Lotus Notes
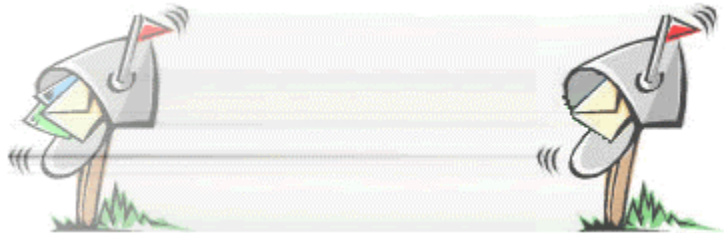
Training Series

Using Lotus Notes Email Filters

Guarding Against Spam

Why use email filters?

To guard against spam and potentially dangerous emails (viruses, for example).

Spam email is generally defined as an unsolicited mailing, usually to many people. It's unwanted email. Period.

Now, you might be thinking, "what about the boss sending email to everyone in the organization about that such-and-such? Isn't that spam?"

No. Because you know the boss and have some kind of relationship to him, even if it is just sharing the same building.

"What about the accountant who works for the same company but works from a state across the country?"

The lines start to get a little blurry here.

If the content of the email you received from the accountant pertains to you and your job, it's not spam. If the accountant emailed everyone, everywhere in the company, including the shipping clerk in the warehouse who has absolutely no link to accounting or what was covered in the email, then it's basically spam.

(To eliminate this potential "hotspot" in a company's email policy, organizations need to better train employees on the appropriateness of targeting recipients to mass emailings.)

For the purpose of this paper, we'll assume we're dealing with unwanted email that originates from outside the organization. I'll show you how to set up filters for this type of email. Hopefully, your Inbox will be less crowded.

What is a filter?

A filter, or email filter, is simply a set of "instructions" that tell Notes (or any email package, for that matter) how to deal with certain emails under certain conditions. You set (configure) which emails are to be dealt with and how you wish to deal with them (more on all of this later).

Before we set up our first filter, you need to create a folder in Notes. Here's a quick way to do what we need (for more detailed instructions, see the paper on creating folders).

1- From your Inbox, click on the Actions menu, highlight Folder and select Create Folder.
2- On the Create Folder window, enter the word "Spam" (without the quotes) and click on the OK button.

That's all there is to it. Let's continue with our filter.

Go into your inbox in Lotus Notes. On the left hand side of Notes, you should see a set of folders, items actually, something similar to this:
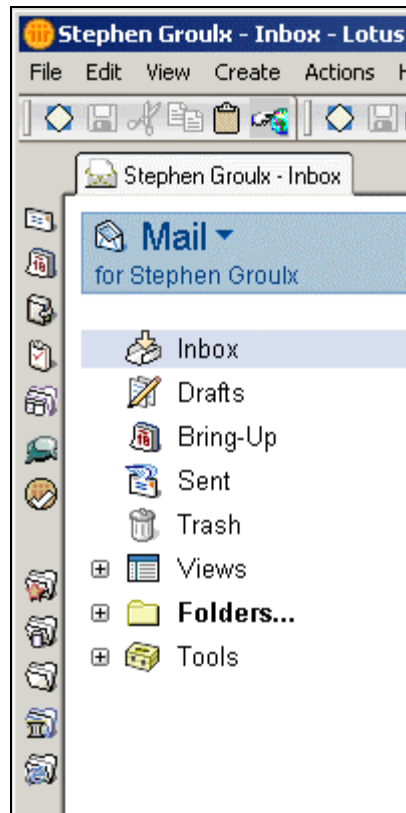

Figure 1

We're all familiar with some of the items pictured above, Inbox, Drafts, Bring-Up, etc. The one we want to use is the Tools item. Expand that by clicking on the little plus-sign to the left of it.

Figure 2

Then go ahead and click on the Rules item. On the right side of the screen in Notes, you should see a set of buttons above a bunch of white space (unless you already have Rules defined) with Condition(s) and Action(s) as the column headers (see Figure 3).
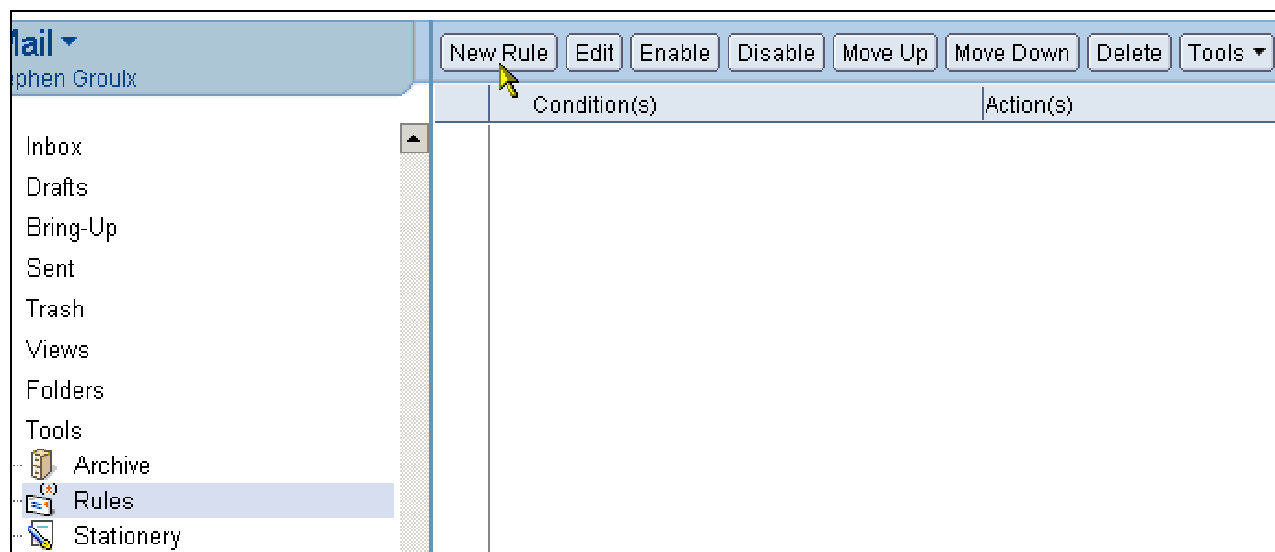
Figure 3

Create your new rule by clicking the New Rule button. A window will open up (see Figure 4); here you will set the "conditions" for your filter.
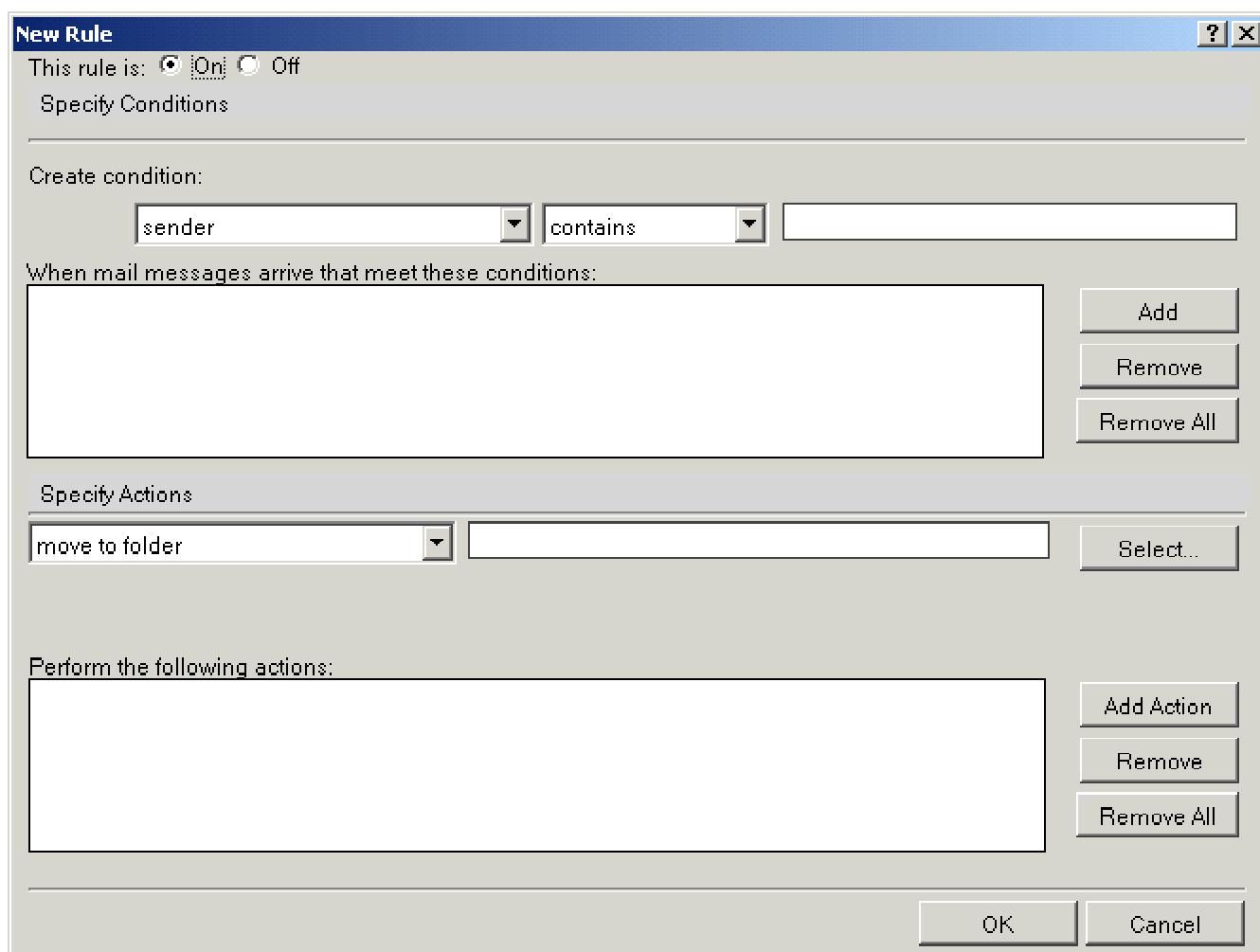

Figure 4

To set up our first rule, I'll give you what we want to do in plain English:

> *We want to create a rule that tells Notes to accept only emails from other Army personnel (officers and employees) and all other emails are to be sent to a specific folder (out of our Inbox).*

We have to figure out how we go about doing this. To help, we need to first translate this English into geek-speak:

> *If sender emails do not contain SArmy in the email address, then it's not from us so move it out of my Inbox to a different folder.*

What we did here is look at commonalities. All employees and officers have SArmy somewhere in their email address (if they're using Lotus Notes to send their emails to us, that is). Keying in on this commonality, we can create a filter to do what we want.

Here's how to configure the New Rule window.

First, make sure the **This rule is** item is set to **on**.

In the first Create Condition dropdown box, make sure it reads **Sender**. Change the second dropdown box to read **Does not contain**. And in the textbox to the right of this, enter the word **SARMY** (this is not case sensitive, so you can also enter sarmy).

Click on the **Add** button when you have completed the above.

About half-way down this window, you'll see **Specify Actions**. Change this dropdown box to read **Move to folder**. To the far right of this, you should see the Select button. Click on that button.

A small window will open where you can select a folder. Go find that folder you created called Spam; highlight it and click on the OK button.

Beneath the Select button, click on the **Add Action** button.

The finished product will look like Figure 5.

Now you can click on the OK button for this window. Your rule is now active.

Any emails you receive that are not from Army personnel using Lotus Notes will automatically be moved to the folder Spam.

This is a nice filter to have because it keeps your Inbox available for receiving only Army emails.

For the emails sitting in your Spam folder, you can browse through this folder at anytime, deleting and reading those you choose.
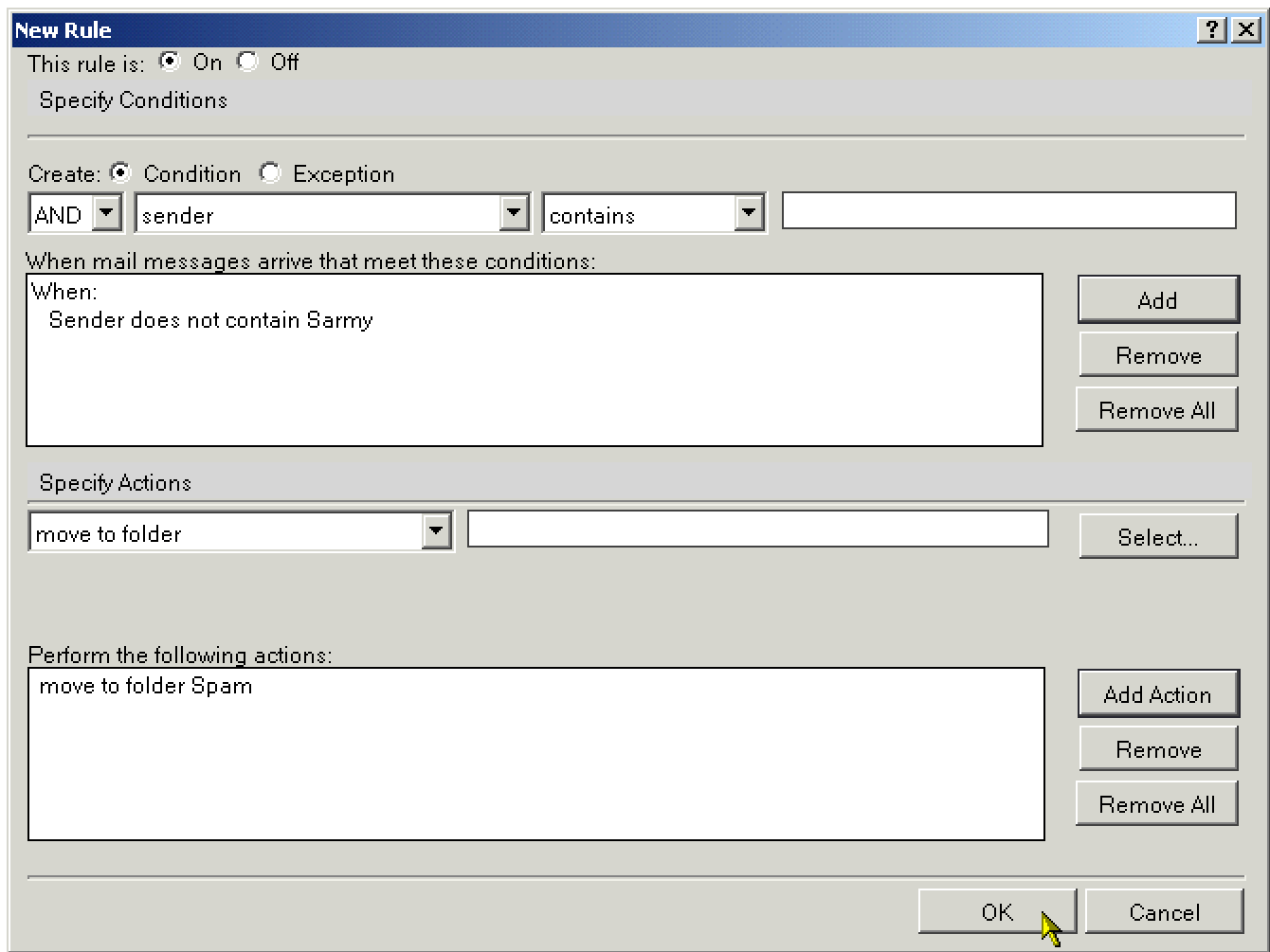
Figure 5

Summary

This is a good rule that works seamlessly in our working environment. Creating this rule will move all non-army email to the Spam folder, from which you can later read and/or delete the appropriate messages.

Caution: One thing you <u>do</u> <u>not</u> want to do is create this filter and, under Specify Actions, select the delete option. Why?

What if your boss or employee emails you from his/her personal email account like AOL or Road Runner?

Let's set a rule based on a single email example. You can use this filter for numerous emails you get, just replace the email address each time you go through the configuration process.

Again, bring up the New Rule window and fill in the following areas (see Figure 6):

Create Condition:
Sender (from dropdown), Contains (from dropdown)

In the textbox, enter the email address of the person you want to block (in the example pictured below, replace The_User_Name@aol.com).
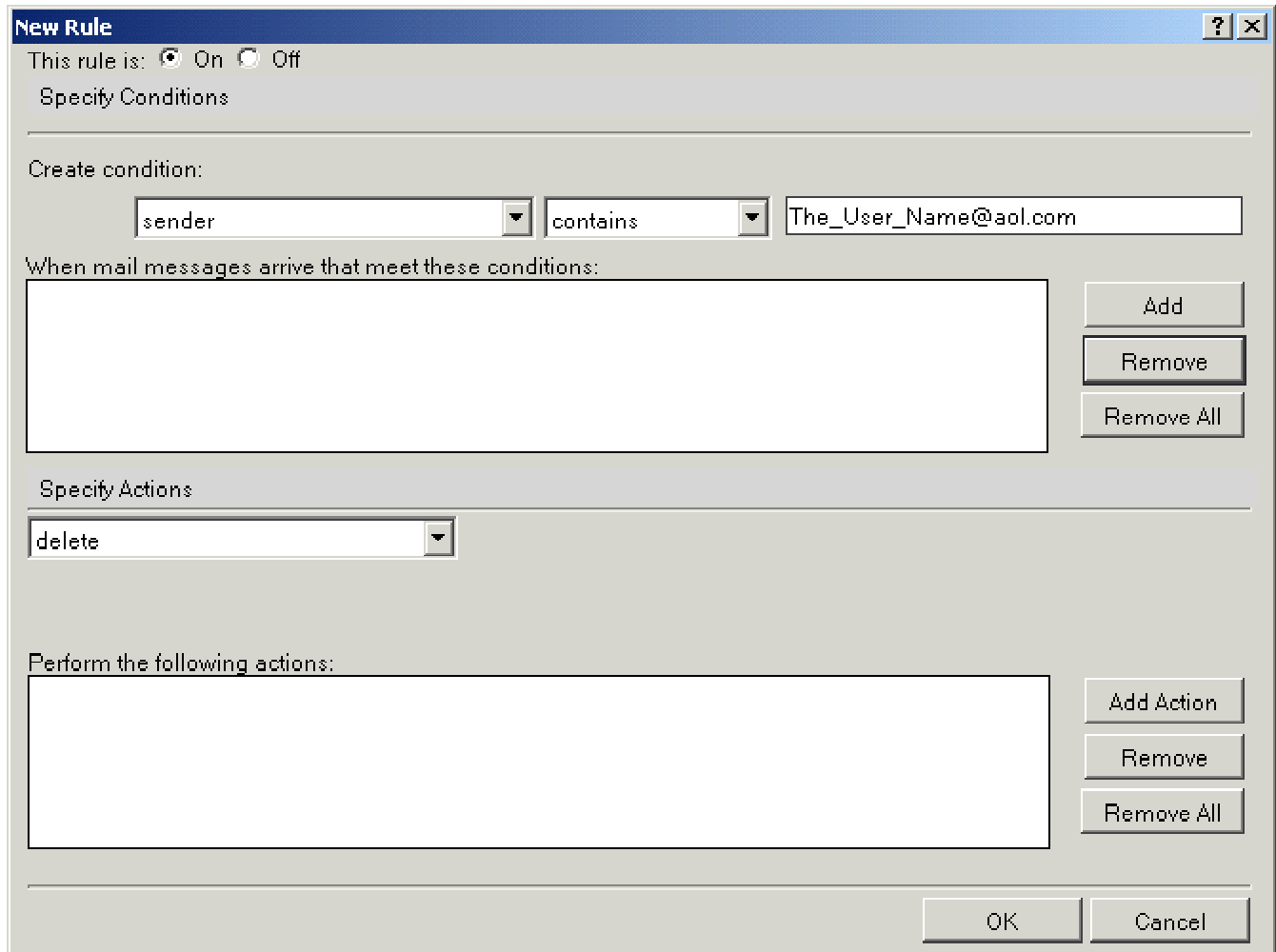

Figure 6

Specify Actions:
Choose the delete option

Remember to click the Add button (after you enter the email address) and the Add Action button (after you specify the action).

Click the OK button, and you're all set.