

Lotus Notes 8 User Essentials

Duration: 1 day



Description

During this course you will learn how to use the core applications included in Lotus Notes 8, including Mail, Calendar, Contacts, To Do, and Personal Journal. This course covers how to perform the most common tasks in both the Standard and Basic configurations.

The application you will use the most is Mail, as it is a key personal and business application. You will learn how to use the Calendar to organize your time and track your tasks in the To Do application.

You will keep track of people in Contacts and keep information in your Personal Journal. As you use the core Notes applications, you will recognize a common pattern that builds your competence and confidence in using almost any Notes application such as a Discussion, which you will join at the end of the course.

Because Notes incorporates Sametime instant messaging, you will also know when people are online so you can chat in real time. Beyond the technical aspects of using Notes, you will learn the “best practices” of how to use Notes to become a more effective communicator and collaborator.

Course goals

In this course you will learn how to:

- navigate in the Notes user interface (both the Basic and Standard editions of Notes are covered in this course)
- launch the core Notes applications from the Home Page and from bookmarks
- set user and Mail preferences to customize your working environment
- send and receive email messages that include formatted text, tables, images, Web links, and file attachments
- find and read new email messages
- take action on email messages, which may mean to mark for follow up later, respond to now, forward, copy into a new meeting or to do, or block the sender from sending future messages
- configure Out-of-Office notification to respond to email messages when you are away
- change the sort order of messages, use full text search to find message content, group messages by mail thread, and organize messages into folders
- add people and groups to your Contacts application
- use the Calendar application to schedule appointments and meetings
- keep track of your tasks in the To Do application
- use the Personal Journal application to save important information
- know when other people are online and communicate with instant messages

- participate in a shared Discussion on a Domino server.

Audience

This course is designed for new Lotus Notes users who can:

- start and stop software applications in Microsoft Windows
- use Microsoft Windows Explorer to find and organize files
- create, format, and print documents using word processing software such as Microsoft Word
- use Microsoft Internet Explorer to browse Web pages and manage a list of favorite bookmarks.

Duration

This course is sold as a 1 day course.

Outline

Topic 1: Start Lotus Notes

Pattern of using Notes

Core applications included in Notes

Public and custom applications

Applications are integrated by Notes

Basic and Standard configurations of Notes

Exercise: Start Lotus Notes

Home Page

Pattern to use core applications

Open core applications

Exercise: Open core applications

Bookmarks and the Home Page

Exit Notes

Preferences

Topic 2: Send an Email Message

Create message

Toolbars

Action buttons

Address fields

Type ahead addressing
Select addresses
Subject field
Body field
Spell checking
Send message
Exercise: Create and send message
Where is the message you sent or saved?
File attachments
Exercise: Attach file
Re-send message
Recall message

Topic 3: Read Email Messages

Read a message
Exercise: Read a message
Find new messages
Best Practice: Schedule time to read new messages
Print message you are reading
Take action on attached files

Topic 4: Respond to Email Messages

Best Practice: Take action on messages
Is this message relevant to me?
Mark message for follow up
Exercise: Follow up
Reply to a message
Exercise: Reply to a message
Forward a message
Copy into New Meeting or To Do
Block Sender
Move message to a folder
Delete message
Exercise: Delete and recover a message
Reply automatically if away from the office
View Collaboration History

Topic 5: Find and Organize Email Messages

- Folder and view sorting
- Rearrange columns
- Find text in a folder or view
- Full Text Search
- Toolbar Search
- Related messages
- Folders
- Create a new folder
- File a message
- Exercise: Organize mail into a folder
- Remove a message from a folder
- Exercise: Add and remove messages from folder
- Discover Folders

Topic 6: Keep Track of Your Contacts

- Open Contacts
- New contact
- Finished contact
- Exercise: Create contact
- Best Practice: Create contact from message
- Create Contact from a directory lookup
- View actions
- Print labels from contacts
- Create vCard from Contact
- Group documents
- Create Group from selected Contacts
- Exercise: Create group from selected Contacts
- Create Group from sent messages

Topic 7: Create an Appointment in your Calendar

- Calendar elements
- Day-At-A-Glance Sidebar Application
- Create Calendar Entry
- Calendar Entry types
- Appointment fields
- Date and Time entry
- Exercise: Create appointment

- Delete entry
- Optional fields
- Workday definitions
- Exercise: Availability schedule
- Conflict checking
- Exercise: Conflict checking
- Holidays
- Print Calendar
- Print Calendar to document

Topic 8: Schedule a Meeting in Your Calendar

- Schedule a meeting
- Who
- Response and Workflow Options
- Where
- Find Available Times tab
- Owner: Save and Send Invitations action button
- Owner: Save as Draft action button
- Exercise: Schedule a meeting
- Participant: Respond to an invitation
- Owner: Look for responses
- Owner: View Invitee Status
- Owner: Declined room or resource reservations
- Owner: Make changes to scheduled meeting
- Participant: Request changes to scheduled meeting
- Exercise: Accept a meeting invitation

Topic 9: Track your To Do Items

- New To Do
- Where to find To Do Items
- Complete a To Do Item
- Incomplete view
- Exercise: Create To Do
- Copy into New To Do
- Group To Do
- Exercise: Group To Do

Topic 10: Make Personal Journal Entries

Open Personal Journal
Create and edit Journal Entry document
Exercise: Create and edit documents in Personal Journal
Delete Journal Entry document
Forward Journal Entry document

Topic 11: Chat using Sametime

Who you can chat with
Web conferencing
Log in to Sametime
Change your online status
Presence awareness in Notes applications
In-context chat with person who is online
Exercise: In-context chat
Toolbar extras
Sametime Contacts
Add contact
Sametime Contacts icons
Two-way chat from the Sametime Contacts list
Exercise: Add contact and chat
Group chat
Exercise: Group chat

Topic 12: Join a Discussion

Best Practice: Organizational perspective of email and chat
Multi-purpose Discussion applications
Exercise: Open Public Forum application
Views
Main Topic form
View categories
Quickly read documents
Edit and delete documents
Application security
Exercise: Create a Main Topic document
Response documents
Exercise: Create responses
Dual-purpose view twisties

DocLinks

DocLink caveats

Create a Notes Document Link

Exercise: Create Document Link

Move or copy a DocLink icon

Link message

Paste DocLink into Chat window