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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	
Summary	
Notes client settings and functions	11
Open documents in new windows	11
Preview pane	11
Shortcuts	
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	
Notifications	
Out of office	
Spellchecking your email	
Spellchecking while writing	
Spell-checking before sending	
Prevent sending emails with blank Subject line	
Formatting email text	35
Set default email font	35
Add another email account	
Calendar	
Share your calendar	
Add a shared calendar to your calendar	
Colour code calendar entries	
Change calendar views	42
Period views	42
Summary or timeslots	43
Week numbers	43
Find available time	44
Check one person's schedule	
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	
Conclusion	
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

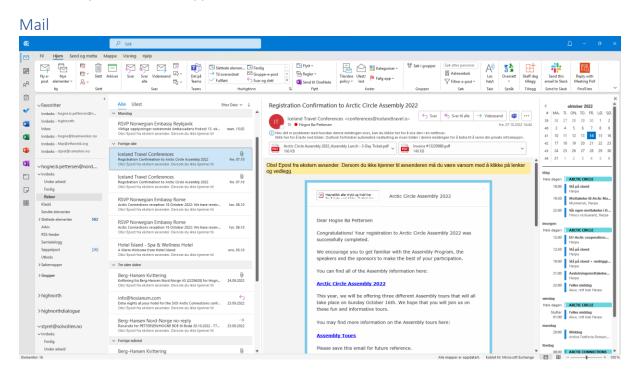
While there are really no prerequisites for using this document, a basic understanding of email and electronic scheduling will come in handy.

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.



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.

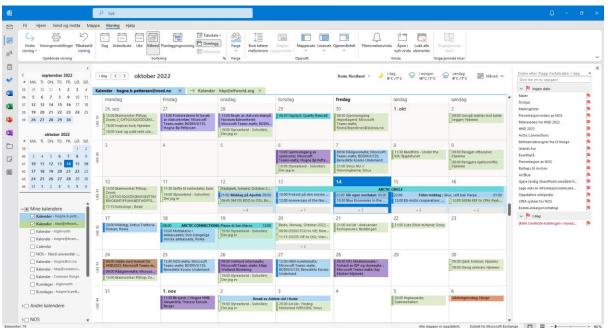
To the left, below the top menu, you have the menu for mail accounts and folders. In Outlook you can add several mail accounts that will be listed in the left menu, and you can then work with the folders belonging to each account.

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

6	Gjeldende mappe ∨	P tips → ×	Δ - σ ×
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	✓ Minke kontakter Kontakter - Negele & pettersmöller. Kontakter - Negele & pettersmöller. Kontakter - Negele & Sontakter - Negele &	Image: Second	ABC Nyheter
Element	ter: 13		Alle mapper er oppdatert. Koblet til: Microsoft Exchange 🔟 📴

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 Fil Hjem Send og motta Mappe Visning Hjelp 옷 Søk i grupper Î 🗠 🗗 🏴 I dag Α Ô Møte Ft. 🖄 🛛 🖡 5 Q P Ingen dato P I morgen 8 Adressebok Svar Videresend 🛱 Mer Svar Marker Fjern fra om fullført listen Flytt OneN Ny e-post ele P Der Behandle oppgave Følg opp Ny Ordne etter: Flagg: Startdato l dag 🔺 Mine oppgaver Liste over gjøre 🗸 🎙 Ingen date Oppgave Ż \sim \sim \sim \sim \sim HND 2022 Ilke 16 Re_After the event.msg HND.msg Re HND.msg HND22-eva HND 2022 Re_ After the ArcBlue Project - Website and D Bilder av KOLT New AlaskaNor-related academ Tasks Oppgave nic article publishe wer - Common Norge Oppgaver - hbp@con Fredag Fornye brosjyre Oppgaver - hbp@elfworld.org Mailinglister Presentasjonsvideo av NOS er - hogne@isi.no Hjemmesiden for InnNord -Fw: Her kommer kvittering og billetter til Kari Brei Sjøre ferdig SharePoint-området til NOS Lage wiki av informasjonsdokumentet til informasjo Oppdatere wikipedi CRM-system for NOS Lage mediestrategi for HNC

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:

type filter text	Windows	
 Accounts Basic Notes Client Configu Calendar and To Do Composite Application Edit Contacts Fonts, Colors and Themes Live Text Locations 	 On restart, reopen any tabs that were open when I closed the client Use large icons in the Open List Inform me that I can return a panel to an application from the View menu Inform me that I can return a panel to the sidebar from the View menu Window Management Choose how you want to open documents. Documents that are already open will not be them. 	affected until you close and reopen
Log Settings > Mail Notes Ports > Regional Settings	 Open each document in its own window Open each document in its own tab Group documents from each application on a tab 	
 Replication and Sync Sametime Search Spell Check Toolbar Widgets Windows XPages Performance 	L3	

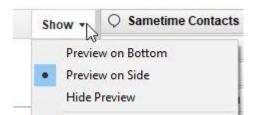
- 4. Click **Apply** and then **OK**.
- 5. Every window and document will from now be opened in its own window.

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:



W Preferences

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:

typ	e filter text	Basic Notes Client Configuration	
> > >	Accounts Basic Notes Client Configu Calendar and To Do Composite Application Edir Contacts Fonts, Colors and Themes Live Text Locations	Startup and shut down Empty trash on application close (if not emptied at a timed interval): Always Ask Auto Sa <u>v</u> e every 15 📑 minutes	Local application folder: C:\Program Files (x86)\HCL\Notes\Data Check subscriptions Scan for unread Enable scheduled local agents
>	Log Settings Mail Notes Ports Regional Settings	Display Default <u>F</u> onts	
2	Replication and Sync	Additional options	
> >	Sametime Search Spell Check	Mark documents read when opened in Mark incerner URLs (http://) into i Textured Workspace	n preview pane

4. Click **OK.**

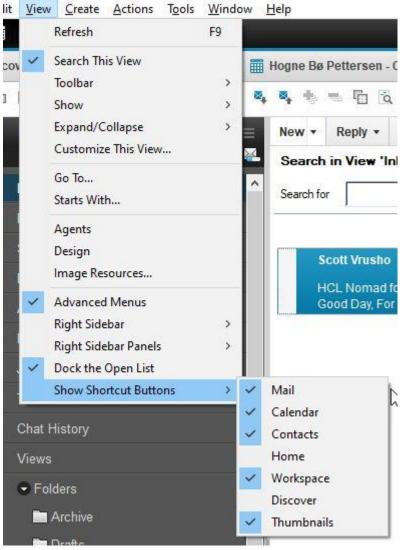
PS! You can also mark a read document as unread, or an unread document as read, by hitting the **Insert** button on your keyboard

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 Mail, Calendar, 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:



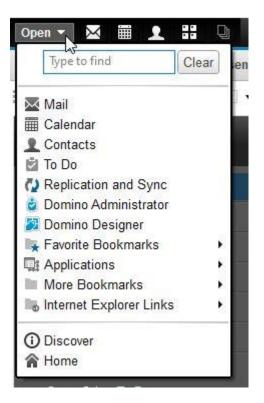
Unfortunately **To do** is not available as a shortcut button.

Bookmarks

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

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

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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:

Q	Hogne Bø Pe on Local
\times	Inbox
	Drafts
	Sent
	Follow Up
$\overline{}$	All Document
()	By Sender
8	Junk
	Trash
	Chat History
*	Views
	Folders
	Archive
_	🖿 Drafts
\odot^+	🖿 Ferdig
$\overline{\mathbf{O}}$	🖿 Junk Er
	📔 Kladder
	🖿 Regnsk

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.

 Accounts Basic Notes Client C Calendar and To Do 	Installed dictionaries for Norwegian	
	opfiqu	
Calendar and Io Do	Primary Dictionary:	Supplemental Dictionaries:
Composite Applicat	on Edi Hungarian 🔥	
Contacts	Italian (Standard)	
Fonts, Colors and Th	emes Italian (Switzerland)	
Live Text	✓ Norwegian (Bokmal) Norwegian (Nynorsk)	
Locations	Polish	
Log Settings	Portuguese (Brazil)	A
> Mail	Set as Default Edit User Dictionary	
Notes Ports		
Regional Settings	Defaults for Norwegian	
 Replication and Syn Sametime 	Ignore words containing numbers	
> Search		
Spell Check	Ignore words in <u>UPPERCASE</u>	
Toolbar	Keep on the fly dictionary changes until ne	xt language tag change
Widges		
Windows	Enable Instant Spell checking	
XPages Performanc	Instant Corrections	
	Correct common typing errors (for example,	replace teh with the)
\	Capitalize first letter of every sentence	
1	Correct TWo INitial CApitals	

- 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:

lee:			
ubject:			
rom: Hogr	ne Bø Petterse	en/ELFWO	RLD
	rom: Hogr	Card and a second s	rom: Hogne Bø Pettersen/ELFWO

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:

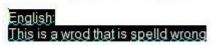
Norsk: Dette er et ordd som er stavt feil English:

This is a wrod that is spelld wrong

T

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

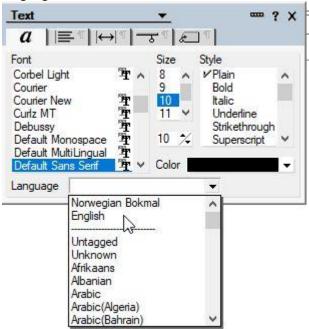
Dette er et ordd som er stavt feil



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

ons	Text	T <u>o</u> ols	<u>W</u> indow	<u>H</u> elp		
		Text Pro	perties		Ctrl+K	
Pette	Permanent Pen				>	
. *		Highlig	hter		>	h

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:

Norsk: Dette er et grdd som er stavt feil

English: This is a wrod that is spelld wrong

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:

A <u>ttach</u> You can format a te:	xt in many ways.		I
Like creatin	g a headline		
Create a table:			
Changing the font	Change the colors	Change the font size	Have a list 1. Or one 2. Or two 3. Or three
And use • Bullet • Points	Have it in bold , <i>italic</i> underlined and so or		L Ambassador
To Get		And have pictu	ires!
Your Point			
Across			

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

															_				
Default Sans Serif	~	9	~	b	i	<u>u</u>	A	1	2	• *1	+	ŧΞ	1233	畺		1	1≣	Â	

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**:

View	<u>Create</u> <u>Actions</u> <u>Text</u>	T <u>o</u> ols <u>W</u> in	dow	<u>H</u> elp				
	Refresh	F9						
-	Ruler	Ctrl+R	Bø	Pettersen - Calendar	A Hoane Bø Pe			
	Toolbar	>		Address				
	Show	>	~	Editing				
60	Parent Preview Document Link Preview			Language Mobile				
	Image Resources		Navigation Table Properties					
	Expand All Sections	Shift +		Text Properties	5			
	Collapse All Sections	Shift -	~	Universal	-0			
	Switch Form			View				
Ð	Go up to Parent View		~	Widgets				
	Encoding	>	-	Show Toolbars Only Wh	en Editing			
~	Advanced Menus			Hide All Toolbars				

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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

<u>To</u> : 🔶	
Cc:	
Bcc:	
Subject:	
From:	Hogne Bø Pettersen/ELFWORLD

you can click on To:

a) You now see this popup:

Select Addresses					? ×
Choose the directory, the	n type all or part of the name.				
Directory:	ELFWORLD's Directory	ſ	<u>V</u> iew by:	List by name	~
Find names starting with:	1		Recipients:		
	nino Fault Reports nino Smart Upgrade Tracking Re dmins ervers ervers		Instantian Sectors Se		
Details Add to Co	ontacts		<u>R</u> emove	Re <u>m</u> ove All	
Tip: You can drag and dra	op the names			ОК С	Cancel

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:

Directory:	ELFWORLD's Directory	~
Find names starting with:	Pettersen's Contacts ELFWORLD's Directory Local Address Books	5
Administration	F Bigfoot	
domino-42.elfv	Verisign	

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.

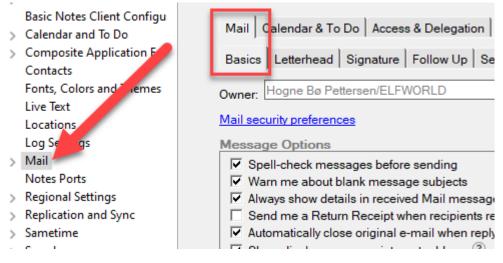
3. You can now write your email. To add attachments, you can simply drag and drop files into the email.

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:
 - Automatically sort date columns (takes effect after reopening mail tab):
 - Most recent on top
 - O Most recent on bottom

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:

🖾 🛿 Who 🔺	> Subject	Date	Size 🛛 🖉	•
Web Services	Complete order for nummer1inorge.com Congrats on your new domain! The next step you need to take	2 feb 10:33	31K	^
WeTransfer	rboccadoro@qmail.com sent you files via WeTransfer rboccadoro@qmail.com sent you some files 9	10 jan 19:36	48K	

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

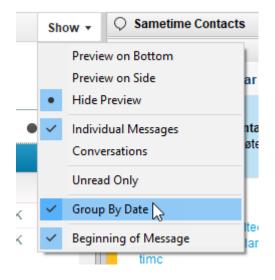
If you click Date you switch between having the newest email on top or at the bottom

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:

-
• Today (total: 3)
• Yesterday (total: 9)
Rest of Week (total: 28)
Last Week (total: 85)
Rest of October (total: 10)
Month of September (total: 239)
Older Messages (total: 7678)

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:

🖤 Find		×
<u>F</u> ind in	Who v ?	
<u>S</u> tarts with	fac	?
	Fac ebook	Find Close

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:

<u>F</u> ind in	Who	¥?
<u>S</u> tarts with	Any column Who	۰۲ <u>ــــــــــــــــــــــــــــــــــــ</u>
	Subject Date	

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.

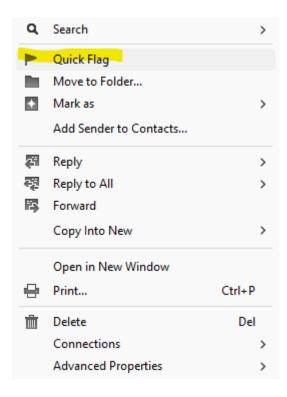
If you choose *Any column* you can search for any expression in any column. It does not even have to start with that expression:

👐 Find	N	×
<u>F</u> ind in	Any column v ③	
Cont <u>a</u> ining	tickets	~ ?
	More <u>Options</u>	
		Find <u>N</u> ext <u>C</u> lose

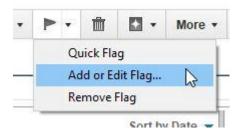
The example above finds any email containing the word *tickets* in either **Who** or **Subject**, even if the column value started with another word. Example: It would find both *Tickets for you*, *Your tickets* and *Bus tickets*.

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:



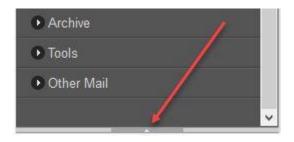
You can also mark one or more emails and then hit the flagging button above the folder:



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

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**.

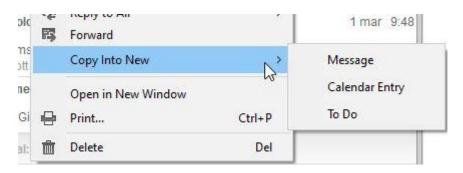
After clicking on the arrow, you can choose **Follow Up** in the pulldown menu that appears:



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:

Day-At-A-G	lance
4	Thu, Mar 4, 2021 🔸
09:20 - 10:	20
Legetime	
Der jeg er	
11:00 - 14:	00
	ek Comes To You EMEA - Day 2
Join the ev attend	/ent at https://hclsw.co/ds-dw-emea
hcl_digital	_solutions_events
Exchange https://ht-g	HCL Connections Guide Program
Meet-Up - Exchange https://ht-g Week	HCL Connections Guide Program roup.zoom.us/j/95794941629
Meet-Up - Exchange https://ht-g Week	HCL Connections Guide Program roup.zoom.us/j/95794941629
Meet-Up - Exchange https://ht-g Week	HCL Connections Guide Program roup.zoom.us/j/95794941629 9 - 43 weeks left in the year - day Mar 5, 2021 March 2021 >
Meet-Up - Exchange https://ht-g Week	HCL Connections Guide Program roup.zoom.us/j/95794941629 9 - 43 weeks left in the year - day Mar 5, 2021 March 2021 >
Meet-Up - Exchange https://ht-g Week	HCL Connections Guide Program roup.zoom.us/j/95794941629 9 - 43 weeks left in the year - day Mar 5, 2021 March 2021) T W T F S S
Meet-Up - Exchange https://ht-g Week	HCL Connections Guide Program roup.zoom.us/j/95794941629 9 - 43 weeks left in the year - day Mar 5, 2021 March 2021) T W T F S S 2 3 4 5 6 7
Meet-Up - Exchange https://ht-g Week To 4 M 1 8 5	HCL Connections Guide Program roup.zoom.us/j/95794941629 9 - 43 weeks left in the year - day Mar 5, 2021 March 2021) T W T F S S 2 3 4 5 6 7 4 9 10 11 12 13 14
Meet-Up - Exchange https://ht-g Week To 4 M 1 8 15 22	HCL Connections Guide Program roup.zoom.us/j/95794941629 9 - 43 weeks left in the year - day Mar 5, 2021 March 2021) T W T F S S 2 3 4 5 6 7 9 10 11 12 13 14 5 16 17 18 19 20 21

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.

- () . More • 0. Preferences... like c Out of Office... Copy Into New > ort by Add Sender to Contacts... wet Deliver Sender's Mail to Junk... tnet t Schedule a Meeting ... vroos com d for New Message with Stationery... Mark/Unmark Document As Expired... vrushc 2 Create QuickRule... Mail Rules > Good Day,
- 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:

Create QuickRule				? ×
Create a Rule based	on information in the selec	cted docume	ent.	
Note: The rule will ac	t on new incoming messa	ges. Mail in y	your Inbox will not be aff	ected.
1 Select the condi	tions to match			
When Sender	contains	~	noreply@foo.com	
🔲 When Domain	is	~	foo.com	
Vhen Subject	contains	~	Project ABCD	
2 Decide when to	take action			
When at least one	of the selected conditions	is met		
O When all of the selection	ected conditions are met			
3 Choose the action	n to perform			
 Move to Folder Change importan Do not accept me 		arbeid		Select
To work with this rule	in the future, go to the Rul	les folder, un	der Tools.	
(Run Now On Inbox	Run Now C	n All documents	OK Cancel

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**:

	More - ()	Q.			
-	Preference Out of Of Copy Inte	fice		>	like current view 💌 🔘 Inde
)) 11	Deliver Se	er to Cont nder's Mai a Meeting	il to Junk		web private beta on-p net to targeted compa vroosh
1	Mark/Uni	-	Stationery ment As Expired		
	Mail Rule	s		>	Manage Rules
1	Go	od Day,			Run 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.

- () 0. . More • Preferences... like c 63 Out of Office... Copy Into New > ort by Add Sender to Contacts... web Deliver Sender's Mail to Junk... net t Schedule a Meeting ... vroos com d for New Message with Stationery... Mark/Unmark Document As Expired... vrusho Create QuickRule ... Mail Rules > Good Day, Π
- 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:

	r & To Do Access & Deleg	gation				
Basics Letterh	nead Signature Follow	Up Sender Colors	Recipient Icons	Swiftfile		Cancel
Automatically	append a signature to the	bottom of my outgo	oing mail message	s		
New Messages	Reply and Forward Me	essages				
A signature fo	r new messages.					
Type of signature	ə:		I			
Rich Text	C Plain Text	C HTML or	Image File			
	gnature to use text formatti pear on any computer whe		ther rich text featur	es. Once you set	it, the	
To add text, grap	phics and attachments, use	the "T" control belo	w.			
elsewhere (such	al rich text features (such as a as the body of an email) c tt signatures will work only i	opy it, and paste it h	iere.			
elsewhere (such	as the body of an email) o t signatures will work only i	opy it, and paste it h	iere.			
elsewhere (such <mark>Note</mark> : Rich Tex	as the body of an email) o t signatures will work only i	opy it, and paste it h	iere.			
Note: Rich Tex Append MyvC	as the body of an email) o at signatures will work only i ard	opy it, and paste it h	iere.			
Append My vC Append My vC 	as the body of an email) of at signatures will work only i ard ③ ettersen , writer, photographer	opy it, and paste it h	iere.			
Append My vC Append My vC 	as the body of an email) of at signatures will work only i ard ③ ettersen , writer, photographer	opy it, and paste it h	iere.			
Append My vC Append My vC Hogne Bø Pe IT-consultant, +47 911 93 1 https://domin	as the body of an email) o at signatures will work only i ard ③ ettersen , writer, photographer 144	opy it, and paste it h	iere.			
Append My vC Append My vC Append My vC 	as the body of an email) of the signatures will work only it and ③ ettersen , writer, photographer 144 o.elfworld.org	opy it, and paste it h if all users of this ma	ail file are using No			

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:

New Messages	Reply and Forward Me	ssages	
A signature for signature is us		ages. If default is sele	ected, the new messages
Type of signature:			
Default	C Rich Text	C Plain Text	C HTML or Image File

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.

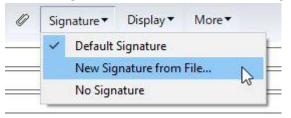
Different signatures

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:

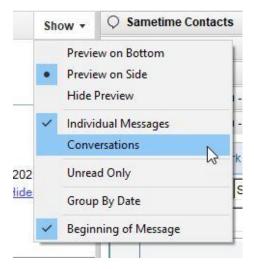


- 5. Click **Browse** to find the signature file.
- 6. Click on OK.
- 7. The signature will now be added to your email, instead of the standard one.

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**:



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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:

Re: Björk nytt album 30:e Sep Hej Ådne, Tack! Fint!

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.

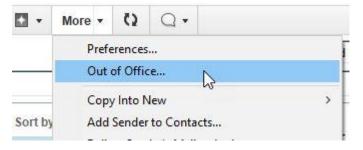
You can control these notifications by clicking on **File -> Preferences** and then expand **Mail** and choose **Sending and Receiving**. Under the section called **Receiving** you can choose what notifications, if any, you want:

~	Mail	Sign messages that I send
	Access and Delegation Internet	Add forward prefix to the subject of forwarded mess
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Sending and Receiving Notes Ports Regional Settings Replication and Sync Sametime Search Spell Check Toolbar Widgets Windows XPages Performance	Receiving Check for new mail every 5 minutes When new mail arrives: Refresh Inbox automatically Play a sound Browse Alerts: Show a popup O Slide in a summary Image: No alert Display an icon in the system tray

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:

To send an a	alternate out-of-office notification to certain people, specify the people
<u>To:</u>	
Subject:	Hogne Bø Pettersen is out of the office
	Append return date to subject
Body:	I am out of the office until 07.03.2021.
Additional body text:	

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:

	nditions are met, specify the conditio
Reset Defaults	
Do not automatically reply to mail from Internet a	ddresses.
A message is sent by any of these people:	
Sent by: *hotmail.com	
A message subject contains any of these exact phras	ses:
	Add Phrase
Nigerian prince	Remove Phrase

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:

Message Options
Spell-check messages before sending
Warn me about blank message subjects
Always show details in received Mail messages

- 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:

Norsk:	Spell Check		?
Dette er et <u>ordd</u> som er <u>stavt</u> feil	Not in dictionary	Epost	Skip All
English: This is a <u>wrod</u> that is <u>spelld</u> wrong	Suggest	Eposet Post Epos Eposa	Replace All
- Iogne Bø Pettersen		25	Add to Dictionary
T-consultant, writer, photographer a ⊦47 911 93 144			Edit Dictionary
ttps://domino.elfworld.org	Dictionary:	Default - Norwegian (Bokmal)	~
ttps://about.me/hbpettersen/	Spelling Options		

- 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:

Log Settings	Message Options
✓ Mail	Spell-check messages before sending
Access and Delegation	Warn me about blank message subjects
Internet	Always show details in received Mail messages
C C 10 **	

- 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:

	Subject: From:	Hogne Bø Pettersen/ELFWORLD
This is the	font I want t	to use
Hogne B IT-consult +47 911	tant, write	en er, photographer and speaker

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

Text	Tools Window Help	
	Text Properties	Ctrl+K
tte	Permanent Pen	>
*	Highlighter	>
3	Pass-Thru HTML	
	Normal Text	Ctrl+T
i	Italic	Ctrl+l
b	Bold	Ctrl+B
u	Underline	Ctrl+U
	Strikethrough	
J	Effects	>
_	Color	>
	Enlarge Size	F2
0	Reduce Size	Shift+F2
e	Align Paragraph	>
r,	List	>
_	Spacing	>
	Indent	F8
4 +≣	Outdent	Shift+F8
	Apply Style	>
L	Set Current Font as Mail Def	ault N

4. Notes confirms your choice:

ise when composing
OK Avbryt
c

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:

W Preferences

type filter text	Access and Delegation 🤤
 Accounts Basic Notes Client Configu Calendar and To Do Access and Delegation 	Mail Calendar & To Do Access & Delegation
Regional Settings > Composite Application Edir Contacts Fonts, Colors and Themes	Access to Your Mail & Calendar Access to Your Schedule Shortcuts to Others' Mail You can give one or more people or groups access to your contacts and to all or part of your mail file (Mail, Calendar and To Do), and you can control the actions that each delegate is allowed to perform To delegate access to your Contacts, you must also enable the Contacts preference labeled "Enable "Synchronize Contacts' on the Replicator."
Live Text Locations Log Settings Mail Notes Ports Regional Settings	For Mail-In-Database Only: Fable Alternate From Feature Automatically use internet address of Mail-in database as sender Mail, Calendar, To Do, and Contacts
Replication and Sync	Delegate access to these people or groups:
Sametime	Add
Search Spell Check	Remove
 Toolbar Widgets Windows XPages Performance 	No other people or groups have been delegated access to your mail file
	Change Access

3. Click Add...:

ld People/Groups	? ×
Person or Group	ОК
To whom do you want to give access to your mail file? C Everyone	Cancel
G Just this person or group:	
Components	
Which components of your mail file do you want to give access to?	
O Mail, Calendar, To Do and Contacts	
Calendar, To Do and Contacts	
C Calendar and To Do	
C None	
Iccess	
How much access do you want to give for Calendar, To Do and Contacts?	
Read ~	
utomatic Forwarding	
Enabling automatic forwarding makes it easier for someone to manage your calendar when it is not open and on display. These settings apply even if no components are delegated, and they apply to all auto-forwarded messages.	
Forward calendar notices I receive for meetings where:	
🗖 I am the chair	
🔲 I am a participant	
For notices associated with calendar entries I have marked as private:	
Do not forward	

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:

Add Add: Notes user's caler	ndar 🗸			
Add Notes user's calenc *User name: ③	dar 🖓			
View this calendar w	hen offline ③			
Calendar Entry Formatti	ing			
Set display options for t	he added calendar's entries: 💿			
	Text:		Entry icon:	
Background:				
Background:	 ✓ 	~	📾 calendar gray	~
Background:	 	~	📾 calendar gray	

- 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:

When:	Starts:	tir. 16.03.2021	15:00	٩	L
	Ends:	tir. 16.03.2021	16:00	٩	L
Where:	Location:				
Category:	I HCL				



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

	 Category 	N	1			
	✓ Additional	Mail Options				
	Calendar En Type: App	try pintment	-			
Qubiadt						_
Subject When:		nects! Confirmation		15:00	Ō	

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

✓ HCL ^ Cancel Holiday Vacation Projects Clients Phone Calls	loose one or more cate	pories: OK
	Holiday Vacation Projects Clients	

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...:

Where:	Location:	
Category:	HCL	Assign Colors.
Description		

6. Click it and this popup appears:

il Calendar & To Do Access & Delegation				ОК
Display Scheduling Alarms Autoprocessing	Colors Rooms & R	esources		Cancel
Calendar - Colors	T			
Calendar Entry Colors Category Colors	-		-	-
alendar Entry Category Colors ou can use <u>Mail - Sender Colors</u> for your Calenda	Fatrice as well (?)			
Note: You can add Categories on the <u>Calendar &</u>		es tab.		
Select Categories and the Color to associate then	n with: Backg	ound Text		
HCL			-	
NCUG, Collabsphere		•	•	
Konsert				
Konseit		-	-	
Brainworker		•	-	
Familie, Venner				
Moldejazz				
Kurs		.	•	
To add categories to this color set, click		•	-	
To add categories to this color set, click		•	•	
To add categories to this color set, click		-	-	
Restore Default Colors				
Note: You can add Categories on the Calendar &				

- 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:

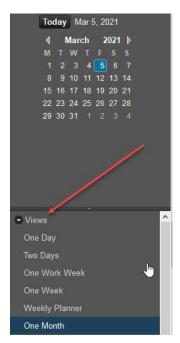


Change calendar views

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:

Sh	ow - O Sametime Conta						
	Previe	ew on Bottom ew on Side					
•	Filter	Preview by	>				
•	Sumn	nary					
	Times	ilots 🔀					
~	Calen	dar Footer	h				

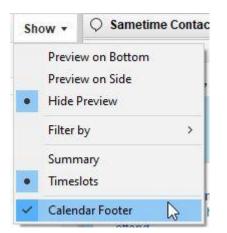
Timeslots display the calendar like this:

Q Tuesday, I	March 2, 2021		
Expanded Tw	vistie Icon	٥	Bodo, Norway, March 2021 Bodo, Norway
09:05	- 10:00	٥	SK4519 Molde to OSL Molde
10:35	- 12:05	٥	SK4106 OSL to BOO Oslo (OSL)
O Wednesd	ay, March 3, 202	1	
11:00	- 14:00		Digital Week Comes To You EMEA - Day 1 Join the event at https://hclsw.co/ds-dw-emea-attend hcl_digital_solutions_events
O Thursday,	March 4, 2021		
09:20	- 10:20	0	Legetime Der jeg er
11:00	- 14:00		Digital Week Comes To You EMEA - Day 2 Join the event at https://hclsw.co/ds-dw-emea-attend hcl_digital_solutions_events

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]**:

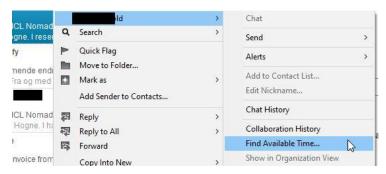
31	Apr 1	2	3
		Day 64 - 301 days left in the year	
	•	Week 9 - 43 weeks left in the year Month 3 - 9 months left in the ye	
Week 9 - 43 week	c left in the year -	Show Calendar Footer	

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**:

FROM MICROSOFT OUTLOOK TO HCL NOTES

C Summary C Details Refresh Schedule	Informati	ion																			
								f	ired	lag	14	. ol	cto	ber	20)22	-				
Invitees	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	00	01 0	2 0	3 0
✓ All people																					
✓ Hogne Bø Pettersen/ELFWORLD														Π						T	
🗹 🗆 Required																					
√ foobar														Π							
														Π						Т	Т
														Π					-	+	+
					_									Η					-	+	+
		-			_								_	H					+	+	+
Scheduled Rooms	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	00	01 0	2 0	3 0
										- 1											

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:

New	Edit	Send		Brows	e for Contact
6	Group				Category
All 💩	LocalDon	nainServe	rs		

3. Give the group a name and a description:

1000	10 87973	
	Description:	A group for previous Outlook users who need user training in Notes
		Т
Members:		
Separate m	ultip <mark>l</mark> e entries v	vith a comma, semicolon, or new line.

- 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:

Select Names						? ×
Choose the directory, then	type all or part of the name.					
Director <u>v</u> :	ELFWORLD's Directory	\sim		<u>V</u> iew by:	List by name	~
Find names starting with:	foo			<u>N</u> ames		
	ervers		<u>A</u> dd ►	ै Nam ै	ies: Foo Foobar	

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:

Directory:	ELFWORLD's Directory	~
Find names starting with:	Pettersen's Contacts ELFWORLD's Directory Local Address Books	5
Administration	Bigfoot	
domino-42.elfw	Verisign	_

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:

Send	Send and File.	Save as Draft	Delivery Options	Dash	0	Signature 🕶	Display▼	÷ •	
То	foo								
Сс		foo@foobar.com (Foo Foobar, foo@fool	bar.com)					
Bcc		Search Directory fo	or "foo"						
Subject	t								

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:

Subject:	[
When:	Due by:		
	Start by:		
	<u>Repeat:</u>	This entry does not repeat	
Who:	Assign to:		
Category:	2		
Description	1	I	

 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