

INBOX AND MAIL BASICS

This guide illustrates various differences between Lotus Notes and Outlook.

When composing an email with multiple recipients, Lotus Notes requires a comma separator between email addresses. In Outlook, the separator required is a semi-colon (see Image 1).

Inevitably, when working with email, a deleted email will need to be restored to the Inbox. The process for restoring emails in Lotus Notes and Outlook is similar, but individual steps will vary.



Image 1. Outlook email semi-colon separator

Restoring an email in Lotus Notes requires you to navigate to the Trash folder. To restore an email in Outlook, go to the **Deleted Items** folder. **Right-click** the message and hover over the **Move** option (see Image 2). From the menu of folder options, choose the folder to move the message to. The message will be restored to the folder selected.

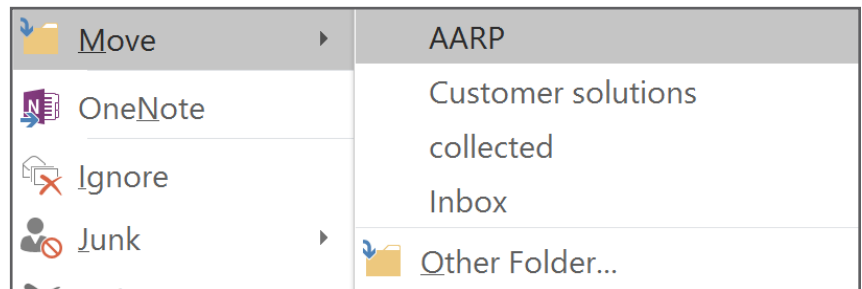


Image 2. Outlook restore an email

Folders are one of the best ways to keep saved messages organized. In addition to the default folders that appear for the program, you can create custom Folders to store messages for easy viewing and retrieval.



To create New Folders in Outlook:

1. **Right-click** the folder name where the new folder should be created
2. Click **New Folder** in the right-click menu (see Image 3)
3. Type a new name for the folder

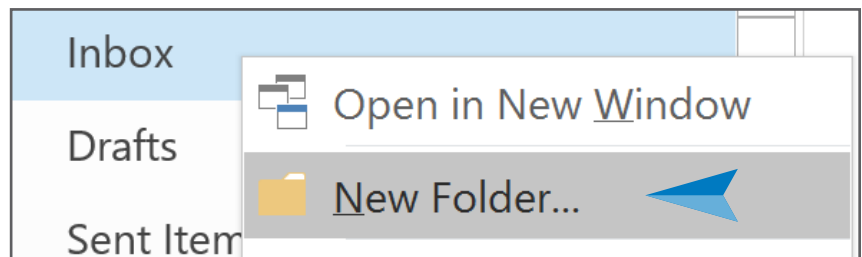


Image 3. Outlook new folder

OUT OF OFFICE/AUTO REPLIES

An Out of Office message can be configured in the event that the email account will be temporarily unmonitored. This allows you to configure a custom, automatic reply for incoming messages to inform senders that you are away from the office.



Create an Out of Office message in Outlook:

1. Click **File > Info > Automatic Replies**
2. Click the **Send Automatic Replies** radio button (see Image 4)
3. Check the box for **Only send during this time range**
4. Set your start and end dates and times
5. Type your reply message and click **OK**

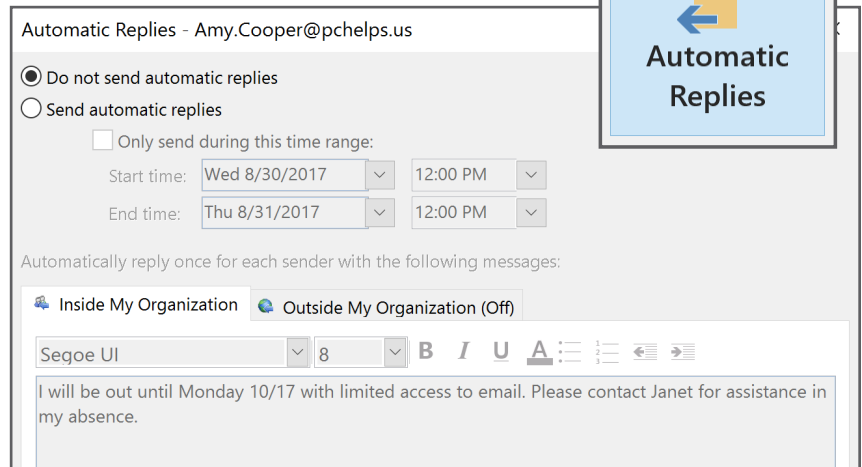


Image 4. Automatic Replies window

SETTING YOUR SIGNATURE

Professional business email accounts usually have a signature that has the sender's business information, such as their title and phone number, as well as various other contact methods to be included on every email.

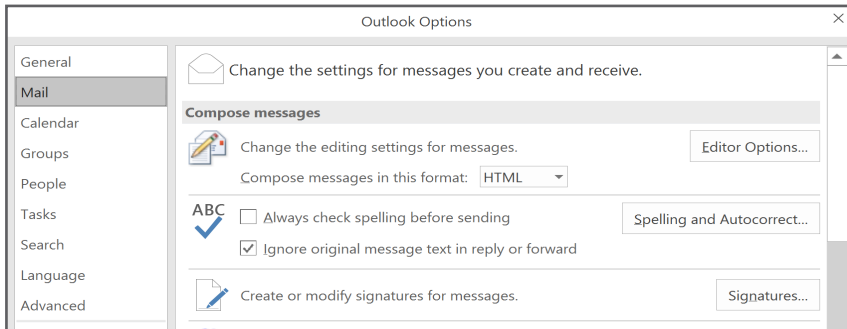


Image 5. Outlook Options window



To create a Signature in Outlook 2016:

1. Click the **File** tab and then click **Options** on the left
2. Click **Mail** in the Outlook Options window and then click the **Signatures** button (see Image 5)
3. Click **New** and then enter your new signature into the provided text box. If you want to use your Notes signature, make sure to copy the signature from Notes to paste into the text box
4. Click **Save**
5. Confirm that your new signature is now listed as the default for new messages and close the window

HANDLING MESSAGES

Lotus Notes and Outlook are both designed to handle email messaging but offer different capabilities for doing so. For example, both programs have the ability to **Reply** to email messages but, when messages contain attachments, only Lotus Notes can automatically include the original email attachment in the reply message. Outlook does not automatically include the attachment, and requires that you manually re-attach the file in your reply. This is designed to help prevent attachments from being repeated in message threads and taking up limited mailbox storage.

Another basic function available in both programs is filing sent messages into folders. In Lotus Notes, the **Send & File** button will save a copy of the sent message in a folder. Outlook requires you to configure this manually for each item that does not go to the default sent folder.

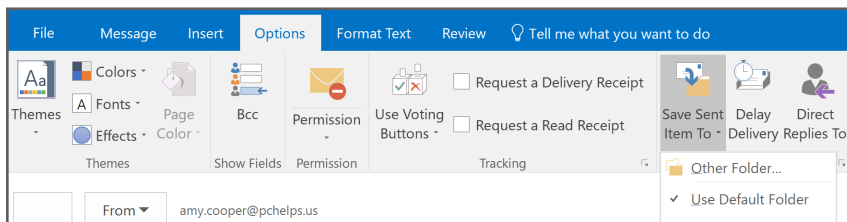


Image 6. Save Sent Items To option



To file a sent message to a folder in Outlook:

1. In the message window click the **Options** tab
2. In the **More Options** group click **Save Sent Items To**
3. From the menu select the **Folder** you would like to save a copy of the message (see Image 6)

Note: Outlook will only save one copy of a sent message. If you have Outlook configured to save to sent messages, and you use this option, the message will be in the folder you select and will not also appear in Sent Items.



To recall a Sent Message:

1. From the **Sent** folder, open the message you wish to recall
2. Click **Message > Actions > Recall This Message** (see Image 7)
3. Select **Delete unread copies of this message** or **Delete unread copies and replace with a new message**

Note: Please be aware of the following limitations:

1. Messages can only be recalled from other Outlook users, not external accounts
2. Messages can only be recalled if they have not been read
3. The user from whom you are recalling must be using Outlook for Windows, and have Outlook open at the time of recall
4. Recipients using Outlook Web Access, Outlook for Mac, or a mobile device will not have their message recalled

Just as the steps to perform certain actions can change by program, so can the available capabilities. One such feature available in Outlook is the ability to **Recall a Message**. If an email was prematurely sent, or sent to an incorrect recipient, you can attempt to recover the email before it has been read.

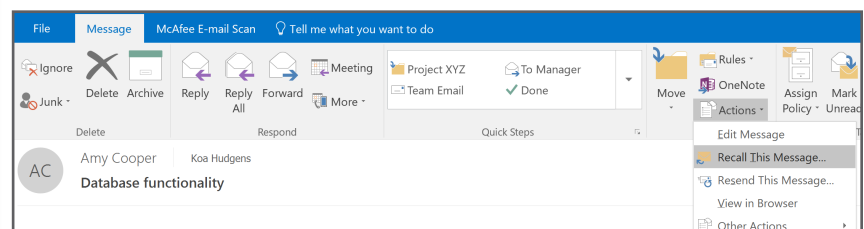


Image 7. Recall This Message option

VIEW ALL ITEMS IN YOUR MAILBOX

Lotus Notes has a view titled All Documents, which displays all the messages in the mailbox, including messages from the Inbox, Sent Items, and custom folders. To replicate this view in Outlook, you can create a **Search Folder** that provides the same functionality.

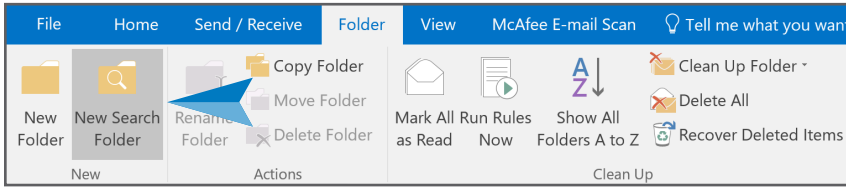


Image 8. New Search Folder option



To create a "All Documents" Search Folder in Outlook:

1. Click on the **New Search Folder** in the **Folder** tab (see image 8)
2. Double-click **Create a custom search folder** (see image 9)
3. In the **Custom Search** folder dialog box, enter the name as **All Documents** and click **OK** (see image 10)
Note: Do not click Criteria as you do not want to set any criteria for this folder so it pulls in all email messages.
4. Click **OK** to exit the **Custom Search Folder** dialog, and click **OK** to leave the search folder dialog
5. In the **Navigation Pane** on the left side of your **Outlook** account, you should see a new folder called **Search Folders**, this is where the **All Documents** search folder is located
6. Click the folder to see **"All Documents"** in the mailbox

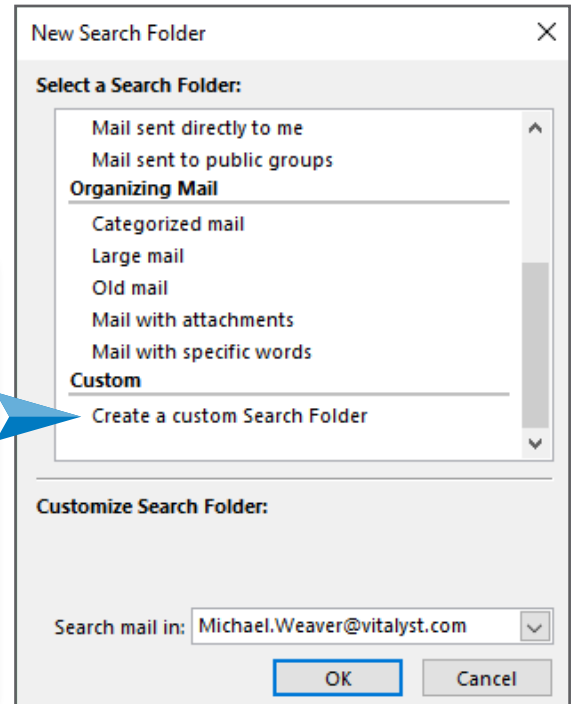


Image 9. Create a Custom Search Folder

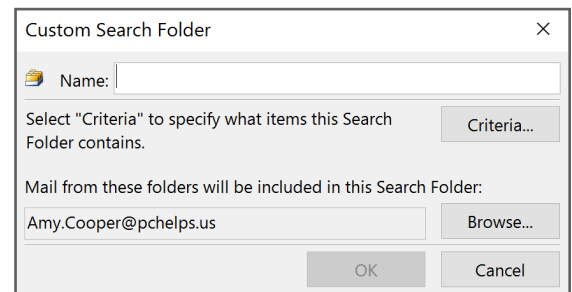


Image 10. Name the Custom Search Folder

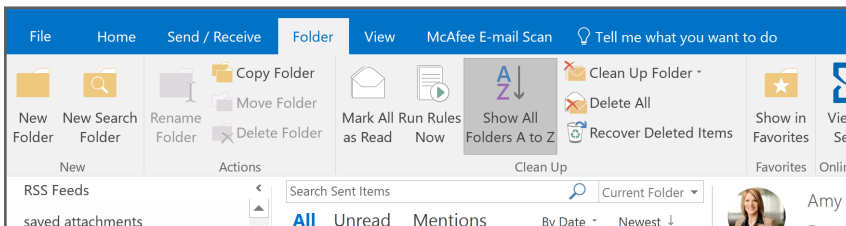


Image 11. Show All Folders



To sort folders in Outlook alphabetically:

1. Right-click your mailbox name and select **Sort Subfolders A to Z** (see Image 11)
- OR-
2. Select the **Folder** tab, and click **Show All Folders A to Z** (see Image 12)

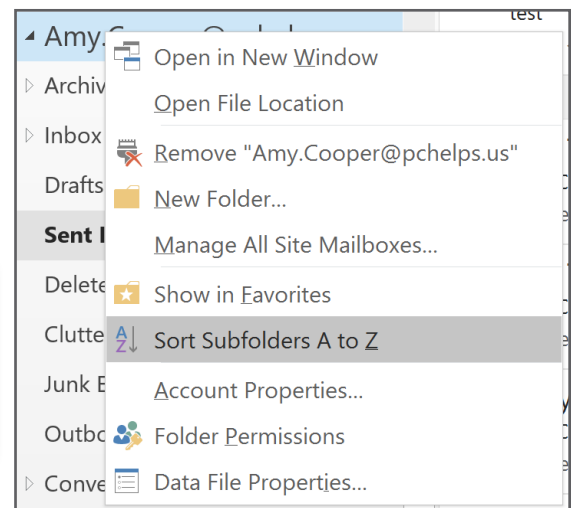


Image 12. Sort All Folders

ORGANIZATION WITH FOLDERS

By default, all folders in Lotus Notes are sorted alphabetically. In Outlook, you can choose to sort folders alphabetically, although they are not listed that way by default. Folders can also be re-ordered simply by clicking and dragging them to the desired location.

SAVE AS DRAFT

Outlook allows you to save drafts of messages that you are working on, it will automatically occur after you close the window (see Image 13). In Outlook, there is only one location that draft messages can be saved and that is the **Drafts** folder. While you can manually move messages from the Drafts folder, you will not be prompted to save them there.

Vital Tip: Make sure to include the subject for the message before saving to a draft so you can easily identify it in the Drafts folder later.

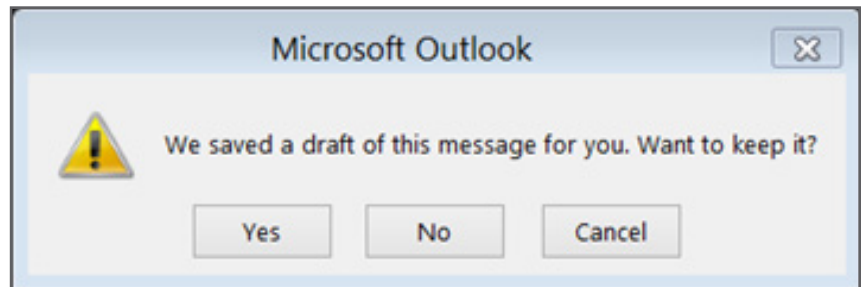


Image 13. Save as Draft prompt

RECURRING MEETINGS AND APPOINTMENTS

In Outlook recurring appointments and meetings must follow a pattern, such as every Friday, the 15th of every month, or every third Tuesday.

In the **Meeting** or **Appointment** tab of an event, click the Recurrence command to view and apply available recurrence patterns (see Image 14).

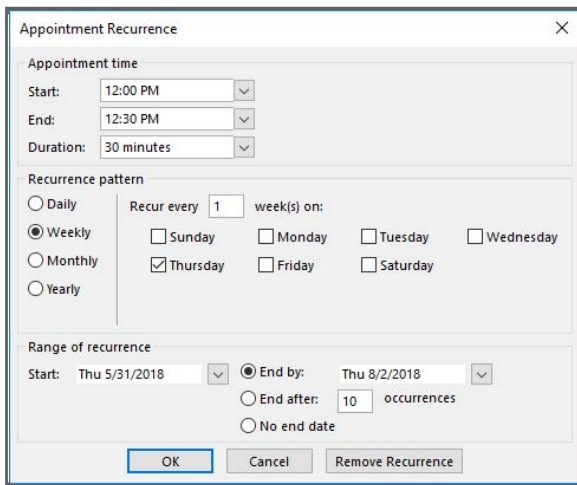


Image 14. Mailbox Cleanup options window

READ RECEIPTS

Notes had the ability to request return notifications for when a recipient opens or deletes a message. Outlook is a bit different.

In a message on the **Options** tab in the Tracking group, you can set whether you want to receive a **Delivery Receipt** when the message hits the recipients mailbox or a **Read Receipt** when the recipient reads the message (see Image 15).

A Delivery Receipt will be sent automatically to confirm the delivery of the message. A Read Receipt will require the recipient to allow for it to be sent back and there is not always a guarantee that you will receive one from your colleague.

Tasks and **Calendar** events have their own separate method of responses which are set independently.



Image 15. Read and Delivery Receipts



To add a file attachment to an email:

1. In the message window, click **Attach File**
2. Choose a **Recent** file, or **Browse This PC**
3. In the **Insert File** window, navigate to the file
4. Highlight the file you want to attach
5. Click **OK** to attach the file to the message



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