iNotes
Version 8.5
Reference Guide
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Accessing iNotes

From Mozilla Firefox or Microsoft Internet Explorer, go to url:  http://notes.marist.edu

Note: You must allow popups for this site.

Logging in to iNotes

From the following screen click Log In!

Enter your first name and last name(separated with a space) and the password. Click OK.
Click Your Inbox to access Lotus Notes functions.
Internet Security

Important: if the following screen appears, click the Allow button

![Internet Security]

Install Active X

If the following screen appears, click the Install button

![Install Active X]

Security: Changing Your Password

To change your iNotes password, click on Preferences in the upper right-hand corner of the screen. A window will pop-up; select Security from the list that runs along the left-hand side. Another window will appear; under the heading “Change Internet Password” at the top of the screen, click Change.
The following window will open:

**Note:** Changing your Internet password requires the following steps:
1. Complete this dialog and click OK. This submits a request to the administration process to change your Internet password.
2. Wait for your old password to stop working, before using your new password.

Enter your old Internet password and then enter your new Internet password twice (for verification of spelling). Click the **OK** button until all the windows are closed.

**Home Page**

Upon logging in to iNotes, the Home screen is displayed.

This default page that appears upon first opening iNotes can be altered according to your personal preferences. To select a new layout, from the Home Page, choose Edit Layout...
The following screen will appear:

You have the option of selecting from a variety of layouts and choosing the contents.

Click **Save & Close** when done.

**Navigating iNotes**

On top of the left sidebar are buttons which allow you to move between iNotes functions.

**Refresh**

To refresh the view of any section you are in, click on the blue arrow icon, which is located towards the top of the screen.
Preferences

Automatic Signatures
To sign your name to outgoing e-mail automatically, click on Preferences located in the upper right-hand corner of the screen. A new window will pop-up; select the Mail tab on the left-hand side and then select Signature. Check the box next to “Automatically append a signature to the bottom of your outgoing mail messages” and then type a personal signature which will automatically append to all of your outgoing messages.

![Signature settings](image)

Click the OK button located at the bottom of the window when done.

Mail

To enter the Mail function, click on the Mail icon on the left sidebar.

![Mail interface](image)

The Inbox will open up as a new tab.
Along the left sidebar you will see the navigation panel containing a list of views and folders.

**Inbox**
The Inbox view contains all the mail that has been received, not including mail that has been moved or deleted. The e-mail will show up in two basic formats: read and unread. Read documents will appear as a line of text written in black; unread documents will appear as a line of text written in red. To read mail, double click on a message. Notes will open up a new tab from which the document can be read, saved, replied to, printed, and forwarded.

**Preview Pane**
iNotes offers a preview pane that lets you preview the text of your e-mail messages as you scan through your inbox without actually opening the message. Clicking on the message once will open a preview, which will be displayed along the bottom half of the screen.
Composing Mail
From the Mail function, click on the **New** button that runs along the top of screen. The following Message window will appear.

Locating Addresses
1. Manually type an address in the **To** field.

2. Type Ahead feature: begin typing a person’s name in the **To** field. Next to the **To** button, a contact icon with a green check will appear. To see names that match what you have typed, click the icon. If the name is unique, the only person with that name will be inserted in the **To** field; if there are multiple matches, a list of names will appear. To select a recipient, highlight his or her name and click OK.
3. Another way to locate an address is to click the To: button; a window will appear from which you can browse through address books and search for contacts.

Sending Mail with Attachments
1. At the bottom of the Message window you will see a space for adding attachments. Click on Browse button for a document to attach. Then click the Add to List button.
2. At the top of the Message window, click on the paper clip icon.

Formatting A Message in Plain Text
When composing messages destined for Marist listservs (MARFAC, MARSTAFF, course listservs), you must format the message in plain text. To do this click on the Format button at the top of the Message window and then choose Plain Text.

Spell Check
To check the spelling of a message before you send it, click on the button at the end of the icon list that runs along the top of the body field within the Message window.

Sending Mail
Once the message (new, forwarded, or reply) has been composed, there is a choice between Send, Send & File, Save as Draft. The Send button sends the message out to all the addressees and saves a personal record in the Sent folder. The Send & File button sends out the message to all the addressees, saves a personal record in the Sent folder, and allows filing in a folder. The Save as Draft button saves the message in the Drafts folder and holds it there until a later time.

Receiving Mail
To open a newly received message, double click on it. This will open the message in a new window.

Replying to Received Mail
When highlighting or reading a message, there is a button at the top of the screen labeled Reply. Clicking on the down arrow next to Reply with provide several options, all of which will open a new message. The To: field will be filled in with the original Sender’s address and the Subject field will contain the original subject pre-pended with Re:.

Reply with History Only
This is the preferred option. Replies to the sender without any attachments that were included in the original message. It appends the body of the original message.
**Reply with History & Attachments**
Replies to the sender and appends the body of the original message, including any attachments.

**Reply**
Just replies to the sender without appending the body of the original message.

**Replying with Internet-Style History**
This method of replying is useful for Marist listservs (MARSTAFF, MARFAC, course listservs).

**Reply To All**
The Reply to All options are the same as Reply. The message will also be sent to all recipients of the original message and they will be placed in the CC: field.

**Forward**
To forward a received message to another party, click on the button marked *Forward*, when highlighting or reading the message. Clicking on the down arrow next to Forward with provide several options, all of which will open a new message. The Subject field will contain the original subject pre-pended with Fw:. The Forward options are similar to the Reply options.

**Receiving Mail with Attachments**
When you receive a message with an attachment it will be at the bottom of the message window; simply click to launch it, provided you have the appropriate application installed on your desktop. For example, if opening a .pdf file, you need Adobe Acrobat Reader installed. To save the attachment without launching, right click on the filename for the option to save.

**Saving Mail in Folders**
The recommended way to save and organize messages is to file them in folders.

To save a message in a folder, click on the down arrow next to the button and you can choose to Move or Copy to a particular folder.

Select the desired folder and press the OK button.
Please refer to the Folder section of this document to learn how to create and delete folders.

**Setting an Out of Office Message**
You can set an out of office message to let others know when you are away from the office. From the Mail function, select More, Out of Office.

The following window will appear; fill in the appropriate fields and check the box ‘Enable the Out of Office agent’. Click the **Save & Close** button when done.
When composing a message, it is possible to save the current message and send it out at a later date. In order to save the message in draft form, click the Save as Draft button. This automatically stores it in the Drafts folder. To retrieve an unsent message that has been stored, click on the selection for Drafts from within the navigation panel that runs vertically along the left-hand side of the screen. From this section, unsent messages are listed; double click on the message to open, edit, and send.

Sent
This folder contains all of the messages that have been sent out (new, forwarded, and reply). As in all views and folders, you have the ability to sort by the columns to help you locate a message: by clicking on any heading (Sender, Subject, Date, or Size) this will cause the entire chain of mail to organize itself by the respective heading.

All Documents
All Documents is a reference view. It contains links to all documents that are located in the mail database. This is a useful view for searching purposes. To organize the list of items, you can click on Who, Subject, Date, or Size to organize the column by each respective choice.

Trash
When messages are deleted from any of the views or folders, they get stored in the Trash folder where they remain until the Trash is manually emptied or after the default time of 48 hours. To quickly free up space, you should empty your Trash folder regularly. To delete a message, highlight the message and hit the delete button on the keyboard, right click and select delete, or click on the trash icon. This will
move the document into the Trash. To empty the trash, select Trash from the navigation panel and click on the Empty Trash button.

Un-deleting Documents
While the message is still in the Trash folder, it can be restored to the location from which it was before deletion. Once a document is deleted and before refreshing the database, a document that has been marked for deletion can be un-deleted by highlighting it within the Trash and clicking on the Restore button.

Once the trash has been emptied, the message is permanently gone.

Folders
To create a folder, click the down arrow next to the New button and select Folder.

![Folder creation interface]

Type the name for the folder and Click the OK button.

![Folder creation dialog]

The newly created folder will be displayed under the Folder section within the navigation panel that runs vertically along the left-hand side of the screen.

To Delete folders, you must first delete or move all message contained within the folder. Once the folder is empty, right click on the folder name in the navigation panel and select Delete.
Calendar
To enter the Calendar function, click on the Calendar icon on the left sidebar.

Creating a Calendar Entry
To create a calendar entry click on the down arrow next to the New button and a menu will appear. From here you can choose what type of entry you would like to create; once an option is selected, a form will open. Fill out the appropriate information and then click Save & Close at the top of the window; the entry will then be added to your calendar.

When viewing your calendar, you can also create an entry by right clicking on an open date or time (depending on your view), choose New and select what type of entry you would like to make from the menu that appears.

Accepting a Meeting
When someone sets up a meeting and includes you on the invitation list, you will receive an e-mail in your inbox from that person. To accept the meeting and add it to your calendar, simply choose the Accept option from within the e-mail. Upon doing this, Notes will automatically enter the meeting into
your calendar. Whether you choose to accept or decline the invitation, Notes will send a notice to the person chairing the meeting to let them know your decision.

Creating and Sending Meeting Invitations
To send out a meeting invitation, create a Meeting entry from within the calendar section. Fill out the appropriate information as you would for any other calendar entry, but here you have the option of sending out meeting invitations to other people. To do this, insert the names of those you wish to invite and choose **Save & Send** when you are done.

Contacts
To enter the Contacts function, click on the Contacts icon on the left sidebar.

This section of iNotes organizes specific people that are located within your network of connections. You can also enter personal or off campus information for e-mail addresses that are not located within the realm of Lotus Notes. To create a new entry, select the down arrow next to the **New** button and select **Contact**.
A new screen will pop-up with a number of fields that can be filled in. The most important fields to fill in are first and last name as well as e-mail address. Be sure to click **Save & Close** at the top of the window when you are done.

An easier way to store a contact is from a received message. Click on the **More** button and then select ‘Add Sender to Contacts’.

The same form will appear with the Name and e-mail address already filled in. You have the option of entering additional information if desired. Click **Save & Close** when done.

**Managing Your Lotus Notes Mail Database Size**

Along the top of the screen in iNotes will be a mail file size percentage indicator. Mouse over the indicator and a window will appear telling you how much of your mail database is being used.
Refer to the link http://www.marist.edu/it/pdfs/managingsize.pdf on the Marist College web site for more information on managing your Lotus Notes mail database size.

**Logging Out of iNotes**

Click the Logout button located in the upper right-hand corner of the screen.

![Logout Button](image)

**Assistance**

There is a Help facility provided with iNotes. Just press the Help button located in the upper right-hand corner of the screen.

![Help Button](image)

For further assistance with iNotes, please contact the Help Desk at 845-575-4357, x4357, or e-mail HelpDesk from the Marist Address Book. Provide as much detail as possible and include the type of browser, browser version, and operating system.