



Evaluation Copy

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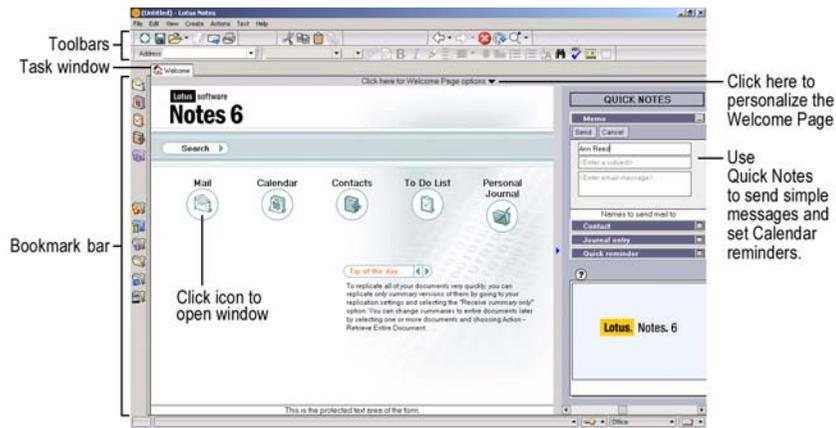


## Using IBM® Lotus Notes® 6

*Reference Card*

## THE NOTES 6 WORKSPACE

The IBM® Lotus Notes® 6 interface contains the tools to create bookmarks, access your mail and Calendar, manage your address book, work with databases and Web pages, and find information. The following image shows the standard Welcome Page.



### Personalizing the Welcome Page

You can use the standard layout, a pre-designed style, or customize the content of the Welcome Page. These are a few of the Welcome Page styles.

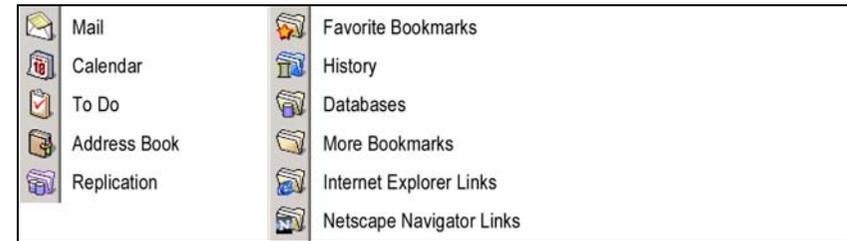
To show this on the Welcome Page...	Choose...
Your Calendar	Basics with Calendar
Your Calendar, Inbox, and other applications	Basics Plus
Your Calendar, Inbox, and Web sites	Headlines

To...	Do This...
Change the Welcome Page content	At the top of the Welcome Page, click the <b>Click here for Welcome Page options</b> text.
Select a Welcome Page style	In the Welcome Page options, choose a page style from the <b>Current Welcome Page selection</b> list.
Change the content in a frame	Click the arrow to the right of the frame and choose the type of content from the <b>Switch Frame</b> list.
Use a custom template or design your own layout	Click <b>Create a new Welcome Page</b> and follow the instructions in the Welcome Page Wizard.
Return to the default Welcome Page	In the Welcome Page options, click <b>Return to first-time setup</b> .



## BOOKMARKS

The Bookmark bar displays direct links to your mail, Calendar, and address book. The default bookmark folders contain links to databases, documents, Web pages, and other applications.



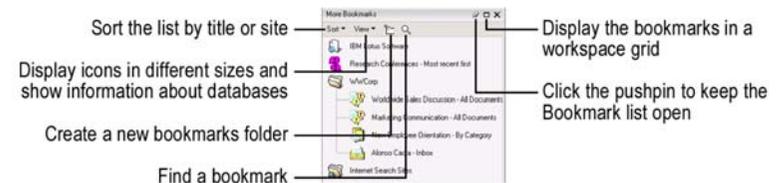
### Using Bookmarks

Create bookmarks to any open message, database, or Web site.

To...	Do This...
Add a bookmark	Drag window tab or desktop icon to the Bookmark bar or bookmark folder, or choose <b>Create a Bookmark</b> .
Open a bookmark	Click the Bookmark icon.
Remove a bookmark	Right-click the Bookmark icon, and choose <b>Remove Bookmark</b> or <b>Remove Folder</b> .
Create a bookmark folder	Right-click a bookmark folder and choose <b>New Folder</b> .
Open a bookmark folder	Click the bookmark folder icon.
Designate selected bookmarks to automatically launch when you start Notes	<b>Note:</b> The bookmark list opens in a sliding frame. Create a bookmark folder called <b>Startup</b> in the <b>More Bookmarks</b> folder. Drag desktop icons, bookmarks, or window tabs into the Startup folder.

### Organizing Bookmarks

Use the Bookmark list to organize and manage bookmarks and bookmark folders.



### Displaying the Bookmark workspace grid

An alternative to the Bookmark list, the grid view displays the bookmarks as tiles on a grid, organized by tabs.



## NAVIGATION

### Window Tabs

Window tabs for currently open documents, messages, views, and Web pages appear across the top of the Notes screen.



**Note:** You can manage open windows with an optional Window menu.

To...	Do This...
Enable the Window menu	Choose <b>File</b> → <b>Preferences</b> → <b>User Preferences</b> , and select the <b>Display Window Menu</b> option in the <b>Additional Options</b> area.
Close a window	Click the <b>x</b> on the window tab. If the window is active, you can press <b>ESC</b> to close it.
Activate a window	Click the window tab.
Move a window tab	Drag the window tab to a new position on the windows bar.

### Toolbars

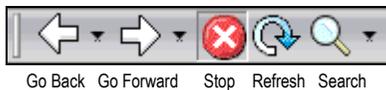
You can move the toolbars around your Notes window and change the scope of your toolbars.



Use the grip bar to drag a toolbar to any position within the Notes window.

### Using the navigation buttons

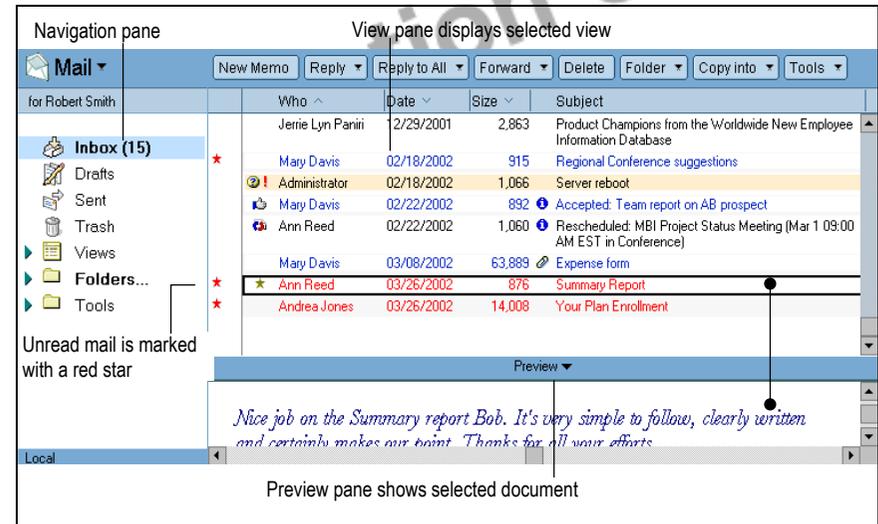
The Navigation toolbar keeps track of the windows you have opened.



To...	Do This...
Display or hide toolbars	Right-click within the toolbar rows, then select or deselect the toolbars to display.
Customize toolbar display or create a new toolbar	Choose <b>File</b> → <b>Preferences</b> → <b>Toolbar Preferences</b> .

## VIEWS, PANES, AND FOLDERS

In your mail file (and other databases), a view is the display of a selected group of documents, such as all the messages in the Sent mail view. Use the navigation pane to select the information to display in the view pane, and use folders to organize messages or documents. The preview pane is optionally used to view messages.



## MESSAGING

Your mail file opens to the Inbox view.

### Working with Incoming Mail

You can sort, file, and reply to messages, as well as view and save attachments from messages.

• To sort messages by sender, date (ascending/descending), or size click the column header.



• To rearrange the order of the columns, drag the column header to the new location.

To...	Do This...
Open a message	Double-click the message.
Preview a message	Select the message and click the preview pane arrow.
Save a message attachment 	Open the message and double-click the attachment icon. Choose to <b>View</b> , <b>Open</b> , or <b>Save</b> the attachment to your computer.  <b>Note:</b> If you intend to save the message, you can delete the attachment to reduce the message size.
Open a Web page or document link in a message	Open the message and click the link icon to open the document, database, or Web page.
Select multiple messages	Click the margin to the left of the messages.
Delete a message	Select the message and click <b>Delete</b> .
File a message	Drag and drop the selected message(s) to the folder. You can also choose <b>Move to Folder</b> from the Folder drop-down list.
Create a mail folder	Click <b>Folder</b> and choose <b>Create Folder</b> .
Remove a message from a folder	Click <b>Folder</b> and choose <b>Remove from Folder</b> .

## Trash

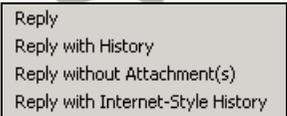


Deleted mail messages are put into the Trash folder of your mail file. You can permanently remove messages from the Trash and set time frames to automatically empty the Trash.

Restore   Restore All   Delete Selected Item   Empty Trash

## Creating and Sending Mail

Send messages to individuals or groups that include images and attached files.

To...	Do This...
Respond to a message 	Click <b>Reply</b> and choose the reply style. Use <b>Reply to All</b> to send the reply to all recipients of the original message.  <b>Note:</b> The last three reply options include the original message in the reply.
Forward a message, document, or Web page in e-mail 	Click <b>Forward</b> .
Create a new message	Choose <b>Create</b> <b>Memo</b> , or click <b>New Memo</b> .
Look up an address	At the top of a new memo, click the <b>Address</b> button and choose an address from an address book.
Save a draft message	Click <b>Save As Draft</b> . The memo is saved in the Drafts view.

## Editing Messages (and other documents)

To...	Do This...
Attach a file to your message 	In the open memo, choose <b>File</b> <b>Attach</b> (or click the <b>Attach</b> button) and select the file, or drag a selected object from your system to the memo.
Insert a picture	Choose <b>Create</b> <b>Picture</b> and choose the file.
Insert a link to a document, view, or database	With the original item selected, choose <b>Edit</b> <b>Copy as Link</b> , and select the link type (Document, View, or Database). At the place in the message where the link will appear, choose <b>Edit</b> <b>Paste</b> .
Create a collapsible section	Select the entire amount of text to be grouped under one section. Click <b>Create</b> <b>Section</b> .
Create a table	Choose <b>Create</b> <b>Table</b> or click the <b>Insert Table</b> button.
Move an item in a list up or down	Place the cursor on the line to move. Press and hold <b>CTRL</b> and press the up or down arrow key.
Format text in a message 	Choose <b>Text</b> <b>Text Properties</b> , or click the <b>Properties</b> button.

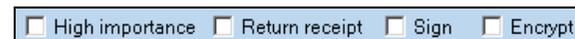
## Using Mail Delivery Options

Before sending a message, you can specify the way the message will be delivered.

- Click **Delivery Options** to set delivery priorities, return receipt, message tracking, and security.



- Click the **Delivery** icon in the memo header to set the most frequently used delivery options.



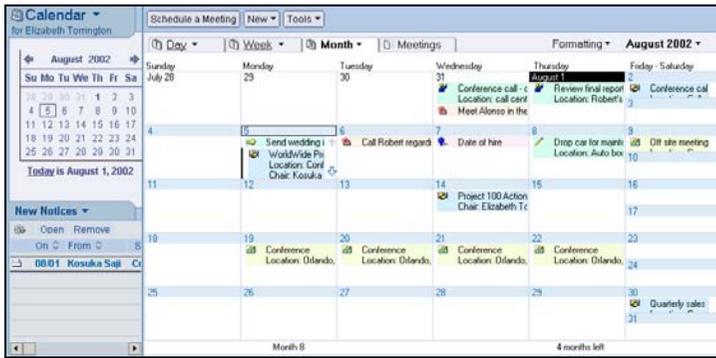
## Changing Mail Settings

To...	Do This...
Open your mail settings	Click <b>Tools</b> and choose <b>Preferences</b> . Click the <b>Mail</b> tab.
Choose settings for handling messages sent and Inbox notification	Choose <b>File</b> <b>Preferences</b> <b>User Preferences</b> . Click the <b>Mail</b> icon and select options.
Set color scheme to identify incoming messages from different senders	Click <b>Tools</b> , and choose <b>Preferences</b> . Click the <b>Mail</b> tab, then click the <b>Colors</b> tab. Enter the sender names and select colors.
Automatically spell check outgoing messages	Click <b>Tools</b> , and choose <b>Preferences</b> . Select <b>Automatically check mail messages for misspellings before sending</b> .
Delegate mail handling to another user	Click <b>Tools</b> , and choose <b>Preferences</b> . Click the <b>Access &amp; Delegation</b> tab.

## CALENDAR AND SCHEDULING

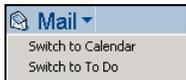


Use the Calendar to schedule and track meetings, appointments, and anniversaries.



### Displaying Your Calendar

- Switch between Mail and Calendar from the drop-down list at the top of the Navigation pane.

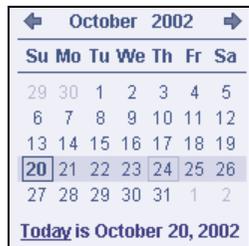


- Choose the number of days to display from the drop-down lists in the Day, Week, and Month tabs.
- The following are items that can appear on the Calendar.



#### To...

Move around the calendar



#### Do This...

Use the date picker to go to a specific date.

- Click a date on the date picker to go to that date.
- Click Today to go to the current date.
- Click the forward and back arrows on the date picker to move to the next or previous month.

**Note:** When the Calendar is displayed by day or week, you can use the forward and back arrows at the bottom of the Calendar to advance or reverse by the displayed time interval.

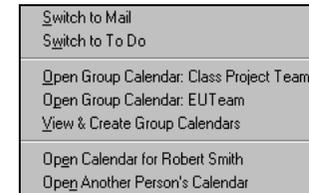
#### To...

Display time slots

Display a list of all meetings

Display a list of all Calendar entries

Create or view a group Calendar



Open another person's Calendar

Print your Calendar



### Creating Calendar Entries

#### To...

Create a new Calendar entry

Set an alarm notification for a Calendar entry

Schedule an entry to repeat at timed intervals

Change an existing entry

Copy a mail message into a Calendar entry

#### Do This...

For all days, click **Formatting** and then choose **Show Time Slots**.

For a single day, right-click a date on the calendar and choose **Show Time Slots**.

Click the **Meetings** tab.

Click **Formatting** and choose **Summarize**.

Click **Tools** and choose **View and Create Group Calendars**.

**Note:** You can use the **Switch** menu to open an existing group Calendar.

Click **Tools**, then select **Open Calendar For**, or click the drop-down arrow next to Calendar in the navigation pane, then choose **Open Another Person's Calendar**.

From the Calendar view, choose **File** → **Print**, and select Calendar style, options, and page type.

#### Do This...

Choose **Create** → **Calendar Entry**, or click **New**, and then choose the type of entry.

Click the alarm icon in the top right corner of the open Calendar entry, and select alarm notification options.

In the Calendar entry, select **Repeats**, and then choose the **Repeat Options** settings.

Double-click the Calendar entry. You can drag an entry to a new date and time.

Select the mail message and choose **Actions** → **Copy Into New** → **New Calendar Entry**.

## Scheduling Meetings

To...	Do This...
Invite others to a meeting	Click <b>Schedule a Meeting</b> .  <b>Note:</b> Meeting invitations are delivered to each invitee's Inbox.
Find the best time for a meeting	Enter invitee names into a new meeting invitation and click the <b>Scheduler</b> button.  <b>Note:</b> Notes suggests times for the selected day, week, or month.
Display a graphic representation of invitee's free time	Click the <b>Scheduler</b> button and select <b>Details</b> . Drag the slider until it displays a green bar, which indicates an available time for all invitees.
Reserve a room and resources	Enter the information in the <b>Rooms</b> and <b>Resources</b> fields. Click the Address book icon to select from a directory.  <b>Note:</b> The administrator must enable this feature.
Verify responses to a meeting invitation	Select the meeting entry, click <b>Owner Actions</b> and choose <b>View Invitee Status</b> .
Reschedule or cancel a meeting	Select the meeting entry, click <b>Owner Actions</b> and choose <b>Reschedule</b> or <b>Cancel</b> .
Respond to a meeting invitation	Click <b>Respond</b> or <b>Respond with Comments</b> , and then choose to <b>Accept</b> , <b>Decline</b> , or <b>Delegate</b> .

## Setting up Your Calendar Preferences

To open Calendar preferences click **Tools**, then choose **Preferences**.

To...	Open this Calendar Preferences tab
Set how the Calendar should be displayed	Display
Designate your available time	Scheduling
Delegate access to your mail to someone else	Access & Delegation
Set a color scheme for types of entries	Colors

## SCHEDULE TO DO TASKS



You can create tasks with assigned priorities and due dates in a To Do list. Active tasks can appear in the Calendar, and in the To Do notes in the navigation pane. You can assign tasks to others, and receive notification of tasks assigned to you.

To...	Do This...
Switch to the To Do list from mail or Calendar	Click the drop-down-arrow next to the word Mail or Calendar in the navigation pane, and choose <b>Switch to To Do</b> .
Create a task	Choose <b>Create à To Do</b> or click <b>New To Do Item</b> .
Assign tasks to others	Select <b>Others</b> in the <b>Assign To</b> field.
Prevent tasks from displaying on the Calendar	Click <b>Tools</b> and choose <b>Preferences</b> . Click the <b>Calendar &amp; To Do</b> tab, then the <b>To Do</b> tab, and deselect <b>Do not display To Do entries in the Calendar</b> .
Mark a task complete	Select a task and click <b>Mark Complete</b> .
View ongoing tasks	Display To Do notes in the Calendar navigation pane.

## YOUR ADDRESS BOOK



Maintain a Personal Address Book of contact names. Each entry can contain multiple business and personal addresses, telephone numbers, and other information. Send mail and meeting invitations directly from your address book.

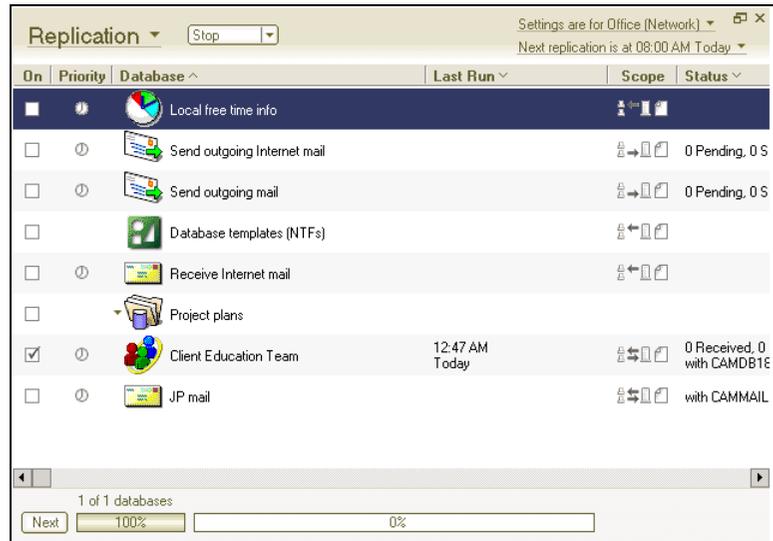
To...	Do This...
Find a contact name	Click a letter tab, or start typing the name. As you type, the <b>Starts with</b> box opens.
Print your contact names list	Choose <b>File à Print</b> . Select whether to print documents or the view. Use the document setup page to select how the contact documents will print.
Change the display format of contact names	Choose <b>Actions à Edit Address Book Preferences</b> , or click <b>Tools</b> , then choose <b>Preferences</b> .
Create a mailing group	Click <b>New</b> and choose <b>Group</b> . Enter the <b>Group name</b> and <b>Members</b> .
Copy address from company directory	Click <b>Directories</b> . Select the directory and the person's name, and then click the add person button.
 Create a contact from the sender of a mail message	Select the message, and then click Tools and choose <b>Add Sender to Address Book</b> .

## REPLICATION



Replication enables users to work offline with Notes. When you are not connected to the network, you can continue to create mail, use your Calendar, and work with other databases. When you reconnect, replication synchronizes your offline work with your server.

You can drag and drop database bookmarks from a Bookmark page onto the Replicator page. To drag selected documents or views to the Replicator page, display the Replicator page as a slide-out page and drag selected items from the view to the Replicator slide-out page.



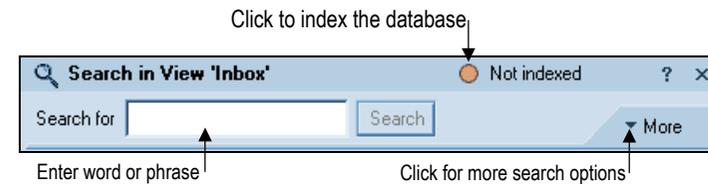
### Enabling Replication

To...	Do This...
Display the Replicator page as a slide-out	Click the grid icon in the top right corner of the Replicator page. <b>Note:</b> The Replicator page can be opened simultaneously with a Bookmark page or a database view.
Replicate your mail file	Choose <b>Actions</b> → <b>Send and Receive Mail</b> .

To...	Do This...
Create a database replica	Open the database and choose <b>File</b> → <b>Replication</b> → <b>New Replica</b> , or use one of these alternate methods: <ul style="list-style-type: none"> <li>Position the cursor over the database bookmark and right-click, then choose <b>Replication</b> → <b>New Replica</b>.</li> <li>Drag the selected database icon, window tab, or element to the Replicator page.</li> </ul>
Create a schedule for replication	Click the Replication schedule drop-down arrow in the top right of the Replicator page. Then choose <b>Set Replication Schedule</b> .
Create a folder on the Replicator page	Choose <b>Create</b> → <b>Folder Entry</b> . <b>Note:</b> Click and drag replication entries into the folder.

## SEARCHING

The Search bar can be used in any view. You may want to create a Full Text Index of the selected database. You can also use Find/Replace and Starts with... features for simple searches.



**Note:** If the database does not have a Full Text Index, the More tab displays the Create Index button. If you already have a Full Text Index, the Add Condition button displays.

To...	Do This...
Show/Hide the Search bar	Choose <b>View</b> → <b>Search This View</b> .
Search a view for documents containing specific text	Enter text in the <b>Search for</b> field and click <b>Search</b> .
Reset search	Click <b>Clear Results</b> in the Search bar.
Sort the search results	Click the Options button on the Search bar. The database must have a Full Text Index.
Define search criteria	Click the <b>More</b> button on the Search bar.
Find and/or replace text in a document	Choose <b>Edit</b> → <b>Find/Replace</b> , or press <b>CTRL+F</b> .

## SECURITY AND MOBILITY



With basic preferences you can set your password, lock your ID after a period of inactivity, encrypt messages, and lock documents to prevent save conflicts.

To...	Do This...
Change your password	Choose <b>File</b> à <b>Security</b> à <b>User Security</b> . Click <b>Security Basics</b> , and then click <b>Change Password</b> .
Set automatic locking on your user ID after a period of inactivity	Choose <b>File</b> à <b>Security</b> à <b>User Security</b> . Click <b>Security Basics</b> , and then select <b>Logout (and lock Notes display) if you haven't used Notes for</b> and enter number of minutes.
Lock your Notes display	Choose <b>File</b> à <b>Security</b> à <b>Lock Display</b> , or press <b>F5</b> .
Enable document locking in a database	Choose <b>File</b> à <b>Database</b> à <b>Properties</b> . Click the Database Basics tab and select <b>Allow document locking</b> .
Lock a single document	Select the document and choose <b>Actions</b> à <b>Lock Document</b> , or open the document in Edit mode.

## GETTING ONLINE HELP



Use online Help to guide you or browse the Help topics independently. Help documents appear in a separate Notes window, with universal navigator and search tools.

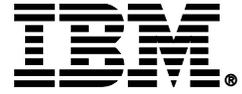
To...	Do This...
Get context-sensitive Help	Choose <b>Help</b> à <b>Context Help</b> , or press <b>F1</b> , then select an appropriate topic.
Browse the Help database	Choose <b>Help</b> à <b>Help Topics</b> , then display the Contents or Index.

## KEYBOARD SHORTCUTS



There are keyboard shortcuts for menu and toolbar selections. Use the following shortcuts for some common Notes tasks.

To Do This...	Press...
Get Help on current feature	<b>F1</b>
Move to next pane or frame	<b>F6</b>
Access menu bar	<b>ALT</b> or <b>F10</b>
Select multiple bookmarks	<b>SHIFT+CTRL</b> , then <b>UP ARROW</b> or <b>DOWN ARROW</b>
Select all documents in view	<b>CTRL+A</b>
Find text in a view	<b>CTRL+F</b>
Print selected document	<b>CTRL+P</b>
Close document and open next	<b>ENTER</b>
Close document and open previous	<b>BACKSPACE</b>
Close current document	<b>ESC</b> , or <b>CTRL+W</b>
Move to next unread document	<b>F4</b> or <b>TAB</b>
Edit an existing document	<b>CTRL+E</b>
Save current document	<b>CTRL+S</b>
Create new mail memo	<b>CTRL+M</b>
Open a database	<b>CTRL+O</b>
Refresh Mail or Calendar view	<b>F9</b>
Permanently delete mail memo	<b>SHIFT+DELETE</b>
Go to first entry in Replicator	<b>HOME</b>
Go to last entry in Replicator	<b>END</b>



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