agent. If you have set it to start at a later date, it won't start sending out automatic replies until the selected date and time is reached. If you click **Save and Close**, you only save this as a draft, and it will not be activated.

Spellchecking your email

You learned how to turn on and off spellchecking in Notes in the section ***Notes client settings and functions*** above, as well as how to use it. In this section you will learn the extra functions Notes has for spellchecking emails.

Spellchecking while writing

Check the spell-checking sub sections in the ***Notes client settings and functions*** section above

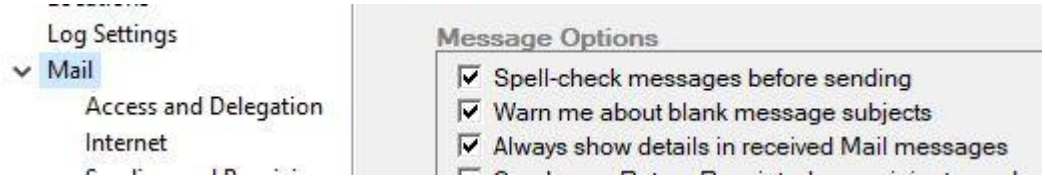
Spell-checking before sending

You can also do a last spell check before sending the email. It will also spell check the **Subject** line.

To turn on this feature:

1. Go to **File -> Preferences.**

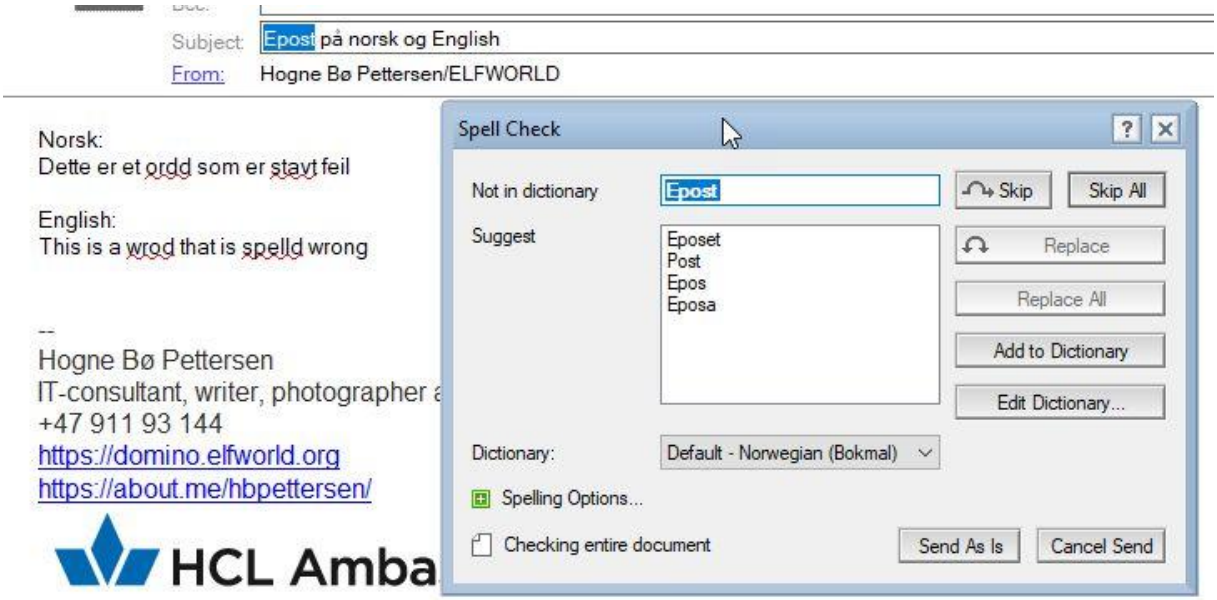
2. Choose **Mail** in the preferences window:



3. Make sure the *Spell-check messages before sending* option is checked under **Message Options**.

4. Click **OK**.

When you now write an email and hit send, Notes spell checks the **Subject** line and the main text of the message:



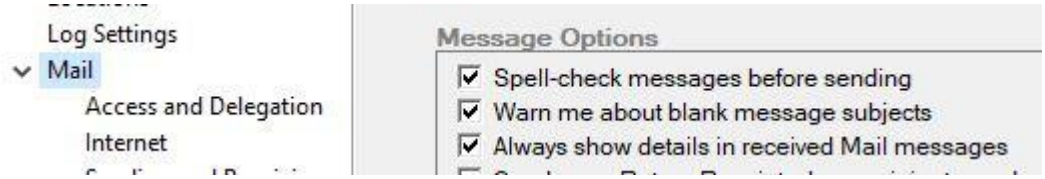
- You can choose which language you want to use as **Dictionary**.
- You can skip a word and jump to the next or you can skip all by just clicking **Send As Is**.
- You can choose a suggested word from the list, or type your own correction, and then click **Replace**. Notes jumps to the next misspelled word.
- You can add a word to the **Dictionary** so that Notes won't claim that it's misspelled the next time.
- You can click **Spelling Options...** to tell Notes to ignore words in uppercase and with numbers.

When all errors are corrected, Notes sends the email. If you want to skip over spell checking, you can click **Send As Is**.

Prevent sending emails with blank Subject line

1. Go to **File -> Preferences**.

2. Choose **Mail** in the preferences window:



3. Make sure the *Warn me about blank message subjects* option is checked under **Message Options**.

4. Click **OK**.

Notes now warns you if you try to send an email without a subject line

Formatting email text

Check the ***Rich text formatting in HCL Notes*** sub section in the ***Notes client settings and functions*** section above on how to format text in an email.

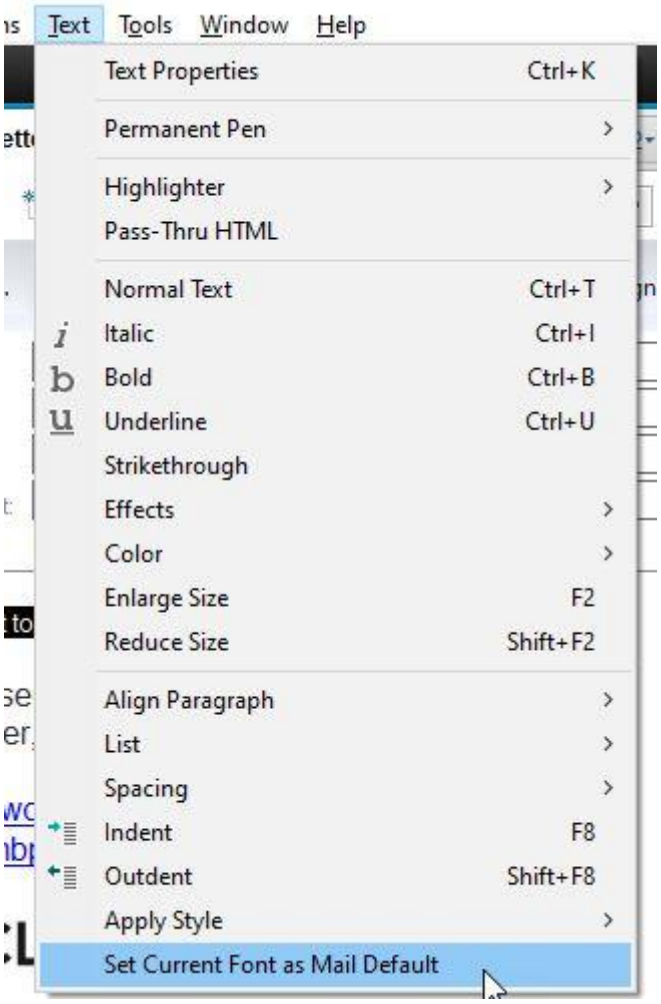
Set default email font

To change the default font in email:

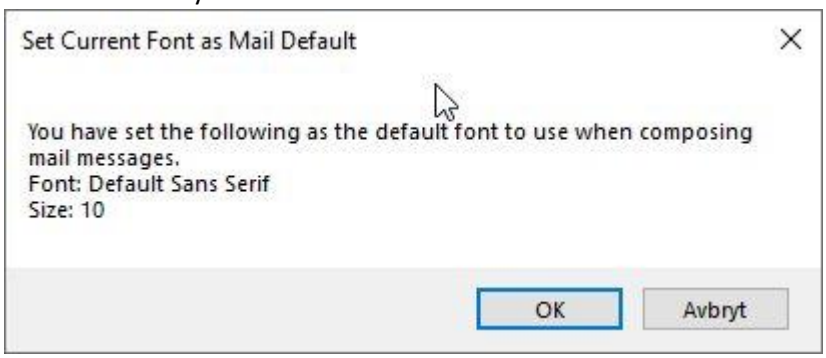
1. Write a text with the font that you want to set as a standard font.

2. Highlight it:

3. Go to the **Text** menu and choose **Set Current Font as Mail Default**:



4. Notes confirms your choice:



5. Click **OK**.

Now Notes uses this font as your default font in emails.

Add another email account

Unfortunately, you cannot add another email account to Notes like you can in Outlook.

What you can do is create group mail applications that you can open like you open your own email. You can also be given access to other people's email, which you then can open like your own mail application.

However, are opened as separate Notes applications or databases in the Notes client, and not collected in the left side menu in your mail, like in Outlook.

Calendar

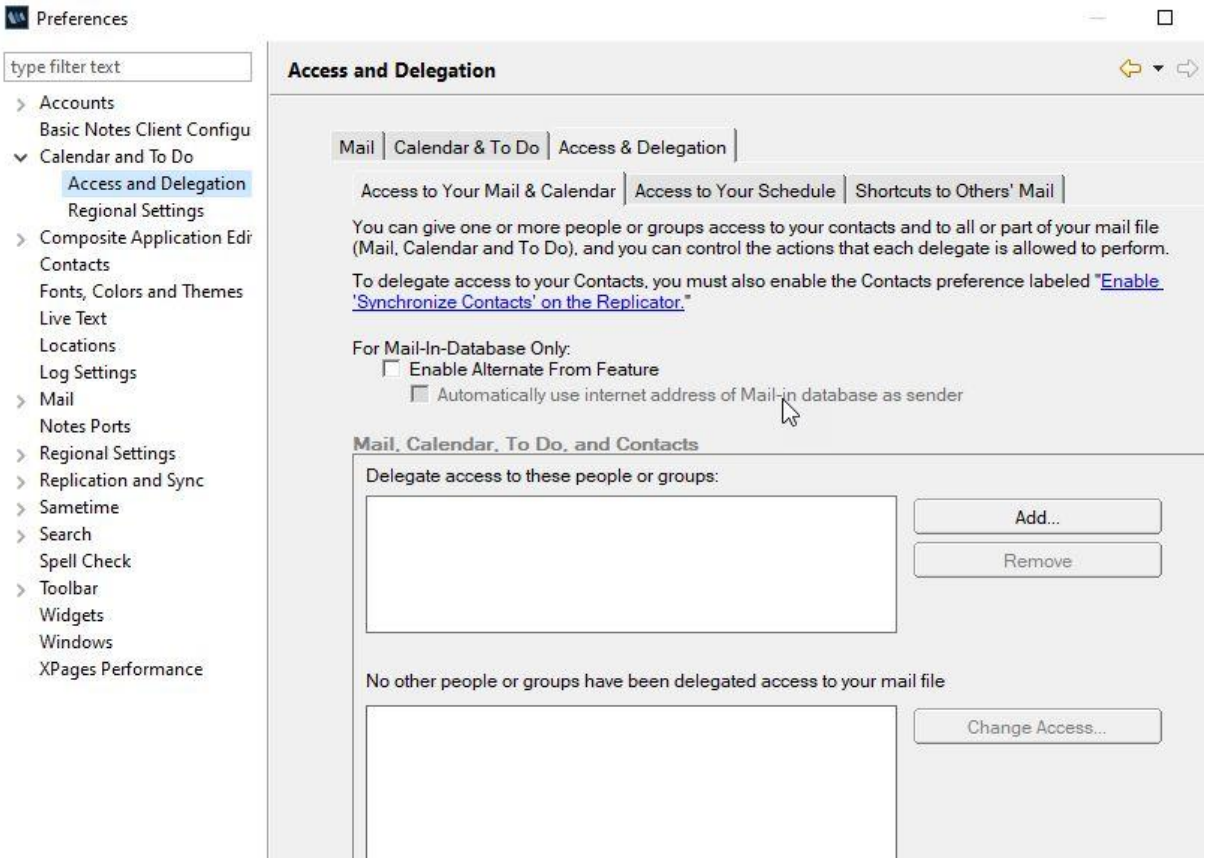
Notes has a very good calendar that you can use to schedule meetings, appointments, and reminders. In this section you will learn how to get the most out of the Notes calendar so that you can set up your work schedule in the most effective way.

Share your calendar

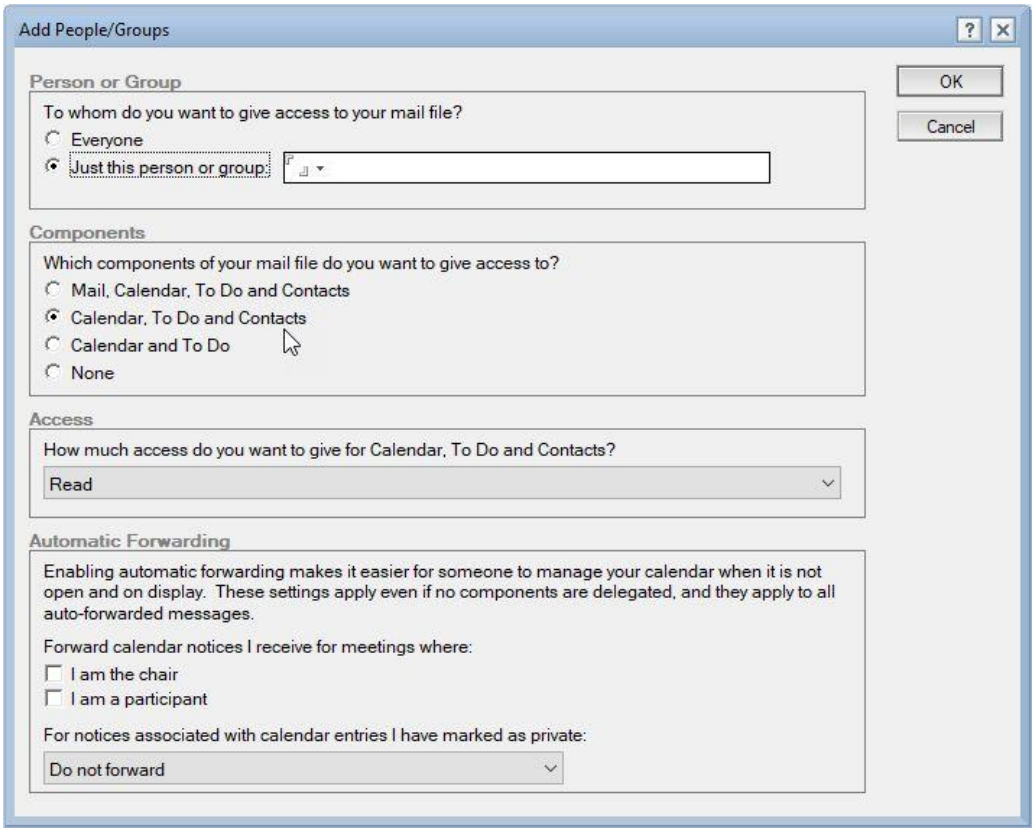
You can share your calendar with other users.

1. Go to the menu **File** and choose **Preferences**.

2. Click **Calendar** and **To do** and then **Access and Delegation**:



3. Click **Add...**:



   Under **Person or Group** choose if everyone should have access or just the people or groups that you add by clicking in the field to the right of *Just this person or group*.

   Under **Components** select what they should have access to.

   Under **Access** choose if they only should be able to read your calendar, or if they should also be given full access (there's nothing in between).

4. Click **OK** when finished.

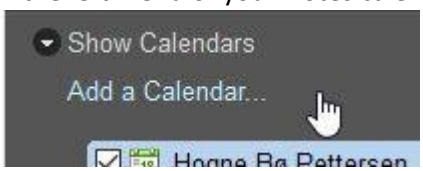
5. You will now see the person and how much access they have in the list under **Delegate access to these people or groups**.

You can later change the access via the **Change Access...** button or remove the person from the access list by clicking on **Remove**

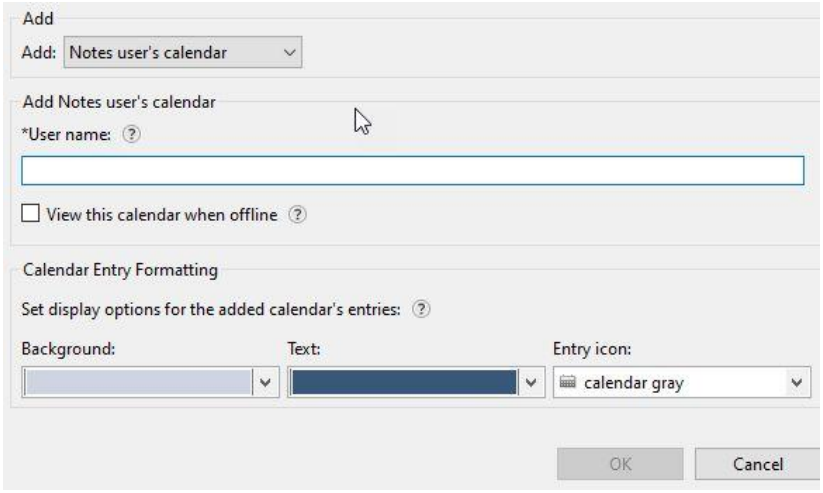
Add a shared calendar to your calendar

To add a shared calendar:

1. In the left menu of your Notes calendar, expand **Show Calendars** and click **Add a calendar...**:



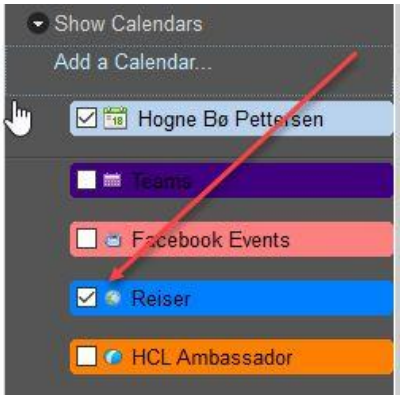
2. This window appears:



3. You can now search for a Notes user and then choose the colours you want this user's calendar entries to be displayed with.

4. Click **OK** when finished.

5. To toggle on and off this users calendar, check and uncheck the calendar from the list of your calendars:

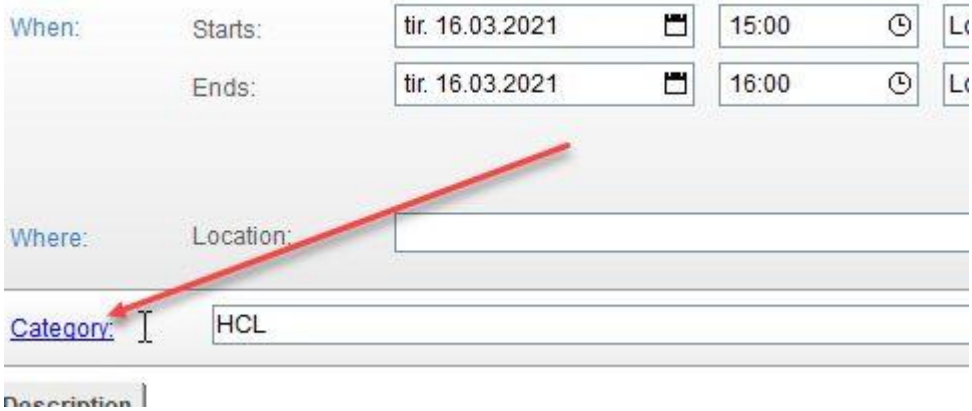


Colour code calendar entries

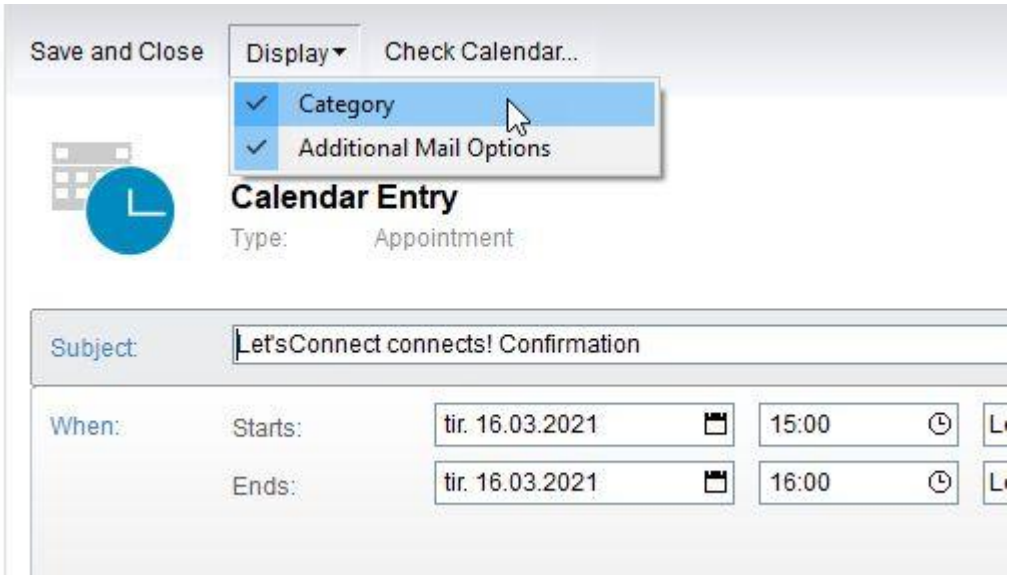
Just like in Outlook, you can also colour code your calendar entries. This means that calendar entries matching certain criteria that you set will be colorised so that you can differentiate the various appointments with a quick glance.

You do this by adding a category to a calendar entry:

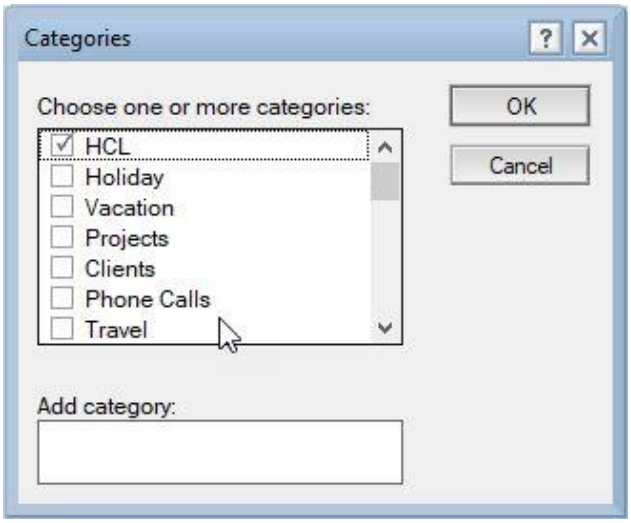
1. When you create a calendar entry, like a meeting, you can add a category by clicking here:



If the **Category** option is not there, click the button **Display** and choose **Category**:



2. After clicking **Category**, you see a list of all your categories in a popup window:



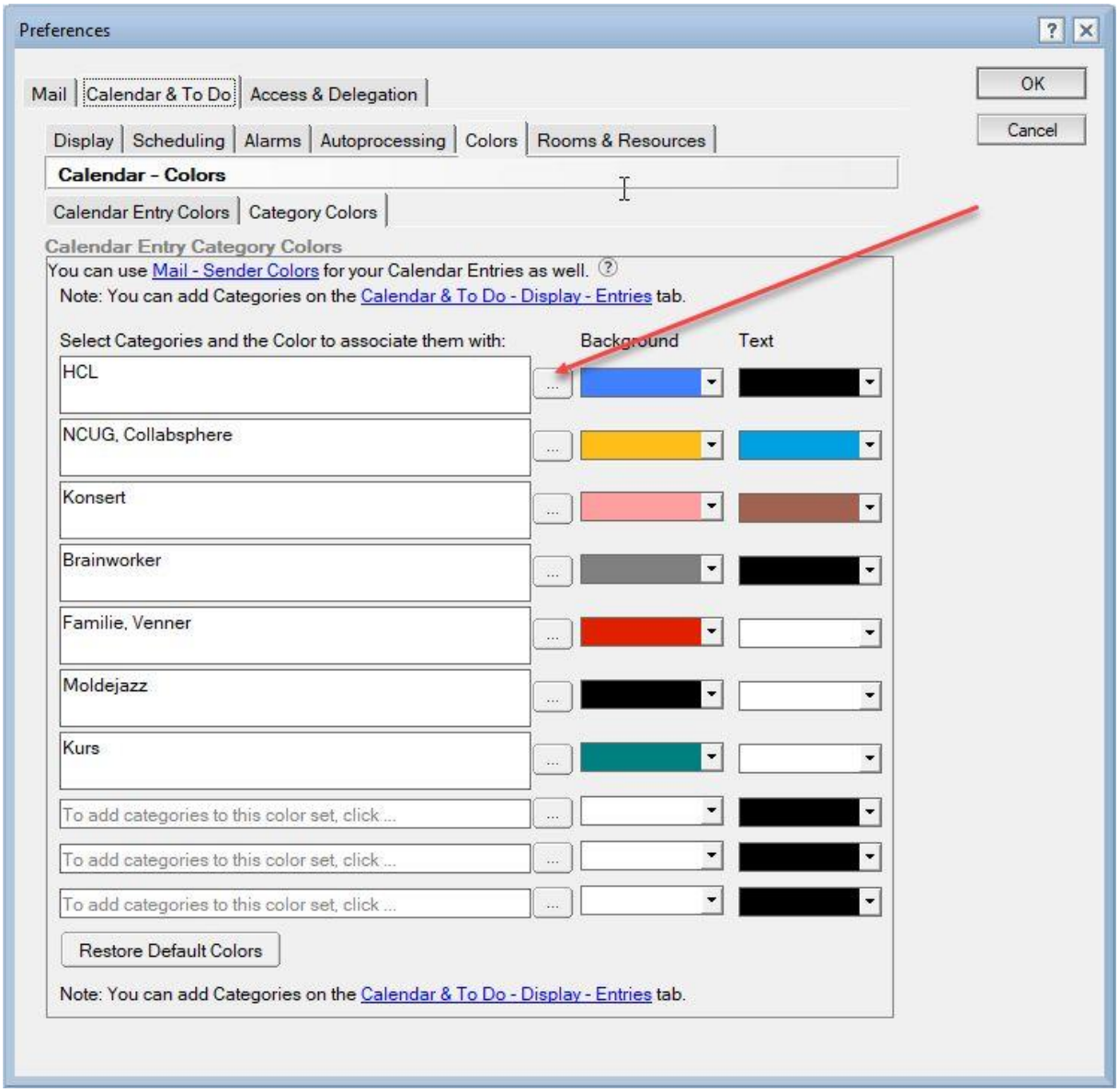
3. You can add more than one category by checking the checkboxes next to the category title. To add a new category, simply type it in the **Add category** field and hit the Enter key on your

keyboard.

4. Click **OK**.

5. To the right of the Category field, you find an option called **Assign Colors...**:

6. Click it and this popup appears:

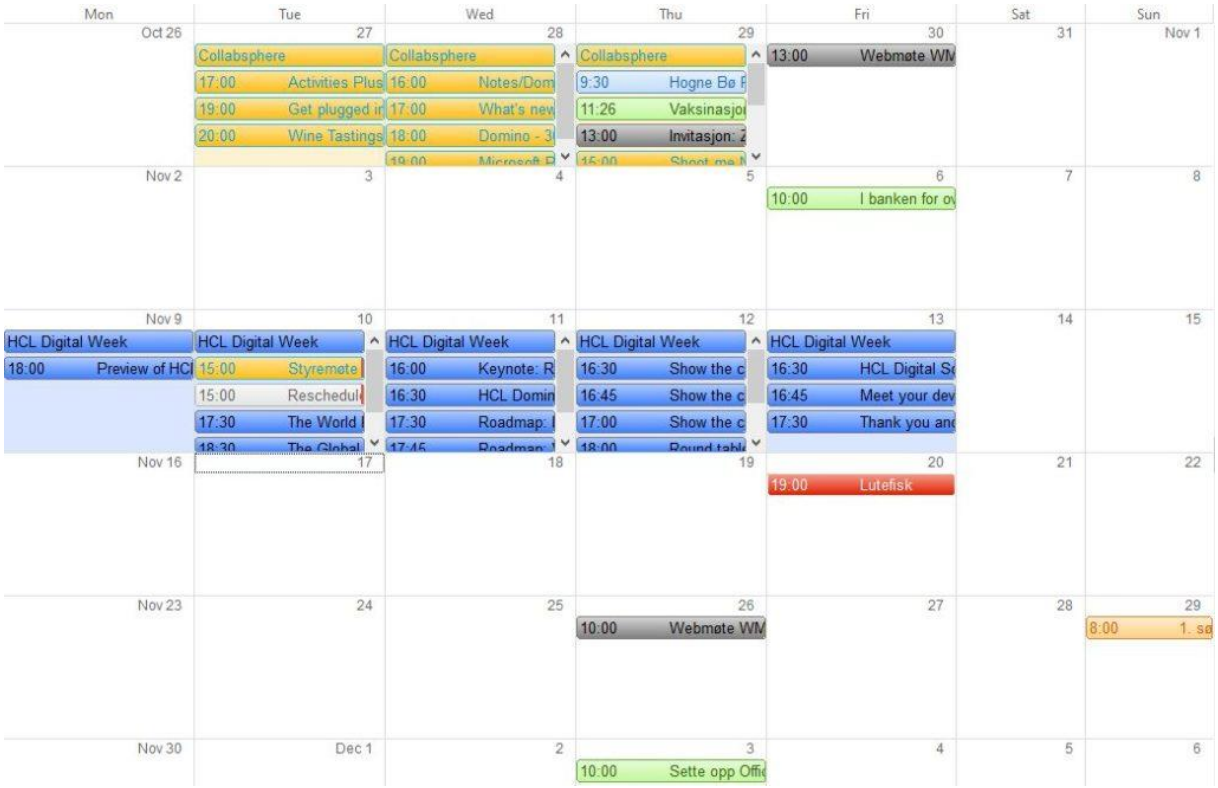


7. Click one of the buttons that looks like the button the arrow in the illustration above is pointing at to select the category or categories you want to give a certain colour.

8. Then choose the background colour and text colour for this category.

9. Click **OK** when finished.

The calendar is immediately updated with this colour. Here is an example of a calendar with colour coded entries:

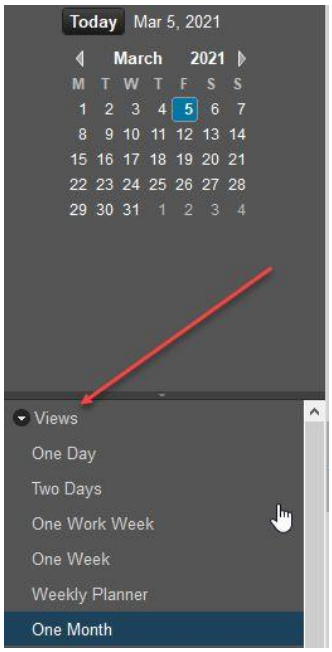


Change calendar views

In Outlook you choose in the top ribbon menu if you want to see a calendar displayed as a day, week, work week, month or as a schedule.

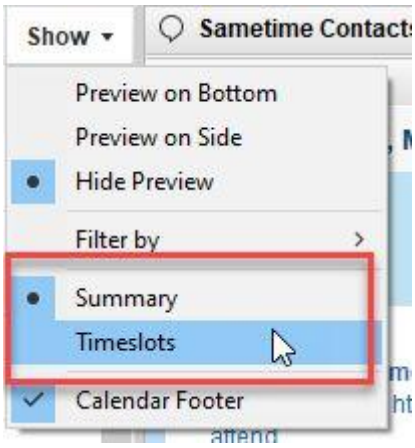
Period views

In Notes you use the left side menu item called **Views** to switch between a day, two days, a work week, a week, a month, or weekly planner:

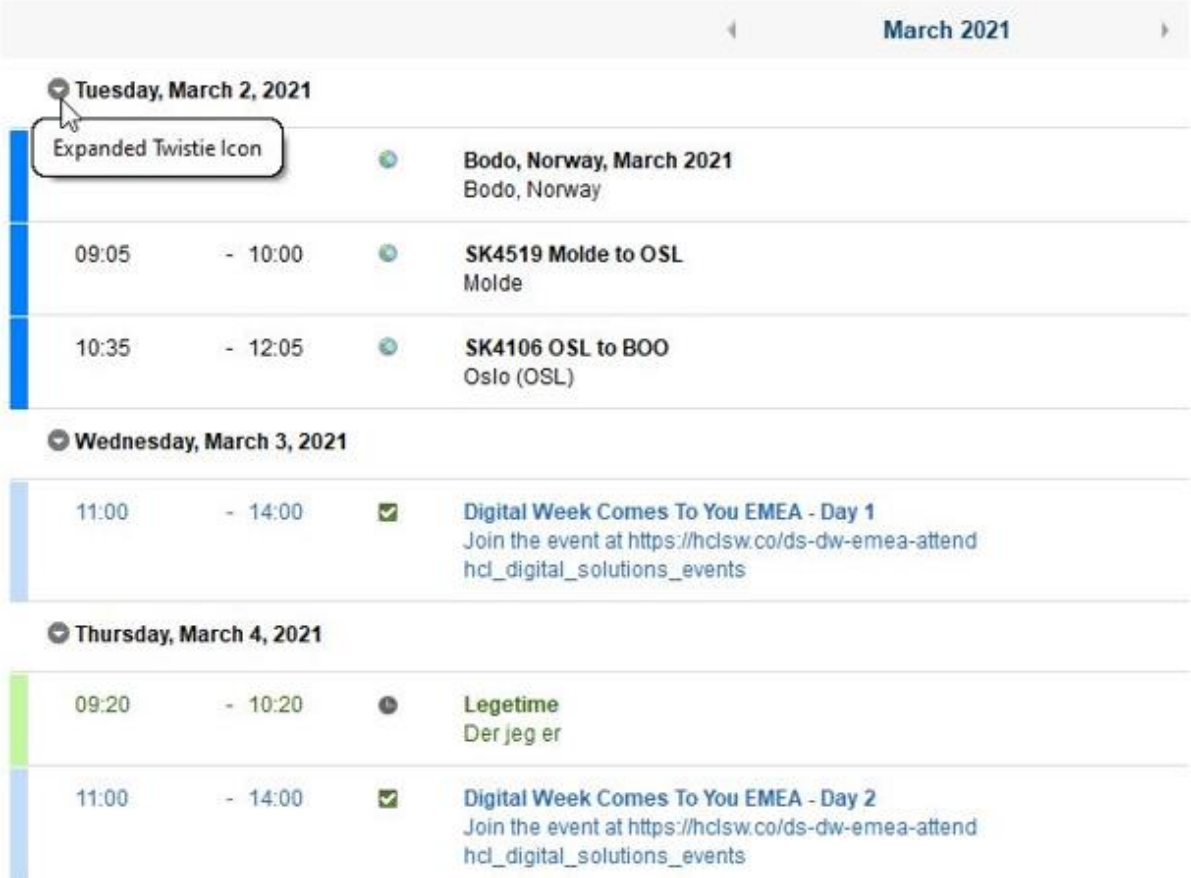


Summary or timeslots

You can switch between viewing the calendar as a summarised calendar or as timeslots by clicking on the **Switch** button in the upper right of the calendar:



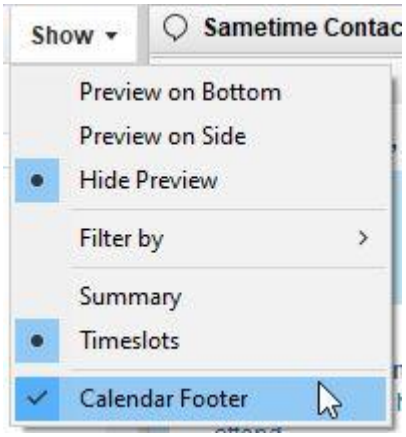
Timeslots display the calendar like this:



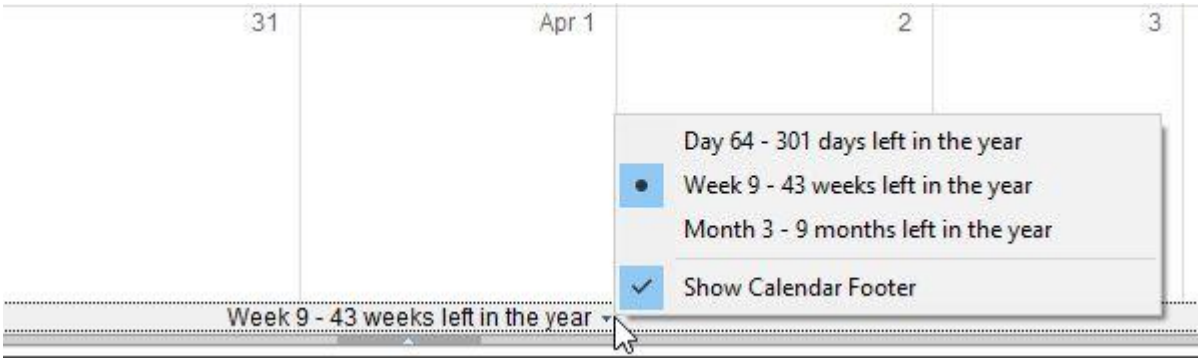
Week numbers

Week numbers are displayed in the calendar footer at the bottom of the calendar. To turn on week numbers:

1. Make sure the calendar footer is turned on by clicking on **Display** and then choose **Calendar** footer:



2. The calendar footer will now be visible under the calendar view. Click on the little pulldown arrow to choose **Week [Number]**:

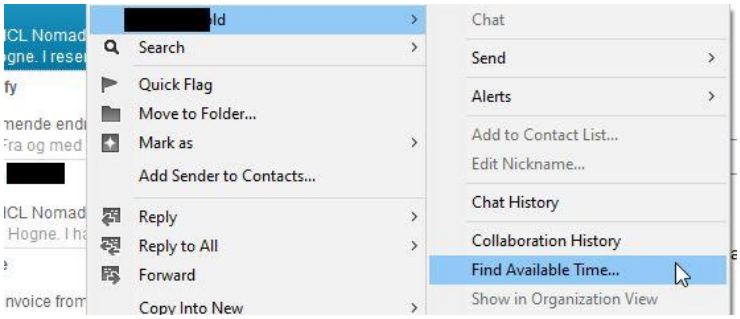


You can also do this in **Day at a Glance** in the right sidebar panel.

Find available time

Check one person's schedule

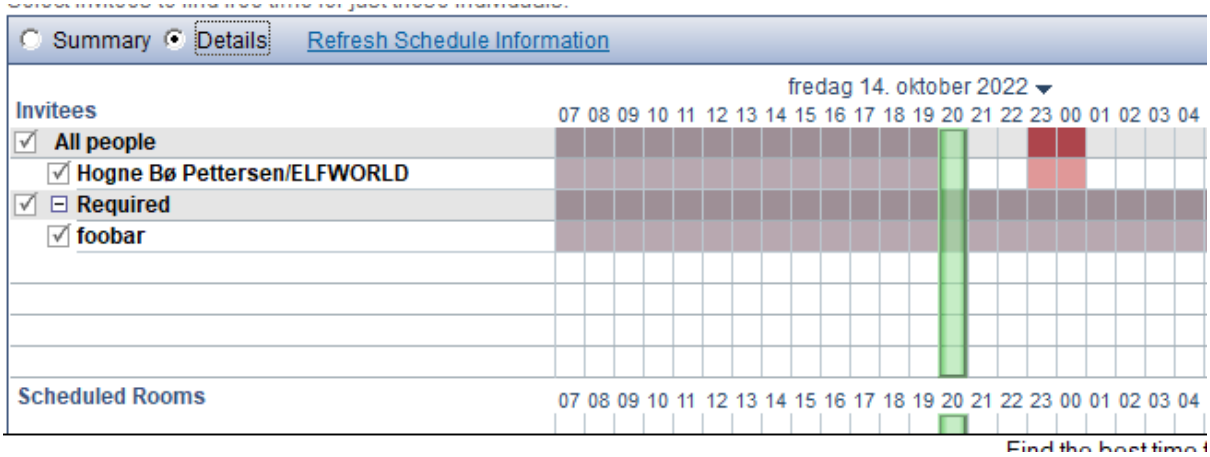
To quickly check if a colleague is available, rightclick an email from this person, choose the name of the person, and then select **Find Available Time...**:



You will now see a pop-up window where you can select a time where both of you are green and then you can click **Create Meeting**.

Check the schedule for meeting participants

If you are creating a meeting, you can check when people you have added to the meeting are free. Click the **Find Available Times** tab, next to **Description**:



If the bar turns green, it means everybody whose schedule you have access to is available. If it's red, it means one or more of the invitees are busy at the proposed time.

M the bar around to change the date and time of the meeting. You can even increase or decrease the size of the bar to change the length of the meeting.

View Invitee Status

It is very easy to check who has replied to your meeting invite, and whether they have accepted or not. Simply open the meeting document and click the button **Invitee Status**.

Contacts

Like in Outlook, you have your own personal Contacts app in your Notes client. In this section you will learn how to add contacts and organise them in groups. You will also see how you can take control over the addresses that are displayed when you type email addresses into the **To** field in a new email.

Add contact

From Mail

You can add a contact from an email by right clicking on the email and choose **Add Sender to Contacts...**.

A popup window appears with the email address and name fields filled out. You can then add more details if you want.

After clicking on **OK**, the contact is added to **Contacts**.

From Contacts

Open your **Contacts** application and click the **My Contacts** item in the left side menu and then simply click the **New** button above the contacts' view. A popup window will appear where you can add some basic information about the new contact.

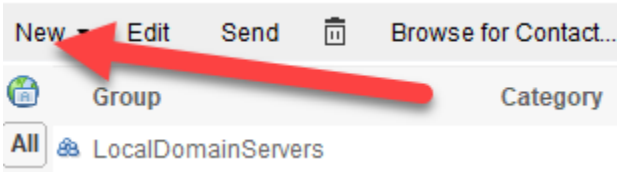
If you want to fill in more details about a new contact, click on the pulldown arrow to the right of the **New** button and choose **Contact**. A form now appears where you can add a lot of details about the new contact.

Create contact group

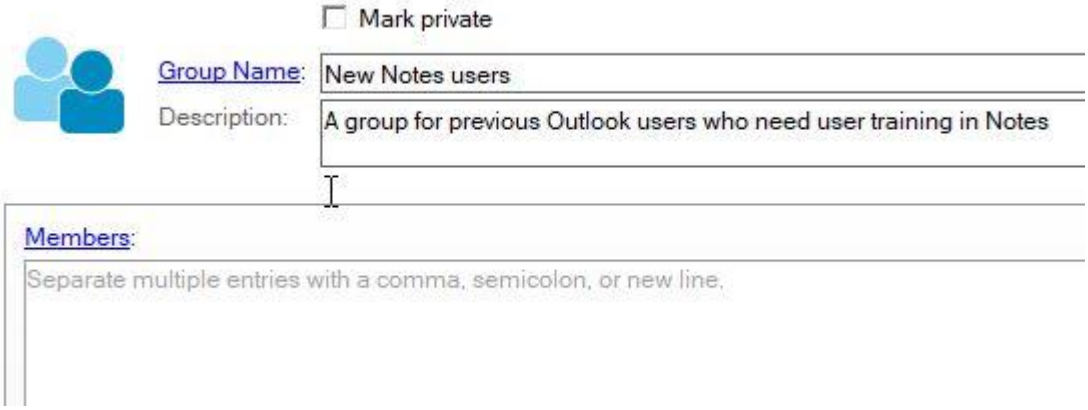
You can also organise your contacts into groups.

1. Open your **Contacts** application and click the **Groups** item in the left side menu.

2. Click the button New in the upper left corner above the Groups folder:



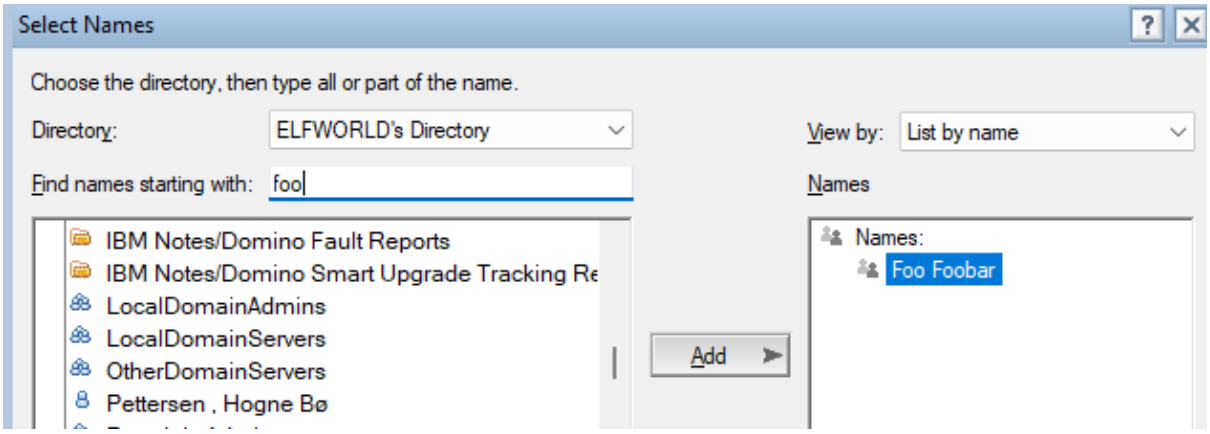
3. Give the group a name and a description:



4. Go to the field **Members**.

5. Start typing the name of the contact you want to add. Notes suggests names from already existing contacts. Click the one you want and click the enter key on your keyboard to start adding a new one. You can also add the email address of contacts that aren't in your Contacts register. Just type the email address and hint the enter key.

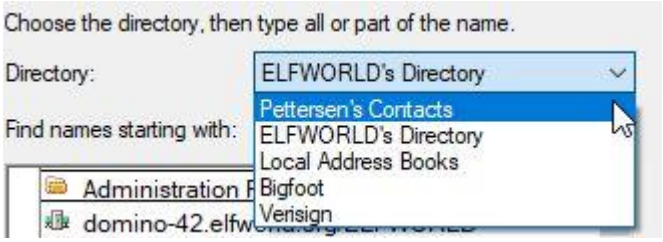
   You can also click **Members**. You then see this popup:



   You can now select people from your company directory.

   If you want to add people from your personal Contacts, change to your contact application

in the **Directory** pull down field:



You can use the **Find names starting with** field to type the beginning of a person's name to find the person you are looking for, if you do not want to scroll through the list.

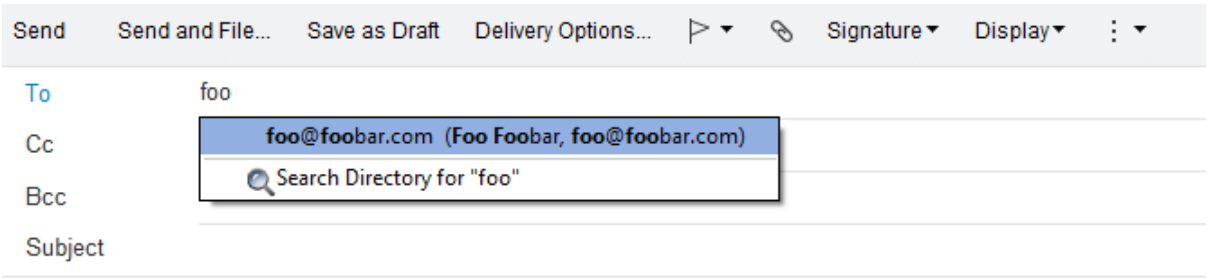
Click **OK**.

6. Click **Save and Close**.

You can now use the group when sending emails or meeting invites.

Recent contacts

When you create a new email and start typing the address or name of a person in the To, Cc or Bcc field, Notes suggests names and addresses for you:



Sometimes Notes suggests email addresses or contacts that you do not want to see in the typeahead. You can fix this in Contacts:

1. Open Contacts.

2. Click the **Recent Contacts** item in the left side menu.

3. Find the address or person you do not want to see in the typeahead anymore and click him or her.

4. Now click the button over the view called **Hide in Typeahead**

It will now no longer show up in in the typeahead. If you want it to show up again, you just repeat step 1-3 and then click **Show in Typeahead** in step 4

To do

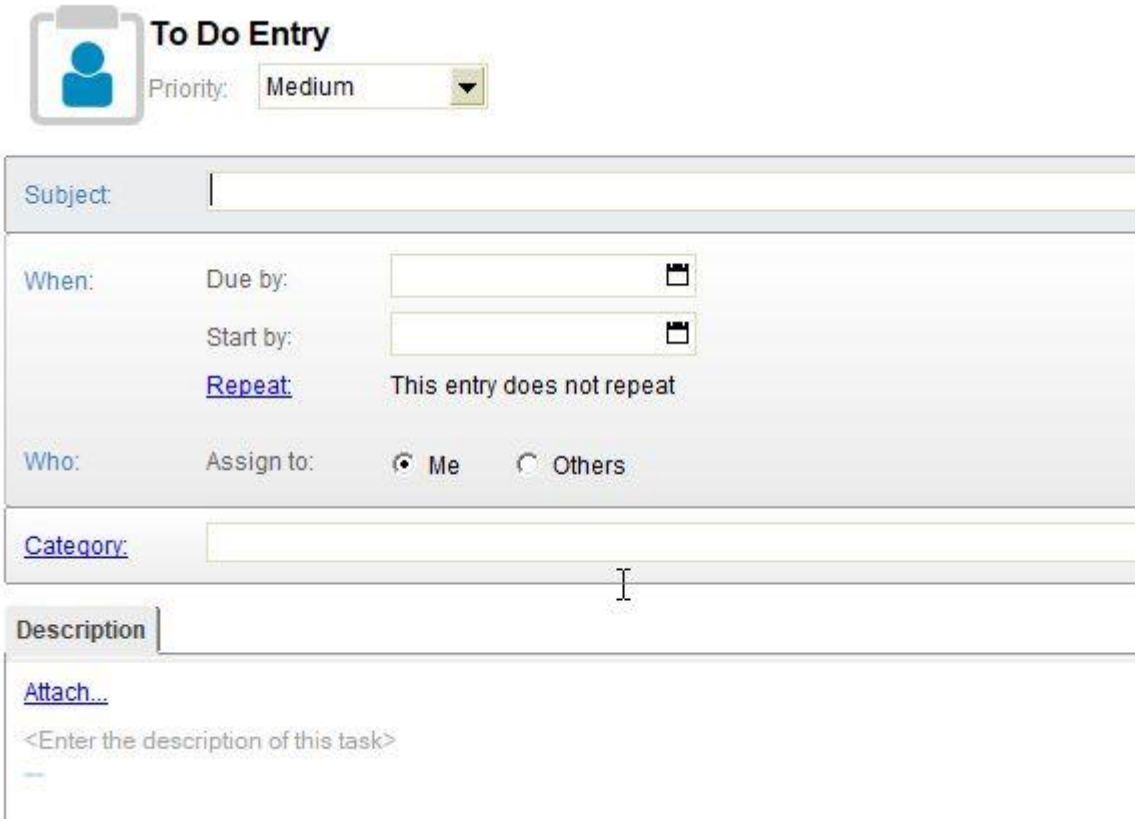
In Outlook you have an application called Tasks. In Notes this is called To do.

Create a To do

As described under the section Mail, you can turn an email into a To do, just like in Outlook. But you can also create a To do from scratch:

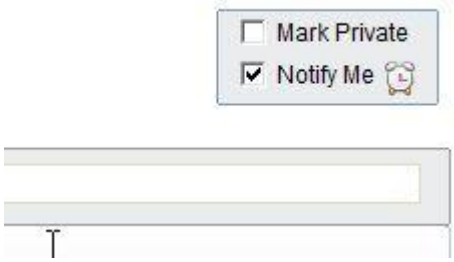
1. Open the To do application.

2. From any folder inside To do, you can click the **New** button in the upper left corner above the folder. This form appears:



3. You can set a priority, a due date, a start date and whether this is a To do that should be repeated or not (if you click on **Repeat** you can choose a whole range of repeating patterns). You can also assign this To do to another person.
In addition, you can categorize it and add further details in the rich text field **Description**.

   If you choose a due date, an option called **Notify Me** will appear in the upper right corner of the form:



   If you click the clock icon you can choose when you should be notified, and how.

4. Click **Save and Close** when finished.

Mark a To do as completed or incomplete

To mark a To do as completed, simply right click it and choose **Mark Complete**. You can also open it for editing and click the button **Mark Complete**.

You mark a completed To do as incomplete in the exact same way.

To see your completed To dos, click the menu item **Complete** in the left side menu in the To do app.

Conclusion

In this document you have seen how you can ease the transition moving from Outlook to Notes. You have also mastered how to use the settings in the Notes client and how to use the standard applications Mail, Calendar, Contacts and To do, so that Notes works best according to your needs.

The next step would be to dive even deeper into how to use email and calendaring, and maybe even give the users some tips on how to set up their own Notes/Domino low code applications.

Resources

Go to the following resources to learn more:

- Hogne B. Pettersen's Notes tips
- HCL Notes documentation
- HCL Notes/Domino forums
- HCL Notes/Domino blogs
- HCL Notes/Domino product's page