

Lotus Notes

Training Series

Creating Folders and Organizing
Your Email

Creating Folders and Organizing Your Email

Why create folders for your email in Lotus Notes?

Think of Notes as a person, you. Think of your email as USPS mail you receive six days a week. Some mail you immediately throw away (the typical junk mail). Some mail you put aside to act on later (bills and other business correspondence). Some mail you file away for your records and safe keeping (insurance documents, receipts/paid bills, bank statements, etc.).

If you don't use folders in Notes, it's like getting all your USPS mail and throwing it on your kitchen table. You go through stacks and piles of all the different letters you get, paying bills and placing the check stub and receipt back on the table (amongst all the other stuff!). In other words, it's a system without any method and, in the case of the mail on the table scenario, almost impossible to quickly find a particular item should you need to.

Organizing Lotus Notes and employing a systematic folder system, you can clean the "kitchen table" of the mess and know where things are (and should be!) when you need to refer back to them.

Start Notes and let's get started creating folders.

Go into your Inbox. On the left side of the screen, you should see a series of items similar to those in Figure 1.

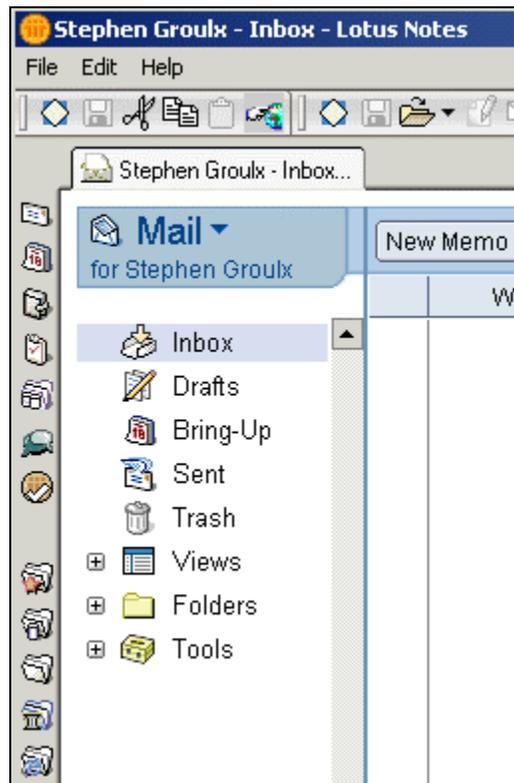


Figure 1

To create a folder, simply right click over the Folders item (Figure 2) and choose New Folder...

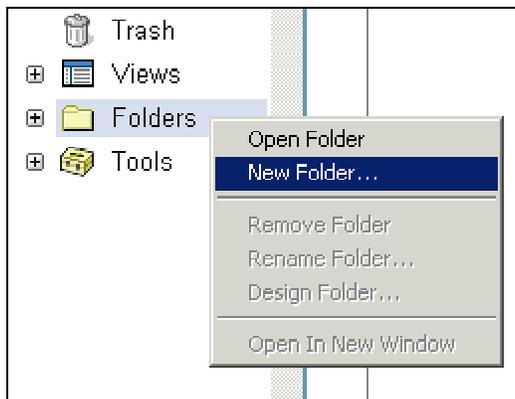


Figure 2

A window will open (Figure 3) where you can give your new folder a name.

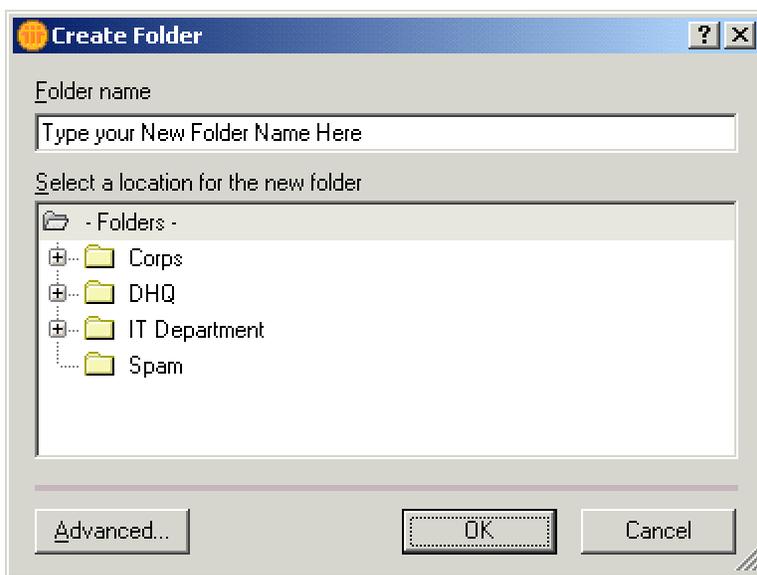


Figure 3

If this is the first folder you are creating (you won't see the sub folders I have above), simply highlight the - Folders - item itself (it should already be highlighted). With your new folder name already typed it, simply click on the OK button.

Repeat all these steps to create your folders. You'll notice that each time you create a folder, with the - Folders - item highlighted, your new folders appear directly beneath the - Folders - item (see Figure 3).

If you want to create a sub-folder beneath a newly created folder, simply highlight that specific folder before you click on the OK button.

You may want to think things through before you actually start creating your folders. My system for filing emails is quite simple and adequate for me (see Figure 4). You may require something more complex or even simpler.

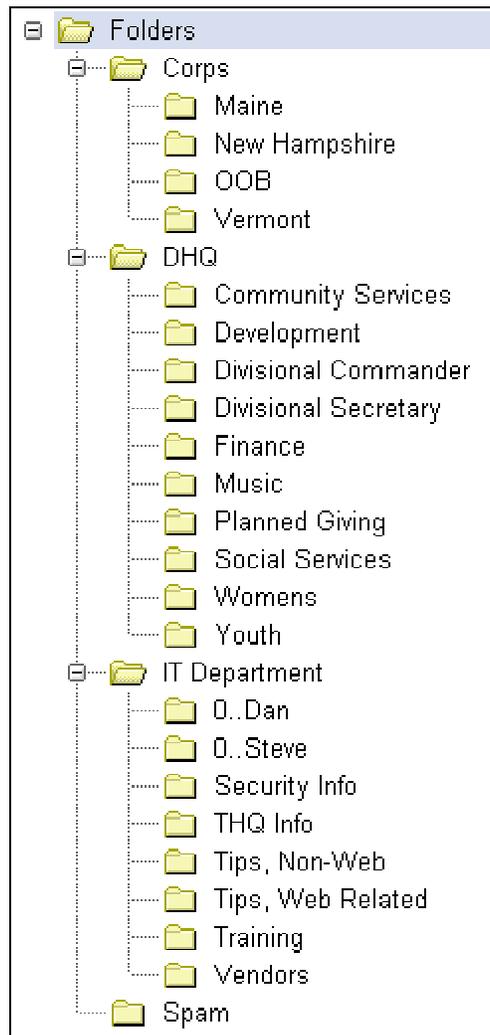


Figure 4

Consider...

Should you delete an email or file it in a folder?

I don't delete any email message; I file everything I receive. I have messages that go back to the day we actually started Notes here at DHQ. Is this the perfect system? Probably not. Would it work for you? You have to determine that.

The problem with deleting every message you've received and read (and I know people who do this), when you need to refer back to something you can't. The problem with keeping everything is that you end up with a huge database (which sits on our servers, not your computer); but that's about as bad as it gets.

With your folders newly created, you can now use your Inbox more effectively. When you get an email, read it and, if it doesn't require any further action on your part, you can file it (or delete it?). This gets it out of your Inbox.

If an email requires further action, you can simply leave it in your Inbox (as a reminder).

By employing this system (file it if an email is done, leave it in the Inbox if you need to follow up on it), you can keep your Inbox relatively clutter free. And when you need to refer to something, you can simply go to that folder and find that email message.

Moving Emails...

One last thing I'll cover is the actual moving of emails. You have to have at least one folder created to do this. If you haven't created one yet, do that now before continuing.

Click on your Inbox. Pick an email message you've already read and want to file it. Now click and hold down the left mouse button over the message you want to file. Drag this message over the folder name where you want to place the message.* Let go of the mouse button. The message is now out of your Inbox and in your folder.

Basically, this drag and drop action can be used on any folder. You can use this method to move email messages from one folder to another or even back to your Inbox. If you're not familiar with drag and drop, practice with one or two emails to get used to it.