New features in Lotus Notes 7 mail

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People use Notes/Domino in all sorts of different ways, and one of the most popular is email and messaging. With that in mind, Notes/Domino 7 offers significantly enhanced mail functionality, including expanded calendar and scheduling. This article reviews some of the more important and useful of these new features.

Collaboration with ease has been the Lotus Notes mantra since its first release. Notes/Domino 7 continues this trend, helping people collaborate more effectively. Developers, end users, business partners, and customers around the world are eager to explore and discover how Lotus Notes/Domino 7 can help improve productivity, usability, and IT infrastructure.

This article examines new features included in the Notes 7 mail database. This includes email features, as well as Calendar and Scheduling features. We assume that you're familiar with basic Notes functionality. For a review of all new features in Notes 7 and Domino Designer 7, see the developerWorks Lotus article, "New features in Lotus Notes and Domino Designer 7.0."

New mail features

Notes 7 mail offers a significant number of new features. These include:

- Message marking based on recipients list
- Instant messaging from the mail database
- Quick flags for Follow Up messages
- "Autosaving" an in-progress document
- Block mail from sender

The following sections describe these features in detail.

Message marking based on recipients list

Message marking was introduced in Notes 6. In Notes 7, an additional option allows you to display icons in mail views that indicate how important each message is, based on the recipients list in the To and cc fields. These message indicators help you quickly identify and respond to the most critical messages addressed to you (see figure 1).

Figure 1. Display of message indicators for each message in Inbox
In figure 1, you will find a column displaying a solid circle, a half-solid circle, and an empty circle for each received message. A solid circle indicates that you are the only recipient in the To field of the message, a half-solid circle indicates that you are one of "x" number of recipients included in the To field of a message, and an empty circle indicates that your name is included in the cc field (or is one of more than "x" names in the To field) of a message. The message indicator column can be sorted, to quickly identify messages addressed to you. These message indicators help you to determine the degree of attention required for a message.

You can also customize message marking preferences. To do this:

1. From within the mail database, choose Actions - Tools - Preferences.
2. Under Mail, click the Message Marking tab.
3. Click the Recipients tab.
4. Select the options to display the appropriate icon. You can also specify any alternate or group names under which mail might be sent to you, for which you want these preferences to apply (see figure 2).

**Figure 2. Recipients tab in Preferences dialog**

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**Instant messaging from the mail database**

Sametime instant messaging is tightly integrated with the Notes 7 mail database. Using this feature, you can communicate with colleagues from within your mail database. **(Note: Sametime**
instant messaging server information must be configured in your Notes 7 client to use this feature. This is done in the Location document, on the Servers tab, in the section titled "IBM Lotus Sametime server."

Notes 7 provides the option to save a chat transcript in a text file or in the mail database. To see the saved transcript in your mail, click Views - Chat Transcripts in the left navigation pane of the mail database (see figure 3).

**Figure 3. Saved chat transcripts in Chat Transcripts view**

![Chat Transcripts view in Lotus Notes 7](image)

The Chat Transcripts view displays the document with the name of the person you were chatting with, and the date and time the transcript was saved. The "Chat I started" and "Chat I took part in" icons in the view can help you find a particular transcript. You can forward the saved chat transcripts to others, allowing you to share information in an instant.

Notes 7 allows you to set preferences for alerts and preferences for saving chat transcripts, and to set timestamps during a chat conversation. These preferences can be set by accessing File - Preferences - User Preferences. Then select Instant Messaging - Options. The Instant Messaging preferences appear (see figure 4).

**Figure 4: Instant Messaging preferences**
Quick flags for Follow Up messages

Quick flags allow you to set priority flags to a message for Follow Up, without displaying the Follow Up dialog box. You can set a quick flag for a message by clicking the Quick Flag option under the Follow Up action menu (see figure 5).

Figure 5. Quick flag options in Follow Up menu

The quick flag is set using the defaults in Follow Up preferences (see figure 6). To change the default preferences, do the following:

1. Choose Actions - Tools - Preferences.
2. Click the Follow Up tab.
3. Indicate the importance of the follow up action to be used as the default by selecting one of the priority levels (Urgent priority, Normal priority, Low priority).
4. Optionally, you can set the default follow up date and time, and also set an alarm.

Figure 6. Follow Up tab in Preferences dialog box
You can use the Follow Up MiniView to keep note of follow up actions you need to take. In addition, Notes 7 allows you to access follow up action messages listed in the Follow Up MiniView from calendar views.

**Autosaving an in-progress document**

In Notes 7, you can have an active working document saved automatically, through a new feature called AutoSave. With this feature enabled, Notes saves the document to a local encrypted database. This helps you to recover messages in case of a power failure or system crash. Notes discards these messages or documents when the active working document is sent, saved, or discarded.

To use this feature, you need to enable AutoSave in your user preferences. The User Preferences dialog now includes a new checkbox for enabling AutoSave, and for setting the time interval at which an active working document is automatically saved (see figure 7).

**Figure 7. Option to set AutoSave in User Preferences dialog box**

For more information about this feature, see the article, "All about AutoSave in Lotus Notes/Domino 7."
Block mail from sender

The Notes 7 mail database now allows you to block mail from one or more users. You can block emails from a particular user, or from the entire mail domain (for example, @domain.com). Messages from the blocked users are delivered directly to the new Junk Mail folder in the Notes 7 mail database.

To block mail from sender(s):

1. Select a message from the sender you want to block (or if you want to block several senders at once, select a message from each sender to be blocked).
2. Choose Actions - Tools - Block Mail from Sender. The Block Mail from Sender dialog appears. (You can also use the right-mouse menu to do this.)
3. Choose "Block mail from this sender (sender@domain.com)" to block mail from that specific sender. Or you can choose "Block mail from any address that ends with (@domain.com)." Choosing this option blocks all mail from this domain. This option is only available if the sender has an Internet-style address, rather than a Notes-style address.
4. Click OK. All future incoming messages from the blocked users will be delivered automatically to the Junk Mail folder.

To unblock mail from sender(s):

1. In the Junk Mail folder, select the message(s) from whom mail will no longer be blocked.
2. Choose Actions - Unblock. Click Yes to confirm the email address to be removed from the Blocked Senders list. (You can also use the right-mouse menu to do this.)

New features in Calendar and Scheduling

Notes 7 extends the integration with Sametime instant messaging to your Calendar meeting invitations and other calendar entries. You can initiate an online chat with the chairperson of a meeting notice, and other invitees included in the meeting schedule.

Calendar views are now enhanced, with a set of filter options (see figure 8) to access your calendar entries quickly.

Figure 8. Filter menu of Calendar view

Calendar filters let you:

- Search for meeting invitations from a particular chairperson
- Search calendar entries by type (for example, by appointments or by reminders)
• Search calendar entries by status (for example, by accepted status)
• View calendar entries marked as private

Notes 7 also helps you to manage your calendar entries effectively. A calendar cleanup action lets you remove your calendar entries based on a user-specified cut-off date. To perform this action, you need to access the Calendar Cleanup action under the Tools menu. When you select this action, you are prompted with a Calendar Cleanup dialog to choose the type of calendar entries to be removed, and the cut-off period.

Scheduling a meeting using the Notes 7 calendar supports scheduling an online meeting. When scheduling an online meeting, you can include the online meeting location, the password for the online meeting, and attachments required for the online meeting. The chairperson can even restrict the online meeting to meeting invitees only. (Your environment must have a Sametime server with Web conferencing to use this feature.)

While creating a meeting schedule, you can reserve rooms and resources required for the meeting. The Notes calendar lets you search for an available room and resource. You can perform this search by using the Find Room or Resource action. This action is available via the Action Bar on a meeting document, and via the Actions menu. You can also set preferences for Rooms and Resources (see figure 9).

To set these preferences, do the following:

1. Open the calendar and choose Actions - Tools - Preferences. Click the Calendar & To Do tab, and click Rooms and Resources.
2. Specify the site that the Find Room and Find Resources dialogs will open with by clicking the Address book icon.
3. Select the Room(s) list by clicking the Manage Room List button.
4. Select the Resource(s) list by clicking the Manage Resource List button.
5. Under "Preferred Room list management" or "Preferred Resources list management," specify how Notes should function when you select rooms or resources for a meeting invitation.

Figure 9. Rooms and Resources tab under Calendar & To Do tab of Preferences dialog
When the preferences for Rooms and Resources are set, these preferences serve as the defaults for the preferred site, and the preferred list of rooms and resources that display when you are scheduling a meeting. If, at any point, you change the location of the meeting or add another room, Notes automatically reschedules the reservation.

Notes also has the ability to "learn" to identify non-preferred rooms, and automatically add them to the list (or change the preferred site value) whenever a new meeting invitation is created and sent out. The Notes client will detect that an invited room/resource/site is not in the configured preferred set, and prompt you to change/update your current list.

**Note:** To allow you to reserve a room or resource, your organization's Domino Directory must support and contain entries of rooms or resources. The Domino administrator must create a Site Profile document by providing a preferred site name, and associate the Site Profile document with a particular Resource Reservation database and with a Domino Directory. The Site Profile documents are created in a Room Reservation database hosted on a Domino server. A Resource document is created in the Room Reservation database, and a Resource Document has to be associated with a Site Profile document. A Resource document lets you specify the resource type (Room, Online meeting place, or Other). After the resources information is set and associated with a Room Reservation database and Domino Directory, you can search for the free time of a room and a resource, and schedule them for a meeting. For more information about Rooms and Resources functionality in Notes/Domino 7, see the articles, "Rooms and Resources design in Lotus Notes/Domino 7" and "New Rooms and Resources features in Lotus Notes/Domino 7."

Using Lotus Notes 7 Calendar, you can add a predefined set of holidays. When you add a set, Notes adds each holiday to the Calendar as an anniversary. You need to import holidays to create entries in the Calendar. To add holidays, choose Actions - Tools - Import Holidays and select a holiday set (see figure 10).
Figure 10. Import Holidays dialog

Note that the list of available holidays needs to be configured by the Domino administrator. See the Domino administration documentation for more information.

Other new mail features

The Notes 7 mail database right-click menu has been expanded to include many new actions. These include blocking mail from a sender, setting quick flags for Follow Up, initiating a chat conversation, adding a sender to your address book, copying your message to a new memo, calendar entry, or To do item document, moving a message to a particular folder, and creating a QuickRule.

Notes 7 now supports sorting messages by subject. This feature lets you quickly locate messages on a particular subject. Additionally, Notes prompts you to confirm whether or not a message should be sent with an empty subject.

Notes 7 lets you display only unread messages in the Inbox. This can be done via View Unread (see figure 11). This action allows you to toggle between the display of only unread messages and the display of all messages.

Figure 11. Toggle action to display unread messages

Conclusion

These new features in Lotus Notes 7 help you determine the level of importance of the information in your mail database. Using the Notes 7 mail database, you can more effectively collaborate in a timely and productive manner, and better manage daily information and resources.
Related topics

- For a review of all new features in Notes 7 and Domino Designer 7, see the developerWorks Lotus article, "New features in Lotus Notes and Domino Designer 7.0."
- For more information about the new Autosave feature, see the article, "All about AutoSave in Lotus Notes/Domino 7."
- For more information about Rooms and Resources functionality in Notes/Domino 7, see the articles, "Rooms and Resources design in Lotus Notes/Domino 7" and "New Rooms and Resources features in Lotus Notes/Domino 7."
- See the Domino administration documentation for more information about configuring new mail features in Notes/Domino 7.
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