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*Quick
Reference*

**by Stephen Londergan
& Pat Freeland**

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Reference for
the Rest of Us!®**

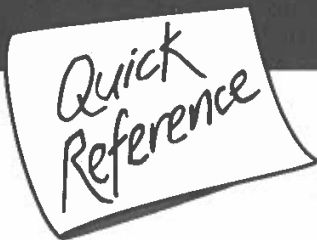


***The Quick and Easy Way
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LOTUS NOTES® R5 FOR DUMMIES®



**by Stephen Londergan
and Pat Freeland**



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Dedication

For Engelbert Humperdinck.

— Stephen Londergan

Twice now, as I started to write a book, I lost a friend, both of them very special people. To Fred Doll and Sally Lenhardt.

— Pat Freeland

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How to Use This Book

You probably want to keep this little tome close at hand, ready to leap up and help you when you're trying to do something that you can't remember how to do or when you're trying to do something that you've never done before.

We try, in this book, to emphasize the *how* at the expense of the *why*, because we assume that you have better things to do than read computer books! Foolish assumption or not, we wrote the information in the following parts to get to the point as quickly and as accurately as possible. You probably don't plan to read the book from cover to cover, and that's okay with us. Just keep it handy so that you can quickly look up whatever you need to know.



How This Book Is Organized

To find out where to get information on how to do something, look in the Index or the Table of Contents. You can also figure out where to look by considering that we divide the book into eight parts, plus a glossary:

- ♦ **Part I** talks about some of the basic concepts that you need to master (or at least be familiar with) as you begin to use Lotus Notes.
- ♦ **Part II** is all about e-mail: how to send, read, and manage your electronic messages.
- ♦ **Part III** helps you figure out how to manage your schedule in Notes, creating appointments and events, checking others' availability, and managing resources like rooms and AV equipment.
- ♦ **Part IV** concerns using the other kinds of Notes databases that you may encounter.
- ♦ **Part V** explains everything you need to know to take Notes (and your laptop computer) on the road.
- ♦ **Part VI** shows you how to use Notes to search for text in anything from the contents of the screen to the contents of the World Wide Web.
- ♦ **Part VII** covers how Notes works with other programs and how you can incorporate the information that you have in other places in Notes documents.
- ♦ **Part VIII** explains how to change the way that Notes behaves to make it meet your needs and preferences.
- ♦ Last but not least, the **Glossary** at the end of the book can help you sort through some of the techno-jargon that's unavoidable, even in a book like this one.

Conventions Used in This Book

Here are a few other tips to help you get the most out of *Lotus Notes R5 For Dummies Quick Reference*.



When you need to click a SmartIcon, a picture of the icon appears immediately to the left of the related paragraph. For example, you may be reading about how to check the spelling in a document. When the instructions in the text say, "Click the Edit Check Spelling SmartIcon," the picture at the left of the paragraph shows which icon you use.

Sometimes, we tell you to press combinations of keys. For example, one way to print a document is to press Ctrl+P. That means that you press (and hold) the Ctrl key and then press the P key. (If you use a Macintosh, you use the ⌘ key, plus P.)

You can perform some tasks by choosing items from the Lotus Notes menus. For example, another way to print a document is to choose File⇨Print. The symbol ⇨ means that you should choose Print from the File menu.

In “choose File⇨Print,” the F in File and the P in Print are underlined; this means that those letters are the *hot keys* for making that choice in the menu via the keyboard (instead of with the mouse). If a hot key is underlined in the Lotus Notes menus, it’s underlined in this book, too.

Occasionally, we tell you that you have to type some text. For example, you may come across instructions such as “Type **user.id** in the Tools dialog box and press Enter.” Whenever you see boldface words, you should type them exactly as they appear in the book.

Icons That You Will Find

To help you use this book and to make it easy to read, the following small icons (pictures) are sprinkled liberally among the pages:



This icon identifies cool tricks that you can use to make your life easier and to impress your friends.



Ignore paragraphs with this icon at your own peril!



This icon points you to other related ...*For Dummies* books for additional information.



For those who like to know the techie details behind the instructions, information following this icon will give the propeller on your beanie a spin.

Off You Go, Then

And good luck!

Getting to Know Notes

Lotus Notes is a computer program that enables you to communicate and interact electronically with other people. You use Notes to send people e-mail (whether or not they use Lotus Notes) and to share other kinds of information with them — such as spreadsheets, word processing documents, pages from the World Wide Web, and so on.

The best thing about Notes is that it's easy to use. You get to jump on the electronic superhighway with little or no knowledge of the messy underside of computers. If you find expressions such as local area network, ISDN, and HTML scary (or just downright boring), Notes is the program for you.

And what's better, you don't even have to be at the office to participate in this technological fiesta. If you have a modem, you can do all your work from home, the hotel, or even an airplane; your colleagues won't ever know that you're goofing off!

In this part . . .

- ✓ Understanding groupware
- ✓ Using databases
- ✓ Working with compound documents
- ✓ Using replication
- ✓ Understanding the role of servers
- ✓ Understanding the Notes desktop



Groupware and Notes

Groupware is software that enables you to work with a group of other people. That was easy, wasn't it? Unlike a spreadsheet program, which you toil away with by yourself, Notes can help you do the following things:

- ◆ Send e-mail documents to individuals and groups
- ◆ Create databases and put information into them that you, everyone, or only people you choose can read and edit
- ◆ Ensure information management — that is, making sure that the same information on a particular subject is available to everyone who is supposed to see it, regardless of where they are and without having to worry about what kinds of computers or networks they use
- ◆ Retrieve, view, and share pages and files from the World Wide Web
- ◆ Enable collaboration — that is, enable everyone in the organization to communicate with each other as quickly as possible, whether the communication is gossip, news, or vital corporate data (assuming that you can tell the difference)
- ◆ Prevent prying, unauthorized busybodies from rummaging around in places where they have no business
- ◆ Be sure that the forms and documents your organization uses are standard, so that you all seem organized, even if you're not
- ◆ Provide a central place to look for everybody's daily calendar of appointments
- ◆ Combine data, graphics, text, and tables from many different places, such as spreadsheet programs, word processing programs, and even the World Wide Web and the Internet
- ◆ Keep information in a safe and readily available place, rather than in piles on everyone's desk
- ◆ Save trees
- ◆ Store information and e-mail for users who are only occasionally connected



For more information about groupware, Notes, and their capabilities and limitations, see *Lotus Notes R5 For Dummies* (also written by us and published by IDG Books Worldwide, Inc.).

Working in Notes databases

The most important concept in Notes is the database. In fact, the entire program is organized around databases. A *database* is essentially a bunch of information that is assembled in a way that makes it easy to retrieve. You can think of the Sears & Roebuck catalog as a kind of database — it's organized in alphabetical order, with the name, description, picture, and price of each item neatly arranged. But the only way to find an item in the Sears catalog is to turn the pages and let your fingers do the walking. That's where electronic databases are much more useful.

Imagine an onion. It has layers that you can peel off one by one to reveal the next inner layer. Forgetting the tears, an onion is like a database on your computer. The layers from the outside in are

- ◆ Your computer, the hardware
- ◆ The operating system (Windows, Mac, UNIX, and so on)
- ◆ The program you use, Notes in this case
- ◆ A database, symbolized by an icon on your desktop
- ◆ A view or folder listing the contents of the database
- ◆ A document
- ◆ A field — that is, a single container in a Notes document for information (Documents generally contain many fields.)
- ◆ Data — that is, the contents of the fields in the document

When you use Notes, you create *documents*: memos, company policy statements, sales records, or listings of baseball statistics. These documents are all stored in databases with other documents so that you can select information from a database without turning pages or scanning long lists. If you ask your database to show you all sales contacts in Alabama, for example, as quickly as the electrons can arrange themselves, the list of Alabama sales contacts appears on-screen.

A good example of a Notes database is a *discussion database*, which is the electronic equivalent of chatting over the backyard fence. You can express your opinion on a particular subject by composing a main document. Then someone in the Singapore office may compose a reply to your statement telling you that you're all wet. People anywhere in your organization can respond to these opinions.

Remember: You may write your opinion using Notes on a PC with Windows, while the response can be created on a Macintosh; other respondents may be using UNIX or OS/2. Everyone can read all the documents, regardless of the kind of computer and operating

system used in composing the documents. Everyone can share not only his or her sought-after opinions but also drawings, enhanced text, and even information from other sources, such as Excel or the Internet.

In Notes, databases contain *views* and *folders*. Both contain *documents*. Documents contain *fields*. And fields contain individual pieces of data. See, the whole concept is based on data, hence the term *database*. Don't let all these new words bog you down. We get into what they mean and how you can put them to good use in other parts of this book — we just want to give you the big picture for now.

For more information about using databases, see *Lotus Notes R5 For Dummies*.



Communicating with e-mail

You probably already know that the *e* in *e-mail* stands for *electronic*. Sending e-mail is better than sending snail mail because e-mail is fast, cheap, and fun.

Most people prefer e-mail to snail mail because it's so fast; you can get a five-page e-mail message to a coworker in Japan in just a few minutes. The post office can't compete with that! You send e-mail right from your desk, without leaving your chair.

To send e-mail, you simply put a name at the top of a memo and click the Send button. If you put several names at the top of the memo, the memo goes to everyone.

In Notes, the e-mail that you send goes to everyone you address it to and *only* to those people. Although you can prevent the recipients from forwarding a memo, you should still avoid writing something you don't want everyone to see.

In Notes e-mail, you can add text enhancements, such as boldface, italics, or underline; you can change colors and fonts; and you can add tables, links, and graphics. Instead of sending messages that make people yawn, you can make them sit up and take notice! And when you use Notes to send a message, the recipient's computer beeps the minute the e-mail arrives, to notify him or her of your all-important correspondence.

When you add someone to the bcc: (blind courtesy copy) field, only you and the bcc recipient know about it.



People around the world are now connected via all kinds of e-mail programs, and now you can send them e-mail from the comfort of your Notes desktop. You can send an e-mail message to your friend (who works at another company), your cousin (who's studying art in Paris), or even to your kids (who may be at home using America Online).

Lotus Notes — What It Can and Can't Do

Notes is groupware with amazing e-mail and database capabilities. But, for all its power and glory, Notes can't do some things.

Knowing what Notes isn't

Notes isn't a true *relational database*. In a relational database, you can enter data in a field in one database and then use that same field in another database. Notes can't do that.

The good news is that Notes isn't rigid. Unlike other databases, Notes doesn't require you to set the size of a field and then limit entries in that field to your specified maximum size. (Fields are the places where you enter information, which can be anything from a single fact — a person's last name — to volumes of information — their life story.

Because Notes isn't rigid, it enables you to use *rich-text fields*. A rich-text field is one in which you can add fancy stuff, such as character formats (boldface and italics, for example), shared data from other applications, or even video clips and pictures.

So, if that's the good news, what's the bad news? If you need to use your computer to track 92,000 customer orders and relate them to other database records, Notes just isn't the best choice. If you need to manage thousands of interrelated information records, *don't* use Notes.

Not only is Notes not a relational database, but it also isn't the program to use for *transaction-based systems*. An example of what that mouthful means is airline ticketing. Imagine many offices (all in different cities) that are selling tickets for a particular flight and recording the data on their local copy of the reservations database. Until the databases replicate (share) their information at a regularly scheduled time, all the offices don't know what the others have done. So at flight time, a huge crowd appears, with lots of folks holding tickets for the same seats on the plane.

But don't worry; whether you use Notes is probably not your decision. Let the geeks in the MIS department decide whether Notes is the right tool for your company. Just make sure that you tell them to buy lots of copies of this book — whatever they decide!

Knowing what Notes is

Notes is a truly useful and powerful program because of its ability to send e-mail *and* create databases that every person in the organization can share, add to, and read.

Also, the fields in other database programs are, in a word, *blah*. There is no boldface, no variety in fonts, and no possibility for attachments or embedded objects. Rich-text fields, however, contain more than just information. Rich-text fields can contain anything your heart desires to set them apart from the mundane, to educate and excite your readers, and to enable you to express yourself as the creative genius that you are.

Using Notes, you can create databases for many uses including the following:

- ♦ **Reference:** Members of your organization who are seeking knowledge can find what they need to know from the information contributed by those who have knowledge to share.
- ♦ **Workflow:** Those people charged with a broad task can record individual assignments and proclaim the completion of each assignment, documenting their progress toward the goal.
- ♦ **E-mail:** Anyone in the organization can communicate privately or publicly with anyone else.
- ♦ **Internet access:** Users can access Web pages and Internet e-mail from the comfort of their own Notes environment.
- ♦ **Fax:** This is one means by which you can distribute valuable data stored in your organization's databases to a needy and grateful public.

This, then, is Notes. More than just a program, more than just a database, more than just an e-mail facility, Notes is a dynamic tool that aids the sharing of knowledge throughout an organization.

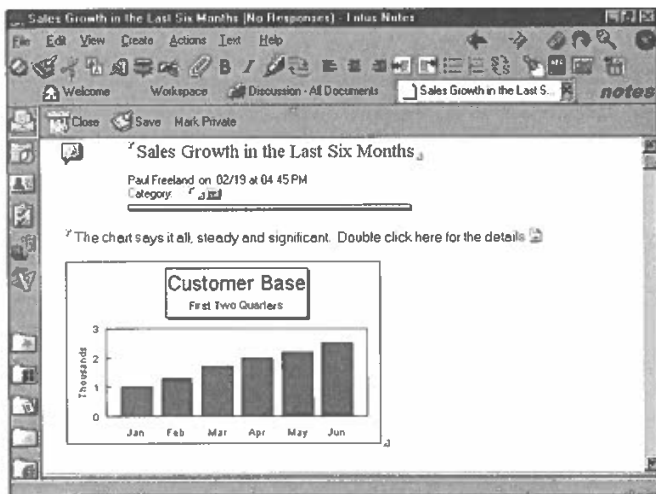
Compound Documents

Normally, when you're busy using Notes, you're typing a memo, filling out a form, or writing some text to be included with other similar entries in a database. Sometimes, however, you need to put more than just text in your document.

To emphasize a point that you're making about sales figures, you may want to include a spreadsheet that you created in Lotus 1-2-3. A graph that you made in Freelance seems helpful — as does a link to a related home page that you found on the World Wide Web. So you copy and paste them all into your document.

The result is a *compound document*, which contains data, graphics, or other features from other programs.

12 Notes and the Network



Notes and the Network

Notes uses computers that are connected in a *network*. In some ways, a network is like a department in a corporation, because it has individual workers and someone who is in charge. The individual computers need to be connected to a “boss” computer to be able to work together. No doubt your boss serves the same vital role in your department.

Understanding Domino servers

By a curious twist of fate, the computer in charge is called the *server*. The server acts as a central, shared computer for the other computers, storing the mail databases for all the people whose computers are hooked to it and regulating the flow of information.

A server also stores databases that are created by users who want to share information in the database with others. The server is usually a powerful computer with more storage capacity than the other computers that are connected to it, and it's kept in a secure and remote location. Another point worth mentioning is that a server isn't where the reading, editing, and adding to databases in Notes is done. This work is done on the individual computers that are connected to the server.

Understanding Notes Workstations

In the wonderful world of Notes, the computer on your desk is known as a *workstation*, which is where individual users get the real work done. Each workstation usually contains the Notes program files for an individual user, as well as any databases the user creates.

Not all workstations are connected to a server. If you go on a business trip and use your computer to connect to the server by phone line and modem, your computer is called a *remote workstation*. Some workstations are both local area network (LAN) and remote types. If you have a laptop, you can connect it to the LAN when you are at the office and then use its modem for a remote hookup when you are on the road.

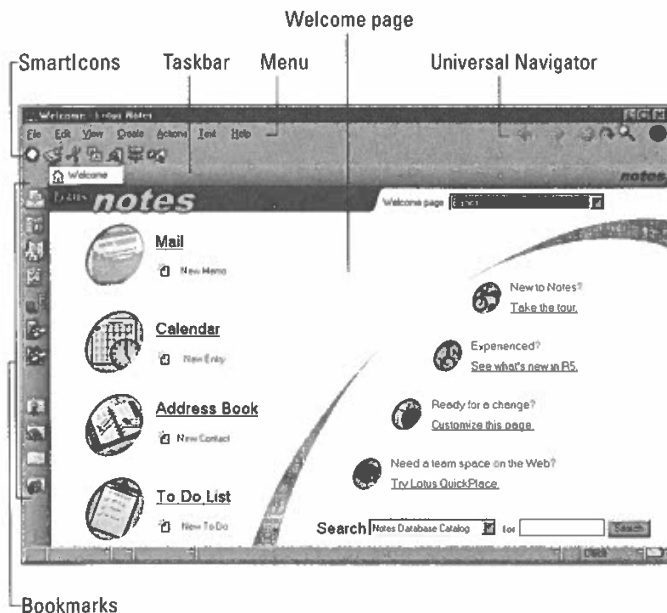
Remember: No matter how fast your modem is, using Notes on a modem is slower than using Notes on a LAN. So plan on taking extra time with the modem and be sure that your teenager doesn't need the phone for a while.

The Workspace

The Notes *workspace*, also called Home (sounds like baseball, doesn't it?) or the Notes Home Page, is the first screen you see when you open Notes. The workspace has the following six main elements:

- ◆ Bookmarks
- ◆ Menu
- ◆ SmartIcons
- ◆ Taskbar
- ◆ Welcome Page
- ◆ Universal Navigator

14 The Workspace



Ordering from the menu?

More good news: The menu works exactly the way you'd expect it to. You're probably already familiar with many of the options available on the Notes menu, because many are the same as the options in other programs you may use. For example, you save a document in Notes the same way you save a spreadsheet in Lotus 1-2-3, which is the same way you save a document in Microsoft Word.

Notice that some of the words in the menu are gray, and others are black. You can only choose the black items; menu options that are grayed out aren't appropriate options for whatever you're doing. For example, if you're in the middle of editing a document and you take a look at the Edit menu, you find that the Select by Date option is gray, indicating that you can't select by date (whatever that means!) while you're editing a document.

Working smart with SmartIcons

If you've ever used any of the Lotus SmartSuite applications before, you probably recognize the row of small pictures that

stretches across the top of the screen; these pictures are what Lotus calls *SmartIcons*. SmartIcons are just a way for you to execute certain commands very quickly — without having to use the menu.



For example, if you want to print the document that's on-screen, you *can* choose **File**⇨**Print**, but an easier and faster approach is to click the Print SmartIcon, shown in the margin. (Lotus probably doesn't like to admit it, but their SmartIcons are a lot like the buttons found on the Microsoft toolbar. Or maybe the Microsoft buttons are like the Lotus SmartIcons. . .)

Some SmartIcons are obvious — or relatively obvious, anyway. For example, you can probably guess that you use the SmartIcon that looks like a small jar of library paste to paste from the clipboard. Some of the SmartIcons aren't so obvious, though. What about one with red and green arrows that sort of looks like a traffic sign? (It happens to be one of the Help SmartIcons.) Fear not — you don't have to be an Egyptologist to use the SmartIcons.

If you can't guess what a SmartIcon does, just place the mouse pointer on it without clicking and then wait a second or two. A little balloon appears to tell you what the SmartIcon does. If you want to see the SmartIcon hints on your Mac, you have to choose **Balloon Help**⇨**Show Balloons** (the little question mark in the upper-right corner of the screen).

Notes has more SmartIcons up its sleeve than first appear — in fact, probably more than you'll ever use. Because so many SmartIcons are available, Lotus has collected them into palettes. The idea here is that the SmartIcons you use when you read a message are probably not the best ones to have around when you compose a message. So don't be surprised if you notice the SmartIcons changing; the SmartIcons you see in one context (like reading your e-mail) are different from the ones you see in another context (like setting up your modem).

Selecting tasks on the Notes taskbar

As you open different databases, documents, and Web pages, a button representing each window you open appears in the taskbar. You use these buttons for two actions:

- ◆ **Switch.** To switch from one window to another, click the button representing the window you want to see.
- ◆ **Close.** To close a window, click the little X in the right-hand corner of the button representing the window you want to close. You can close the window you have open by pressing **Esc** or choosing **File**⇨**Close**.

16 *The Workspace*



You don't need to click a task to open it before you close it. Just click the X in the task button and the task closes.

Switching among tasks on the Welcome Page

Located in the middle of your Notes home page is the Welcome Page, which gives you access to all your important information and provides instant access to your e-mail, calendar, and to-do lists. You can customize the page to see your latest e-mail messages and appointments at a glance, you can add your favorite Web sites or newsgroups, and you can perform a search of Web sites, local documents, and databases.

Broadening your universe with the Universal Navigator Bar

Have you asked yourself what those symbols in the upper right-hand corner of the screen are? Have you asked yourself what they're for? Do you often find that you're talking to yourself? Maybe you've been surfing the Web too much.

Those symbols comprise the Universal Navigator Bar, which performs in Notes the kinds of things you do on the Web. Check the following table to see what each button on the navigator bar does.

<i>The Button</i>	<i>The Name</i>	<i>What It Does</i>
	Admin	Launches the Admin client program, if you installed it
	Designer	Launches the Designer client program, if you installed it
	Previous	Takes you to the Web page you previously visited (click the drop-down arrow to see all the places you can go)
	Next	Takes you to the next Web page you visited after the current Web page (click the drop-down arrow to see all the places you can go)
	Stop	Stops loading a Web page
	Refresh	Updates the current Web page

<i>The Button</i>	<i>The Name</i>	<i>What It Does</i>
	Search	Launches a search (whether in Notes or on the Web; in Notes, the search bar appears if it's not already visible)
	Open URL	Opens a designated Web address

Betting on Bookmarks

The *Bookmarks* feature is a way to remember a particular Web page, Notes document, view, or database. Notes comes loaded with a bunch of bookmarks; you can also add your own personal bookmarks as you develop your own favorite places to go.

Opening a bookmark

When you want to open a bookmark, just click it. For example, if you want to read your e-mail, just click the mail icon in the bookmark bar. Presto, your e-mail appears.

What happens when you click on a bookmark depends on what kind of bookmark it is. One bookmark may open a particular Notes database, like the one for your e-mail; another bookmark may open a particular document in a Notes database. Other bookmarks may open particular Web pages or even lists of more bookmarks.

If you're not sure what a bookmark is going to do before you click it, treat it as we suggest you treat an unfamiliar SmartIcon — point to the bookmark without clicking it. Notes doesn't waste any time showing you a hint about what the bookmark does or where it takes you.

Creating a bookmark

Say that you open a really useful Web page, a Notes database, or a document in a database and you want Notes to remember where it is so that you can easily get to it again. Add it to a bookmark folder — click and drag the document from the view, the task button from the task bar, even a task button representing an Internet search you may need to conduct again, and drop it on one of the bookmark icons in the Bookmark bar. See Part VI for more information about searches and adding them to a bookmark.

18 *Windows and OS/2 Function Keys*

Deleting a bookmark

To remove a bookmark that you no longer need, follow these steps:

1. Right-click the bookmark you intend to delete.
2. Choose Remove Bookmark from the pop-up menu.

Moving a bookmark

If you decide that you're unhappy with a bookmark's location, you can move it to another place on the bookmark bar or into one of the bookmark folders. To move a bookmark, follow these steps:

1. Place the mouse pointer on the bookmark you intend to move.
2. Press and hold down the right mouse button.
3. Drag and drop the bookmark to its new location.

Creating a bookmark folder

If you want a whole new place to put bookmarks, you need to create a new bookmark folder. Here's how:

1. Place your cursor where you want the new folder to appear.
2. Press and hold down the right mouse button.
3. Choose Create Folder from the pop-up menu.

Deleting a bookmark folder

To remove an entire bookmark folder, follow these steps:

1. Right-click on the folder you want to delete.
2. Choose Delete Folder from the pop-up menu.

Windows and OS/2 Function Keys

The function keys in Windows and OS/2 work as the following table describes:

<i>Key</i>	<i>Use</i>
F1	Open context-sensitive help
F2	Enlarge text to next available point size
Shift+F2	Reduce text to next available point size
F3	Go to next selected document

<i>Key</i>	<i>Use</i>
Shift+F3	Go to previous selected document
F4	Go to next unread document
Shift+F4	Go to previous unread document
Alt+F4	Exit Notes
F5	Lock ID
Alt+F5	Restore Notes program window to default size
Ctrl+F6	Cycle through open windows
F7	Indent first line in a paragraph
Shift+F7	Outdent first line in a paragraph
F8	Indent entire paragraph
Shift+F8	Outdent entire paragraph
F9	Update all fields in current document, view, or workspace
Shift+F9	Rebuild current view
Ctrl+Shift+F9	Rebuild all views in current database
Ctrl+F9	Minimize active window and cascade other active windows
F10 or Alt	Access menu
Alt+F10	Maximize the Notes program window (OS/2 only)
Ctrl+F10	Maximize all open Notes windows

Your User ID — Your Key to Notes

When you were born, the hospital gave your mother a copy of your birth certificate; when you graduated from high school, you got a diploma; and when you learned to drive, you got a driver's license. When you start using Notes, someone gives you a *user ID*. Your user ID is really just a small password-protected computer file that your Notes administrator gives you.



You can't use Notes without your user ID, so keep a copy of your ID on a floppy disk so that you can recopy it to your hard drive if you accidentally delete your Notes program files or if you experience the heartbreak of computer failure. Remember that if your computer breaks down, your user ID enables you to use another person's computer as if it were your own.

Keep your Notes user ID in a secure place. If other users get your ID and know your password, they can read your e-mail and send memos using your name. Next April Fool's Day, they may send an insulting memo to the president of the company under your name. And next April 2, you may be looking for a new job.

Remember: You need your user ID each time you use Notes. Most people keep their user ID file on their hard drive in the Notes Data folder. If you want to use your computer at home, make a copy of your user ID file and bring it home with you. You can't use Notes without a copy of that ID.

Your E-Mail

Your e-mail (that's *e* as in *electronic*) database is probably the one that you use more than any other; it's the one and only Notes database that has your incoming, outgoing, sent, and not-quite-ready-to-be-sent messages. You also use your e-mail database to sort, organize, and otherwise manage the many messages that you have.

In this part . . .

- ✓ Choosing a letterhead
- ✓ Opening your e-mail and reading your messages
- ✓ Letting people know that you're on vacation
- ✓ Sending messages
- ✓ Using views and folders
- ✓ Using your Personal Name & Address book

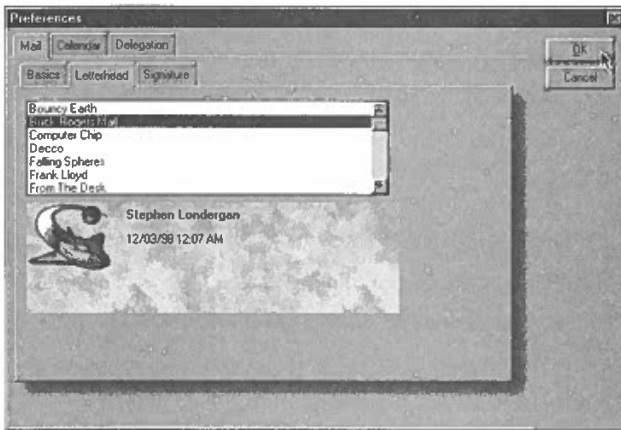


22 *Choosing a Letterhead*

Choosing a Letterhead

Notes lets you make your memos reflect your own individual tastes and personality by changing the letterhead. *Letterhead* is a graphic that appears at the top of each memo you send.

First, open your e-mail; choose **A**ctions⇧**T**ools⇧**P**references and then click the Letterhead tab in the Preferences dialog box. Use the list to select and preview the graphic that you want inserted at the top of all your messages. The following figure shows the letterhead called Buck Rogers Mail. Whichever letterhead you choose appears at the top of each new memo and reply that you send (until you choose a new letterhead). Finish your letterhead selection by clicking OK.



Closing a Message

When you're done reading a message, you can close it and return to the View pane. To do so, use any of the following methods:

- ◆ Press **E**sc. The memo disappears, and you're back to the View pane.
- ◆ Click the little X in the message's task button.
- ◆ Choose **F**ile⇧**C**lose Window.
- ◆ Press **C**trl+**W**.

Letting People Know You're Out of the Office 23

If you want to move immediately to another message, take any of these steps:

- ◆ Press Enter, and the next message appears.
- ◆ Press Backspace, and the previous message appears.
- ◆ Press Tab to move to the next unread message, or press Shift+Tab to move to the previous unread message, if you have one.
- ◆ Press F4 to see the next unread document or press Shift+F4 to see the previous unread message.
- ◆ Click on any of the four SmartIcons pictured here:



- This icon opens the next memo.
- This icon opens the previous document in the list.
- This icon opens the next unread memo.
- This icon opens the previous unread document.

You may notice that before you open a new document, a little star appears next to its name in the View pane. After you close the document, the little star goes away. The name of the document in the View pane changes colors after you open and close it (usually only for the e-mail database). It used to be red, and now it's black. What gives?

Notes keeps track of which documents you've read and which ones you haven't read. If a document in the View pane has a star next to it and is red, you know that it's new — or at least that you haven't read it. On the other hand, if the document in question doesn't have a star and is black, you *have* read it.

Remember: R-E-D documents haven't been R-E-A-D.

Letting People Know You're Out of the Office

Someone sends you a memo, "Meet me for coffee tomorrow." You're on vacation, so not only do you not send a reply saying that you'll be there, but you also don't show up for coffee and hurt someone's feelings. You can tell your e-mail database to respond automatically whenever you're going to be away for a while so that you can avoid unintentional slights, such as ignoring invitations.

To let people know that you're temporarily unable to answer their memos, follow these steps:

24 Opening Your E-Mail

1. Open your e-mail.
2. Choose **A**ctions⇨**T**ools⇨**O**ut of Office to get to the Out of Office dialog box.
3. Enter the dates on which you plan to leave from and return to the office in the Leaving and Returning fields of the Out of Office dialog box.
4. Click the Basic Message tab at the top of the Out of Office dialog box.
5. Enter the subject and message for your automatic response to memos that arrive in the two fields on the Basic Message tab.

If you want to send a different memo to certain people — such as your boss, who may not need to know that you're off fishing — click the Special Message tab on the Out of Office dialog box.

6. Enter the names of the people who will receive this special message in the To field on the Special Message tab of the dialog box. Then, in the fields below, enter the unique subject and message for these special people.
7. If other people shouldn't receive any message at all, click the Exclusions tab on the Out of Office dialog box and then enter the names in the appropriate fields.

A good example of people who shouldn't get a vacation message is those who send "shotgun" messages to the whole company. They really don't care whether you're around or not.

8. Click the Enable button to turn on automatic replies.

Remember: To turn off automatic replies, choose **A**ctions⇨**T**ools⇨**O**ut of Office and click the Disable button.

Opening Your E-Mail

You need to open your e-mail database to send and receive messages. To open your e-mail database, do one of the following:

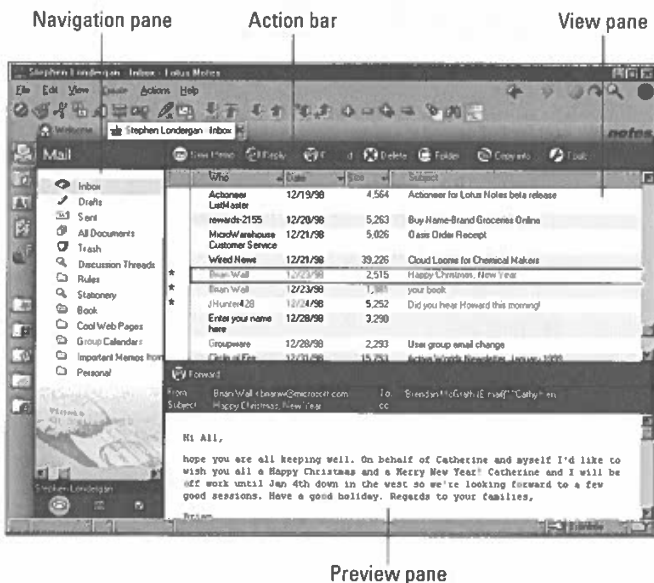
- ◆ Click the Mail bookmark (which is the first one in the Bookmark bar).
- ◆ Click the Open Mail button on the Welcome page.

When the database opens, the screen is divided into four parts:

- ◆ The first and left-most pane is called the *Navigation pane*. You use this pane to organize and find the messages that are in your e-mail database.
- ◆ On the top-right side of the screen is the *View pane*. It lists the messages that are in your e-mail database.
- ◆ Below the View pane is the *Preview pane*, where you see the contents of the document that is highlighted in the View pane.
- ◆ Last, but not least, is the *Action bar*, which contains buttons that enable you to do things to your e-mail.



If your e-mail database doesn't have a Preview pane, choose View→Document Preview.

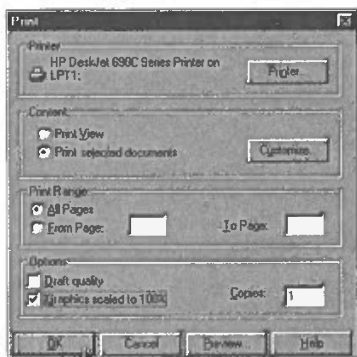


Printing

You can print a single document, such as the one on your screen or the one currently highlighted in the View pane, or you can select several documents in a view and print them all.

26 *Printing*

When you want to print, just choose **File**→**Print** to get the Print dialog box.



Despite all the buttons and fields in the Print dialog box, you don't have too many decisions to make. In fact, you're probably only interested in choosing the content (whether you want to print the entire document or just some of the pages) and the view options (whether you want to print the document that you have selected or print the contents of the View pane).

If you choose **Print selected documents**, you get the contents of the selected messages printed. If you choose **Print View**, Notes prints exactly what you see in the View pane — only the columns are printed.

If you choose **Print selected documents** and are printing more than one message, you need to decide how Notes should separate one printed message from the next. Click the **Customize** button and then choose one of the following:

- ◆ **On a new page:** Each document starts a new page.
- ◆ **One blank line beneath the previous document:** Notes prints a line between each document.
- ◆ **Immediately beneath the previous document:** Each document follows the one before it, with no separation.

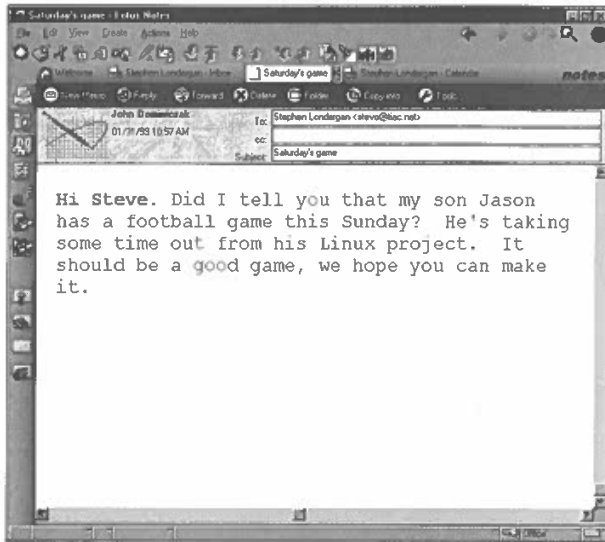
If you choose **Page Break**, you can also decide how to number the pages, assuming that you want to number the pages at all. Select **Starting with page number 1** to have each new document start with a page number of 1. Otherwise, the first page of each new document gets the next consecutive page number.

Reading Your Messages

As you press the up-arrow and down-arrow keys to move the selection bar in the View pane, the Preview pane changes. To read the message in its entirety at that point, use one of these methods:

- ◆ Double-click the message in question.
- ◆ Highlight the message with the selection bar and press Enter.

After you have opened a document, you can use the up-arrow and down-arrow keys (or the vertical scroll bar) to move through the document. When you open a message in either manner, the panes all disappear, and the message in question fills the screen.



Selecting Messages

If you want to print, delete, or organize just one document, selecting it is easy. You can use either of these methods:

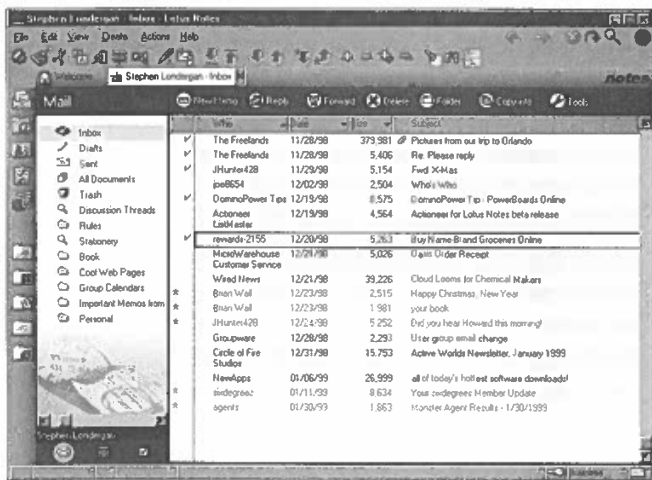
- ◆ Use the mouse to click the document in question.
- ◆ Use the up-arrow and down-arrow keys to select the document in the View pane.

28 *Sending a New Message*

Either way, when the message selector is highlighting the document that you want, you're in business.

When you want to do something to more than one document, you have a little more work to do:

1. Highlight the first document and press the spacebar. Watch for a little check mark to appear next to the document in the View pane.
2. Highlight the next document and press the spacebar again.
3. Continue this process until you have selected all your documents.



To select multiple documents with the mouse, click where the check mark appears — in the column immediately to the left of the message(s).

If you change your mind, you can use either technique (the mouse or the spacebar) to deselect a message.

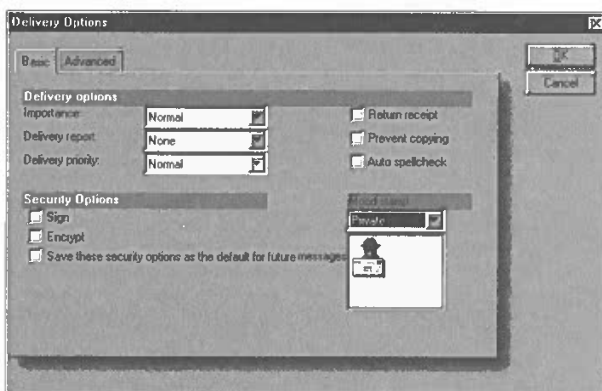
Sending a New Message

Whenever the spirit grabs you, you can dash off a brand new e-mail message to a person or even a group of people. So, you ask, exactly how do you do that? Well, read on. . . .

Choosing delivery options

In addition to deciding whether you want to save a copy of an outgoing message, you also may want to consider some special delivery options. (But you don't have to — you can send your message just the way it is, if you want.) When you finish with the Body field and are just about to click the Send and File button, consider the options that become available when you do one of the following:

- ◆ Choose **A**ctions⇨**D**elivery Options.
- ◆ Click the Delivery Options button in the Action bar.



The Delivery Options dialog box includes several useful features:

- ◆ **Importance:** You can mark your message's importance as being Normal, High, or Low. Notes flags messages that have been marked as high importance with a special red envelope in the recipient's e-mail database. You can use this feature to alert your recipient to an especially important message.
- ◆ **Delivery report:** The Delivery report drop-down list offers four choices:
 - **Only on failure:** You only want to be notified if the message can't be delivered. (No news is good news, in other words.)
 - **Confirm delivery:** You want to know exactly when and where your message was delivered.
 - **Trace entire path:** You want to know all the gory details about when and where your message stopped on its way to your recipient. (You probably don't care.)

30 *Sending a New Message*

- **None:** You're throwing caution to the wind; you don't care to know whether your message gets delivered.

If you choose a delivery report option other than None, you receive a report (as an e-mail message) as soon as the message that you sent arrives in your recipient's Inbox. The arrival time depends on your network and your network administrator. If your recipient is far away, your message may take a couple of hours (or maybe an entire day) to arrive.

- ◆ **Delivery priority:** The setting for this option determines how quickly your message is delivered:
 - **High priority** tells Notes to deliver the message as quickly as possible.
 - **Normal priority** tells Notes to send the message according to the regular delivery schedule, which is set by your Notes administrator.
 - **Low priority** tells Notes to send the message in the middle of the night.



When you want to send a huge attachment in an e-mail message, consider marking it Low priority. The message won't be delivered until you're home fast asleep, but sending it during off-peak hours costs your company less money.

- ◆ **Return receipt:** If you use the Delivery Options dialog box to request a return receipt, Notes notifies you when the recipient *reads* your message. This report is different from a delivery report, which tells you when the message arrives in the recipient's e-mail database. Request a receipt report to prevent the "I never saw your message" excuse; use delivery reports to eliminate the "I never got your message; the network must have lost it" excuse.



If you need to send a message to someone who doesn't use Notes, or if your message is going through the Internet, you may not be able to get delivery or receipt reports.

- ◆ **Prevent copying:** If you choose this option, you can be certain that the person who receives your message cannot forward it. You probably won't use this option.
- ◆ **Auto spell check:** This option means that Notes automatically spell checks the message before you send it.
- ◆ **Mood stamp:** The Mood stamp drop-down list provides a picture that Notes displays at the top of a message, so that your reader knows the frame of mind you were in when you sent the message. A message with a mood stamp is also

marked as such in the View pane of the recipient's e-mail database. You can choose from 12 mood stamps; try each one to see what it looks like.

- ◆ **Sign:** This option is a way to add security to your document. If you check this box, Notes adds a fancy digital signature to your message so that your recipient knows that it really came from you.
- ◆ **Encrypt:** Encrypting a message scrambles it in such a way that only the intended recipient of the message can read it. You probably don't have to worry about this level of security for your messages, but having the option of protecting your documents is nice.
- ◆ **Save these security options as the default for future messages:** This option is a handy way to apply the settings you've just specified to memos that you prepare in the future. If you often use the same settings, this button's for you.

After you make up your mind about the delivery options, choose QK to return to your document. In most cases, you can then click the Send and File button to be done with the message.



If your head is spinning from all these delivery options, you may be happy to know that you only need to use them under special circumstances. In fact for most messages, you can ignore these options altogether.

Preparing to write a new memo

When you want to write a new e-mail memo, do one of the following:

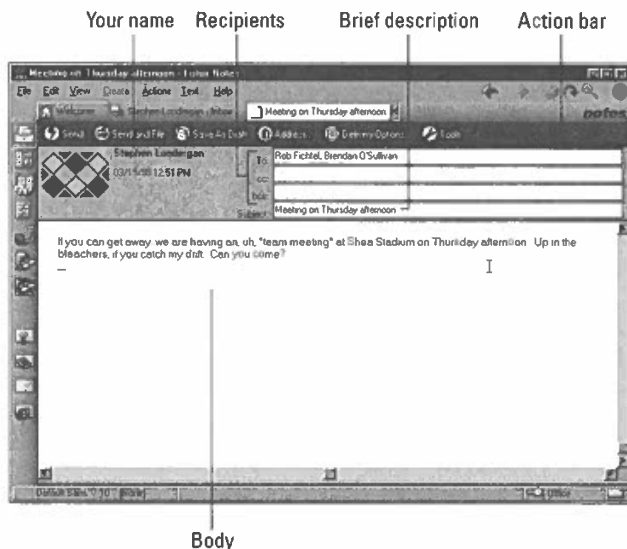
- ◆ Choose Create⇨Mail⇨Memo. If you already have your e-mail database open, click the Action bar's New Memo button.
- ◆ Click the Create Mail bookmark located inside the Create folder.

A blank memo form appears.

Every memo has four parts:

- ◆ **Action bar:** Buttons that you use while preparing your message
- ◆ **Your name:** Finally, your name in lights!
- ◆ **Address and subject fields:** Where you indicate the names of the recipients of your message and provide a short description of your memo
- ◆ **Body:** Where you type the body of your message

32 *Sending a New Message*



Before we get carried away in the following sections with explaining in detail each stage of writing a new message, we should mention that you can simply enter a recipient's name in the To field, enter some text in the Body field, and then click the Send button (in the Action bar) to dispatch your message.

Addressing a message

If you know the name of the person (or persons) to whom you want to send a message, simply type the name (or names) in one or more of the address fields. You have the following three address fields to choose from:

- ◆ **To:** The field in which you enter the name(s) of the message's primary recipient(s). If you want to put more than one name in the field, put a comma between the names.
- ◆ **cc:** The field in which you enter the name(s) of the people to whom you want to send a courtesy copy of your memo. Again, if you want to put more than one name in the field, put a comma between the names.

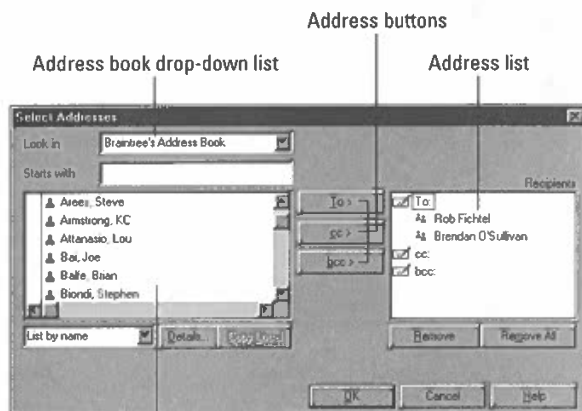
- ◆ **bcc:** The field that you use to send a *blind courtesy copy* of the memo — that is, to send someone a copy without having the other recipients know about the copy. Imagine, for example, that you send a memo asking a coworker to complete a certain job. You want your manager to know that you have made the request, but you don't want the coworker to know that your manager is aware of what's going on. Send the memo to the coworker (using To) with a bcc to your manager. When your coworker receives the message, the bcc field isn't visible, so your secret is safe. Your coworker doesn't know that you sent a copy of the message to your boss.



As you type a recipient's name, Notes tries its best to help you get the spelling of the name right. If, as you type a name in one of the address fields, you want to accept the "guess" that Notes offers, just press Enter to accept the suggestion.

If you're not sure how to spell a person's name, you can easily find out how. Just let your fingers do the walking when you want to address a message:

1. Click the Address button in the Action bar or choose **Actions⇒Address**. A Select Addresses dialog box appears, and you see a list of the people and groups of people for whom you can select an address.
2. Select a person (or group) name and then click the To, cc, or bcc button, depending on how you want the message to be addressed. The name of the person that you select appears in the right side of the dialog box. (If you make a mistake, use the Remove or Remove All button to start over.)



List of people

34 Sending a New Message



If you are a mouse aficionado, you can drag the name from the left window into the right window.

3. Click **OK** when you're finished using the Mail Address dialog box to choose your recipients' names.

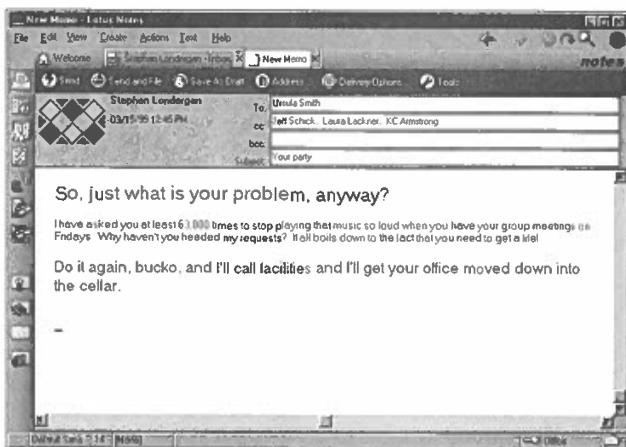


After choosing the recipients' names, type a brief description of what your memo is about in the Subject field. Although doing so is optional, what you enter here shows up in the View pane of your recipients' e-mail databases.

Entering the body of a message

After you type (or choose) the recipients' names and enter a subject for your message, say what you want in the *body* of the message. (On-screen, this area is immediately beneath the Address fields.)

You can enter any text that you want; you can get as fancy as you want, too. You can make the text **bold**, or *italicized*, or even change the **font** and **SIZE**. Because the Body field in e-mail is known as a *rich-text field*, you can make its contents pretty fancy. In addition to all these crazy things you can do with the text, you can even include other cool things, such as files and objects. Read more about fonts and stuff in Part IV.



Sending a message

When you finish saying your piece (typing your piece, actually) in the Body of the message, choose one of the following methods to send the memo off with barely a whisper:

- ◆ Choose **A**ctions⇨**S**end.
- ◆ Click the Send button in the Action bar.

Off goes the memo.

If you change your mind and decide not to send a message (what were you thinking?), do the following:

1. Press Esc.
2. Choose **D**iscard changes.

Poof! Your message is gone, as if you had never started it in the first place.

If you want to send your message later and just save it for now (maybe you want to take a break first), click the Save as Draft button in the Action bar.

What really happens when you send your memo? It gets handed off to your Domino server, the computer down in the basement that's responsible for shuttling the message to its recipients. And you? You're right back where you were when you started composing the message. Rest assured that your memo will be delivered to the recipients; Notes lets you know if it can't deliver your message.

Filing a message

The only possible downside to using **A**ctions⇨**S**end is that the memo is *not* saved for you. It goes to the recipients, but you have no record of what you sent.

To send your message and save it so that you have a record of what you sent, do one of the following:

- ◆ Choose **A**ctions⇨**S**end and **F**ile.
- ◆ Click the Send and File button in the Action bar.

When you choose to send and file your message, you can choose the folder into which you want to save your outgoing message. To designate the folder, do the following:

1. In the Move to Folder dialog box, select the folder where you want to save your outgoing message.
2. Click the **A**dd button.

36 Switching Views and Folders



If you're not sure about where to save a message, you can always safely add it to your Inbox folder.

Switching Views and Folders

A *view* (and its cousin, the *folder*) is an organization of messages that are in your e-mail database; you use views and folders to sort through and organize your incoming and outgoing e-mail messages. Your e-mail database comes ready-made with eight views and folders.

Folder Name	What the Folder Contains
Inbox	Messages that have been sent to you
Drafts	Messages that you have composed but haven't (yet) sent
Sent	Messages that you wrote and sent to other people
All Documents	Pretty obvious
Trash Bin	Documents that you intend to delete
Discussion Threads	Messages that are listed together based on their subjects
Rules	Agents you have defined to process incoming messages automatically
Stationery	If you've created any, this view displays sample message templates

When you want to see the messages in one of the views or folders, click the name of the view or folder in the View pane. When you do, the Document and View panes switch to show you the messages in that view or folder.

Using the View Pane

The View pane presents a summary of the documents in the view or folder that you select. When you press the up-arrow and down-arrow keys, you see the *message selector* move from one message to the next. (The message selector is the large black bar that highlights the messages in the View pane.) As you press the up-arrow and down-arrow keys, you also see a preview of that document in the Preview pane.

Each row of information in the View pane represents information about an individual message. Each message is divided into columns of information, such as the name of the person who sent the message, the date when it was sent, and the subject of the message. In addition to looking at the pane to see who sent what messages, you can change the column width and sort your e-mail.

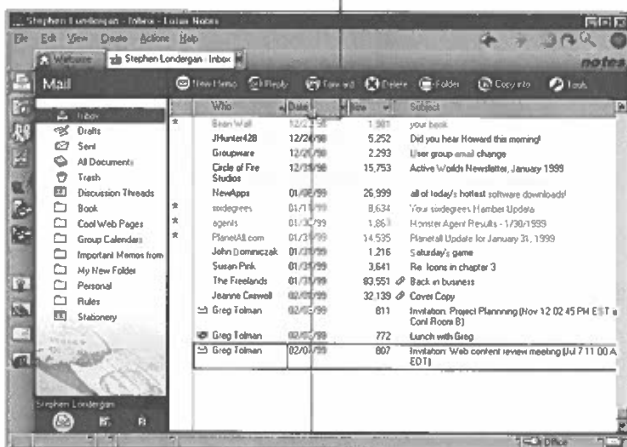
Changing a column width

Sometimes, the contents of a column are wider than the column itself, and you can't see all the information. You can remedy this problem by changing the column's width:

1. Move the mouse so that the pointer is on the horizontal line representing the right side of the too-narrow column. When the mouse is placed properly, the pointer changes to a double-sided arrow.
2. Drag the column to its new size.

38 Working in Your E-Mail Database

Use the double-sided arrow to change the column width



Sorting your e-mail

When you look at the documents in your e-mail, notice that the headings for the Who column and the Date column in the View pane have little triangles in them. Those triangles tell you that those columns are set up for *sort on the fly*, which means that you can re-sort the documents by clicking on the column heading.

For example, to rearrange the documents in the Date column so that they're listed from newest to oldest, click the word *Date* in the column heading. Before your very eyes, the documents rearrange themselves. Click Date again, and the documents shuffle into the opposite order — oldest to newest. You can do the same thing with the Who column to realphabetize the documents based on the person's name.

Remember: Whenever you see a small triangle in a column heading, you can click it to rearrange the documents listed in that column.

Working in Your E-Mail Database

In addition to using your e-mail database to read your messages, you also open it to manage your messages. Read on to find out how to organize or delete messages and how to create and use views (or folders).

Deleting documents

Unless you press the proper keys to delete a message, Notes saves the message in your e-mail database. However, because each message consumes valuable disk space, you should delete your unwanted messages on a regular basis. The most sensible course of action, obviously, is to delete all memos immediately after you read them, unless you expect to need them.

To delete a message, do any of the following:

- ◆ With the memo open on the screen, press Delete. This action marks the memo for deletion, puts it in the Trash folder, and opens the next memo in the list. Doing this doesn't actually delete the message; it only marks it for deletion. If you open the memo again, you see the word [Deleted] in the title bar.
- ◆ In the View pane, select the document(s) that you want to delete and either press Delete or click the Delete button in the Action bar. This also marks the message(s) for deletion. You can tell that a message has been marked for deletion because a small trash can appears next to it in the View pane. -
 - ◆ Drag the message(s) from the View pane and drop into the Trash folder in the Navigation pane.

If you change your mind and decide that you don't want to delete a message, take the following steps:

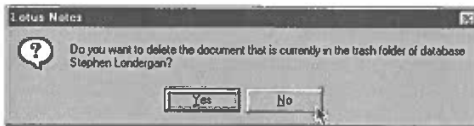
1. Open the Trash folder by clicking the folder's name in the Navigation pane.
2. Select the message(s).
3. Choose **A**ctions⇨**R**emove From Trash or click the Remove From Trash button.

Presto! The message(s) return to the original folder(s).

Remember: A message that has been marked for deletion isn't removed from the database until you do one of the following things:

- ◆ Press F9 to update the database.
- ◆ Close the database.
- ◆ Choose **A**ctions⇨**E**mpy Trash.

No matter which of these methods you use to empty the Trash folder, you always get one last chance to change your mind. If you decide that you want to keep the messages that you marked for deletion, choose **N**o in the dialog box that appears when you press F9. The messages remain saved in the database.



Remember: The easiest and fastest way to delete a document is to highlight it in the View pane, press Delete, and then press F9.

Creating a new folder

To add a new folder to your e-mail database, follow these steps:

1. Choose **C**reate⇨**F**older.
2. Name your new folder in the Create Folder dialog box.
3. Click **O**K.

If that seems easy, it's because it is. As soon as you click OK, your new folder is available in the Navigation pane.

Deleting a folder

If you no longer need a certain folder in your e-mail database and want to delete it, do the following:

1. Select the folder in the Navigation pane.
2. Choose **A**ctions⇨**F**older Options⇨**D**elete Folder.



Deleting a folder also deletes all the documents in that folder, so be careful! If you want to delete a folder without removing the documents within it, first move the documents to a different folder.

Finding documents

The boss calls and asks you to find some memo that she sent you last month about one of your company's clients. You look in all the likely folders and don't find anything on that client, but you know that you *never* delete messages about clients.

Rest assured that if you didn't delete the message, it's still there (somewhere)!

Tracking down a particular message can be a chore unless you know who sent the message. If you know who sent it, just switch to the folder that most likely contains the message that you're trying to find (if all else fails, use the All Documents folder) and then click the small Sort arrow in the Who column heading to sort the messages by name.

When you sort the folder based on the Who column, all the messages from a particular person are listed together; this makes a document easier to find. Use the arrow keys and Page Up and Page Down to move through the documents in the View pane.

To jump right to the messages from a particular person, instead of having to scroll through the alphabet, use Quick Search:

1. With the message selector in the View pane, type the name of the person for whom you are looking. As soon as you start typing a name in the View pane, the Starts with dialog box appears.



2. Enter the name that you're trying to find and click **OK**. Notes quickly takes you to the first message from that person.

Remember: You have to sort the messages in the View pane (by clicking the column heading) before you can use Quick Search.

If you don't know the name of the person who sent the message that you're trying to find, your search can take a bit longer as you look through more messages.



You can create a full-text index for your e-mail database so that you can very quickly search the contents of the documents. Indexing a database is discussed in Part VI.

Forwarding messages

In addition to replying to a message, you also can forward a message. Perhaps you get a message asking about some company policy, but you're not the right person to ask. Just forward the misdirected document to the right person by doing one of the following:

- ◆ Choose **A**ctions⇨**F**orward.
- ◆ Click the Forward button.



When you forward a document to someone, you might include a cc to the person who sent the document in the first place. That way, the author knows that you're not going to reply directly.

Opening a folder to see what's in it

To use the mouse to open a folder, do one of the following:

- ◆ In the Navigation pane, click the folder that you want.
- ◆ Choose **View**⇨**Go** to and choose the folder from the Go to dialog box.

Putting a document in a folder

To put a message (or several messages) in a folder, do the following:

1. Select the message(s).
2. Choose **A**ctions⇨**F**older⇨**M**ove to Folder.
3. Select the folder name from the Move to Folder dialog box.
4. Click **M**ove.



You also can use your mouse to place a document in a folder. Just drag and drop the message from the View pane to the desired folder in the Navigation pane.

Replying

You're reading an e-mail message from a colleague in which he asks you to do something. To reply to him, you have two options:

- ◆ Reply directly by choosing **C**reate⇨**R**eply or by clicking the Action bar's Reply button.
- ◆ Return the document to the originator by choosing **C**reate⇨**R**eply With History or by clicking the Reply With History button.

In either case, Notes begins a new memo and automatically fills in the e-mail address of the person who sent you the request in the first place.



After you begin a reply, use the Reply To All button in the Action bar to include the names of the original memo's cc list in the cc list for your new message.

When you select Reply With History, Notes includes a copy of the original memo in your reply; this is a nice way to remind the person what you're talking about. All too often, you receive memos in which the author expounds on some topic, leaving you with no idea of what he or she is talking about.

After clicking either of the reply buttons, you are free to alter the address fields. Type what you want in the Body field and then send or save the message as you would any other outgoing memo.

Distinguishing views from folders

What's the difference between a view and a folder? Not much, actually. Both a folder and a view list the documents that are in your e-mail. The two key differences are as follows:

- ◆ You can create new folders, but you cannot create new views.
- ◆ You can move a document in and out of folders, but you cannot move a document out of a view (unless you delete the document from your e-mail database altogether).

For example, perhaps you create a folder called Status Reports and drag a message from your Inbox folder to your new Status Reports folder. The message no longer appears in your Inbox; instead, it appears in your Status Reports folder. If, on the other hand, you drag a document from your All Documents view to the new Status Reports folder, the document is listed in both places: It still shows up in the All Documents view, but it also appears in the Status Reports folder.

Your Calendar

Your calendar — including appointments, meetings, events, and more — is part and parcel of Lotus Notes. Although the parts of your calendar are actually stored in your e-mail database, the special views and forms that you use to manage and interact with your calendar look an awful lot like what you see in a printed day planner.

In this part . . .

- ✓ Opening your calendar
- ✓ Adding things to your calendar
- ✓ Using the group calendar and free-time search options
- ✓ Setting calendar preferences



Managing Your Calendar

One of the coolest things about Notes is that your calendar is built right into your e-mail; you use your e-mail database to keep track of the meetings you need to attend, places you need to be, and even things you need to do. What's more, you can use the Notes-based calendar to schedule meetings with other people at your company or organization, and you can even check their availability before you propose a meeting time.

Opening your calendar

You have three ways to open your calendar:

- ◆ Click the Calendar bookmark, which is the second in the Bookmark bar.



- ◆ Click the second Open Calendar button on the Notes Welcome page.



Calendar

 New Entry

- ◆ If you already have your e-mail open, click the Calendar button at the very bottom of the Navigation page.



Opening somebody else's calendar

You can open and manage other people's calendars, too. For example, you may be responsible for tracking your boss's appointments, so you want to open his or her calendar, respond to meeting invitations on his or her behalf, and so on. Here's how:

1. Choose **File**⇨**Database**⇨**Open** or press **Ctrl+O**.
2. Select the name of the server with the person's calendar that you want to open in the **Server** field of the **Open Database** dialog box.
3. Select the person's e-mail file in the **Database** list. (You may have to open the **Mail** folder, first.)
4. Click the **Open** button.



If you need to open another person's calendar regularly, drag the **Task** button for the person's calendar into your **Bookmark** bar, so that you can easily find it in the future.

Viewing your calendar

Use the **Calendar** view in your e-mail database to see the appointments, meetings, and other events that you added (or someone else added) to your schedule. The calendar screen contains a lot of information, so we provide here a blow-by-blow description of each button and other parts of the screen:

- 1 ♦ **One day:** This button shows you one day's calendar items.
- 2 ♦ **Two days:** This button shows you two days' calendar items.
- 7 ♦ **One week:** This button shows you seven days' worth of calendar items. The following figure shows a sample calendar, using the seven-day view.
- 14 ♦ **Two weeks:** This button shows you 14 days' calendar items.
- 31 ♦ **One month:** This button shows you a whole month's calendar items.
- 🕒 ♦ **Clock:** This button shows or hides the free time. In other words, hiding the free time means that you see only the times when you have a meeting; showing the free time means that your calendar displays the hours when you are free, too.
- ♦ **Week-by-week calendar:** You can click any day in the calendar to go to that day. Use the little black arrows at the top of the calendar to quickly move through your calendar, one week at a time.

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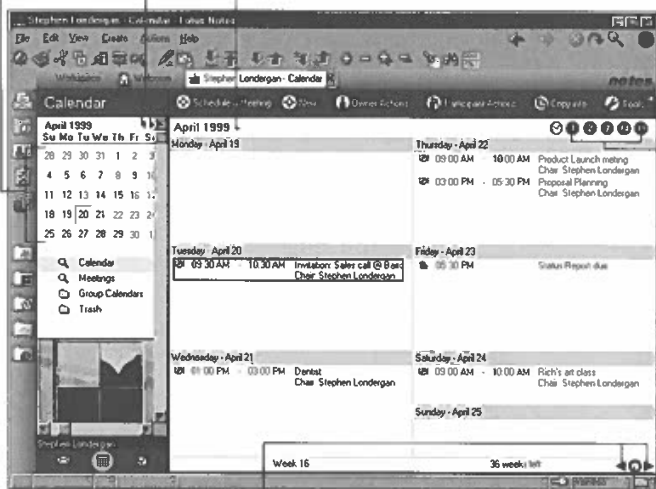
- ◆ **Monthly calendar:** You can click the arrow to change the month that displays.
- ◆ **Page arrows:** These arrows enable you to scroll to the next or previous day/week/month. (You can also press PgDn and PgUp.)
- ◆ **Day arrows:** These arrows enable you to scroll through the entries for a particular day.
- ◆ **Today:** This button always takes you to the entries for the current day.

Use these buttons to change the month.

Click any date to jump to that date.

Use this button to change the calendar's contents to another week or month.

Use these buttons to decide how much of the calendar you see.



Use these buttons to move the calendar forward or backward one page at a time.

Click this button to jump to today's calendar.

Setting calendar preferences

You can manage some of the finer points of how your calendar behaves — such as the default duration for new meetings, the names of the people who can view your calendar, and so on —

through your calendar preferences. To see your calendar preferences, open your calendar and choose **Actions⇨Tools⇨Preferences**.

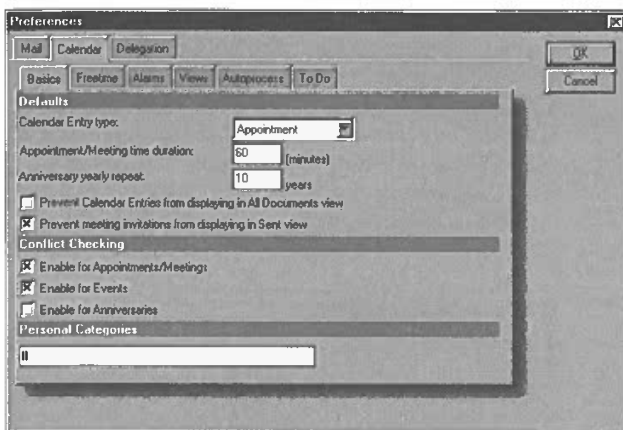
As you can see in the following figure, the Preferences dialog box is divided into three main tabs (Mail, Calendar, and Delegation), each of which is further divided into Tabs of its own.

You probably don't have to worry about most of the options in the Preferences dialog box, but we'd be neglecting our duties if we didn't describe, in mind-numbing detail, each and every one of them:

The Calendar/Basics Tab

Default Calendar Entry type	Sets the type of entry you make most often.
Default Appointment/Meeting time duration	Sets the default length of time for new appointments and meetings.
Default Anniversary yearly repeat	Sets the default number of years for which an anniversary repeats.
Prevent Calendar Entries from displaying in All Documents view	Checking this option means that any and all calendar entries will not appear in the All Documents view of your e-mail database.
Prevent meeting invitations from displaying in Sent view	Checking this option means that any and all invitations that you've sent will not appear in the Sent view of your e-mail database.
Conflict Checking/Enable for Appointments/Meetings	Determines whether Notes checks your calendar for conflicting appointments and meetings when you save a new appointment or meeting in your calendar.
Conflict Checking/Enable for Events	Determines whether Notes checks your calendar for conflicting events when you save a new event in your calendar.
Conflict Checking/Enable for Anniversaries	Determines whether Notes checks your calendar for conflicting anniversaries when you save a new anniversary.
Personal Categories	Defines the list of categories that you can assign to new calendar entries; enter more than one by pressing Enter after each.

50 Managing Your Calendar



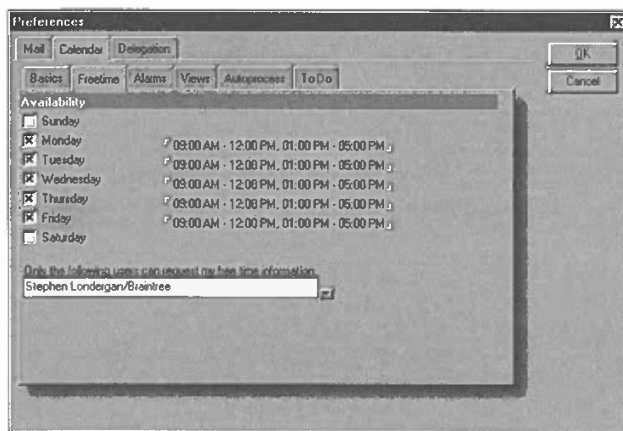
The Calendar/Freetime Tab

Days and times

Determines the days of the week and times of the day when you're generally available for meetings.

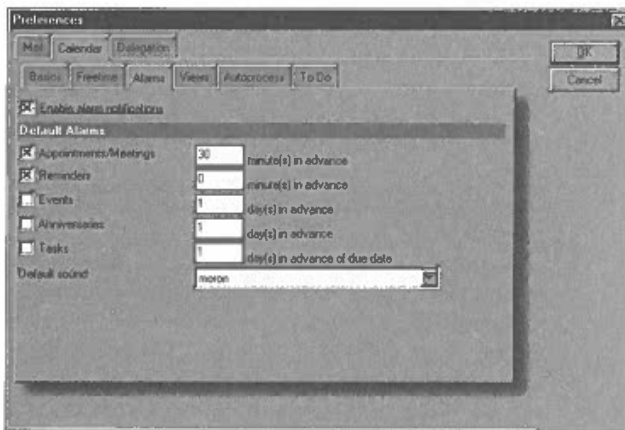
Only the following users can request my free time information

Determines the people who can review your availability. Enter their names in this text box or use the drop-down arrow next to the box to select their names from the Public Directory.



The Calendar/Alarms Tab

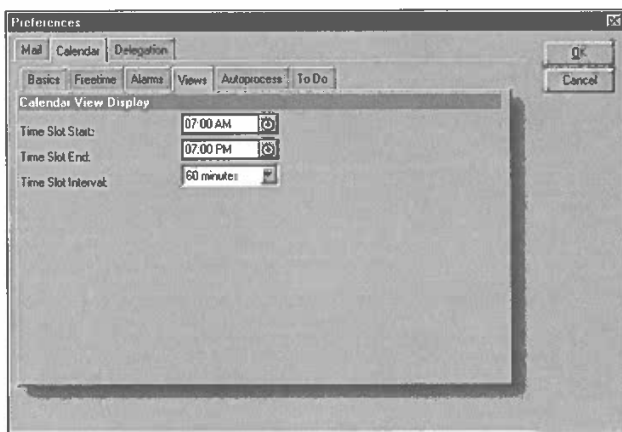
Enable alarm notifications	Warns of pending calendar items.
Appointments/Meetings	Warns of upcoming meetings and appointments; use the Minute(s) in advance box to determine how much notice you get.
Reminders	Warns of upcoming reminders; use the Minute(s) in advance box to determine how much notice you get.
Events	Warns of upcoming events; use the Day(s) in advance box to determine how much notice you get.
Anniversaries	Warns of upcoming anniversaries; use the Day(s) in advance box to determine how much notice you get.
Tasks	Warns of upcoming to-do's; use the Day(s) in advance box to determine how much notice you get.
Default sound	Determines the sound that plays, by default, for any of the above alarms.



The Calendar/Views Tab

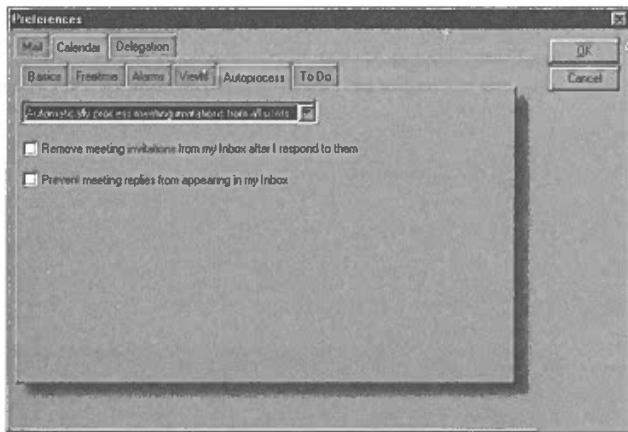
Time Slot Start	Determines the beginning time that displays on each day of your calendar.
Time Slot End	Determines the ending time that displays on each day of your calendar.
Time Slot Interval	Determines the time slots that display on each day — 15, 30, or 60 minutes.

52 Managing Your Calendar



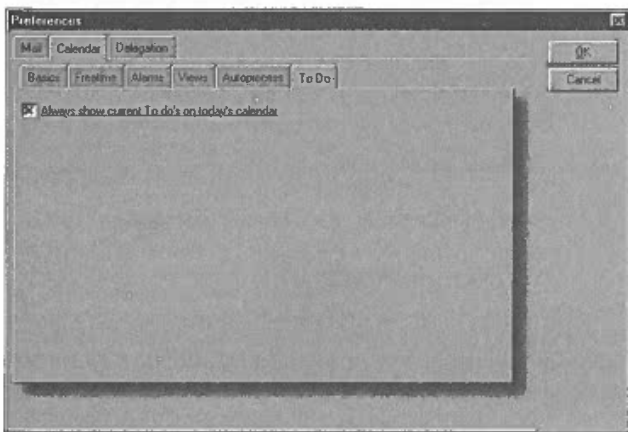
The Calendar/Autoprocess Tab

The pull-down menu	Determines which, if any, meeting invitations Notes automatically adds to your calendar. For example, you may want Notes to automatically accept any meeting invitations that your boss sends to you, so you use this menu to enter the boss's name.
Remove meeting invitations from my Inbox after I respond to them	Determines whether the meeting requests that you've replied to stay in your Inbox.
Prevent meeting replies from appearing in my Inbox	Hides the replies that people send you from your e-mail database's Inbox folder.



The Calendar/To Do Tab

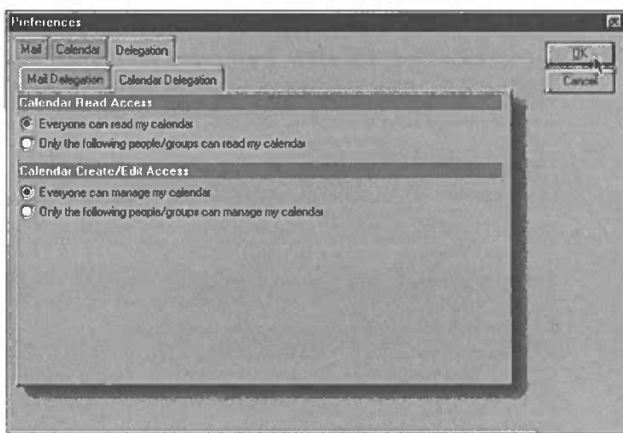
Check box Determines whether to display your to-do items on your calendar.



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The Delegation/Calendar Delegation Tab

Calendar Read Access	Determines the names of the people, if any, who can read your calendar. If you click Only the following people/groups can read my calendar, you get a new field in which you enter their names.
Calendar Create/Edit Access	Determines the names of the people, if any, who can manage your calendar (that is, accept and decline invitations) on your behalf. If you click Only the following people/groups can manage my calendar, you get a new field in which you enter their names.



Click OK when you finish editing your calendar preferences.

Printing your calendar

When you have your calendar open, you can choose **File**⇒**Print** to print it. As you can see in the following figure, you use the **Content** section of the dialog box to determine whether Notes prints a single day, week, or month of your calendar. Also, the **Print range** boxes determine the beginning and ending dates for the entries you want to print.

Click OK to print your calendar.



Modifying Your Calendar

No matter what you want to add to your calendar, the first step is always the same.

Remember: To add any new item to your calendar, you first have to open your calendar.

You can do several different kinds of things in your calendar. Check them out here:

- ♦ **Appointments** are meetings that you attend at a particular time on a particular day. Appointments do *not* involve other people from your company or organization — in other words, you can't invite other people to an appointment. An example of an appointment may be a visit to the dentist.
- ♦ **Meetings** are appointments that you attend on a particular day at a particular time, usually with other people from your company or organization. The big difference between a meeting and an appointment is that you can invite other people from your organization to a meeting.
- ♦ **All-day events** are really just day-long appointments. Use events when you need to be someplace for an entire day. Since events are associated with an entire day (and not a particular time during the day), they appear at the top of the day's schedule.

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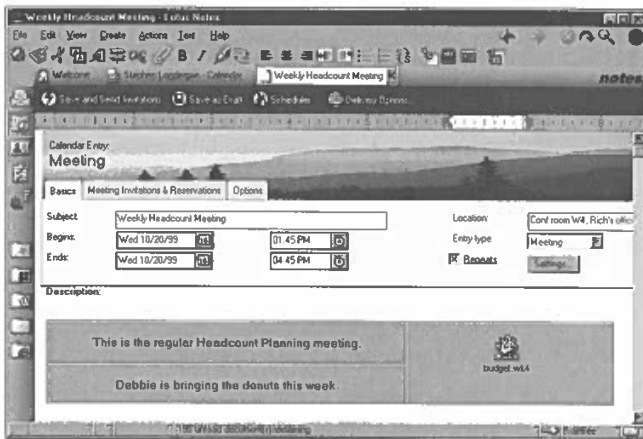
- ◆ **Reminders** are entries on your calendar that make sure you don't forget to do something at a particular time on a particular day. Just like events, reminders appear at the top of a day's schedule.
- ◆ **Anniversaries** are similar to reminders. Anniversaries aren't scheduled for a particular time, just a particular day.

Adding a new meeting

Adding a meeting really does two things: It adds the meeting day and time to your schedule, and it sends the name, time, and location of the meeting to whomever you list in the Meeting form. Use a meeting whenever you want to involve other people from your company or organization.

To schedule a new meeting, follow these steps:

1. Open your schedule.
2. Click the Action bar's Schedule a Meeting button, or choose Create⇒Calendar Entry. Make sure that Calendar Entry and the Entry type field say Meeting.



3. Enter a few words describing the meeting in the Subject text box.
4. Use the Begins and Ends date and time text boxes to enter the beginning and end of the meeting. If you prefer to select a date and time, click the little picture of a calendar or clock that is immediately to the right of the boxes.

5. (Optional) Enter the meeting's location in the Location text box.
6. (Optional) Use the Description area of the Meeting form to add any information, attachments, and so on that pertain to the meeting.
7. If the meeting occurs more than once (such as a weekly staff meeting), check the Repeats check box and then click the Settings button to enter how often the meeting happens.
8. Use the options in the Meeting Invitations & Reservations tab of the Meeting form to enter the names of the people you hope can attend and to select a room and other resources for your meeting. If you enter names in the cc and bcc fields, those people get a notice of your meeting, but aren't required to respond to your invitation.



Your company's administrator must configure your server before you can schedule rooms and resources.

9. Click the Pencil in check box on the Options tab if the meeting has not yet been absolutely, positively confirmed, and you are willing to have another meeting supersede it. You can always uncheck this box later, after plans for the meeting firm up.
10. Click the Mark Private check box to make the meeting private and to keep people who have access to your calendar from seeing it. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.
11. Use the Notify me check box if you want Notes to remind you in advance of the meeting. You can also use the Alarm settings button to determine how much notice you're given and how, exactly, you are reminded.
12. Click the Action bar's Save and Send Invitations button. This saves the meeting on your calendar and dispatches invitations to the people you listed in the To, cc, and bcc fields.



If you don't want to wait for your invitees to respond to your invitation, use the Action bar's Scheduler button to have Notes automatically check their schedules for a time when they're all available.

After you click the Save and Send Invitations button, Notes returns you to your calendar. Switch to the day of the meeting that you just scheduled to find it listed among the items for that day. You also receive, in most cases, e-mail notification from your invitees as they read your invitation and decide whether to accept or decline your invitation.

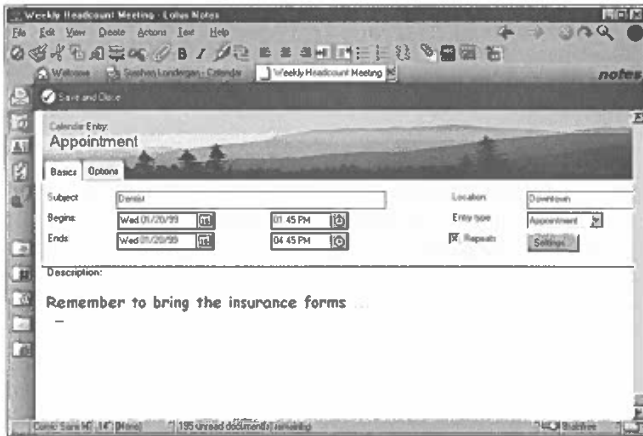
58 *Modifying Your Calendar*

Adding a new appointment

Add an appointment to your schedule whenever you want to both record where you need to be at a particular time and when you want to block off that time on your schedule — so that no one else tries to schedule a meeting with you during that time.

To add a new appointment to your calendar, do the following:

1. Open your schedule.
2. Click the Action bar's New button, and then choose Appointment. Note that Calendar Entry and the Entry type field say Appointment.



3. Enter a few words describing the appointment in the Subject text box.
4. Use the Begins and Ends date and time text boxes to enter the beginning and end of the appointment. If you prefer to select the date and time, click the little picture of a calendar or clock that is immediately to the right of the box.
5. (Optional) Enter the appointment's location in the Location box.
6. (Optional) Use the Description area of the Appointment form to add any information, attachments, and so on that pertain to the appointment.

7. If the appointment occurs more than once, check the Repeats check box and then click the Settings button to enter how often the appointment happens.
8. Click the Pencil in check box on the Options tab of the Appointment form if the time or date for the meeting has not yet been finalized. You can always uncheck this box later, after plans for the appointment firm up.
9. Click the Mark Private check box on the Options tab to make the appointment private and to keep the people who have access to your calendar from being able to see the appointment's title. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.
10. Use the Notify me check box if you want Notes to remind you in advance of the appointment. If you choose to do so, you can also use the Alarm settings button to determine how much notice you're given and how, exactly, you're reminded.
11. Click the Action bar's Save and Close button when you finish entering the details of your appointment.

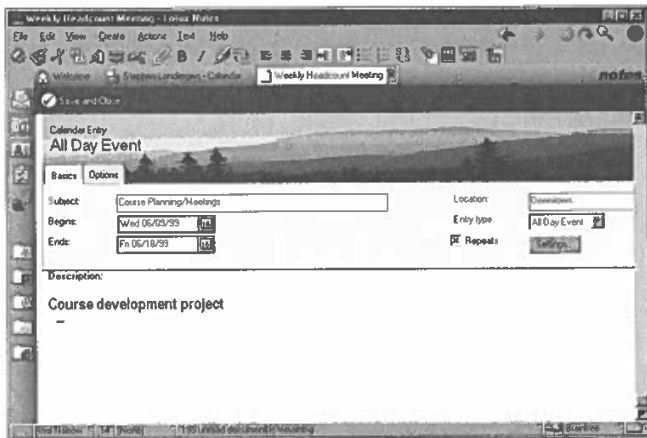
After you click the Save and Close button, Notes returns you to the calendar view; switch to the day of the appointment you just scheduled to find it listed among the items for that day.

Adding a new event

Add an event to your schedule whenever you want to record something that's going to last all day, such as an off-site meeting, business trip, vacation day, and so on.

To add a new event to your calendar, follow these steps:

1. Open your schedule.
2. Click the Action bar's New button, and then choose All Day Event. Note that Calendar Entry and the Entry type field say All Day Event.



3. Enter a few words describing the event in the Subject text box.
4. Use the Begins and Ends date text boxes to enter the beginning and end of the event. If you prefer to select the date, click the little picture of a calendar that's immediately to the right of the boxes.
5. (Optional) Enter the event's location in the Location text box.
6. (Optional) Use the Description area of the Event form to add any information, attachments, and so on that pertain to the event.
7. If you want the event to appear more than once on your calendar, check the Repeats check box, and then use the Repeat options dialog box to determine how often the event repeats.
8. Click the Pencil in check box on the Options tab if the date for the event has not yet been finalized. You can always uncheck this box later, after plans for the event firm up.
9. Click the Mark Private check box on the Options tab to make the event private and to keep people who have access to your calendar from seeing it. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.

10. Use the Notify me check box if you want Notes to remind you in advance of the event. You can also use the Alarm settings button to determine how much notice you're given and how, exactly, you're reminded.
11. Click the Action bar's Save and Close button when you finish entering the details of the new event.

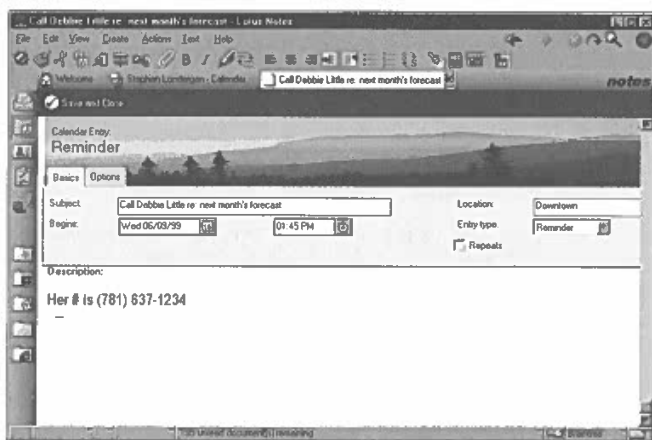
After you click the Save and Close button, Notes returns you to the calendar view; switch to the day of the event you just scheduled to find it listed at the top of the day's items.

Adding a new reminder

Add a reminder to your schedule whenever you want to leave a note for yourself on a particular day — sort of the Notes equivalent of tying a string around your finger.

To add a new reminder to your calendar, follow these steps:

1. Open your schedule.
2. Click the Action bar's New button and then choose Reminder. Note that Calendar Entry and the Entry type field say Reminder.



3. Enter a few words describing the reminder in the Subject text box. Whatever you enter displays in your calendar.

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4. Use the Begins date and time boxes to specify where you want the reminder to appear on your calendar. If you prefer to select a date and time, click the little picture of a calendar or clock that's immediately to the right of the boxes.
5. (Optional) Enter the reminder's location in the Location text box.
6. (Optional) Use the Description area of the Reminder form to add any information, attachments, and so on that pertain to the event.
7. If you want the reminder to appear more than once on your calendar, check the Repeats check box and then use the Repeat options dialog box to determine how often the reminder should appear on your calendar.
8. Click the Pencil in check box on the Options tab if the date for the reminder has not yet been finalized. You can always uncheck this box later, after plans for the reminder firm up.
9. Click the Mark Private check box on the Options tab to make the reminder private and to keep people who have access to your calendar from seeing it. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.
10. Use the Notify me check box if you want Notes to remind you in advance of the reminder. You can also use the Alarm settings button to determine how much notice you're given and how, exactly, you're reminded.
11. Click the Action bar's Save and Close button when you finish entering the details of the new reminder.

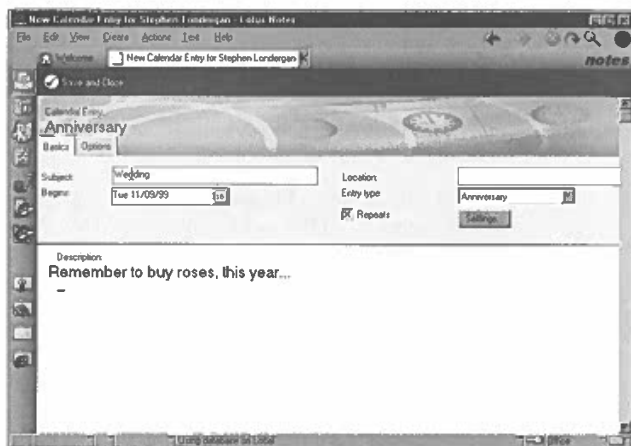
After you click the Save and Close button, Notes returns you to the calendar view; switch to the day of the reminder you just scheduled to find it listed at the top of the day's items.

Adding a new anniversary

An anniversary — such as the day you got married, the day you started your job, and so on — appears on your calendar at the top of the day's entries.

Follow these steps to add a new anniversary to your calendar:

1. Open your schedule.
2. Click the Action bar's New button and then choose Anniversary. Note that Calendar Entry and the Entry type field say Anniversary.



3. Enter a few words describing the anniversary in the Subject text box. Whatever you enter displays in your calendar.
4. Use the Begins date box to specify where you want the anniversary to appear on your calendar. If you prefer to select the date, click the little picture of a calendar that's immediately to the right of the box.
5. (Optional) Enter the anniversary's location in the Location box.
6. (Optional) Use the Description area of the Anniversary form to add any information, attachments, and so on that pertain to the anniversary.
7. If you want the anniversary to appear more than once on your calendar, check the Repeats check box and then use the Repeat options dialog box to determine the regularity with which the appointment repeats.
8. Click the Pencil in check box on the Options tab if the date for the anniversary has not yet been finalized. You can always uncheck this box later, after plans for the anniversary firm up.
9. Click the Mark Private check box on the Options tab to make the anniversary private and to keep people who have access to your calendar from seeing it. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.

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10. Use the Notify me check box if you want Notes to remind you in advance of the anniversary. You can also use the Alarm settings button to determine how much notice you're given and how, exactly, you're reminded.
11. Click the Action bar's Save and Close button when you finish entering the details of the anniversary.

After you click the Save and Close button, Notes returns you to the calendar view; switch to the day of the anniversary you just scheduled to find it listed at the top of the day's items.



Anniversaries automatically appear on the same date for the next ten years of your calendar. Use the Repeats button if your anniversary should be listed more or less frequently.

Editing an entry

Although the items in your calendar are presented in a certain way, they are really just documents in your e-mail database, and you can easily edit them to change a date, time, description, and so on. To modify an item in your calendar, do one of the following:

- ◆ Select the item in any of the calendar views and press Ctrl+E.
- ◆ Double-click the item to open and edit it.

Click the Action bar's Save and Close button when you finish editing the document.

Responding to an invitation

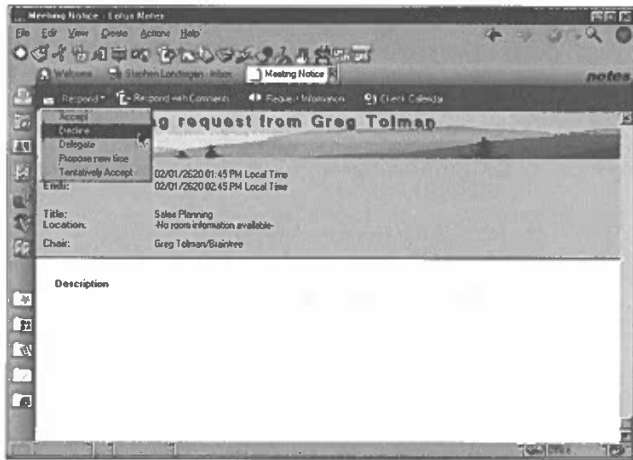
As you and your colleagues begin to use the calendar options, you may begin to receive invitations to meetings (unless you're very unpopular, of course, which we know isn't true!). Responding to these invitations is important so that the person who is trying to set up a meeting knows whether you plan to attend. To respond to an invitation, do the following:

1. Find the invitation document in your Inbox.
2. Double-click to open the item.
3. (Optional) Click the Invitees section on the document to see who else is invited.
4. Use the Action bar buttons to decide what to do with the invitation.

You can Accept the invitation (meaning you plan to attend), Decline it (saying, essentially, "thanks, but no thanks"),

Delegate it (which sends the invitation to someone else, in the hope that they'll agree to attend in your place), Propose a new time, or Tentatively Accept it.

5. You can also use the Action bar's Respond with Comments button to send a few words along with your response.



Operating a Group Calendar

Group Calendar is a quick and easy way to see an overview of several people's calendars all lumped together. You can use a group calendar to manage an entire department's appointments or anytime you need to see more than one person's calendar at the same time.

Creating a group calendar

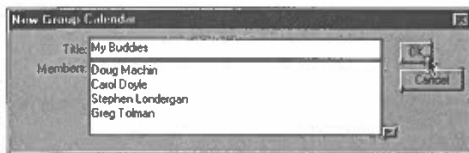
Before you can view a group calendar, you have to create a group calendar document in your e-mail database. To create a group calendar, use the following steps:

1. Open your calendar or e-mail.
2. Click on the Group Calendars folder in the Navigation pane.
3. Click the New Group Calendar button in the Action bar, or choose Actions → New Group calendar.



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4. Enter the name by which the group calendar will be known in the Title text box.



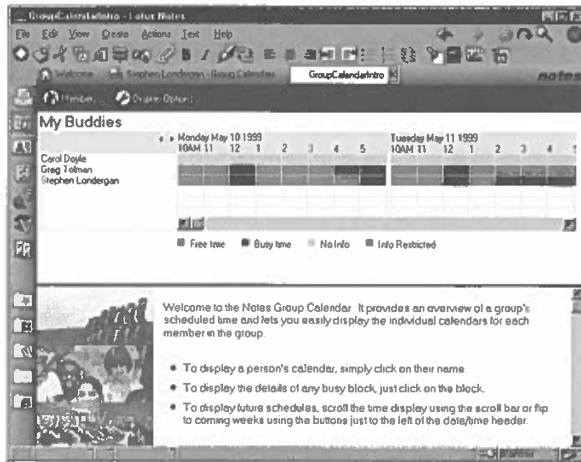
5. Enter the names of the people whose calendars you want to view in the Members text box. (Click the drop-down arrow at the bottom of the box to pick the names from the Public Directory.)
6. Click OK to create the new group calendar.

Opening a group calendar

After you create a group calendar document, use it to easily open a collective view of the members' calendars. To see a group's calendar, follow these steps:

1. Open *your* calendar or e-mail.
2. Click on the Group Calendars folder in the Navigation pane.
3. Double-click in the View pane the group calendar you want to open.

A group calendar shows you a collective, day-by-day representation of the schedules for the people who are members of the group. As you can see in the figure, each person's schedule is broken into hour-long blocks, and Notes tells you if the person is busy or available during a given hour by coloring in the corresponding block — green if free, blue if busy. You can see the details of a person's schedule by clicking the block.



The person whose calendar you want to see must list you in his or her Delegation Profile before you can add that person to your group schedule.

Tracking To-Do's

In addition to keeping track of your meetings and appointments, Notes also enables you to track to-do's — things that you have to do. Notes can even help you remember the date by which you have to complete the to-do, the priority of the to-do, and whether a to-do is overdue. So get busy!

Creating a new group to-do

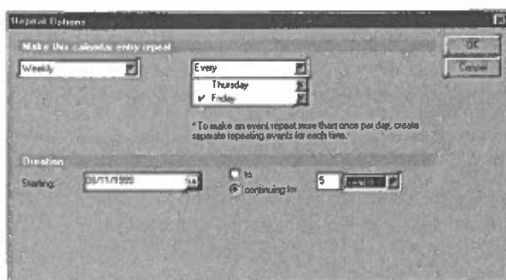
To add a new group to-do (a task that involves more than one person), follow these steps:

1. Click the To Do bookmark to open your to-do's. (It's probably the third one in the Bookmark bar).
2. Choose **Create To Do**, or click the Action bar's **New To Do Item** button.



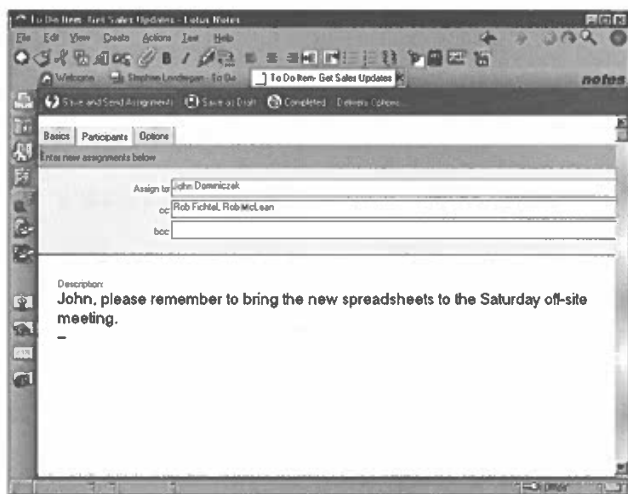
68 Tracking To-Do's

3. Enter a brief description of what needs to be done in the Subject field.
4. Indicate the item's importance by choosing a Priority: High, Medium, Low, or None. The Priority you choose determines how the item is listed in your To Do views. Top priority items ❶ appear at the top, medium priority items ❷ appear next, low priority items ❸ appear next, and so on.
5. Enter the date when the task should begin in the Starts field.
6. Enter the date by which it needs to be finished in the Due field.
7. Choose Group To Do in the Type field.
8. If you want the to-do to be automatically entered on more than one date, use the Repeats button. (For example, you could add a to-do named "Take out the garbage" and then set it to automatically repeat every Friday.) Use the Repeat Options dialog box to specify how often the task is entered automatically and how long the task repeats.



9. If you want, include any information about the task in the Description area of the form.
10. On the Participants Tab of the new to-do document, enter the name (or names) of the person (or people) to whom you want to send the new to-do. Putting someone's name in the Assign to field means that you expect them to be directly involved in completing the task, while putting a name in the cc or bcc fields means that you want to send the person a copy of the to-do, *without* expecting them to complete it.

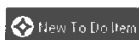
11. Click the Action bar's Save and Send Assignments button when you finish.



Creating a new personal to-do

To add a new personal to-do (a task that involves you and only you), follow these steps:

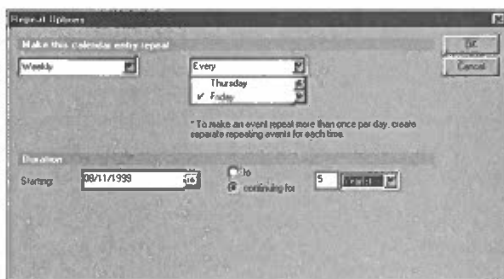
1. Click the To Do bookmark to open your to-do's. (It's probably the third one in the Bookmark bar).
2. Choose Create To Do, or click the Action bar's New To Do Item button.



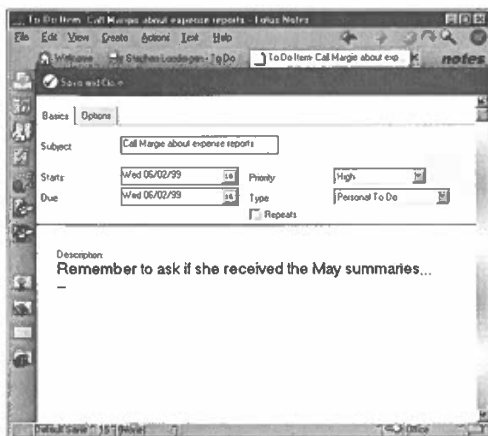
3. Enter a brief description of what needs to be done in the Subject field.
4. Indicate the item's importance by choosing a Priority: High, Medium, Low, or None. The Priority you choose determines how the item is listed in your To Do views. Top priority items ❶ appear at the top, medium priority items ❷ appear next, low priority items ❸ appear next, and so on.
5. Enter the date when the task should begin in the Starts field.

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6. Enter the date by which it needs to be finished in the Due field.
7. Choose Personal To Do in the Type field.
8. If you want the to-do to be automatically entered on more than one date, use the Repeats button. (For example, you could add a to-do named "Take out the garbage" and then set it to automatically repeat every Friday.) Use the Repeat Options dialog box to specify how often the task is entered automatically and how long the task repeats.



9. If you want, include any information about the task in the Description area of the form.
10. Click the Action bar's Save and Send Assignments button when you finish.



Editing a to-do

To edit the contents of a to-do, such as editing its subject, changing the date by which you need it completed, or changing it from a personal to-do to a group to-do, follow these steps:

1. Click the To Do bookmark to open your to-do's.
2. Select the to-do item with the contents you want to change.
3. Double-click, or press Enter, to open the to-do.
4. Use the fields on the form to edit them there parts that needs a-changin'.
5. Click the Action bar's Save and Close button.

Updating your to-do's

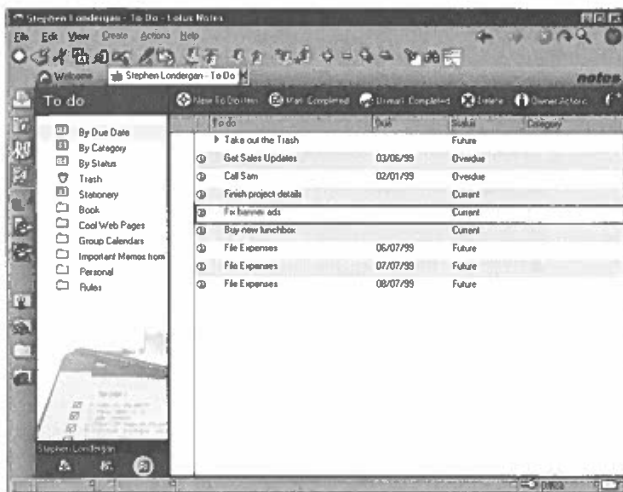
Because the status of your to-do's is time-dependent, you need to keep them up-to-date. To change the status of a to-do item, follow these steps:

1. Click the To Do bookmark to open your to-do's.
2. Select the to-do item whose status you want to change.
3. Use the Action bar's Mark Completed or Unmark Completed buttons to change the to-do's status.

Viewing your to-do's

You view all your to-do's together by clicking the To Do bookmark, which opens the By Due Date view.

72 Tracking To-Do's

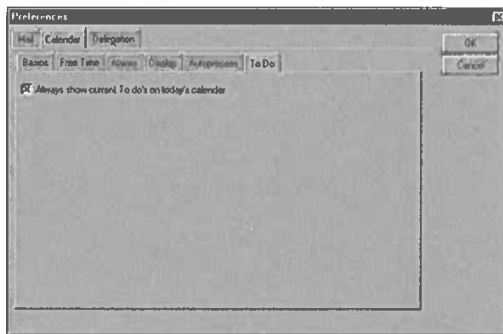


As you can see in the figure, the By Due Date view displays your tasks in order by the date upon which you're supposed to complete them. (If you've been remiss in your duties and let some of your Tasks become *Overdue*, the overdue to-do's always appear at the top.) As you may notice in the figure's Navigation pane, you can also view your to-do's by category or by status.

In addition to the to-do views, and as a matter of personal preference, you can display your to-do's in your calendar, listed right among the appointment and meetings for a particular date. If you do choose to view your to-do's on your calendar, you find them listed on the day on which they're due — unless they are overdue, in which case they appear at the top of today's list.

To make your to-do items appear in your calendar, follow these steps:

1. Click the To Do bookmark to open your to-do's.
2. Choose **Actions**⇨**Tools**⇨**Preferences** to display the Preferences dialog box.



3. Click the To Do tab.
4. Click the Always show current To do's on today's calendar.
5. Click the OK button.

Dealing with Databases and the Data They Contain

After you open a database, your work really begins. You have to find documents, read them, edit them, create new documents, and maybe make some sophisticated additions to them, such as tables and hyperlinks. This part helps you find, understand, and accomplish the types of tasks you most often need to do in a database.

In this part . . .

- ✓ Creating a document
- ✓ Creating and modifying tables
- ✓ Editing a document
- ✓ Hiding a document
- ✓ Linking documents, views, and databases to a document
- ✓ Locating and opening Notes databases
- ✓ Navigating around a database
- ✓ Searching for text
- ✓ Working with documents



Access

Knowing what you *can* do in a database is important. A database has seven levels of access, which are listed in the access control list (ACL), and all users are given or denied privileges in the database based on the access level assigned to them.

You can determine your level of access to an open database by looking in the third section from the right in the status bar, where you see a symbol of your access level. If you click on the symbol, you see a message about what the symbol means.

Access-level symbol



If you find yourself barred from doing something, you may not have the right access level to do what you want to do. From the top, the levels are as follows:

- ◆ **Manager:** Can do anything, including changing the access control list.
- ◆ **Designer:** Can change the design elements, such as forms, views, and folders.
- ◆ **Editor:** Can make changes to all documents in the database.
- ◆ **Author:** Can create and read documents.
- ◆ **Reader:** Can read but not create documents.
- ◆ **Depositor:** Can create but not read documents.
- ◆ **No access:** Can't even open the database. If you don't have access to a database and you try to open it, you receive the curt message "You are not authorized to access that database."

Bulleted Lists

Bullets make paragraphs look like items in a list (as an example, check out the bulleted list in the previous section). To use bullets, follow these steps:

1. Highlight the existing paragraphs that you want to convert into bullets, or just start a new line.



2. Click the Text Bullets SmartIcon. The text you highlighted converts to bullets. Every time you press Enter, a new paragraph starts with a bullet.

3. When you're done using bullets, press Enter to start a new paragraph and then click the same SmartIcon to turn off the bullets.

Database Icons

You can't open a database until you add its icon to your desktop or a bookmark folder. One of the bookmarks in your bookmark folder is called Workspace. Clicking that bookmark opens the Notes workspace where you see icons representing the databases you have opened in the past. Each icon is a square with the following properties:

- ◆ The name of the database
- ◆ Possibly a picture (depending on how motivated the database designer was)
- ◆ Perhaps some other information, such as the server on which the database resides and how many unread documents in the database

The last two bits of information, the server and the number of unread documents, don't display automatically. You have to choose to display them. Open your Notes workspace and choose View⇨Show Unread and View⇨Show Server Names.

Unfortunately, you have no automatic way to know about all the databases that are available to you. So how do you find out what databases are available?

- ◆ A fellow employee or your boss officially informs you about a database that you need to use.
- ◆ Your company may publish a list of important databases. Your company may even have a database that catalogs all the available databases.
- ◆ You accidentally overhear a conversation about a useful database.
- ◆ You may ask coworkers about places to find information that you need.
- ◆ You use the Notes menu to see what's available.

Using the menu may seem like the most sensible choice, because you can reasonably assume that all Notes databases appear when you use the menu. Unfortunately, Notes doesn't work that way. You must use the menu to open a database, but the menu isn't necessarily the way to see all the databases in your company.

78 Database Icons

Listing every database in the menu would be a bit confusing, not to mention lengthy. You might see a huge list of databases or the same database name listed several times. So, to keep things simple, the only databases that you see listed are those on the servers that the Notes administrator has grouped with your home server. Your home server is where your e-mail is stored; you use the home server to contact your whole organization through Notes.

If you have trouble finding a database that you want to use by browsing and clicking in server after server, get the following three pieces of information from someone in the know:

- ◆ The database name (the actual title — something like “Company Policies”)
- ◆ The database filename (the name used to store the database on disk — something such as COMPPOL.NSF)
- ◆ The server on which the database resides

Armed with this information, you can add a bookmark for the database by following these steps:

1. Choose **File**⇒**Databases**⇒**Open**. The Open Database dialog box appears.
2. Look in the text box under the word **Server**. The text box says **Local**. If you're using a Mac, the space says **Notes Data Folder** instead of **Local**. Either way, this space is where you want to look if the database you're seeking is on your own hard disk. Most databases are on a server, and if you know that the database you want is on a server, go on to Step 3. If you're looking for a database on your own computer but having trouble locating the database, use the **Browse** button to search the various nooks, crannies, and directories of your hard disk. Remember that you see the filename (the name used to store the database on disk), not the name that the database designer gave the database for display in Notes.
3. Click the down arrow across from the word **Local**. You now see the names of one, a few, or lots of Domino servers, depending upon how your administrator has set up Notes at your company. If you don't see the name of the server you're after, use the scroll bar to move down the list.
4. Click the name of the server that you want. Your company may have Domino servers whose names don't appear in the Open Database dialog box. If you want to find a server that's not on your list, type the server's name in the **Filename** text box at the bottom of the dialog box and then click **Open**. If that doesn't work, contact your administrator.

5. When you locate the correct server and database in the Open Database dialog box, choose one of the following options:

- **Open the database right away.** If you click Open (or double-click a database's title), Notes does four things. First, it adds that database to the list of bookmarked databases in your Databases folder so that you can open it in future Notes sessions without having to go through these steps again. Second, it adds the database to your Workspace (which is also in the Databases folder), giving you another way to open the database in future sessions. Third, it closes the Open Database dialog box. Finally, it opens the database you chose.
- **Bookmark the database so that you can easily open the database later.** If you click the Bookmark button, you see a dialog box; use this dialog box to determine where the icon for the new database appears. Selecting Workspace, for instance, puts the icon on the Workspace, but not in any database folder. If you want the icon in a folder and on the Workspace, choose a folder; the icon appears in both places. If you want a new folder for your new icon, first click the name of the folder in which you want the new folder to appear, and then click New Folder and enter a name for the new folder in the Name text box of the dialog box that appears. Click OK and the database is added to the workspace and to your new folder.

Notice what didn't happen? The database *didn't* open. It's not supposed to. Why? Notice that you're still looking at the Open Database dialog box. You have a chance to open or bookmark more databases. Bookmark is useful if you need to collect a few databases and you want to get them all in the same trip to the Open Database dialog box. Opening each database individually and then returning to the dialog box to open another one can be quite time consuming and cut into the things for which you were really hired — such as having meetings and doing power lunches. Or is it doing meetings and having power lunches?

If you have several replica icons representing the same database located on several servers, you can “stack” the icons so that they are all in the same place on your desktop. You know the database icons are stacked if you see a little triangle in the top icon's upper-right corner. If you don't see the triangle and you want to stack the icons, follow these steps:

1. Open the window that displays your Notes desktop.
2. Choose View ⇨ Stack Replica Icons.



If you add a database to a list and later don't want it there, right-click the name of the database that you want to remove from the list. Click "Remove from Bookmarks" at the bottom of the pop-up menu. A confirmation prompt asks if you're sure you want to remove the database; click Yes, and the offending item disappears from the list. You can always add the item back if you need to. To remove a database from the Workspace, click the database once and press the Delete key. Answer Yes, and the icon is gone.

Database Navigation

Unless you're satisfied to stare blankly at the view that you see on your screen, you should know how to maneuver around the database. You can, for example, open a different view, open a document, and move from document to document.

Switching from view to shining view

Depending on the complexity of a database, it may have one view or many views. Each view may display a different set of documents, the same set of documents arranged differently, or the same documents but with different data displayed in each view. For example, a database listing people in your company may have several different views. One view may list managers. Other views may list employees by last name, by department, or by eye color.

To open a different view, look in the Navigation pane on the left side of the screen. Under Folders and Views, you find a list of all the folders and views that you're allowed to see. (The database may also have views you are not allowed to access, such as a list of all employees and their salaries. If you're not supposed to see a view, it won't appear under Folders and Views.) Click the name of a view, and in a jiffy, or in a few jiffies if it's a big database or if you are using a slow computer (or both), the new view appears in the View pane.

The Navigation pane may include graphics, rather than a list of views, to make seeing your choices easier. A graphic navigator contains graphic elements that replace the list of views and folders in the database. Each graphic element represents an action that you can take (such as opening a document) or the name of a view to which the database's designer thinks you may like to go. Just clicking the graphic element launches the action or takes you to the view represented by the graphic.

Navigating around a document in Edit mode

When you open an existing document in Edit mode or create a new document, you fill in the individual fields in that document. After you finish with one field, you're ready to move on to the next one. To move to the next field, choose one of these methods:

- ◆ **Press Tab:** (Press Shift+Tab to return to the previous field.) This action moves you to the next field unless you're in a rich-text field.
- ◆ **Press the arrow keys:** You may need to press the key more than once to get to the field you want.
- ◆ **Click in the field where you want to enter data:** This method always works and is the best way to move to a distant field.

Opening a document

Each view contains a list of the documents. To read a document, use one of the following methods:

- ◆ Highlight the line containing the document that you want to read and press Enter to open it.
- ◆ Double-click the line to open the document.
- ◆ Highlight the line and look in the Preview pane; you can see the document there.

If the document is a long one, you need to scroll by using the scroll bars, the arrow keys, or the Page Up and Page Down keys. Notice that if you use Page Down, a small line near the top of the screen shows the last line visible on the preceding screen; this feature keeps you from getting lost.

Seeing another document

If you're looking at a view with a document highlighted and visible in the Preview pane, and you want to preview another document, use the mouse or arrow keys to highlight the other document. The contents of the new document appear in the Preview pane.

On the other hand, if you have opened a document and want to see another one, use one of the following methods:



- ◆ To see the next main document in the view, click the Navigate Next Main SmartIcon (skips any response documents).



- ◆ To see the previous main document in the view, click the Navigate Previous Main SmartIcon (skips any response documents).



- ◆ To see the next document in the view, click the Navigate Next SmartIcon or press Enter.



- ◆ To see the previous document in the view, click the Navigate Previous SmartIcon or press Backspace.



- ◆ To see the next unread document in the view, click the Navigate Next Unread SmartIcon, press Tab, or press F4.



- ◆ To see the previous unread document in the view, click the Navigate Previous Unread, press Shift+Tab, or press Shift+F4.

Document Actions

In addition to reading documents in a view, you may want to do these several other things with them, either singly or in a group:

- ◆ Add them to a folder
- ◆ Delete them
- ◆ Forward them
- ◆ Print them
- ◆ Remove them from a folder

Remember: Before you do any of these things, you first need to select the documents.

Selecting and deselecting a document

Highlighting one document is the same as selecting it, but when you want to affect more than one document at a time, you need to tell Notes which documents you want to work with. You do this by clicking in the *marker column* — that is, the column to the left of the data in the view. A check mark indicates that the document is selected. To deselect a document, click the check mark.

Selecting a group of documents

The quickest way to select a group of documents is to click and drag your mouse pointer in the marker column from the first document that you want to select to the last. If you want to select all documents in the current view, choose **Edit⇨Select All**.

Adding documents in a folder

A folder is like a view, with one small difference: No documents are automatically assigned to it. You have to put documents there. To add a document to a folder, do one of the following:

- ◆ Click and drag a selected document to a folder.
- ◆ Choose **A**ctions⇨**M**ove to Folder. You need to specify the folder to which you want to add the document.



If no column in the folder shows the contents of at least one field in the document that you place in the folder, the document appears as a blank line.

Deleting a document

To delete selected documents, follow these steps:

1. Press Delete.
2. Do one of the following:
 - Choose **V**iew⇨**R**efresh.
 - Press F9.
 - Close the database.

A message box asks if you're absolutely sure that you want to delete the documents.

3. Choose Yes (unless you want more time to think about it); then, the documents are gone — maybe. If you don't have the type of access that enables you to delete documents, they remain after you're done, even after all that agonizing. In Notes, the documents don't go to a trash folder, waiting for you to change your mind about deleting them. When you confirm that you want to delete documents, they are deleted permanently.

Forwarding a document

To *forward* a document or a group of documents means to e-mail them in a memo to others. Here's how to forward selected documents:

1. Choose **A**ctions⇨**F**orward. A new memo appears with all the highlighted documents in the body of the memo.
2. Enter the names of the recipients and any other information that you think is appropriate and then send the document.

Printing a document

To print an open document, follow these steps:



1. Choose **F**ile⇨**P**rint or click the File Print SmartIcon.
2. Click **Q**K.

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If you're looking at a view, you have to decide whether you want to print the view itself or the selected documents. Here's how:

1. Choose **File**⇨**Print**.
2. Click **Print View** or **Print selected documents**.
3. Click the **Custom** button to make decisions about how the printed documents appear. You can choose how to begin printing each document:
 - On a new page — a page break puts each document on a new page. Check the **Starting with page number 1** box to add page numbers.
 - One blank line beneath the previous document — each new document follows the previous one with just a blank line between them.
 - Immediately beneath the previous document — each document follows the previous one with no indication that it's a new document.

You can also decide whether to print the selected documents the way they appear on-screen (the most common choice) or using an alternate form. The latter choice is useful only if you're sure another form will display the documents' data in a more desirable arrangement.

4. Click **OK**.

Removing documents from a folder

Removing documents from a folder is similar to adding documents to a folder. Choose **Actions**⇨**Remove from folder** or **Actions**⇨**Move to Folder**. (Moving a document to a new folder removes the document from the old folder. It still appears in the other views and folders where it has been appearing.)



Do not mark the document for deletion to remove it from the folder. Marking the document for deletion removes it from the folder all right, but it also removes the document from the database.

Document Edits

Although *editing* can mean opening an existing document and changing it, the meaning here includes any tasks involved with creating and modifying text, even in the document that you're currently creating.

What you can do depends on the field in which you're currently entering data. The only field type that allows enhancements, such as changed fonts, bold, or text colors, is a *rich-text field*. If you're entering your bank balance in a number field and you want it to be red because it's a negative balance, you can't make it red, because the field is not a rich-text field.



You know that your cursor is in a rich-text field when you see the font name and font size in the status bar.

Enhancing text

Text enhancements include anything that makes text look different from its standard form. The thing to remember here is, "It's in the box." You can change fonts; change the appearance of text with bold, underline, italics, and colors; and set the alignment by activating the Properties box that contains all the properties for the text that you have currently highlighted.



Click the Properties SmartIcon to activate the Properties box. For selected text, the tabs in the Properties box are as follows:

- ◆ **Font:** Sets font style, font size, font attributes (bold, italic, and so on), and text color.
- ◆ **Alignment:** Sets the alignment (left, center, right, full, or none), first line and paragraph indent, spacing (between lines, above and below the paragraph), and list options (bullets or numbers).
- ◆ **Pagination:** Sets pagination options, left and right margins (the right margin is for printing only; it has no on-screen effect), and tabs (for the whole paragraph).
- ◆ **Hide When:** Hides the selected paragraph(s) when reading, previewing, printing, editing, or according to conditions specified in a formula.
- ◆ **Styles:** Assigns a style to the currently selected paragraph(s). Of course, you have to create styles before you can apply them.

Setting the permanent pen

When you're reviewing someone else's work and inserting comments within the original text, differentiating your comments from the original text is difficult. To make the job of inserting comments easier, use a *permanent pen*. When you are editing a document and want to add your comments to the existing text, follow these steps:

1. Be sure that you are in a rich-text field.
2. Use the Text Properties box to set text properties for your editorial comments. Red, bold text, for example, makes your comments stand out from surrounding text.
3. Choose Text⇨Permanent Pen⇨Set Permanent Pen Style from the menu. You have now assigned your unique font selections to the permanent pen.
4. Position the cursor where you want to make your first comment.
5. Click the Permanent Pen SmartIcon.
6. Type your comment.
7. Move to a new location and type a comment there. The permanent pen is engaged until you turn it off.
8. Click on the Permanent Pen SmartIcon to turn off the permanent pen.



Remember: When you create a permanent pen, you can use it immediately in all databases, not just in the one in which you created it.



If you want to call attention to existing text without making any comments, choose Text⇨Highlighter⇨Use Yellow, Pink, or Blue Highlighter, and then click and drag across the text you want to highlight.

Document Hiding

When you're composing or editing a document, you may decide that only certain people or groups should be able to see it. Of course, you can encrypt fields in a document so that parts of a document are hidden from everyone who doesn't have access to the encryption keys. But sometimes you want to restrict access to the entire document.

To hide a whole document from all but designated people, follow these steps:

1. Open or highlight the document that you want to hide.
2. Activate the Properties box for the document.
3. On the tab page that has the key on it, deselect All readers and above.
4. Click the names of individuals or groups whom you want to be able to see the document.
5. If some names are missing, click the icon representing a person, which is to the right of the list box, and choose the Name & Address book from which you want to select additional names. The Names dialog box appears.
6. In the column to the left of the name list, click next to the names of groups and individuals whom you want to add to the list.
7. Click the Add button. Notes adds all selected names to the access list.
8. Close the Properties box and save the document.

Encryption

The best way to secure your data is to encrypt it. You encrypt data on a field-by-field basis, so some data in a document may be visible while other data in the encrypted fields is visible only to those with the key.

Remember: You don't use the following procedure to encrypt your e-mail memos, just fields in databases. Encryption in your e-mail database is done automatically when you choose to encrypt an e-mail message.



You can tell whether a field is encryptable because the *field markers* (the little corners showing the beginning and end of the field) are red.

Creating your key

To create an encryption key, follow these steps:

1. Choose **File**⇨**Tools**⇨**User ID**, enter your password, and then click the Encryption button.
2. Choose **New**.

3. Give the new key a name, preferably something you can associate with its purpose. Select North American only if this database will only be seen in North American installations of Notes. If you have offices around the world that may use the database, then choose International. Places outside North America have a different way of encrypting information. The United States government requires this distinction. We could tell you why, but then we'd have to shoot you.
4. If making a comment helps you remember details of the key, type the comment in the Comment text box.

Sending your key

You need to send the new key to anyone who needs to see the encrypted field. To send the new key, follow these steps:

1. Choose **File**⇨**Tools**⇨**User ID** and then click the Encryption button.
2. Select the key you want to send.
3. Click **Mail** to open the Mail Address Encryption Key dialog box.
4. Enter the name, names, or group to whom you're sending the key. You can send courtesy copies (cc:) to people who need to know that you sent the key, but those folks don't receive the key itself. The Subject line of the memo automatically contains whatever text is in the Subject box, but you may change that text if you want it to say something else. Happy with everything in the dialog box?
5. Click **Send**.



By choosing **Export**, you can save a key as a computer file and distribute disk copies if you can't e-mail it.

Attaching your key to a document

After you create the key, you add it to the document you're writing by following these steps:

1. Choose **Create** to start a document. Of course, if you've already started the document you want to encrypt, you can ignore this step.
2. Choose **File**⇨**Document Properties**.
3. In the Properties box that appears, click the tab with the picture of a key to open the Security page.

4. Choose an existing key from one of the two list boxes. Use the Secret Encryption keys list box to choose a key that you've created, or click the person icon next to Public Encryption keys and choose the person or people whose public key (in the Public Name & Address Book) you want to use to encrypt the message. Only the people you choose can decrypt the field.

Accepting a key

Follow these steps to add an encryption key sent by e-mail to your user ID:

1. Open the memo with the attached encryption key.
2. Choose **A**ctions⇨**A**ccept Encryption.
3. Click **A**ccept.

To add to your user ID an encryption key sent on disk, use these steps:

1. Choose **F**ile⇨**T**ools⇨**U**ser **I**D.
2. Click the Encryption icon.
3. Click **I**mport.
4. Specify the drive, directory, and filename of the encryption key that you want to import and click **O**K.
5. Enter the password (if any) and then click **O**K.
6. Click **A**ccept to merge the key with your user ID file and then click **O**K.

Fields

To fill in a field, you put the cursor in the field and type. Then move on to the next field. Several different kinds of fields exist, and some are very picky about what you put in them. Here are some things to remember:

- ◆ Time/date fields require a date like 11/21/97 (11-21-97 if using OS/2); entering anything else gets you the stern reprimand "Unable to interpret date or time."
- ◆ Number fields can't digest characters that are not numbers, such as spaces or even dollar signs.
- ◆ If the database designer makes filling in a field mandatory, and you try to save or close the document without filling in that field, you get a message on-screen telling you what you did wrong.

Find and Replace



Use Find and Replace to correct quickly all occurrences of an error. You may, for example, have referred to Sue when she prefers to be called Susan. To find all the Sues in the document and change them to Susan, select Edit⇨Find/Replace, click the Find/Replace SmartIcon, or press Ctrl+F.

- ◆ Choose Match on entire word, so that Notes doesn't go around changing *suede* into *Susande*.
- ◆ Choose Accent if you're searching for a word that contains a diacritical mark, such as an accent, a circumflex, a cedilla, a freckle, or a mole. When you choose Accent, Find and Replace looks specifically for that mark and ignores any occurrences of the word without it.
- ◆ Choose Case sensitive if the document includes the word *sue* (the legal action); Notes won't replace that with Susan's name.



To be sure that you find all occurrences of a word, you should put the cursor at the beginning of a document before you start beating the bushes for that special word.

After you make all your decisions and type in the text that you want to find and the text that you want to use as a replacement, choose to search through the document in one of the following directions:

- ◆ **Find Forwards:** Click to search from the cursor forward to the end of the document, without replacing anything.
- ◆ **Find Backwards:** Click to search from the cursor back to the beginning of the document, without replacing anything.

After you decide which direction to search, choose one of the following:

- ◆ **Replace:** Click to find the first occurrence of the search text. Click Replace again to replace that text but not find the next occurrence.
- ◆ **All:** Click to get the job done quickly by replacing every occurrence of the search text with the replacement text without checking each time. Use this choice carefully, because strange and unpredictable things may happen. Imagine, for instance, if the word *Sue* starts a sentence: "Sue us at your peril" becomes "Susan us at your peril."

- ◆ **Replace and Find Next:** This says it all, it enables you to make changes one at a time.
- ◆ **Find Next:** Click to leave the current occurrence alone and look for the next occurrence.



The clever little searcher may find an occurrence of the search text behind the Find and Replace dialog box, which means that you may sometimes have to move the dialog box out of the way to see the highlighted text. Just drag the dialog box out of the way by the scruff of its title bar.

Folders and Views

The difference between folders and views is that folders, unlike views, do not naturally have documents in them; you have to put the documents there. To do this, click and drag a document to the name of the folder in the Navigation pane. Keep the following in mind about folders:

- ◆ An alternative to clicking and dragging is to choose **Actions⇨Move to folder**.
- ◆ If no column exists to display the contents of a field in the document that you dragged to the new folder, the document is an empty row in the folder.
- ◆ Dragging a document from a view to a folder makes the document visible in both places.
- ◆ Dragging a document from a folder to another folder moves the document from the first folder to the second folder.
- ◆ To remove a document from a folder, *don't delete it*. Deleting it removes it from the entire database. Choose **Action⇨Remove from folder** or drag it to a new folder.

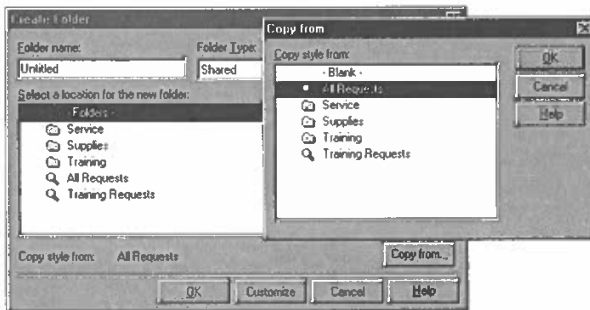
Creating folders

You create folders; the database designer creates views. The first step in creating a folder is to look at all the views, not to see what documents are in them, but to see their design, especially the columns. Pick one you want to use as the design for your folder. Of course, you can modify the design, but if you have a similar design starting out, you can get your own folder done faster.

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To create a folder, follow these steps:

1. Choose **Create Folder**.
2. In the first dialog box you see, type the name of your new folder in the **Folder Name** box.
3. Click the **Copy from** button.
4. In the second dialog box, highlight the view or folder as the one to **Copy style** design from and then click **OK**.

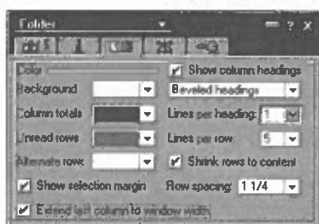


5. Click the name of a folder in the list under **Select a location for the new folder**, if you want the new folder to be "cascaded" under an existing view or folder. *Cascaded* means that a green arrowhead appears next to the existing view or folder. Clicking that arrowhead displays the name of your new folder tucked in underneath the name of the view or folder you selected. If you don't make any selection, the folder appears in the list as an equal with all the other views and folders.
6. Click the **Customize** button if you want to change the design of the new folder. On the other hand, don't choose the **Customize** button now if you plan to use the folder without changes.

Your new folder takes its rightful place, and you go into Design mode — you may now put on your construction hat and set the folder's properties and change its design.

The following list describes the types of settings you can make and tells which page tab of the Folder Properties box they're on:

- ◆ **Name (on the Basics page):** If you want to change the name of the folder, this is the place to do it.
- ◆ **Style (on the Basics page):** The view can either be a Standard outline or a Calendar.
- ◆ **Colors (on the Style page):** Here, you can pick from over 200 stunning colors and patterns for the background, rows containing unread documents, and column totals. In addition, you can choose a color for alternate rows of the view.



- ◆ **Lines per row (on the Style page):** This option is useful if some longwinded person wrote a lengthy name for the subject field. If you pick more than one line per row, you can also choose to shrink a row to content so that it won't take any more room than it needs to.

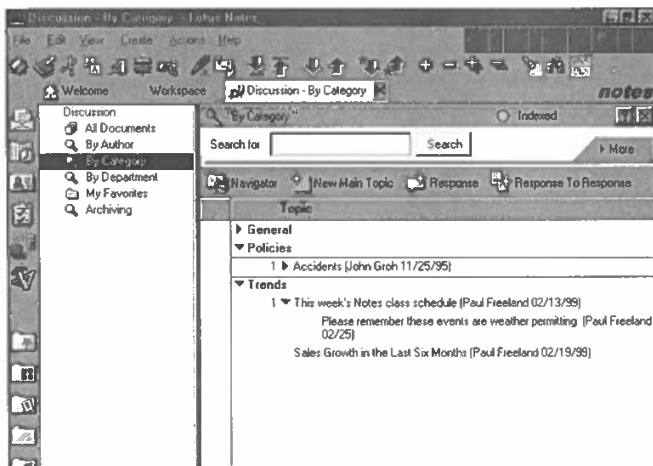
If you're feeling really brave, you can highlight the head of a column and, in the Column Value pane at the bottom, change the column's field or formula to modify what appears in the column.

When you finish all the changes you want to make to your folder, just click the X in the upper-right corner. Then close the folder, save it, and you're done.

Collapsing and expanding folders and views

Some, but not all, folders and views are categorized. *Categorizing* gathers together all the documents that contain the same data in the field used to classify them. For instance, all employees in the Marketing Department may be categorized under Marketing. If a row in a folder or view contains only one bit of data listed all by itself, that row is a *category*, not a document. In the figure, General, Policies, and Trends are categories.

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When you double-click a row containing a category, you *collapse* the category, which means that you temporarily hide all the documents in the category. Double-click again to redisplay the documents and then double-click on one of the documents to open it. In the figure, the General category is collapsed, Policies is partially expanded to show only main documents, and Trends is completely expanded to show main and response documents.

Some views have main documents with response documents indented in a hierarchy beneath them. If a hierarchical view is collapsed, the response (*children*) documents are hidden. When a view is fully expanded, all the responses, the responses to responses, and so forth (called *descendants*) are visible. Usually, an arrow appears next to documents that have children documents. If the arrow points to the right, the responses are hidden; if the arrow points down, the responses are visible. Clicking the document itself opens the document; clicking the arrow expands or collapses the descendants.

So, a categorized or hierarchical folder or view is like an accordion — you can fully open or fully close it, or you can partially open it, revealing some response documents and not others. In other words, you can open one or several categories. The following SmartIcons and keystrokes help you expand and collapse categories, document “families,” folders, or views:



- ◆ To expand a single collapsed category or family, highlight it and click the Expand SmartIcon or double-click the category.



- ◆ To collapse a single expanded category or family, highlight it and click the Collapse SmartIcon or double-click the category.



- ◆ To expand a whole view or folder, click the Expand All SmartIcon or press the Shift + + (that's Shift and the plus sign).



- ◆ To collapse a whole view or folder, click the Collapse All SmartIcon or press the Shift + - (that's Shift and the minus sign).

- ◆ To expand a single category that has subcategories or multiple levels of descendants, highlight it and press the asterisk (*) key. Use the minus key to collapse the whole category.

Headers and Footers

Headers and footers are bits of text that appear at the top (header) or bottom (footer) of every printed page. You type the header or footer once and then sit back, confident that it will be there when the printing is done.

To create a header for the current document, follow these steps:

1. Activate the Properties box for the current document.
2. Click the printer-tabbed page of the Properties box.

Page number

Date Tab

Time Title



96 *Nonstandard Characters*

3. Click Header or Footer to determine where the text appears on the page.
4. Enter the text for the header or footer in the text box. To streamline the process of writing the text, Notes gives you these five icons to choose from, each representing a feature that often appears in headers or footers:
 - **Page Numbers:** Click the Page Number button to have a page number automatically inserted in the header or footer. You can even get fancy and type **Page** and then click the Page SmartIcon. The header or footer looks like this: Page &P. The &P turns into the proper page number when you print, so that you see "Page 5" on page 5.
 - **Date:** Click the Date button to insert the current date in a header or footer. Printing the date and time in a header or footer is handy if the reader needs to tell which is the most recent printout among several printed copies of the same document.
 - **Time:** Click the Time button, and the header or footer shows the current time (according to the computer's clock) each and every time you print your document. Notes prints the time in this format: 03:48:42PM.
 - **A Tab:** When you click the Tab button, Notes moves the next part of the header over to the right, just as if you pressed the Tab key when typing a document. Clicking Tab enables you to make more complete headers and footers with, for example, the date in the lower-left corner of the page, the time in the middle of the bottom of the page, and the Page number in the lower-right corner of the page.
 - **The Window Title:** When you click the last button, Notes puts the title of whatever document you're working on right in the header (or footer) for all to see.
5. Select the font, size, and style for the text.
6. If you want the header and/or footer to appear on the first page, be sure to check the Print Header and Footer on First Page box.

Nonstandard Characters

We are increasingly called upon to use words and symbols in our writing that come from other languages. Notes, recognizing that you may need to type some non-English characters, has a large

number of extra characters not available on your keyboard (or in stores). The LMBCS (Lotus Multi-Byte Character Set) includes all characters available in Notes.

The LMBCS includes characters available on the keyboard as well as nonkeyboard characters — characters unique to languages other than English and such characters as © for copyright or £ for pound sterling. To see the list of LMBCS characters and the way to create them, check the documentation or use the Help feature (use the index and choose LMBCS). Mac users choose Apple menu⇨Key Caps for a reference to nonkeyboard characters. The way to type one of these character sets depends on whether you use an IBM-style or a Macintosh keyboard. If you use Macintosh, you may not be able to see the character on-screen. You have to print the document to see the character.

As an example of the way to create a character, we provide the keystroke sequences used to type Ø:

- * On the IBM-style keyboard, press Alt+F1, then O, and then / (the slash mark).
- * On a Macintosh keyboard, press Option+Shift+O.

To find the Alt+F1 sequence (also called the *compose sequence*) for a particular character, look in Help or in the documentation. If you can't find the character you're after there, you need to use the LMBCS character code by following these steps:

1. Press Alt+F1 twice.
2. Press 0 (that's a zero).
3. Press - (a hyphen).
4. Enter the LMBCS number for the character (such as 157 for the Ø). If the LMBCS code has only two digits, 33 for example, use 033.

(This is almost as bad as dialing a long-distance number with your credit card, isn't it?)

After you create the character, you can copy and paste it if you need it again. Using the Copy⇨Paste command is faster than using the LMBCS or composing key sequences.

Properties Boxes

Properties boxes are dialog boxes that you use to set the properties for whatever item you have selected on-screen. A Properties box exists for virtually any item you select on the screen — text, fields, views, documents, and even the whole database.

Each Properties box contains tabbed pages representing related properties for the selected item. Sometimes the title of the tabbed page is a word; sometimes it's a picture of the nature of the items on the page — for example, a key for the page on which you set properties related to security.

To call the Properties box to the screen, use any of the following methods:



- ◆ Click the Properties SmartIcon.
- ◆ Click the secondary mouse button (Windows) and choose Properties from the pop-up menu (in this case, Text Properties).
- ◆ Press Alt+Enter.
- ◆ Choose Edit from the menu and select the item from the drop-down list that names the item you want to change.

If you don't see in the Properties box the name of the item for which you want to set properties, click the down arrow to see a list of other items and then select the one whose properties you want to set.



If you plan to use the Properties box for several on-screen elements, dismissing it and calling it back every time may be a bit of a pain. If you want to shrink it to get most of it out of your way, double-click its title bar to reduce it to a fraction of its size. Then click and drag it off to the side. When you need the Properties box, double-click its title bar again to restore it.

Links to Documents, Views, and Databases

When you're creating or editing a document, or when you're writing an e-mail memo, you sometimes refer to other Notes information. Of course, you could write, "Open the XYZ.NSF database and then open the ABC view and scroll down to the 144th document and open it to see the year-to-date totals." Perhaps the information that you want readers to see is contained in a view, or perhaps you want them to see a whole database.

Instead of sending your readers off on a fishing expedition, you can link the appropriate information into the current document. Remember that you must paste the link into a rich-text field.

Here's how to link Notes data into a document:

1. Highlight or open the appropriate document and open the appropriate view or database. (If you want to create a database link, you can simply highlight the database on your desktop.)

2. Choose **E**dit⇨**C**opy as **L**ink.
3. Choose **D**ocument Link, **V**iew Link, **D**atabase Link, or **A**nchor Link.
4. Open the document into which you want to place the link, and place your cursor in a rich-text field.
5. Choose **E**dit⇨**P**aste or click the Edit Paste SmartIcon.



Remember: Be sure that the database, document, or view is one to which all readers have access. (To be available, the database and documents must reside on the server, not on a local workstation, with no restrictions preventing potential readers from database and document access.) If you create a link to a memo in your own e-mail database, for example, you frustrate your readers because they don't have access to your e-mail database.

Margins

You may be satisfied with the margins supplied back at the factory, an inch all around, in which case you don't need to read this section. However, if you want to change the margins, follow these steps:

1. Activate the Text Properties box.
2. Click the Alignment tab.
3. Enter a value for the margin in the appropriate margin text box. You can set the following:
 - **Left Margin:** The default is 1 inch, if you're using imperial measurements, or 2.54 cm, if you're using metric measurements. (You can switch from one to the other choosing **F**ile⇨**T**ools⇨**U**ser Preferences, clicking **I**nternational, and choosing **I**mperial or **M**etric.) Since the left edge of the page is always 0, the left margin size and setting are always identical. If you want a first line indentation that differs from the default, switch to the Alignment-tabbed page and choose whatever first line option suits your fancy.
 - **Right Margin:** The right margin setting is the distance from the *left* edge of the page to the right edge of the paragraph. That's the left edge of the page. For a 2-inch right margin on a sheet of paper 8.5 inches wide, the right margin should be set at 6.5 inches. The default margin size is 1 inch, a right margin setting of 7.5 inches.

100 New Documents



Notes doesn't show text on-screen the same way it shows text when printing, so you can't always see how the document will look on paper. To get some idea of where the page breaks are, use **View⇨Show⇨Page Breaks** or to see the document as it will look when it is printed, use **File⇨Print⇨Preview**.

New Documents

Your responsibility in using a database likely includes adding to it, and you do that by creating new documents. All the forms that you can use to create documents in the database appear in the **Create** pull-down menu.

In case the terms *form* and *document* are not familiar, think back to the dark ages when you used paper instead of Notes. Often, you would take a blank form from a pile and fill it out; an employment application is a good example. In Notes, the blank thing that you fill out is a form. Some databases have only one form; others may have many. A request database, for example, may have only one request form. A personnel database, on the other hand, may include one form to recommend new employees, one for a corporate suggestion box, and one for payroll requests. When you complete a Notes form and save it, it becomes a document in a database.

To create a document by using a form, follow these steps:

1. Choose **Create⇨[Name of form]**.
2. Fill in the fields with data.
3. Save the form when you're done.

Remember: To create a response to a document, be sure the document you want to respond to is either open or highlighted in the view before you create the response.

Numbered Lists

Automatic numbering is a convenient way to write down steps or to enumerate items in a list. To number paragraphs that you're about to type, follow these steps:



1. Click the **Text Number SmartIcon**.
2. Type the desired text and press **Enter** to start a new numbered line.

To convert existing paragraphs to numbered paragraphs:

1. Highlight existing paragraphs that you want Notes to number.

2. Click the Text Number SmartIcon. Every time you press Enter, a new paragraph starts with the next number.
3. When you're done with numbered paragraphs, press Enter to start a new paragraph and then click the Text Number SmartIcon again to turn off the numbering. If you click the same SmartIcon in another part of the document, the numbering starts again at 1.

Page Breaks

Of course, like any other responsible program, Notes determines where a page break occurs if too much text is on the current page. But you can also determine where these breaks occur. To create a page break, choose Create⇒Page Break. A solid line appears across the screen.

Where the page break occurs depends on where the cursor is. If the cursor is at the beginning of a field, the page break occurs outside the field, and the whole field moves to a new page. If the cursor is anywhere in the field other than at the beginning, the page break occurs within the field.

The way to remove a page break depends on where it is.

- ◆ If the page break is outside the field, place the cursor at the beginning of the field and choose Create⇒Page Break.
- ◆ If the page break is inside the field, place the cursor just below the break and press Backspace or choose Create⇒Page Break.

Pagination

Pagination is a setting that determines what happens to paragraphs that are broken up by the sudden, menacing appearance of a dreaded page break. You have three options to choose from:

- ◆ **Page break before paragraph:** As the name implies, this option forces the currently selected paragraph to appear on the next page.
- ◆ **Keep paragraph on one page:** This option allows Notes to determine where the page break falls — either before or after the current paragraph.
- ◆ **Keep paragraph with next paragraph:** This setting causes the page break to fall before the first paragraph or after the second paragraph, which may result in some extra white space on a page.

Paragraph Alignment

You can set the alignment of a paragraph in two ways: by using a SmartIcon or by using the Alignment tab of the Properties box for text properties.

Here are the four alignment SmartIcons:



◆ Text Align Paragraph Center



◆ Text Align Paragraph Full



◆ Text Align Paragraph Left



◆ Text Align Paragraph Right

The Alignment tab of the Text Properties box has options for center, full, left, and right alignment. In addition, it has an option for no alignment (to use for text that should not wrap).



When you choose no alignment, text disappears off the screen to the right, and you need to do a great deal of scrolling. One good use for this setting is when you want to use the underline character to draw a line across a page to separate bits of data. Having the alignment set at None prevents the line from wrapping into two or three small line segments if someone shrinks the window considerably.

Paragraph Indents

You can use the SmartIcons or the Properties box for text properties to change a paragraph's indentation when in Edit mode. Remember that you will be indenting the whole paragraph and subsequent paragraphs you type. To indent several paragraphs, highlight them all before clicking any icons.



- ◆ To indent a paragraph, click the Text Indent SmartIcon. To reduce the amount of indent, click the Text Outdent SmartIcon. The text is indented or outdented one tab stop ($\frac{1}{2}$ inch) for every click of the SmartIcon (unless you changed the tabs).
- ◆ For more control over indenting the paragraph, activate the Text Properties box. Click the Alignment tab and set a unique indent for the first line. An icon represents each possible indent option: block, indent, and hanging indent.

Saving a Document

As with any other program, saving your work as you progress is a good idea. Whether you're designing a form, modifying a view, working on a new document, or editing an existing document, saving the document is the only way to ensure that you won't lose it if a power failure or other mishap suddenly strikes. To save your work, whether it's a view, form, or document, do one of the following:



- ◆ Click the File Save SmartIcon.
- ◆ Choose File⇒Save.
- ◆ Press Ctrl+S.

Selecting Text

Many times, after you type something, you later decide to go back and change it. Before you can change its appearance, however, you have to let Notes know what you want to change. The act of selecting the text you want to change is called, well, *selecting*. What you can do to the text comes later; right now we talk about just selecting it.

Three terms you may as well get straight right now are *I-beam*, *cursor*, and *insertion point*:

- ◆ The *I-beam* is the vertical line that moves around the screen as you move the mouse. Notes calls this line an I-beam because it looks like an I beam used in building construction — a vertical line with little horizontal lines at the top and bottom.
- ◆ *Cursor* and *insertion point* are two names for the same thing: the thick vertical line that blinks at the place where something you type appears.

Remember: The mouse pointer is always visible on-screen, often in the shape of an I-beam, but if you use the mouse to scroll up or down, the cursor may scroll off the screen. Don't fear. Move the cursor by pressing any cursor-movement key (such as an arrow key, Page Up, or Page Down) and type something. Or press the spacebar, and the screen changes to show you where the insertion point is.

The easiest way to select text is to click and drag across it with the mouse. The dark box around the text means that it's selected. This dark box is called *reverse video* (light letters on a dark background, rather than vice versa). Using the keyboard, you can select text by moving the cursor to the beginning or the end of the

104 *Selecting Text*

text, holding down Shift, and pressing a directional arrow to move over the characters you want to select. Press the ← or → key to stretch the highlighter one character to the left or right. Press the ↓ or ↑ key to highlight to the same point in the next or previous line. Pressing Shift while using any cursor-movement key combination moves the cursor and highlights text on the way.

The following additional tips about selecting text are well worth remembering because they can save you a lot of time.

- ◆ Use Ctrl along with Shift and the cursor-movement keys to speed up the process of highlighting. Shift+Ctrl+← or → moves the highlight one word at a time. Shift+Ctrl+↓ or ↑ moves the highlight to the beginning or end of the next or previous line, respectively.

- ◆ Double-click a word to select it.



- ◆ If you want to select all the text in the current field, you're in luck — you can use the menu to choose **Edit⇨Select All**, click the **Edit Select All SmartIcon**, or just press Ctrl+A.
- ◆ If you want to select text in more than one field at a time while you're in edit mode, you're out of luck. Regardless of the method you choose to select text, you can select text in only one field at a time.
- ◆ When you use **Edit⇨Select All** in edit mode, you select everything in the current field. If you use it in read mode, you select the whole document. (In the latter case, the only thing you can do with selected text is copy it to the clipboard.)
- ◆ If you want to select two separate chunks of text, you're out of luck. You can select only one bit of text at a time.
- ◆ If you find that you selected the wrong text, simply select other text to correct the mistake.
- ◆ If you selected some text but meant to select more, hold down Shift and then click at the farthest end of the additional text or use a cursor-movement key combination. Notes adds to the selected text all text between the currently selected text and the place where you click.
- ◆ To select a big chunk of text, put the cursor at the beginning of the text you want to select and then use the mouse and scroll bars to scroll until you can see the other end of the text you want to select. Press Shift as you click at the other end of the text. Notes selects all the text in between.
- ◆ To select all text from the cursor to the beginning of the field, press Shift+Ctrl+Home. To select all text from the cursor to the end of the field, press Shift+Ctrl+End.

Spacing

Spacing is the distance between lines in a paragraph or between the paragraphs themselves. You find the spacing settings on the Alignment tab of the Text Properties box. You have three spacing settings and three choices for each.

The spacing settings are

- ◆ **Interline**, for the space between lines of the paragraph
- ◆ **Above**, for the space above a paragraph
- ◆ **Below**, for the space below the paragraph

The choices for the settings are

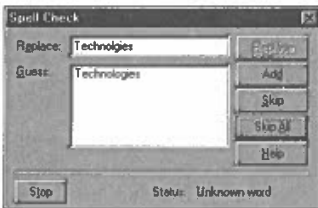
- ◆ **Single**, for no empty lines of separation
- ◆ **1 1/2**, for a line and a half of empty space
- ◆ **Double**, for two empty lines

Spell Check

Use the spell checker to verify the spelling in any document before you close or print it. Here's how to spell check a document:



1. To check the spelling, click the Edit Check Spelling SmartIcon. The spell checker reads the whole document, including every field. When it finds a misspelled word, the spell checker highlights the word and opens a dialog box like the one in the following figure; the misspelled word appears in the **Replace** window.



2. Perform one of the following actions:

- Edit the word right in the **Replace** window. When you do, the **Replace** button becomes available. Click it to replace the misspelled word with the correct spelling.

- Choose **Add** to add the word to the Notes dictionary, so that Notes never, ever highlights the word again.
- Choose **Skip** the word if you want to accept the misspelling this time, but you want Notes to continue to watch for it in the rest of the document.
- Choose **Skip All** if you want to ignore every occurrence of this word in this document.
- Choose **Stop** at the bottom if you're not prepared for the shock of seeing what you spelled *rong*.



If you just want to spell check a small section of a document, highlight all the text you want to spell check and then kick off the spell checker.



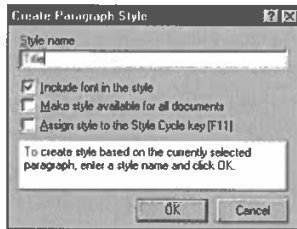
Use the Add button carefully, because adding a misspelling to the dictionary can be very embarrassing. Forevermore, Notes ignores that misspelling.

Styles

You don't have to go through all the keystrokes again and again to format paragraphs scattered around your document. Imagine that you wrote a report with lots of sections, and each section has its own title. You want the titles to be centered and bolded, to have one line of space after them, and to have a larger font with blue text. All you have to do is format one title, turn that format into a *style*, and then use that style for all the other titles, thus saving lots of time and getting you home for dinner. Applying styles also guarantees that you're consistent. After formatting 15 titles, you're bound to get bored and careless, and you may forget to add boldface along with all the other formats to a title. Using styles guarantees that the same characteristics get applied to every paragraph you select.

To create a style, follow these steps:

1. Write some text like a title, section head, or whole paragraph.
2. Apply all the formatting you want to associate with the text — for example, choose alignment, text coloring, bolding, spacing, and font.
3. Keep the cursor in the paragraph and activate the Text Properties box and then click on the Styles tab (the last page).
4. Click the Create Style button. The Create Paragraph Style dialog box appears.



5. Enter a name for your new style in the Style name text box.
6. (Optional) Click Include font in the style. If you leave the item unchecked, the style includes all attributes except the font.
7. (Optional) Click Make style available for all documents if you want to be able to use the style in any Notes document in any database, not just the current document.
8. (Optional) Click Assign style to the Style Cycle key [F11] — which means that when you highlight a paragraph and press F11, the paragraph changes to show each available style in succession.
9. Click OK to get out of the dialog box and finish with the current style.

After you create styles, you can apply them to the current paragraph (the one where the cursor is) or to all selected paragraphs. Press F11 to cycle through all the styles you've created and stop when you find the one you want. Or you can apply one of the styles by clicking on the Style box (immediately to the right of the Font Size box) in the status bar. Click a style name and Notes automatically applies that style to the paragraph where your cursor is or in which you've selected at least part of the text.

Remember: When you choose a style, you apply it to the whole paragraph, or to all selected paragraphs if you selected more than one. You can't apply a style to part of a paragraph. Remember also that a paragraph is everything between the previous and the next carriage return (line feed).



The Styles page of the Text Properties box contains three buttons below the Create Style button that enable you to make some changes to the style. Here they are:

- ◆ **Redefine Style:** If you decide that the attributes associated with a style aren't quite what you want, format a paragraph with the attributes you do want and then activate the Text Properties box. In the Paragraph styles list box, highlight the name of the style you want to redefine and then click the Redefine Style button. The style you choose includes the new attributes.
- ◆ **Delete Style:** No mystery here, highlight a style name in the Paragraph styles list box and click the Delete Style button. The style is toast.
- ◆ **Assign to Keyboard:** We mention previously that pressing F11 assigns certain styles one by one to the selected paragraph(s). To add a style to the F11 key, click the Assign to Keyboard button.

Tables

A *table* is a series of rows and columns of cells into which you can enter data. You have considerable control over such attributes as the size of the table and its appearance.

Building the table



Place the cursor at the place in a rich-text field in which you want to insert the table, and then choose **Create⇨Table** or click the Create Table SmartIcon. You can create four types of tables:

- ◆ **Standard:** All rows and columns are visible all the time.
- ◆ **Tabbed-Only:** One row is visible at a time, and each row is represented by a clickable tab.
- ◆ **Timed:** A new row appears alone every two seconds (yes, you can change the interval for your users who aren't speed readers).
- ◆ **Programmatic:** The table is based on a field in the document. This feature is beyond the scope of this book.

After you add a table to your document, whenever you put the cursor in your table, Notes adds a new menu command called, appropriately enough, **Table**. It appears right after **Text** and right before **Window**. You use this menu choice to do things such as change the table's properties or add, insert, or delete rows and columns.

By default, new tables are set to Fit to window, which means that the table size and column widths change, depending on the size of the window that you (or your readers) use to read your document. In addition to Fit to window, you have two menu choices:

- ♦ **Fixed** causes the table (and its columns) to be the same width, no matter how big or small you make the document window.
- ♦ **Same as window** means that the document displays with the table fitting exactly between the sides of the window.

Entering data in tables

Put the cursor in a cell and start typing. When you're done with one cell, move to the cell to the right by pressing Tab, to the cell to the left by pressing Shift+Tab, to the cell below by pressing the ↓ key, or to the cell above by pressing the ↑ key. Of course, you can move to any cell in the table by using the mouse to click in the cell.

Changing the display of rows

The normal, run-of-the-mill table consists of rows and columns, with all the data visible at all times. However, in Notes you can display one row at a time, either letting users decide which one they want to see or displaying a new row every few seconds. Use the Table Rows tab in the Properties box.

As soon as you click on Show only one row at a time, the table changes to a single row and defaults to a "tabbed table," with a tab for each cell at the top above the single displayed row. Click a tab to display the corresponding single row.



If you click Show only one row at a time, the Which row to display box is visible. In it you can choose one of three options:

- ◆ **Users pick row via the tab buttons that correspond to each row.** This option gives the user control over which row to view and how long to view it.
- ◆ **Switch rows every xx milliseconds** conducts a sort of automatic slide show. You set the interval, measured in thousandths of a second, for the display of a row. After that interval, the next row appears automatically. Set the time so that the reader has time to read the row's contents. The default is 2000 milliseconds; that's 2 seconds.
- ◆ **Switch rows programmatically** is a choice we can't discuss here, because you need to tinker with the design of the form to make it work. Database designers don't allow their users to mess around with the inner workings of their databases. This option uses the contents of a field to determine which row is visible.

When you click on the tabbed-table choice, a new text box appears at the bottom of the Table Properties box that enables you to enter the text for the currently selected tab.

If you elect to switch rows automatically, you make two more choices in the Table Properties box under the heading Transition when switching rows:

- ◆ **Effect.** This option determines the way the background of selected cells appears when their row is displayed. We suggest that you choose each of the effects, open the document in read mode, and see how each row unfolds. One quick note: The only choice under Effect will be None unless you add an image (wallpaper) or color to the cells. Any other choice brings a reminder to the screen that you need to set an image or a color.
- ◆ **Cycle through rows.** This setting determines how the cycling of the rows occurs. It scrolls through data on-screen, similar to the way some data scrolls automatically on the Web. Continually is the default option, which means the rows cycle forever. To prevent the rows from cycling forever, use one of the other three options. Advance on click means that every time a user clicks the table a new row appears. Once when opened means that every time someone opens the document containing the table, the rows cycle once and then stop on the last row. Once on click enables the user to click the table, cycle automatically through all the rows, and then stop on the last row. (Remember that you can change the interval for display of the rows.)



Remember: You won't see the changing rows while you're in edit mode; you need to save the document and then open it in read mode to see the rows change.

Users won't know a table changes when they click unless you tell them with a bit of text near the table.

The last page of the Properties box concerns the use of HTML and JavaScript and is beyond the scope of this book.

Merging and splitting cells

To merge cells, highlight the cells you want to merge and then choose **Table⇨Merge Cells** from the menu. If you merge some cells and then want to split them back to the way they were, use **Table⇨Split Cells**. You can't split a single cell unless it is first merged, and you can't merge a single cell, period.

Putting a table in a table

Putting a table inside a table is sometimes called *nesting tables*. To add a table to a table, first click in the cell where you want to insert a table and choose **Create⇨Table** from the menu. Then make the usual decisions about the number of columns and rows and click **OK**. Enter data and impress your users with your table prowess.

Adding background colors

Use the **Table/Cell Background** tab of the **Table Properties** box to change the color of individual cells or of the whole table. Here are your choices:

- ◆ **Table color** enables you to color groups of cells — all cells, certain border cells, or alternate rows or columns. You need to pick two colors when you want to color border cells or alternate rows.
- ◆ **Cell color** enables you to color the selected cells with a solid color or with two colors fading into each other vertically or horizontally.
- ◆ **Cell image** enables you to add wallpaper to the cell or cells and then to use it once or repeatedly throughout the cells.

Changing cell borders

Cell borders are the lines that surround each cell. Click the **Cell Borders** tab in the **Table Properties** box to change the appearance of the borders. You can change the following:

- ◆ **Border style:** The three styles — solid, ridge, and groove — apply to all cells.
- ◆ **Border color:** All the colors apply to all cells.
- ◆ **Border thickness:** The thickness of the border can range from None to a thickness of 10. Consider the numbers to be just relative; they don't stand for inches or anything that you need to be concerned about. Change the individual borders of individual cells or of all selected cells.

Adding table borders

Table borders (not to be confused with cell borders) are the settings for the outside of the table. Change the settings on the Table Borders tab of the Table Properties box. The settings include, but are not limited to, the following:

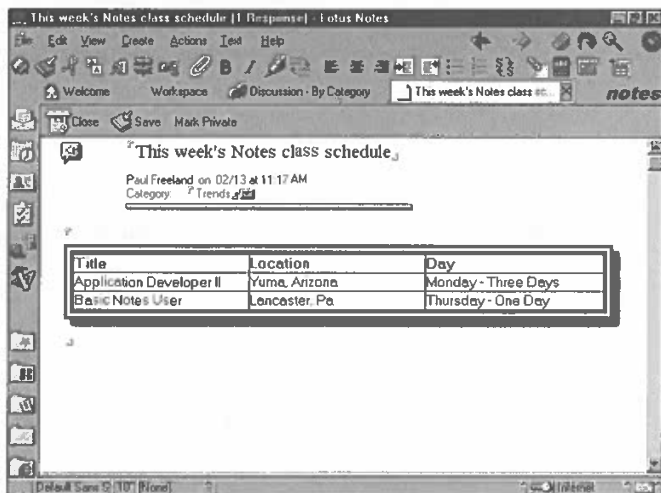
- ◆ **Border style:** Not too surprisingly, this option enables you to choose the type of border. Choose from more than eight (that means nine) options, including dotted, solid, double, and the ever-popular none. Just to the right is where you set the table border color.
- ◆ **Border effects:** This one is simple — it adds a drop shadow to the right and the bottom of the table, so that the table looks like it's floating a bit above the page. The wider you set the width, the higher it appears to float. Set it wide enough and your readers will have to get a ladder to see what's in the table. Note that you can set the width by typing in a number or by clicking on the little up and down arrows.
- ◆ **Width:** At the bottom of the Table Borders tab, you can set Inside, Outside, and Thickness. Changing the Inside number determines the distance from the table to the border; Outside determines the distance from the border to whatever stuff is above, below, to the right, or to the left of the table. Thickness determines the thickness of the border. For each of these settings, you can set each measurement separately by changing just Left, Right, Top, or Bottom. To save time, you can click the larger arrows to the right of the little table and change the whole border at once.

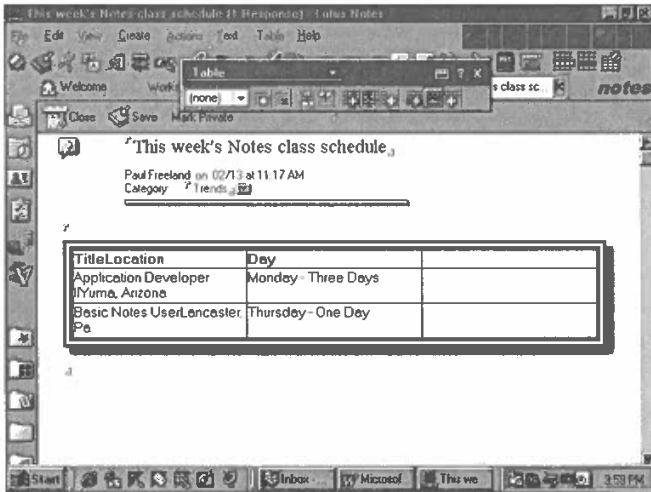
Setting table margins

Use the Table Margins tab of the Table Properties box to set how the table fits in with whatever surrounds it and how it fits into the page. Here's how:

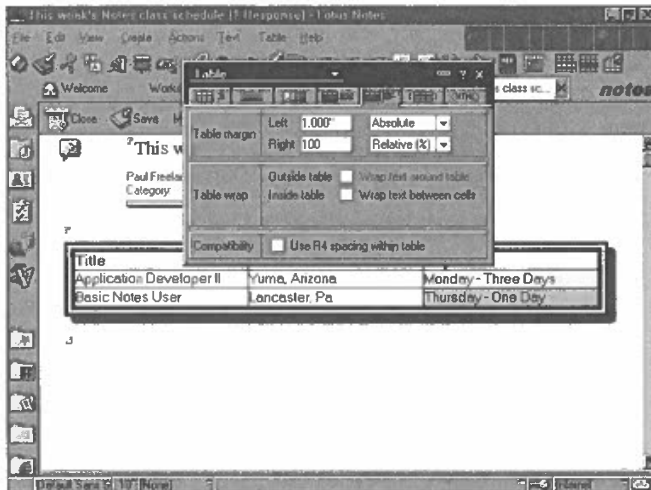
1. Set the table margins the same way you set them for any line of text, whether in a table or not.
2. Choose one of the text wrap settings:
 - **Outside Table — Wrap text around table** is available only if you set the table to Fixed Width on the first tabbed page of the Table Properties box. By checking the Wrap text around table box, you can type text beside the table. However, you can't just type and expect the text to start wrapping; you need to place the cursor beside the table to enter text there. The text wraps after you get even with the bottom of the table.
 - **Inside table — Wrap text between cells** has to do with what happens *inside* cells. Pay attention here or you may get hurt. When you select this setting, a new box appears in which you enter a number representing the maximum height you want the row to be. When you type enough stuff to cause the cell to reach that height, the new text spills into the cell to the right. Be careful, though; as soon as you click on this selection, all *existing* text in the cell to the right of the cell where you put your cursor moves into the current cell, so that the cell to the right is empty and ready to receive the extra text you may type. You may have a lot of arranging to do unless the cells to the right are already empty.

In the two following figures, the first one has data before we select Wrap text between cells. The second shows what happens. Not a pretty sight.





- **Use R4 spacing within table** uses the slightly larger cell and spacing settings from Release 4 of Notes so that users who still use R4 can view the table without distortion.



Changing row height

All you have to do to change the height of a cell is type. If you have too much text to fit on one line in the cell or if you press Enter, the height of the cell increases to accommodate the additional text. The whole row becomes as tall as the cell with the most text in that row.

Changing column widths

The one setting you most frequently want to change is the width of different columns. To change column width, you have three options:

- ♦ **Use the ruler:** Put the cursor in the column whose width you want to change. Choose **View⇨Ruler**. The ruler contains square symbols for the left and right margins of the column (that's column, not cell) and symbols that look like houses indicating the text indents for the cell (that's cell, not column). Note that you set the width for the whole column in the ruler, but you can change the text indents for each cell in the column individually. The moral? Highlight all the cells in the column if you want a consistent text indent. Finally, grab that little square symbol on the right side of the column in the ruler to change the column's size.
- ♦ **Use the Table Properties box:** The more difficult way to set column width is to enter the dimension in the Width box of the Table Properties box. Express your desires in inches (or in centimeters by adding **cm** after the number). Most people find this method harder than using the ruler, but if you prefer to use the Properties box to enter a column's width manually, go right ahead. All that clicking and typing, you could break a nail.
- ♦ **Click the Autosize button in the Table Properties box:** The Autosize button tells Notes to make the column as wide as the widest cell entry in that column. If you also click the Fixed width box next to the Autosize button, no matter how much you resize the window, no matter how much you squeeze the table, the column you selected when you checked Fixed width stubbornly keeps its width.

Changing more than one cell at a time

To make changes to more than one cell, just click and drag from the first cell to the last cell you want to change. After you highlight a bunch of cells, you can make any kind of change you want to those cells; a new font, italics, or even a new cell border is only a menu choice away.

Deleting rows and columns



Place the cursor in the row that you want to delete. Click the Table Delete Selected Row(s) or Table Delete Special SmartIcon (if you want to delete more than one row or column), or choose **Table**⇨**Delete Selected Row(s)** or, perhaps, **Table**⇨**Delete Selected Column(s)**. When you do, you get a warning that the action can't be undone — it's a one way street.



If you have the cursor in the wrong row or column, or if you chose to delete a row when you meant to delete a column, you could end up in big trouble! So *be careful*. Because an ounce of prevention is worth two in the bush, here's a piece of advice. Save the document first; then do your deleting. If you goof, you can then close the document (without saving it) and reopen it. Now try again, and please be more careful this time!

Inserting rows and columns



To add a new column or row, click the Table Insert Row or Table Insert Special SmartIcon, or choose **Table**⇨**Insert Column** or **Table**⇨**Insert Row**, depending on the circumstances.

If you want to insert a column, put your cursor in the column in which you want the new blank column to appear (the column containing your cursor gets pushed to the right). If you want to insert a row, put your cursor in the row in which you want the new row to appear (the row containing your cursor gets pushed down). In other words, when you insert a new column, it appears in the column in which you have the cursor, and all other columns move to the right to make room for the new one. When you insert a new row, all other rows in the table move *down* to make room. If you choose **Append** from the menu rather than **Insert**, the new column is added at the right end of the table, and the new row is added to the bottom. Use **Table**⇨**Insert Special** to insert or append multiple rows or columns.

Deleting a table altogether

On rare occasion, you may want to get rid of a whole table. Getting rid of a table once and for all is a little tricky. You *cannot* select all the cells and then just press Delete. In fact, if you do, you end up deleting all the table's contents, but the empty cells stay. Instead, you have to select the *entire table* by putting the cursor at the end of the line just before (and outside) the table and then pressing **Shift+↓** (which highlights the whole table). Then, and only then, can you press Delete to get rid of the whole thing.

Tabs

Back at the factory, paragraphs automatically have their own tabs set at every half inch. This may be fine for you, in which case you don't have to set any tabs at all. But if you're not happy with the way the tabs are set, you can use the Pagination tab of the Text Properties box to set new ones.



The easiest way to create a tab is to right-click the ruler at the place where you want to add a tab.

In the Tabs box, choose *Evenly spaced* and pick a distance between tabs, such as .75 inch. Or you can choose *Individually set* and then type in the location of each tab. Just type the distance (measured from the left edge of the page) for all the tabs that you need. For that extra touch of variety, you may even enter some tabs in inches and others in centimeters. If you use inches, you don't have to type any symbol; if you want centimeters, just type **cm** after the number. You can't use yards, miles, quarts, or kilometers, though. Here are some things to remember:

- ◆ You have four types of tabs to choose from: Left, Center, Right, and Decimal. The backwards *L* means the tab is a right tab. To change it to another type of tab, right-click the tab and choose the type. (You can also choose to delete the tab if you goofed.) Left tabs align the left end of all lines at the tab, right tabs align the right end of each line at the tab, center tabs center each line at the tab, and the decimal tab arranges a column of numbers so that the decimal points are lined up.
- ◆ The little example box shows you how to set the different tabs by putting the number before the letter; however, the letter comes first. It's "D4" for a decimal tab at the 4-inch mark.
- ◆ Put a semicolon, not a comma, between each separate tab setting. Notes complains if you use commas.
- ◆ Tabs only work in rich-text fields (RTF), which explains why you can't move to a new field from an RTF by pressing Tab. Instead, you move to the next tab stop.

The left margin looks like two houses joined at the peaks of their roofs (one is upside-down) near the left end of the ruler. Move the upside-down house to give the first line of the paragraph a different indent from the rest of the paragraph. Move the right-side-up house to set the indent for the rest of the paragraph. Click and drag the very bottom of the joined houses to move both together.



Notes on the Road

The fact that you're working away from the office doesn't mean that you have to be away from Notes. In this part, we discuss how to make Notes mobile — that is, how to set up your computer so that you can open your databases and read your e-mail while you're away from the office. Through the wonder of something called *replication*, you can be sure that you have all the latest and most up-to-date information from the office, whether you're in a hotel room, at home, or even 35,000 feet in the air!

In this part . . .

- ✓ Working with location documents
- ✓ Configuring your modem
- ✓ Using selective and partial replication
- ✓ Working in Notes away from the office



Connecting through Location Documents

Location documents tell Notes how you connect to your Domino server. You may have one location document that you use when you're at home, one you use when you're calling your server from a hotel room, and of course, one you use when you're at the office and connected directly to the network. Location documents are stored by Notes in your Personal Directory. Specifically, a location document tells Notes whether it should do the following:

- ◆ Connect to the server via the network or the modem
- ◆ Dial 9 (or some other prefix) to get an outside line
- ◆ Deliver your outgoing mail messages immediately or hold them until later (when you call the server)
- ◆ Use your telephone credit card when placing a call

In Notes, you have two ways to communicate with your Domino server by using your modem: Notes Direct Dialup and Network Dialup. The former means that your PC dials the Domino server directly — your PC's modem calls the Domino server's modem. The latter means that your PC calls a modem that's connected to your company's network, which the PC uses to connect to the Domino server.

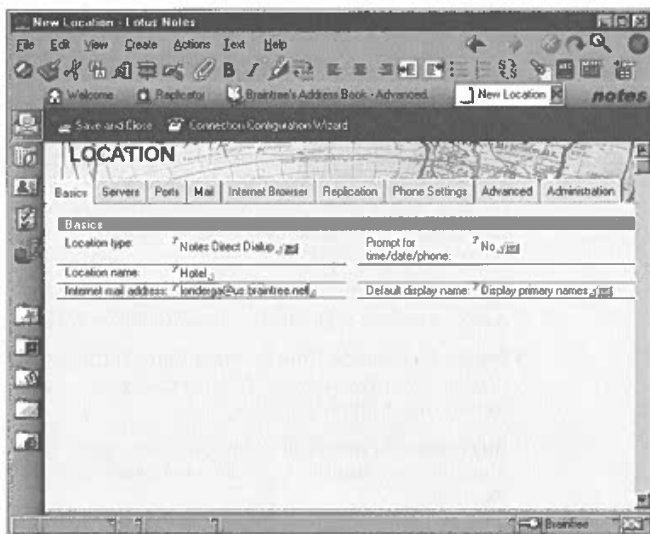
The good news is that you don't have to deal with which method you employ to connect — that's a job for your administrator to figure out. You just need to find out which one he or she chose.

Adding a new location document

Although Notes comes with five location documents (Home, Internet, Island, Office, and Travel), you may need to create your own. If you regularly stay at a couple of different hotels, you may create a new location document for each so that you don't have to constantly change your configuration.

To add a new location document to your Personal Directory, follow these steps:

1. Choose **File**⇒**M**obiler⇒**L**ocations.
2. Click the Action bar's Add Location button or choose **C**reate⇒**L**ocation, and then watch for the New Location form.



3. Fill in the fields that you want to enter information in. A location document has many fields, but you need only concern yourself with these fields:

- **Location type:** This field determines whether your PC calls the Domino server directly or calls a modem that's connected to your company's network. In most cases, you choose either Notes Direct Dialup or Network Dialup.
- **Location name:** This is the name you use to select this location document later, so make it meaningful.
- **Internet mail address:** This is the name by which you receive e-mail via the Internet. If you're not sure, check with your administrator to determine what you should enter in this field.
- **Prompt for time/date/phone:** This field is useful if you intend to use the same location document in many situations. If you choose Yes, Notes asks you, every time you switch to this location document, for the current date, time, and whether you need to dial 9 to get to an outside line.
- **Home/mail server:** Make sure that this field, which is on the Server tab, contains the name of the server on which your e-mail is located.

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- **Ports to use:** This field, which is on the Ports tab, is how Notes knows to connect to your server via the network or via modem. In most cases, you create modem-based location documents, so choose COM2, COM3, and so on.
 - **Mail file location:** This field, which is on the Mail tab, tells Notes if this location document should use a copy of your e-mail database that's on the Domino server or a copy that's on your own system. In most cases, if you're creating a location document so that you can work away from the office, choose Local.
 - **Mail file:** This field, which is also on the Mail tab, is the name of your e-mail file. It's usually mail\yourlastname.
 - **Prefix for outside line:** On the Phone Settings tab, use this field to enter the number (if any) that your computer needs to dial to get an outside line.
 - **International prefix:** If your computer needs to dial a special international number to make a call, enter it here (011, for example).
 - **Area code at this location:** This field is important, so make sure that you enter the area code for the city that you expect to be in when you use this location document.
 - **Country code at this location:** If you place calls from one country to another, be sure to enter the appropriate country code in this field.
 - **Calling-card access number:** If you want Notes to save you a few dollars and use a telephone calling card, enter the number that you dial for your long-distance carrier here.
 - **Calling-card number or extension suffix:** This is the number that you enter so that your long-distance carrier knows who to charge for the call.
4. Click the Connection Configuration Wizard button in the Action bar to create a Connection document that works with your new location document. What happens when you click the Connection Configuration Wizard button depends on what you enter in the Location type field. If you use Notes Direct Dialup, you are prompted for the Domino server's name, phone number, area code, and country code. If you chose Network Dialup, you're prompted for the connection that Notes should use. Check with your administrator before using the Connection Wizard — he or she can tell you exactly what you need to choose.
 5. Click the Save and Close button in the Action bar.



You can use a comma in any of the fields to have Notes pause when dialing. For example, typing 9, (the number 9, followed by a comma) in the Prefix for Outside line field tells Notes to dial a 9 when making a call and then briefly pause before dialing the server's phone number. Each comma that you enter makes Notes pause for about two seconds. You may want to add a comma if your phone system takes an extra second or so when you call outside.

Setting automatic replication

Replication is the fancy word that describes the process by which your computer connects to the Domino server to pick up any new mail that's waiting for you, to deliver any mail you've created, and to make sure that everything else in Notes is shipshape. You can replicate manually or automatically. When you replicate manually, you use the Replicator page, click the Start button, and Notes does its thing. Alternatively, you can set Notes up so that it replicates automatically — in other words, you can set up Notes so that it replicates on a regular schedule without you having to click that Start button.

By using a location document, you can set up a schedule by which Notes regularly calls your server — every hour, every three hours, or perhaps once a day.

Here's how to make a new schedule:

1. Choose **File**⇨**Mobile**⇨**Locations**.
2. Select the location document that you want to use for your schedule.
3. Click the Action bar's Edit Location button or choose **Actions**⇨**Edit Location**.
4. Click the Replication tab on the location document.
5. Use the space bar to change the Schedule field's value to Enabled.
6. Use the Replicate daily between field to tell Notes when to start and stop the schedule. You can enter a range of times, such as 8:00 a.m.–10:00 p.m., or discreet times, such as 9:00 a.m.; 3:30 p.m.
7. Enter the frequency with which you want to call in the Repeat every field.
8. Use the Days of Week field to tell Notes which days to call.
9. When you finish entering a new location document, click the Save and Close button in the Action bar.

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Every time that you start Notes, it checks your location documents to see whether you have set up an automatic replication/mail delivery schedule. If you have, Notes starts calling the server according to the instructions that you entered in the location document.

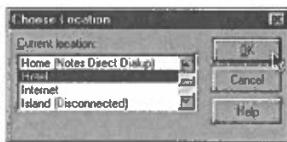
Keep these three things in mind:

- ◆ You don't *need* to set up a calling schedule, and most people don't.
- ◆ "Location document" does not describe this document very well. Setting up a schedule of calls is not just for replication; Notes also uses this schedule to send and receive your e-mail.
- ◆ You have to leave Notes "up and running" on your computer for it to follow your schedule. So if you set up a schedule of calls from a hotel room, leave your computer's power on and Notes running when you leave the room in the morning. Don't forget to leave the phone cord plugged into the modem, too.

Changing locations

Whenever you change your location — well, change your *computer's* location — you have to tell Notes where you (and it) are. The two ways to switch location are as follows:

- ◆ In the lower-right corner of the screen, click the location selector. From the small menu that pops up, choose the location document that you want to use.
- ◆ Choose **File**⇒**Mobile**⇒**Choose Current Location** and then select the location that you want to use from the Choose Location dialog box.



In either case, the location selector shows the name of the location document that you picked. After you switch locations, Notes knows how to connect to the server the next time you try to open a database or replicate.

Making Your Modem Work

Your *modem* is that fancy part of the computer that lets it talk to other computers over the telephone line. For reasons that no one can explain, every modem works a little bit differently, so (unfortunately) you have to do a little work to tell Notes what kind of modem you have and how fast it is.

Enabling your serial port

Your first step is to make sure that Notes knows that you do, in fact, have a modem!

To tell Notes that you have a modem, follow these steps:

1. Choose **File**⇨**Tools**⇨**User Preferences**.
2. Click the Ports button. The Communication Ports list box presents you with a list of all the *ports* that your computer has. (A port is like a pipe for information; you have a pipe that connects you to the network, a pipe that connects you to your telephone, and so on.)
3. Select the port to which your modem is connected.
4. Click the Port **E**nabled button.

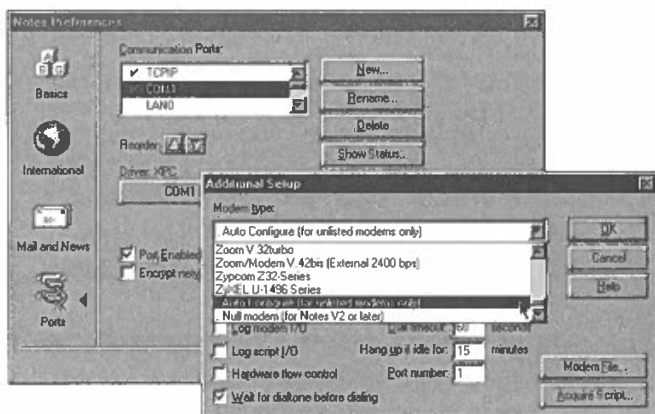
That's it! Now Notes knows that your modem is connected.

Configuring your modem

To tell Notes what kind of modem you have, follow these steps:

1. Choose **File**⇨**Preferences**⇨**User Preferences**.
2. Click the Ports button.
3. Select the port that your modem is connected to.
4. Click the XXX Options button (where XXX is the name of the port you selected).
5. Select your modem from the Modem type drop-down list. If your modem isn't listed, try one of the following (in order of preference):
 - Generic All-Speed Modem File (with instructions)
 - Auto Configure (for unlisted modems only)
6. Click **Q**K twice.

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Troubleshooting modem problems

Troubleshooting modem problems is easily one of the most confusing, least rewarding, and generally no-fun-at-all activities that you can imagine; we certainly can't do it justice in this small book. So leave it to the experts — if your modem doesn't work, don't hesitate to ask your local guru for help.

Saving Replication Time and Money

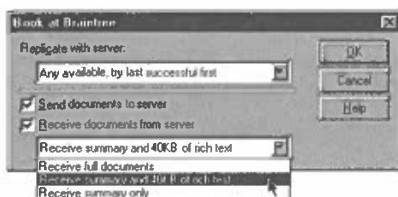
Replication can sometimes take a long time and lead to some big phone bills. So here are a few tips that can reduce your time online and save you a few bucks in the process.

Partial replication

Depending on the speed of your modem, you may find that replication takes a long time. How long it takes depends on the number of databases that you replicate, when you last replicated them, and most importantly, the size of the documents that are waiting for you on the server.

One way of reducing the replication time is to use *partial replication* — in other words, to replicate only a portion of very large documents. That way, if someone has sent you e-mail with an especially large spreadsheet attached to it, you don't have to wait while your modem picks up the whole message. To replicate only part of the documents, follow these steps:

1. Click the Tab for the Replicator page on the workspace.
2. Click the Replication button for the database in question.
3. Select Receive summary and 40KB of rich text from the drop-down list.
4. Click QK.



You must manually set partial replication for each database that you want to partially replicate. If, for example, you want to partially replicate three of your four databases, you need to follow the preceding steps three times.

Remember: If you're reading a document that has been partially replicated, you can choose Actions⇨Retrieve Entire Document to retrieve the whole document. If you're not already connected, Notes makes a special call to the server to update the document and get the rest of it.

Selective replication

Selective replication is a way to replicate only documents that meet a criterion that you establish. This criterion may be only the documents from a certain person, only the documents created after a certain date, or some other detail that you think of. Selective replication is a great way to reduce the amount of time (and money) that you spend replicating with your company's server(s).

To set up selective replication for a database, follow these steps:

1. Open the database.
2. Choose Filer⇨Replication⇨Settings.
3. Click the Replicate a subset of documents check box.

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4. Click the Select by formula check box.
5. Enter the formula in the list box.
6. Click the green check mark to save the formula and then click **OK**.

Clicking the buttons is easy, but writing your selection formula is another story. We can't predict exactly what your formula will look like, but we can say that the most common formulas look something like this:

```
SELECT From = "Debbie Little" : "Ursula Smith":  
"Jeff Schick"
```

You need to know the exact field names to write a selective replication formula — and that means either becoming a database design expert or asking someone for help!

Working in Notes Away from the Office

The good news is that using Notes when you're disconnected from the network is just like using Notes when you're connected, with two notable exceptions:

- ◆ Any e-mail messages that you create are held on your computer and aren't delivered until the next time you call your server.
- ◆ You must have copies of the databases (including your e-mail database) on your computer's hard drive.

Assuming that you have taken care of the second step and have copies of the databases on your computer, you can use Notes anywhere that you can take your computer: at home, in the car, in an airplane, or at the beach.



The key to working *remotely* is always to use the database icons that refer to the copies of the databases that are on your hard drive.

Sending e-mail from afar

You use your e-mail when you're way from the office the same way that you use it when you're at work. In fact, the following are the only two differences:

- ♦ Any e-mail messages that you create are held on your computer and don't get sent until the next time you call your server.
- ♦ The list of people you see when you choose **A**ctions→**A**ddress while writing an e-mail message is only from your Personal Directory.

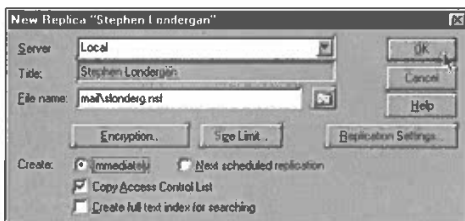


Outgoing messages are held in a special database, called (appropriately enough) Outgoing Mail. This database offers you a chance to second guess yourself, but only when you're working remotely. If you create and send a message and then decide that you don't want to send it after all (and you haven't called the server), you can open your Outgoing Mail database and delete the document. Cool!

Taking a database with you

You have to make a copy of any database that you want to be able to use when you're away from the office — including your e-mail database. To make a copy of a database, so that you can replicate it and take it on the road, follow these steps:

1. Open the database.
2. Choose **F**ile→**R**eplication→**N**ew Replica.
3. Click the **I**mmediately button.
4. Click **O**K.



When you click **O**K, Notes makes a copy of the database on your computer's hard drive.

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Make the copy of the database that you want before you leave the office, while you're still connected to the local area network (LAN). That way, your first replication — where Notes has to do a lot of work — is nice and fast. You can replicate a database for the first time over your modem, but doing so takes much longer.



Notes neophytes often think that they need to copy *every* database that they use at the office and bring it with them. In addition to wasting a lot of disk space on your computer, this practice gives your modem much more work to do every time you replicate. The more experienced Notes user knows to exercise some restraint! The bottom line is that you need to copy only the databases that you *really* need.

When you create a copy of a database, you end up with two icons on the workspace: one for the copy of the database on the server and the other for the copy of the (same) database on your computer. Choose View⇨Stack Replica Icons to have Notes stack all the icons.

Using the Replicator page

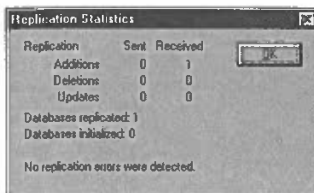
The last tab on the workspace is the *Replicator page*. This is a special page that you use to tell your computer to call the server, deliver your e-mail, pick up any new e-mail, and synchronize the databases that you have on your computer with the databases on the server. Whenever you want to replicate, use these steps:

1. Click the Tab for the Replicator page.
2. Click the Start button.



You can continue working while Notes is replicating. You can switch to another workspace page to open a database or even switch to a different program.

When the phone call is finished, you can switch back to the Replicator page to see an account of exactly what happened. Notes tells you, for each database, exactly how many documents it sent and how many documents it received.





Don't be surprised if your Replicator page tells you that it received, for example, five documents in a particular database. When you open that database, you may find only three new documents. Replication takes care of new documents, deleted documents, and edited documents. In other words, if someone edited a document, the changes get replicated to you, and that counts as a replicated document on the Replicator page. So five documents may really be two edits plus three new documents.

Text Searching Near and Far

Databases crowd your servers, documents pile up in each database, hundreds of millions of documents are tucked in dusty corners of the Internet — mountains of data are there for the reading. Notes offers several ways to find information, from quickly searching a single document to *full-text searching* (a slick way to let Notes do the digging) to letting Notes search the Net. Take our word for it, no matter how many speed-reading courses you take, Notes can find information faster than you could ever hope to.

In this part . . .

- ✓ Building your own index
- ✓ Searching documents, views, databases, the Internet
- ✓ Using the Search bar
- ✓ Setting search conditions
- ✓ Setting search options
- ✓ Using Query by Form



Boolean Searches

We tell you briefly about Boolean searches because the wrong choice can give you the wrong search results. Boolean refers to the use of *and* and *or*. Imagine that you're concerned with the first name *Kathryn* and the last name *Kemp*. Suppose your criteria specify that the Last Name field contains *Kemp* and the First Name field contains *Kathryn*. If you choose to connect the two conditions with *and*, the search results have to contain *Kemp* in the Last Name field. The second condition refines that first condition; it tells the search engine, "Now that you have all the Kemps, find documents in which the first name is Kathryn." What's left is all the Kemps named Kathryn.

What if you use *or* between the two conditions instead of *and*? First, as before, you get all the Kemps, but then the second criterion says, "Find all people whose first name is Kathryn." You're not refining anything, so your list is going to be a combination of everyone whose last name is Kemp and *everyone* whose first name is Kathryn. That could be a big list; lots of people have the first name Kathryn.

Domain and Worldwide Searches

A *domain search* looks beyond the content of your screen to other Notes databases, non-Notes files, and selected Web sites. Before you can perform a domain search, your administrator needs to set up the search. Until that's done, Domain Search mentioned in Step 2 in the following procedure will be grayed out, and you won't be able to do a domain search.

Here's how to perform a domain search:

1. Click the arrow to the right of the Search icon.
2. Choose Domain Search. (The title that your administrator created for the search may be something other than "Domain Search.")
3. Select Documents if you want to search the contents of databases; select Databases if you want to search only the titles of databases.
4. If you want to include non-Notes documents in your search, click More and select File System.
5. Type your query in the search box.

6. Select Terse or Detailed results and an option in Sorted by. Choosing either Terse or Detailed returns relevance (the number of times the search text appears in each document found), date last modified, and document title. Choosing Detailed also returns a summary of content and the URL (if available).
7. Click More.
8. Choose conditions and options to specify the search. These become part of your query, along with the text you type. You can also type operators into the query, such as *and*, *or*, and *not*.
9. Click Search.

To search the world (in other words, the Web), use the Search button to specify your favorite Internet search engine site and then enter your search criteria as you normally would to search around the virtual world. The search engine opens, conducts its search, and delivers the results of the search.



If you plan frequent worldwide searches from inside Notes, you may want to bookmark that favorite Internet search engine. Here's how:

1. Use Notes to activate the Internet search site.
2. Click and drag the task button (near the top of the Notes window) for the site to the More Bookmarks icon.
3. Keep holding down the left mouse button, and when the More Bookmarks folder opens, drop the task where you want it.

Full-Text Index

Before you try searching, you should understand full-text indexing. A search for text is much speedier and offers more options when you have a *full-text index*, a behind-the-scenes list of text and documents that the search uses to find documents containing the text you want. If you're a manager or designer of a database or if you have a copy of the database on your own computer, you can create your own index. How about indexing your e-mail database? That way, you can easily find all those old messages that have your customer's names in them or quickly put your hands on all the messages that are about a certain project. You don't absolutely have to create a database FTI (as the experts sometimes call a full-text index), but an FTI does make searching easier.

Planning your index

Before indexing every database in sight, you need to consider a few issues:

- ◆ **Access.** You can index a database only if the database is on your local computer (not on the server) or you have at least designer access. In the status bar, in the third section from the right, is a symbol indicating your level of access in the currently opened database. Click it, and if it says “You have designer . . .” or “You have manager access to this database,” you’re all set. For more information about database access, see Part IV.
- ◆ **Disk space.** Indexing a database takes up more disk space — maybe an additional 50 percent (or more) of the database’s size. In other words, if your e-mail database takes up, say, 10MB of disk space, indexing could increase the size to 15MB. Predicting exactly how big the index is going to be is hard, because the size depends on the type of database you’re indexing. For a database that contains a lot of pictures and a relatively small amount of text, the index won’t be as big (percentage-wise) as it would be for a database that’s almost all text. Of course, if the database you want to index is on a server, rather than on your own computer, you don’t need to be as conscious of the disk-space requirements, because you’re not going to use any of your hard-disk space — the index is stored with the Notes database on the server.



Don’t let your administrator read that last sentence, because administrators are *extremely* concerned about disk space on the server. That’s their job.

- ◆ **Maintenance.** Like a beautiful lawn, an index requires maintenance. As users add documents to and remove documents from the database, someone has to update the index periodically so that it stays current. (Keep in mind that a new or recently edited document may not show up in the search results if the document was added or changed after the last index update.) And who’s going to do the work to keep up the index? The answer depends on where the database is located.
- ◆ **On the server.** If the indexed database is on the server, maintaining the index is more your administrator’s concern than yours. In fact, the index is automatically updated if the database is on the server. Your administrator controls the frequency with which Notes updates the index — whether the

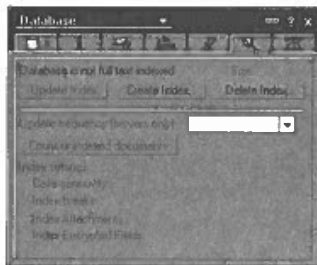
frequency is instantly, hourly, or daily. The more often the update, the slower the server runs, so you may have to do some negotiating (or resort to bribery) to get your administrator to agree to an index that updates the instant that the database changes.

- ♦ **On your hard disk.** If the indexed database is on your computer's hard disk, *you* have to be responsible for keeping it up-to-date. This maintenance may not sound like much, but it takes time — how much time depends on how many documents users have added to and removed from the database since you last updated the index.
- ♦ **Operating system.** If you use a Macintosh, you can't index a database that's on your own computer. Mac users can create indexes for databases that are on the server, and Mac users can certainly use the indexes for the databases on the servers. They just can't create an index for a local database.

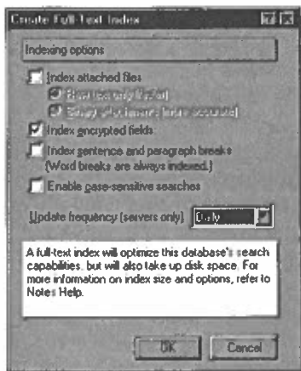
Building your index 101



To create a new full-text index for a database that's on your local hard disk, call up the Database Properties box by clicking the Properties SmartIcon and then clicking the Full Text tab. If the database has never been indexed, you see Database is not full text indexed displayed in the Properties box. The Create Index button is right there for the clicking.



Before you create the index, you have to make several choices in the Create Full-Text Index dialog box. Your decisions can really affect the size of the FTI (that's a TLA, *three letter abbreviation*, for full-text index) and how long the indexing process takes. Here's what the options in the Properties box mean:



- ◆ **Index attached files:** Notes actually reads all the files attached to each document and includes their contents in the full-text index. Wanna guess what happens to the size of the index?
- ◆ **Index encrypted fields:** Notes reads and includes the contents of encrypted fields in the index. If the search finds a document with the search text in an encrypted field, Notes includes that document in the results — even though you may not be able to read the document. See Part IV for information about encryption.
- ◆ **Index sentence and paragraph breaks:** This option makes it possible to find words in a document when they're in the same paragraph or sentence as other words in a search. If you search for "travel" near "policy," you find only documents in which the two words are close to one another, excluding documents that simply contain the two words scattered throughout. This feature tells Notes to remember not only the word, but also where it occurs. Space hog!
- ◆ **Make case sensitive:** This option really increases the size of the index on disk, but if distinguishing between *Sue*, *sue*, and *SUE* is really important, by all means check it.
- ◆ **Update index:** This option determines how often the index is updated. Because the indexing process does take valuable server resources — in other words, it slows the server down — you should choose to index as infrequently as possible.



Creating an index takes a while because Notes has to index every document in the database the first time. The good news is that updating the index after that doesn't take as long, because Notes only has to update the index to reflect users' changes (new,

deleted, and edited documents) since the index's last update. After you create the index, the Index tab of the Database Properties box changes to show the current status of the index.



You can get an idea of how long the indexing process will take, or at least how necessary it is, by clicking the Count Unindexed Documents button on the Full Text tab of the Database Properties box. You may decide not to bother updating the index if it's not too out-of-date. On the other hand, you may decide to go ahead with the update because it won't take very long for just one document. It's your call.

When you're ready to update the index, just click the Update Index button on the Full Text page of the Database dialog box. If you decide that you don't need a database index after all, click the Delete Index button. Why would you want to do that? Perhaps because you're running out of disk space or you simply never do a search for text and therefore don't need the index. These reasons aside, an index is a handy thing to have around.

Full-Text Search



When you use the Search icon in the Navigation bar, you can search anything from a Notes document to the world. Where you look, what you look for, how you want the search results displayed, and what specific search conditions you want to use are all contained somewhere in that Search icon. The choices you can make are determined by where you plan to look and whether the database you're searching has a full-text index.



We didn't get into word and paragraph breaks when talking about setting search criteria because that gets a bit complicated. A search formula to take advantage of sentence and paragraph breaks looks like this:

("gold" sentence "silver") paragraph "diamonds"

Here, you look for the words *gold* and *silver* in the same sentence and in the same paragraph as the word *diamonds*. In this formula, the words *sentence* and *paragraph* aren't text that the search looks for; they're actually part of a search formula.

Searching through all the documents in the view

In this section, we talk about the whole document, not just the text displayed in a view containing the documents you want to rifle through. In a view, you may see just the documents' title and author's name, but of course there is much more information in the document you may need to search.

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The Search icon allows a *full-text search*, which is a way for you to find all the occurrences of a word (or a couple of words) very, very quickly. You can search a huge database in no time at all. Most searches don't take more than two or three *seconds*. And when you ask Notes to search for a word, Notes finds *all* the documents for you, no matter where (or how many times) the documents contain the word. Notes calls this full-text search not because it finds full text (no such thing exists), but because full-text search is more powerful — it enables you to find words near each other or in the same sentence or paragraph, and it allows you to locate variations of the search text.

Playing hide and seek with the Search bar

To do a full-text search, you need to call up the *Search bar* to enter the criteria for your search. To display the search bar, click the Search icon in the Navigator bar, or choose View⇨Search Bar from the menu.



Remember: When you perform a search, Notes searches only the documents in the current open view. So you have to be careful to choose the right view before you start your search. If the open view shows only documents from the first half of the year, your search doesn't look through the documents from the second half of the year.

Bellying up to the Search bar

The Search bar contains several important parts. On the left, the blank box is where you type the text that you want to search for. Here are the types of things you can enter:

- ◆ **A single word:** For example, type **gold** to find all documents that contain the word *gold*.
- ◆ **A phrase in quotes:** For example, type **"gold and silver"** to find documents that contain the phrase *gold and silver*.
- ◆ **Words connected by *and*, without quotes:** For example, type **gold and silver** to find documents that contain both the word *gold* and the word *silver*.
- ◆ **Words connected by *or*, without quotes:** For example, type **gold or silver** to find documents that contain either the word *gold* or the word *silver* — maybe both, but at least one of the two.

If you're satisfied simply to find documents containing the text you enter — and most of the time you want to keep the search simple — enter the text, click Search, and wait for the proper documents to appear.

Getting into conditions

Suppose you search for a word and find 150 documents. Great — you still have too much to read. If you can somehow refine your search, you can narrow the number of search results. For example, you can narrow the search to documents created by a single author. Just click the More button in the Search bar and then click the Author button and enter the author's name in the Search Builder dialog box that appears. Note that the dialog box contains a drop-down list displaying the word *Contains*. Clicking the down arrow enables you to choose *Does not contain* in case you want to exclude documents by a certain author.

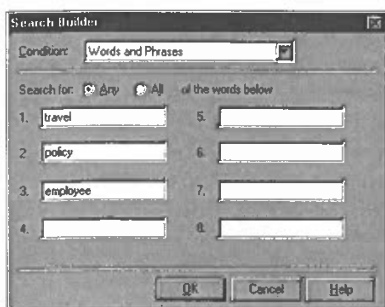


When you click the various buttons and specify certain conditions, each condition appears in the Search window. You can find documents with multiple conditions; for example, you can search for documents written by a certain author, not written by another author, and containing specified text. In the Search bar, each condition is represented by a *condition token*, a gray box containing the specific condition. To see the condition, or to modify it, double-click its token. To delete the condition, highlight its token and press Delete.

But wait, there's more, much more. In fact, there's too much to cram into this part. So we suggest you spend a few minutes improving your search skills by clicking the buttons in the Search bar to see all the options available to you. Here's a quick list of available search conditions:

- ♦ **Date:** When you select By Date, a dialog box appears so that you can enter a date and tell Notes to find the documents that are newer or older than that date. You can also find documents created between two dates, documents not created between two dates, documents created in the last specified number of days, and so on.

- ◆ **Author:** When you choose By Author, a new dialog box appears so that you can enter the name of the author whose documents you want to see or don't want to see.
- ◆ **Field:** When you click By Field, a dialog box appears so that you can enter the name of a field and the data you want that field to contain, or not to contain, in the documents you find. One of the items in the Condition drop-down list is By Form. By Form enables you to do a Query by Form, which we explain in the following section.
- ◆ **Form:** This condition enables you to look for documents created in a single form. If the view you're searching through has many types of main documents and responses, you may only want documents created with a specific form.
- ◆ **Multiple words:** You can also refine your search by looking for several words. Use this option when you want to look for more than just a couple of words or phrases. Instead of entering in the text box words or phrases that you want to find, as we describe in the previous section, click Multiple Words and enter one word or phrase in the numbered boxes in the Search Builder dialog box. Choosing *Any* is like, in our previous example, using the word *or* between *gold* and *silver* in the text box; the resulting search finds all documents that contain any of those words. Choosing *All* is like, in our previous example, using the word *and* between *gold* and *silver* in the text box; the resulting search finds the documents that contain all the words in the list.



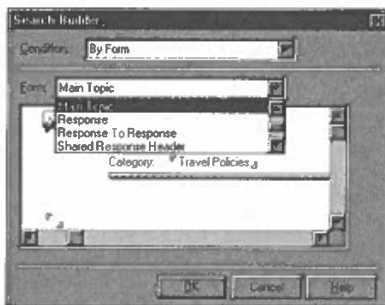
Querying by form

A way to make your life easier is to do a *Query by Form*, which allows you to call up an empty document and enter into the fields the text you want to find in those fields. The search finds the text you specify only when it appears in that field. This method narrows and refines your query substantially.

Imagine that you want to search through a personnel database for someone's name, but that person is the author of many documents in that database. Complicating the problem is the fact that the documents in the view are of many different types (composed with different forms). You aren't interested in documents the person wrote, only in documents in which the person's name is mentioned, and you only want one type of document. You can use Query by Form to tell Notes to be sure that the name occurs in the Body field of a particular form.

Here's how you make a Query by Form:

1. Click More in the Search bar.
2. Click the Field button.
3. In the dialog box that appears, click the down arrow at the end of the Condition text box and choose By Form.
4. Click the down arrow to the right of Form to see the list of forms.
5. Pick the form you want to use, and Notes gives you an empty version of the form.

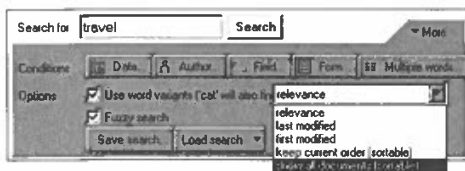


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6. Place the cursor in the field in which you want to find the word or phrase and type the text you want Notes to find in that field. Tired of picking and clicking? Sorry, one more.
7. Click **OK** to close the dialog box and then click the Search button in the Search bar to find the documents.

Querying with Fuzzy Search and the Variants

Sounds like a 1960s band, doesn't it? Actually, it's two search options. In the Search bar, below the search condition buttons, are additional search options you may want to exercise before you send the search engine purring off into the database on a scavenger hunt. You see the options on your screen if you click the More button.



When you have a full-text-indexed database, the following options are available to you:

- ◆ **Use word variants:** This option tells Notes that you want to look for not only the base word you typed, but also the base word with any possible prefixes or suffixes. For example, searching for *sneeze* also finds *sneezed* and *sneezing*. Bless you.
- ◆ **Fuzzy search:** This option tells Notes to use not only the word you typed, but similar phrases and corrected spellings if you misspelled your criterion. For instance, searching for *known problems* returns *known serious problems* and searching for *travel* finds *travel*.
- ◆ **Sorting the results:** You can choose to sort the search results by choosing one of the items from the drop-down list to the right of the Use Word Variants check box:
 - **Relevance:** This choice means that you want to see the search results listed in descending order by the number of times your search criteria appear in each document, with the ones containing the largest number of examples of your criteria at the top. The marker column to the left of the list of documents contains a bar with the darkest part of the bar in the marker column next to the documents with the largest number of occurrences of the search text.

- **Last Modified and First Modified:** Choosing either of these options asks Notes to list the documents in order according to age — from earliest- to latest-composed, or vice versa.
- **Keep current order (sortable):** This choice keeps the documents in the order that they were in the view; they aren't sorted by relevance or age. Only the search results appear in the view, and they appear with checkmarks.
- **Show all documents (sortable):** Choosing this option shows all the documents in the view but puts a checkmark next to the documents that satisfy the search results.

Saving a search

If you plan to execute the same search again and again, save yourself a lot of keystrokes by saving and reusing the search criteria you worked so hard to create. Saving a search is simple; just click Save Search and give the new search a name in the dialog box that appears, and then click OK. Check Shared search to allow other users of the database to use the search you save. To re-use the search, click Load Search, click on the name of the search from the drop-down list, and then click the Search button. You can also click and drag the task button for the search to the Bookmark bar so that you can use the same search in the future.

On your mark, get set, search!

After you set your conditions and choose your options, you may as well go ahead and start the search itself. That's the easy part — just click the Search button. Even though Notes is fast, you may have to wait a little while. If you have a lot of documents in the view, finding them is going to take a couple of minutes. Of course, if the database has only three small documents, the search doesn't take any time at all. The point? The amount of time a search takes depends on three factors:

- ◆ The size of the documents in the database
- ◆ The number of documents in the database
- ◆ The complexity of the search conditions you set

Seek and ye shall find

When the search finally finishes, Notes changes the view to show the search results the way you specified for Notes to display the search results. If the database is full-text-indexed, Notes lists the documents that match your criteria in order of their relevance — in other words, in order from those with the most occurrences of

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your criteria to those with the fewest occurrences. The vertical bar, called the *marker bar*, at the left-hand side of the view represents the relative frequency of your criteria in each document. The darker the bar, the more occurrences in that particular document.

Remember: You can choose to sort documents in other ways than by relevance. Just be sure you make the decision before the search.

You open a document uncovered by a search the same way that you open any other document: Double-click it or select it with your mouse and press Enter. Notes then shows you the document and highlights the text that you wanted to find. As you read a document retrieved by a full-text search, you can jump quickly to the next occurrence of the search text by pressing Ctrl++ (that's the Control key and the plus sign). You use Ctrl+- (Control and the minus sign) to jump quickly to the preceding occurrence of the word.

Resetting the stage

After you read the documents that interest you, click the Reset button to clear the search and return all documents to the view.



If you want to conduct another search, you don't need to click Reset first; instead, just type in a new bunch of text, set your conditions, and then click Search. Typing a new search word makes Notes forget all about the old search and returns only documents that satisfy the new set of criteria. You really only need to use the Reset button when you're completely done searching.

Home Page Search Buttons

Below the task center is yet another way to search. Click the down arrow in the text box next to Search, and then select Notes Database Catalog or an Internet search option. Enter some search text in the text box to the right and then click the Search button.

Keyword Fields

Some fields in your documents enable you to do a kind of search. The fields contain lists from which you may choose one or more items, rather than typing them in. You can find just what you're looking for in a keyword field without having to scroll up and down in a long list. Just zero in on an item by typing its first letter.

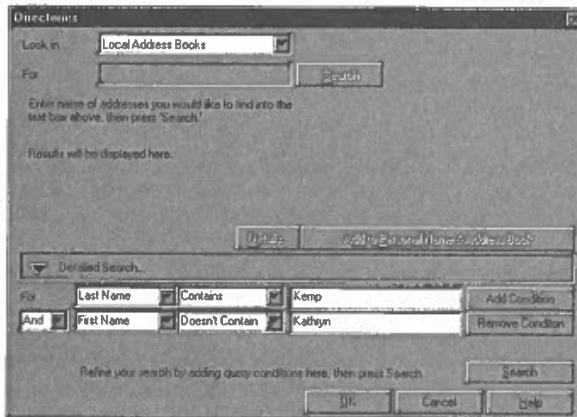
For example, in the name, To, cc, and bcc fields in the memos in your e-mail database, you can start to type the name of the person you want to find, and Notes anticipates what you're typing and finishes the name for you. If Notes gets it wrong, just keep typing the name, and after you type enough of the name to distinguish your choice from similar names, Notes finishes the name for you.

People Searches

Notes can even find a person for you, without making you open a bunch of databases such as the registry. To find someone, follow these steps:

1. Click the down arrow next to the Search icon in the Universal Navigator.
2. From the drop-down list, choose Find People.
3. In the Directories dialog box that appears, choose where to Look in.
4. Enter some helpful text in the Starts With box (a few distinguishing characters will do), and click Search. The results of your search appear in the Search dialog box.

Highlight a line in the results if you want to see Details and click the Details button. The page in the appropriate registry opens so that you can see more about the person. Click Add to Personal Name & Address Book if you want to use the name to address memos in the future.



Screen Contents

Frequently, you may simply want to find some text in the document you're reading. If you're busy with a mammoth document that trails off the bottom of your screen and well into the desk below, reading the whole document to find a small section of text is a waste of time. Instead, you can quickly and easily tell Notes to find a word or a phrase.



1. Use **Edit⇧Find/Replace** or click the **Edit Find/Replace SmartIcon**.
2. Enter the text you want in the little dialog box that appears.
3. Click **Find Next**.

Notes takes you to the highlighted text. To find the next occurrence of the word, simply press **Enter**, though you can also click **Find Next** if you're particularly fond of using the mouse. After you find the specific occurrence of the text you want, click **Close** or press **Escape** to clear the **Find** dialog box off the screen.

You can also easily find a document in a sorted, but not categorized, view — just type the first few characters of the item you're looking for. Just start typing, that's all; no dialog box or menu item is necessary. A small dialog box appears showing you what you typed — in case you forgot. You don't need to type the whole word you're looking for; just type enough characters to distinguish what you're looking for from other similar words and then press **Enter**. Notes jumps to the first document that contains whatever text you typed. To continue your search, leave the current document highlighted and repeat the same procedure again to find the next document containing the text.



You can tell if a view is sorted — the documents in the view are in some sort of order. If it's categorized, the documents are clustered under headings.

Here are three small things to remember as you search the contents of an on-screen view (not a document on-screen):

- ◆ Using **Edit⇧Find/Replace** finds text in the view, but not inside of the documents.
- ◆ You can use the menu or the Smarticons, but you can't use **Ctrl+F**.
- ◆ Searching a view finds the word in the view even if the word isn't the first word in the title of the document. So if you're looking for the word *directions*, using **Edit⇧Find/Replace** finds a document listed in the view as "Follow these directions to install Notes," even though *directions* is not the first word in the title.

Notes and Other Programs

Today, a program can't be a hermit. A program is less useful if it keeps its data to itself, preventing the data from being used by other programs, or if it doesn't allow data from other programs to be used in its environment. In this part, we examine several different ways to exchange data between Notes and other programs.

The way that you bring data into Notes or send Notes data out into the world depends on several things: the form that the data takes outside Notes, what non-Notes program you use, what platform you use (Windows 95 or 98, Windows NT, OS/2, or Macintosh), and what you plan to do with the data after it arrives at its destination. This part gives you some pointers about when to use each technique for data sharing.

In this part . . .

- ✓ Attaching files to a document
- ✓ Cutting (or copying) and pasting
- ✓ Importing and exporting data
- ✓ Linking and embedding



Attachments

Sometimes when you send a memo or create a document, you want to include a computer file along with it. The purpose is simply to give the recipient the file, not to include its contents in the document or to make it possible to edit the file. The file can be of any type — a Word Pro or MS Word document, a batch file, or an executable (.EXE) file — any type of file except Macintosh folders, PC directories, or databases stored on a server.

It probably comes as no surprise that a large attachment creates a large document and increases the size of your database. The attachment goes where the document goes, just like a disk that you include in an envelope with a letter.

Creating attachments

To attach a file to a document, follow these steps:

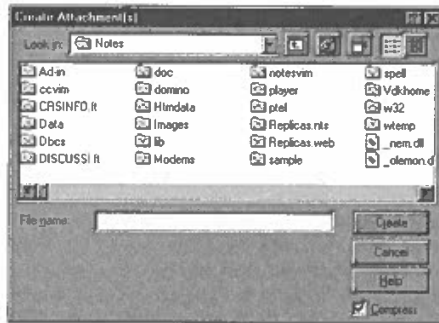


1. Place the cursor in a rich-text field (the body of a memo, for example) in Edit mode.
2. Click the File Attach SmartIcon or choose **File→Attach**. (If **Attach** is grayed, then the field is not a rich-text field.) The Create Attachment(s) dialog box appears. This is where you choose the file or files to attach.
3. If the file that you want is in another drive or directory, select the correct drive or directory in the **Look in** box of the Create Attachment(s) dialog box.
4. Highlight the proper filename in the list of files and press Enter or click **Create**. To attach more than one file at the same time (if they are all in the same directory), highlight the first file and hold down **Ctrl** while you select the other files that you want to attach. To select several consecutive files, highlight the first file and **Shift+Click** the last file. All files between the first file and the last are highlighted.



To narrow your search to only one type of file, type the extension for that type of file in the text box next to **File name** in the Create Attachments dialog box.

By default, the **Compress** box is checked. The file is compressed as it's attached so that it takes up less disk space and takes less time to send. The only reason not to compress files is that the attachment process takes a little longer if the files are being compressed. Attachments are automatically decompressed when the recipient detaches them.



Each file that you attach is represented separately by a small icon. If Notes can figure out which program the file was created in, the icon is the logo of that program; otherwise, the icon looks like a piece of paper with the corner folded over.

Using attachments

When you double-click an attachment, the Properties box appears so that you can choose what you want to do with the attachment. You have the following three choices:

- ◆ **View:** Depending on the type of file, you can elect to see its contents. Seeing is not always possible, of course — a program file has nothing you can see, but a spreadsheet file created in Lotus 1-2-3 does. The attachment viewer often lets you see the contents of an attachment even if you don't have 1-2-3 software on your computer. Remember that you can only see it; you can't edit it.
- ◆ **Launch:** Again, depending on the type of file and depending on whether you have the appropriate software on your computer, Launch starts the program in which the file was created and opens the file. In this case, not only can you look at the file, you can edit it and save it.



When you launch a file, the parent program often opens the file with a strange filename. If you want to save the file, use the **Save As** choice on the **File** menu, so that you have some control over the name and where the file is saved.

- ◆ **Detach:** This term is a slight misnomer. Choosing Detach doesn't actually remove the file from the original document but just enables you to save a copy to whatever disk or drive you choose. If you want to remove the attachment from the document to save disk space, you have to delete the attachment just as you would delete any text (highlight it and press Delete).

Cutting or Copying and Pasting

If you know how to cut or copy and then paste in other programs, you are ahead of the game: The process in Notes is the same. Of course, cutting or copying and then pasting is a way to get data from one Notes document into another. The process is also a way to get data from a document in one program into a Notes document.

The following fascinating facts apply to copying or cutting and then pasting:

- ◆ You aren't limited to pasting into a rich-text field. Any type of field is acceptable, as long as the data matches the field type. In other words, you can't paste a picture into a text field or your name into a date field.
- ◆ If you paste into a non-rich-text field, you lose the formatting (such as boldface) of the data that you're pasting.

To paste something into a Notes document, use these steps:

1. Switch to the program and the file that contains the data you want to paste into a Notes document.
2. Highlight the data or text that you want to paste.
3. Copy or cut the data, depending on whether you want to leave the data in the original document (copy) or remove it (cut).
4. Switch to Notes.
5. In Edit mode, place the cursor where you want the data to appear.
6. Click the Paste icon or choose **Edit**⇨**Paste**.
7. If necessary, and if the cursor is in a rich-text field, format the text to suit your taste.



Data Exports

Exporting refers to taking data from Notes and turning that data into a file in a new format. For example, exporting Notes data to MS Word turns the data into a Word file. Exporting is a useful technique when you need to give some Notes data to a person who doesn't have Notes.

You may have a program on your computer that doesn't use the clipboard. So, a second reason to use **File**⇨**Export** is when you can't transfer the Notes document to another program via the clipboard.

To convert a Notes document into another format, follow these steps:

1. Find and open the Notes document that you want to export.
2. Choose **File→Export**.
3. In the dialog box that appears, use the **Save in** drop-down list to choose the drive and directory to which the exported file is to be saved.
4. In the **Save as type** drop-down list, choose the kind of file that you want the file to be. The choices are as follows:
 - Ami Pro
 - ASCII Text
 - CGM Image
 - Microsoft Word RTF
 - TIFF 5.0 Image
 - Word for Windows 6.0
 - WordPerfect 5.1, 6.0, and 6.1
5. Click **Export**.

File Imports

Importing refers to taking a file from its native format and turning it into data in Notes. For example, importing Lotus 1-2-3 data makes the original file an integral part of a Notes document.

You import a file when other means of bringing in data fail you (for example, if the other program doesn't allow the use of the clipboard, and attaching the file doesn't allow people to see the data when they read the document). Importing converts a file from another program's format into the Notes document that you're composing and sends the data right into the rich-text field in which you're typing. You must import the file if you have the file but not the application that created the file.

To import a file into a Notes document, use these steps:

1. Place the cursor in the area of the rich-text field in which you want the data to appear.
2. Choose **File→Import**.
3. In the dialog box that appears, use the **Look in** box to choose the drive and directory where the file is stored or enter the filename in the **File Name** box.

4. Use the List Files of Type drop-down list to tell Notes what kind of file you're importing. You can import these types of files into a rich text field:
 - Ami Pro
 - ASCII Text
 - Binary with Text
 - BMP Image
 - CGM Image
 - Excel 4.0/5.0
 - GIF Image
 - HTML File
 - JPEG Image
 - Lotus 1-2-3 Worksheet
 - Lotus PIC
 - Microsoft Word RTF
 - PCX Image
 - TIFF 5.0 Image
 - Word for Windows 6.0
 - Word Perfect 5.x
 - WordPerfect 6.0/6.1
 - WordPro 96/97
5. After you find the file, click Import. The data contained in the file appears inside your Notes document. Notes imports the file as regular text.
6. If you wish, change the appearance of the imported text by changing the fonts, making some of the words bold, or making other modifications.



If you need to import a file that is not in one of the listed formats that Notes supports, find out whether the originating program can save the file in one of those formats. For example, if you need to import a Quattro Pro spreadsheet, you can use Quattro Pro to save the file as a Lotus 1-2-3 worksheet and then use File→Import to import the converted Lotus 1-2-3 worksheet.

You can also import a graphic to the background of a document, like this:

1. Make sure the document is saved and in Edit mode.
2. Choose File⇨Document Properties and then click the Background tab (third tab from left).
3. Click Import in the Graphic or Resource section.
4. Select the file to import.
5. Click Import.

You can import BMP, GIF, JPEG, PCX, and TIFF files to use as a document's background. If the picture is the same size as the document, it appears once. Smaller pictures *tile* (or repeat) to fill the background of the document.

Linked and Embedded Data

This is where things get fancy. *Linking* data means that it never loses touch with home, so data changes that are made in the program where the data was created are passed along to the data that appears in a Notes document. *Embedding* means that the data looks as if it's part of a Notes document, but if you "activate" it, you start the program in which the data was created so that you can edit or add to it. Edits to the original data don't appear in the embedded file.



The official software used to make linking and embedding happen is either DDE (dynamic data exchange) or OLE (object linking and embedding), just in case you happen to run across the abbreviations. Whether the software is OLE or DDE is not important, because the procedure is the same in each.

You can use a text search to look for linked or embedded text as long as the data is linked or embedded as text or rich text and is visible (not represented by an icon).

Linking

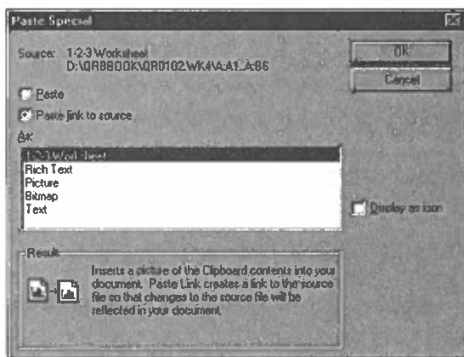
Linking adds data to your Notes document, but the data retains its identity as belonging to the original application. The data doesn't become native Notes data. The link keeps an eye on the original data so that if you or anyone else changes it, the copy in the Notes documents also changes.

156 *Linked and Embedded Data*

Some words used in linking are also used in other Notes contexts. The program in which the original data was created is called the *server*. The program into which you place the data is called the *client* (a term sometimes also used for *workstation*). Keep in mind as you read this section that we're not talking about Domino servers and Notes clients but OLE servers and OLE clients.

To create a link, follow these steps:

1. Open the server application and create or open a file containing the data that you want to link to a Notes document.
2. If the file is new, be sure to save it before you create the link.
3. Highlight the data to link and copy it to the clipboard using the appropriate technique in the server program.
4. Switch to the Notes document, place the cursor where you want to place the data (be sure it's a rich-text field), and click the Edit Paste Special SmartIcon or choose **E**dit⇨**P**aste Special.
5. In the **As:** list box, choose the format for the data to be linked. You may choose the file's native file format, Rich Text (text arrives with all formatting), Picture or Bitmap (usually used for graphic objects), or Text (text arrives without formatting).



6. Choose Paste link to source.
7. Click OK. After a few seconds, the data appears in the Notes document. If the original selection contains multiple text formats, you may see an icon rather than the actual text.

By creating an OLE link, you create a compound document. Notes doesn't allow you to edit the linked data in Notes, though. You need to double-click the linked data or the icon representing the linked data to tell Notes to open or switch to the server application and file, where you can edit the data. As you edit, the changes appear immediately in the Notes document.

Not only can you edit the data; you can also edit the link itself. In the Notes document, choose **Edit→External Links** to see the External Links dialog box.

In this dialog box, you can make the following choices:

- ◆ Click **A**utomatic to allow Notes to automatically update the Notes data if the server data changes. Click **M**anual to prevent Notes from making such updates.
- ◆ Choose **U**pdate Now to bring the data in the Notes document up-to-date with the data in the server application. Use this option if you chose **M**anual updating and are concerned that the data in the Notes document is out-of-date.
- ◆ Click **O**pen Source to open the server application in which the data was first created.
- ◆ Click **E**dit Link to choose a different file to link to the Notes document.
- ◆ Choose **B**reak Link to sever permanently the link between the server and client.



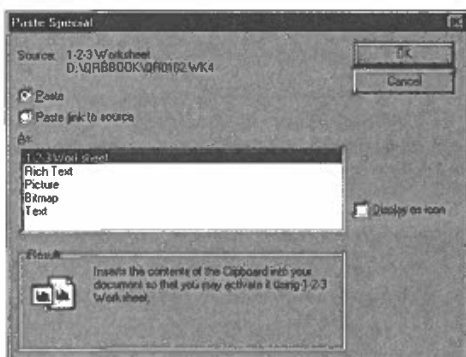
OLE requires that you make a saved file and the server application available to Notes. Often the server file itself is on a Domino server (here are both uses of the word *server* in one sentence), so the same file is available to all users. If all users of the Notes document don't have the same directory structure for the server application or the linked file, Notes cannot open the application to allow updating. Also, if the file is moved or renamed, everyone loses the link between the original information and the information in the Notes document.

Embedding part of a file

To the user, a linked object and an embedded object appear the same. The object may be an icon or data, depending on the complexity of the data in the server file. The difference between the two is that embedding data into the Notes document places the file itself in the document, not a link — so changes to the original file are *not* reflected in the embedded file. To embed information in a Notes document, use the following steps:

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1. Open or create the file in its original program.
2. Copy the information to the clipboard using techniques appropriate to the server application.
3. In the Notes document, position the cursor where you want the data to appear.
4. Click the Edit Paste Special SmartIcon or choose **Edit→Paste Special**, and in the dialog box that appears, leave **Paste** selected (instead of choosing **Paste link to source**).

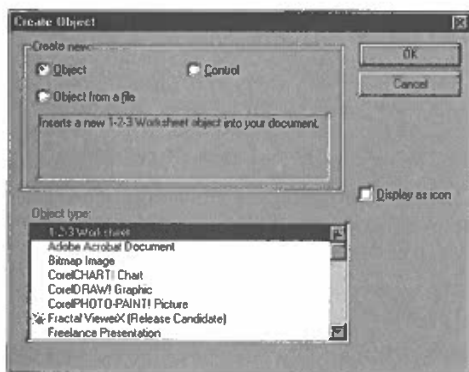


5. In the **As** list box, be sure that the name of the source application is selected. (Don't choose **Picture**, **Rich Text**, or another clipboard format.)
6. Click **OK**. The data (or an icon) appears in the Notes document.

Embedding a whole file

You embed part of a file when you don't think your readers need to see all the information in the original file. The techniques that we describe previously embed part of a file in your document. Another way to embed data in a Notes document is to embed the whole file. You can even embed the file before you create it. To embed a whole file, use these steps:

1. Place the cursor in the Notes document in which you want to embed the file.
2. Choose **Create→Object** to see the Create Object dialog box.



3. If you're going to embed and then create the file, choose **Object**. If you're going to embed an existing file, go directly to Step 6.
4. Select the program in which you want to create the new file from the list of programs under **Object type**.
5. Click **OK**. When the other program opens, create and save the file; it then appears in the Notes document.
6. To embed an existing file, choose **Object from a file**.
7. Click the **Browse** button, which appears in the dialog box after you choose **Object from a file**, to locate the file that you want to embed if it is not listed in the directory displayed under **File**.
8. In the **Browse** dialog box, highlight the file that you want to embed and click **OK**. The file appears in the Notes document, either in its original form or as an icon.

Activating an embedded file

Embedding an object doesn't require the readers of the Notes document to have access to the original file, because they have their own copy of the file in the Notes document. However, each user must have the server application to edit the original data.

To activate the original data so that you can edit it, double-click the embedded data. The server application and the file open. Remember that any changes to the embedded file on one user's version of a document do not appear in other users' copies of the document, depending on whether the documents are replicated to all other users. Also, remember that the original data and the data in the Notes document are not linked in any way.

View Exports

Exporting from a view turns a view into a separate file so that you have a tabular file containing the contents of the view. Although exporting a view to a spreadsheet is the most common kind of view-level export, you can export a view to any of the following file types:

- ◆ A worksheet that is compatible with any version of Lotus 1-2-3 and accessible by most other spreadsheet and database programs, such as Excel, dBASE, and Paradox
- ◆ A structured text file such as an ASCII file, which you can then import into another program
- ◆ A tabular text file, which is easy to import into other spreadsheet and database programs

To make a new file out of a view, follow these steps:

1. Open the database and switch to the view that will be the basis of the file that you create. Only the data appearing in the view appears in the spreadsheet, so be sure that you choose the correct view.
2. If you only want to export some of the documents to a spreadsheet, select them.
3. Choose **File→Export**.
4. In the **Save in** drop-down list that appears, specify the drive and directory where you want to save the file.
5. Use the **File name** dialog text box to give a filename to the exported file.
6. Click **Export**.
7. A second dialog box appears. Use it to tell Notes whether you want to export **All** documents in the view or just **Selected** documents (the ones you selected in Step 2).
8. Click **Include View titles** to make each column heading in the worksheet match the database's field names. If you don't choose this option, the spreadsheet will have no column headings.
9. Click **OK**. Notes creates a Lotus 1-2-3 worksheet for you based on the view that's open.



If you intend to export data from a Notes view to a program other than Lotus 1-2-3, you should still export the view to a Lotus 1-2-3 worksheet and then use that other program to further convert the worksheet. Take it from us: Using Lotus 1-2-3 is much easier than using the structured or tabular text formats.

View-Level Imports

View-level imports bring many documents into Notes at one time. This method can turn a Lotus 1-2-3 worksheet into a view, and each row in the spreadsheet becomes a separate document in a Notes database. Each column represents data in a specific field in each document.

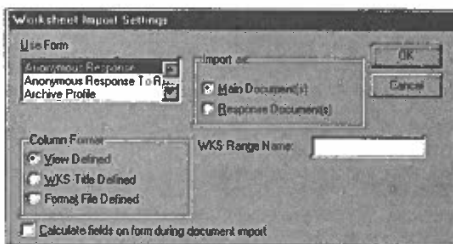
To turn a spreadsheet full of data into a Notes view, follow these steps:

1. Create a 1-2-3 spreadsheet with no formatting and no blank rows. Also, be sure that the column headings for the worksheet are in row 1 of the worksheet and be sure that they are exactly the same as the field names in the Notes database. The rows of spreadsheet information must begin in row 2 of the worksheet and must be in a solid block. You can't have any blank rows in the middle of the spreadsheet, because you then get empty documents in your database.



Here are two suggestions: If the requirements in Step 1 mean big changes to an existing spreadsheet, make the changes and save the spreadsheet under a new filename. Also, if you need to import another kind of file, such as a large text file or an Excel worksheet, you should convert that file into a Lotus 1-2-3 worksheet and then import the Lotus 1-2-3 worksheet into Notes.

2. Open the database into which you're importing the worksheet. Make sure that you have a view on the screen and then choose **File→Import**. Don't open a document or try to compose a new document; the data will be imported into the document instead of the view.
3. Using the Import dialog box that appears, select the file that you want to import and (by using the List Files of Type drop-down list) tell Notes that the file is a 1-2-3 worksheet.
4. Click **Import**. Notes presents you with yet another dialog box. Here you can tell Notes how to import the rows of the spreadsheet.



5. In the dialog box, you have to make five decisions:

- Which form in the Notes database is used to display the new documents
- Whether the new documents are main documents or response documents
- Which range in the spreadsheet to import — either the cell coordinates (such as A1 . . . D341) or a range name
- How the fields are named (If you carefully followed the advice in Step 1, including taking care to make the spreadsheet column headings match the field names, you can choose WKS Title Defined, the easiest of the three choices.)
- Whether Notes should calculate any field formulas (previously defined on the form) for each document as it is created

6. Click **OK**. Notes imports the worksheet and converts each row into a document in the database.

The Web and Notes

Notes enables you to browse the World Wide Web from the comfort of your desk chair and your Notes workspace. Before you do any browsing, you need to specify how you plan to browse. To specify which browser to use, follow these steps:

1. Click the name of the location in the status bar (second box from the right).
2. Choose Edit Current from the pop-up menu that appears.
3. Click the Internet Browser tab of the location document that appears.

4. Click the down arrow next to the Internet Browser field. You have five choices:
 - **Notes:** Notes uses its own browser.
 - **Notes with Internet Explorer (the recommended choice and the default):** Notes adds the power of Internet Explorer to its own Web browser.
 - **Netscape Navigator:** Notes switches to Netscape Navigator for browsing.
 - **Microsoft Internet Explorer:** Notes switches to Microsoft Internet Explorer for browsing.
 - **Other:** Notes switches to another browser that you specify.
5. Click Save and Close at the top of the location document.

For more information about editing location documents, *see* Part V.

If you chose to use Netscape Navigator, Notes with Internet Explorer, Microsoft Internet Explorer, or another Web browser, you're done. However, if you choose to use Notes as the default browser, you need to make a few additional changes. Occasionally, a Web page may have an embedded program called a Java Applet, which makes the page dynamic. You have to tell Notes to enable these applets to make the page work as it's supposed to.

To tell Notes to enable applets, follow these steps:

1. Choose **File**⇨**Preferences**⇨**User Preferences**.
2. On the Basics page of the dialog box that appears, scroll through the list under **Advanced Options** and click on **Enable Java** and **Enable Java access from JavaScript**.

As you scroll through the Advanced Options, you should make two other adjustments: To allow Notes to display the contents of Web pages that it may not be able to display on its own, click on **Enable ActiveX** in Notes Browser and **Enable Plugins**, also in Notes Browser. Happy browsing!



Notes the Way YOU Want It

You may know so much about Lotus Notes that you recognize changes you would like to make in the way the program operates. Or you may want to refer to this book's previous sections on how Notes normally operates before you decide. Either way, this chapter covers the most important areas in which you have a say about how Notes behaves and ways to avoid problems.

In this part . . .

- ✓ **Maintaining certification**
- ✓ **Using passwords**
- ✓ **Creating subscriptions**
- ✓ **Managing SmartIcons**
- ✓ **Setting user preferences**
- ✓ **Customizing the workspace**
- ✓ **Sending newsletters**



Certification

In Notes, you use a *Notes ID* that has one or more *certificates*. Your ID says that you are a Notes user, and the certificates tell which organizations permit you to access their servers.

Certification expires after a couple of years. When your certification is about to expire, a reminder prompt appears on your screen telling you that you need to get recertified; otherwise, on some dark day in the not-too-distant future, you will find that you simply can't access any Domino servers. Ordinarily, you receive a notice from the Notes administrator telling you that your number is up and you need to get recertified soon.



To see when your certificate expires, choose **File⇨Tools⇨User ID** and then click **Certificates**. Highlight each certificate (assuming that you have more than one — most people don't) and information appears below telling you when that certificate expires.

Another reason to get certified is that you may need to use databases on a server in another company or another *domain* (users and servers created with a different certificate) in your company. Because that company or domain uses a different certificate, you won't be allowed access to those servers or databases.

The good news is that getting certified is easy. And you don't need to get recertified very often. Here's what you do:

1. Use **File⇨Tools⇨User ID**.
2. Click **Certificates**.
3. Choose **Request Certificate**.
4. In the dialog box that appears, type the name of the person you're sending your request to. If you don't know, ask around your organization for the name of the *certifier*, the person who issues certificates.
5. Click **Send**.

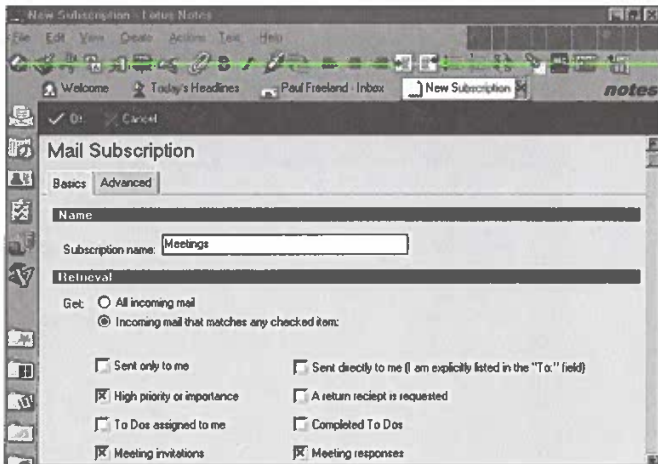
Wait for the certifier to send you a return memo with your certification attached. When this joyous event occurs, open the memo and choose **Actions⇨Accept Certificate**. Type your password in the dialog box that appears and click **Accept**. You're now the proud owner of a certificate.

Headlines and Subscriptions

Headlines is actually just another Notes database in which you create *subscriptions* to other Notes databases and Web pages (if you're connected to the Internet). The subscription performs a text search of the specified databases and Web pages. The first time you run Notes, it creates the Headlines database automatically.

Here's how to create a subscription:

1. Choose **File**→**Database**→**Open** and select a Headlines database on a server.
2. Choose **Create**→**Subscription** and specify the criteria for types of documents you want to see in the Headlines database.



When the subscription conducts a database and Web search, Notes adds the documents to the Headlines database.

Locations

If you and your laptop are always on the go — jumping into planes, staying in hotels, working at home, and sometimes plugging into the network at the office — you need to configure Notes to behave differently in each of those places. Fortunately, you only have to configure each location once.

Selecting a location

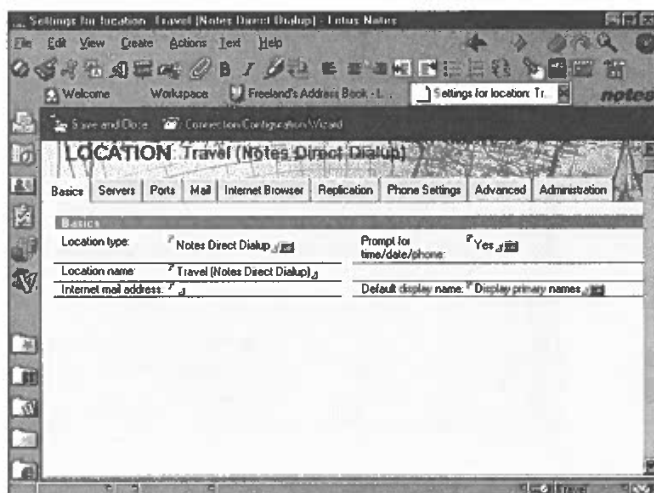
To tell Notes where you are currently working, click the next to the last box at the right end of the status bar. (The box contains a word such as *Home*, *Internet*, *Office*, or *Island*.) In the list that appears, click your current location.

Changing location information

Your Personal Name & Address Book contains several *location documents*. Each one tells Notes how to behave when you're in a specific location. You may need to change some of the location documents to reflect your own information, such as telephone numbers.

To change the settings for a given location:

1. Click to select the location in the status bar.



2. Click the location box in the status bar and choose Edit Current. The location document opens in Edit mode.
3. Make all necessary changes. The specifics vary with each location, each user, each company, and each computer, so we can't help you with the details. Once again, your Notes administrator is the source for the information you need.
4. Click Save and Close.

Setting the location prompt

You may occasionally forget to tell Notes that you're at a new location. To remind you to set the current location parameters, Notes can prompt you on startup to choose the current location.

To tell Notes to prompt you for a location when you start the program, follow these steps:

1. Choose **File**⇨**Preferences**⇨**User Preferences**.
2. Click **Basics** in the User Preferences dialog box.
3. Click to place an **X** in the **Prompt for location** box.
4. Click **OK** to dismiss the User Preferences dialog box. A warning box appears to tell you that some settings may not take effect until you restart Notes.
5. Click **OK**.

Logging Off Notes

When you leave your computer, someone else can sit down and use Notes as if he or she were you. So you want to log off Notes so that no one can use your Notes ID, just as you take your keys when you leave your car. The easiest way to prevent unauthorized use of your ID is to press the F5 key to log off. A message in the status line says "Private user information cleared," which means that the next time you or another person tries to use Notes, the password prompt appears.

Here's how to make Notes log you off automatically after a short time (in case you forget to press the F5 key):

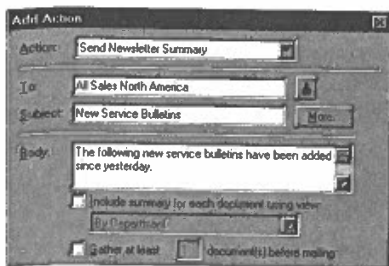
1. Choose **File**⇨**Preferences**⇨**User Preferences**.
2. Click **Basics**. A dialog box appears in which **XX** represents the number of minutes of inactivity before Notes locks your ID.
3. Enter the number of minutes you want Notes to wait.
4. Click **OK**.

Newsletters

A Notes newsletter is a memo, sent to selected recipients, that contains links to documents newly arrived in a database. You can set a newsletter agent (macro) to scan the database daily for new documents that contain specified words.

To create a Notes newsletter, follow these steps:

1. Open the database from which you want the newsletter sent.
2. Choose **Create**⇒**Agent** or **Create**⇒**Design**⇒**Agent**.
3. Give the agent a descriptive name, such as Newsletter.
4. Determine how often you want Notes to send a newsletter (for example, weekly, daily, or hourly) by making the appropriate choice in the box for When should this agent run on Local.
5. In the box for Which document(s) should it act on, select All new and modified documents since last run.
6. If appropriate, click the Add Search button, and then enter the text you want the agent to search for in documents.
7. Click Simple action(s) and click Add Action.
8. In the Action list that appears, choose Send Newsletter Summary.



9. Add recipients' names in the To box. To be sure of spelling, paste the names from the Public Name & Address Book.
10. Add a short description in the Subject box.
11. To provide an overall summary for all linked documents, select Include summary for each document using view. Then select the view from which information should be copied. For example, if the named view contains author and subject columns, the one-line summary adds that information next to the document links.

12. To hold newsletters until a given number of new documents have been added, click Gather at least and type the number of documents that must be collected before the newsletter is sent.
13. Click QK.
14. Close and save the agent.

Passwords

If any bad guys are watching over your shoulder when you type your password, they're bound to figure out how to use it. Or if you once tell people your password so that they can work with your user ID, they have information that may someday be used to your disadvantage. So be sure to change your password periodically.

Here's how to change your password:

1. Choose **File**⇨**Tools**⇨**User ID**.
2. Enter your current password.
3. Click on **Basics**.
4. Click the **S**et **P**assword button.
5. Once again, enter your current password.
6. Enter the new password in the Set Password dialog box that appears. Keep in mind that passwords are case sensitive.
7. Enter the password a second time when prompted, to confirm what you typed the first time.
8. Click **D**one in the User ID dialog box.

As you decide on a password, keep in mind the following:

- ♦ You may use a password of any length, unless your administrator has set a minimum length. If so, the dialog box tells you what the minimum is.
- ♦ Notes recommends a minimum of eight characters, simply because figuring out a long password is much more difficult than figuring out a short one.

- ◆ Obviously, you want your password to be something you can remember. We all have to remember Social Security numbers, credit card codes, login names and passwords, gym locker combinations, in-laws' birthdays, and the date of our tetanus booster. If we forget one of these, somebody treats us as if we're wearing a clown suit. If you set a Notes password and forget it, you need to contact the Notes administrator and ask for a reminder.
- ◆ Obviously, too, you want your password to be something others can't figure out. Using your own first name is not the most secure password.
- ◆ Passwords are case sensitive, so *PASSWORD* is different from *Password* is different from *password* is different from *pAssword* is. . . .
- ◆ As you type in your password, only Xs appear on-screen. This is to protect your password from over-the-shoulder snoopers. Notes takes passwords *very* seriously.
- ◆ After you create your password, Notes prompts you to enter it a second time to be sure that you didn't make a mistake.



Password-protecting the ID file on your main computer has no effect on your laptop's copy of the ID. The best way to handle this problem is to password-protect the ID on your main computer, copy the ID to a floppy disk, and then copy the ID from the floppy disk to your laptop. Delete any copies of the ID file that are not password-protected or keep them under lock. (Usually, people say "lock and key," but if the key were around, why bother with the lock?)



Each of your ID files may have different certificates associated with it. If you have an ID on a floppy disk and one on your hard disk, use **File⇨Tools⇨Switch ID** and pick each ID, one at a time. You can see what certificates are associated with an ID file by choosing **File⇨Tools⇨User ID** and clicking **Certificates**. Add a password to the ID with the largest number of certificates and copy that ID to the floppy disk and your other computers. If each ID has different certificates, add the password to each ID separately.

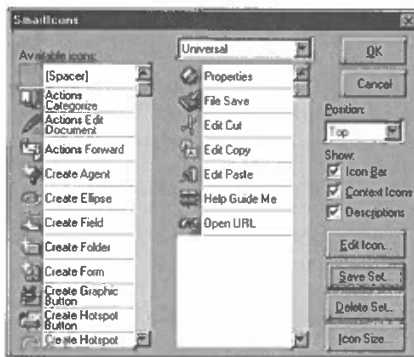
SmartIcons

SmartIcons are useful, no doubt about it. But you may decide to rearrange the order so that the ones you use most often are at the left, or you may decide to add a SmartIcon for a task that you often perform but isn't among the SmartIcons displayed.

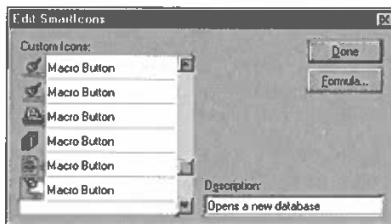
Creating new SmartIcons

A Notes power user, such as your worthy self, may find that the selection of SmartIcons doesn't contain everything that you need. If you'd like to have a new SmartIcon that you can click instead of choosing a series of menu items, you can create a customized SmartIcon, like this:

1. Choose **File**→**Preferences**→**SmartIcons**. The SmartIcons dialog box appears.



2. Click **Edit Icon**.
3. Scroll down through the Custom Icons to find a Macro Button with a graphic that most closely resembles the task that you want to perform with the SmartIcon.



4. In the **Description** text box, enter a short descriptive title for the SmartIcon.
5. Click **Formula**.

6. In the SmartIcons Formula dialog box, enter the formula. Use the Add @Func or Add Command button to be sure that the spelling and syntax are correct.
7. Click **OK**.
8. Click **Done** to close the Edit SmartIcons dialog box.
9. In the SmartIcons box, be sure that "Universal" appears in the text box above the middle column of SmartIcons.
10. Drag the Macro Button that you want to use from the Available icons box to the middle box, the Universal SmartIcons box.
11. Click Save Set to save the palette with the new SmartIcon.
12. In the Save Set of SmartIcons dialog box, type **Universal** in the Name of Set box and **universe** in the File name text box. Click **OK**.
13. Choose **Yes** to overwrite the old set of Universal SmartIcons.
14. Click **OK** to dismiss the SmartIcons dialog box.

Your new icon appears in whatever toolbar is appropriate for the context in which you're currently working.

Changing the display of SmartIcons

You may notice that Notes doesn't display all the icons you need or displays some icons you don't need. You can change the display by using SmartIcon Preferences to create a new icon set and then choosing to use that set. Here's how:

1. Choose **File**→**Tools**→**SmartIcons**.
2. Scroll down through the Available icons until you get near the end of the list where the Macro Buttons appear.
3. Drag each SmartIcon that you want to add from the Available icons box to the middle box, the Universal SmartIcons box.
4. Drag any SmartIcons you don't want out of the middle box. You don't have to drag them to any location, just drag them one by one out of the box.
5. Click **Save Set** to save the new SmartIcons.
6. In the Save Set of SmartIcons dialog box, type **Universal** in the Name of Set box and **universe** in the File name text box. Click **OK**.
7. Choose **Yes** to overwrite the old set of Universal SmartIcons.

8. Click **OK**. Choose **File**⇨**Preferences**⇨**SmartIcons** to change the location of the SmartIcons. If having the SmartIcons at the top of the screen bothers you, or you just want to experiment with other locations, click on **Position** and choose **Left**, **Top**, **Right**, or **Bottom**.

If you lost your glasses, or your contacts are in upside down, and you can't make out one SmartIcon from the next, click on **Icon Size** and then choose **Large**. The right end of the complete set may disappear off the screen during those times when a large set of icons is needed on the screen. You can't have your SmartIcon cake and eat it, too.

User Preferences

You can make important choices about the Notes desktop and working environment. By choosing **File**⇨**Preferences**⇨**Notes Preferences**, you can change **Advanced Options** settings such as the following:

- ♦ **Mark documents read when opened in the preview pane** — so you don't think the documents are still unread
- ♦ **Make Internet URLs into hotspots** — so you can click URLs in Notes documents and easily open Internet documents and Web pages
- ♦ **Textured Workspace** — so you can make the background in the desktop behind the database icon look like cloth rather than dull plain white
- ♦ **Right double-click closes window** — so you can use a default feature from an earlier release of Notes that makes it easier to close any Notes window, except the desktop
- ♦ **Accept Cookies** — so you can tell Notes to allow Web pages to deposit cookies locally

Remember: Some of these settings may not take effect until the next time you start Notes.

Choosing e-mail options

You can make several significant changes in the way Notes handles your e-mail — specifically the way Notes notifies you of new e-mail and the way it handles a new memo after you finish writing it. For example, depending on your preference and the tolerance of those who work near you, the little tune Notes plays when you have new e-mail may be handy or a pain in the neck.

Here's how to determine whether and how Notes notifies you when you have new e-mail:

1. Choose **File**⇨**Preferences**⇨**User Preferences**. A User Preferences dialog box appears.
2. Click **Mail**.
3. To receive notification that you have new e-mail, be sure a number replaces the XX in Check for new mail every XX minutes. The number represents the frequency with which Notes checks your e-mail. If this option is deselected, you still receive e-mail but without any Notes notification.
4. Select **Audible notification** if you want to hear the tune, **Visible notification** if you want to see an envelope plus the "You have new mail" message in the Status bar, both if you really want to be sure that you know when the mail is in, and neither if you don't care.
5. Click **OK**. A warning box appears to tell you that some settings may not take effect until you restart Notes.
6. Click **OK**.

When you close a memo after writing it, Notes can automatically handle saving, signing, and encrypting the memo.

To set these options, follow these steps:

1. Choose **File**⇨**Preferences**⇨**User Preferences**. A User Preferences dialog box appears.
2. Click **Mail and News**.
3. In the **Save sent mail** drop-down list, choose from the following:
 - **Always keep a copy** — to save the memos you write
 - **Don't keep a copy** — not to save the memos you write
 - **Always prompt** — to be given a choice of saving or not saving each memo
4. Click **Sign** sent mail, to attach automatically your digital signature to all outgoing memos.
5. Click **Encrypt** sent mail, to encrypt automatically the body field of all outgoing memos.
6. Click **Encrypt** saved mail, to encrypt automatically the body field of all memos saved in your e-mail database. This option encrypts e-mail that you have created, sent, and kept a copy of. (Encryption of e-mail you receive is handled by the sender.)

7. Click **OK**. A warning box appears to tell you that some settings may not take effect until you restart Notes.
8. Click **OK**.

Changing e-mail notification

If you use Windows, Notes can play a WAV file instead of using the boring old “beep beep beep” sound to tell you when e-mail arrives. To tell Notes to play your special tune, follow these steps:

1. Add the following line to your NOTES.INI file:

NewMailTune=c:\windows\tada.wav

2. Substitute your favorite WAV file for *tada* and be sure to specify the correct path (the c:\windows part of the file information).

To hear this change, your system must include a speaker that can play music. Assuming that it does, prepare for a real symphonic delight!



NOTES.INI is an ASCII file full of configuration information. The file is usually located in your Windows folder. You can edit it by using either the Windows Notepad or the SysEdit program. This is only available if you use Notes in MS Windows.

If you work under, shall we say, *crowded* conditions, and every few minutes someone's computer plays that catchy little tune signifying that new mail has arrived, the office can sound like a nursery full of little kids playing those annoying toy pianos. If you receive complaints about your noisy computer, the following steps may make you more popular.

To silence the constant “beep beep beep” signal that Notes uses to alert you when new e-mail arrives, follow these steps:

1. Choose **File**→**Preferences**→**User Preferences**.
2. Click the **Mail** button.
3. After the mail page appears, click to turn off **Audible Notification** and click to turn on **Visual Notification**.

When you have new mail, the message “You have new mail” appears quietly in your status bar. You can always change your mind later and go back if you decide that you miss those “beep beep beep” alerts.

Scanning for unread documents

You can arrange for Notes to scan automatically all databases at startup and call unread documents to your attention.

Here's how to scan for unread documents:

1. Choose **File**⇨**Preferences**⇨**User Preferences**. The User Preferences dialog box appears.
2. Click **Basics**.
3. Click to place an **X** in the **Scan for unread** box.
4. Click **OK**. A warning box appears to tell you that some settings may not take effect until you restart Notes.
5. Click **OK**.

The next time you start Notes, it prompts you in the Scan Unread dialog box to specify which databases to scan. These are the choices that you can make:

- ♦ **View First Unread** takes you to the first unread document in the database that's named at the top of the dialog box.
- ♦ **Mark All Read** marks all unread documents as read but only in the database that's named at the top of the dialog box.
- ♦ **Skip This Database** tells Notes to go on to the next database that contains unread documents.
- ♦ **Choose Preferred** takes you to a dialog box in which you can specify which databases you want Notes to scan for unread documents (after all, you may not want to scan every database on your desktop).
- ♦ **Done** tells Notes to forget the whole thing and closes the Scan Unread dialog box.

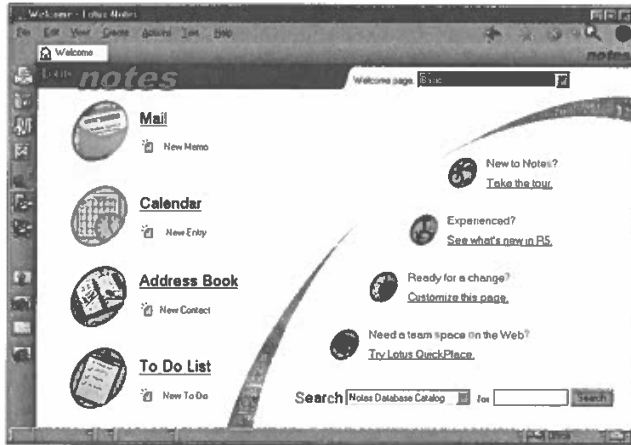
Setting international options

Click **International** (below **Basics** in the User Preferences box) and, among other things, you can change the following:

- ♦ **Regional settings**, which determine the language Notes uses when deciding how to sort documents in views
- ♦ **Calendar settings**, such as the day that is considered the first day of the week in a particular country
- ♦ The measurement units from **Imperial** (gallons, inches, miles, six-packs) to **Metric** (meters, liters, tweeters)
- ♦ The dictionary (so that when the spell checker finds errors, it presents the correct alternative spellings for your context)

The Welcome Page

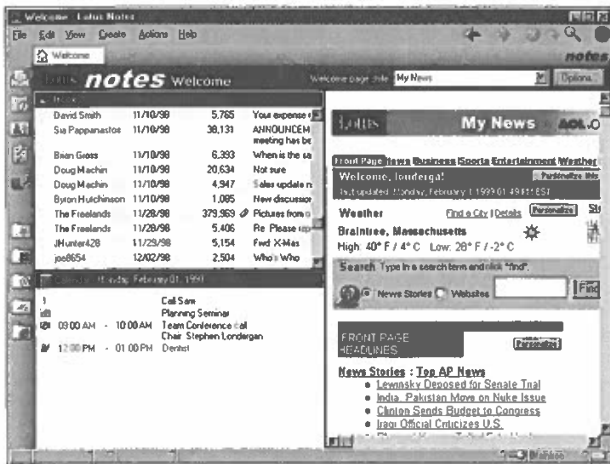
When you start Notes, you are confronted with the Welcome Page, as shown in the following figure.



A couple of factors determine what you see displayed in the Welcome Page. First, you can change the Welcome Page's layout and contents, as we discuss later. Second, your administrator has some control over what you see — so that he or she can make sure that you see important announcements, and so on.

In general, though, you can safely bet that your Welcome Page (however it's set up) is divided into a couple of sections, known as *frames*. For example, the following figure shows a sample Welcome Page belonging to some guy named Steve Londergan. It has three frames: One contains his Inbox, one his schedule, and one a Web page.

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Changing the Welcome Page

You can easily change the layout of your Welcome Page: Simply choose the layout you want from the Welcome page style drop-down list, as shown in the following figure.



Notes comes with these three Welcome Page styles:

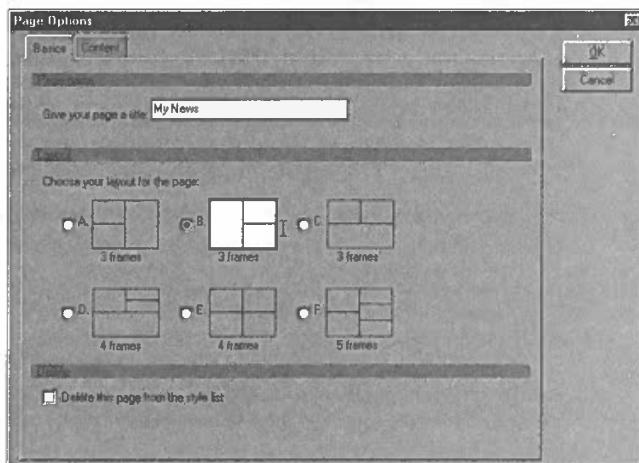
- ◆ **Basics** is the simplest. It's the default style and displays the Welcome Page with all those pictures of kids.
- ◆ **My News** is a little more informative. It contains three pages: one for your Inbox, one for your calendar, and one for a special news page from America Online.
- ◆ **Notes and Domino News** is similar to My News but has a Web page from the Lotus Web site instead of America Online.

Remember: If you're happy with the layout and content of one of these Welcome page styles, just pick the one you like, and you're in business. If, on the other hand, you want to customize the Welcome Page — perhaps add another frame or change what's in one of the frames — select the style you want and then click the Options button.

Customizing the page

As we mention previously, you can customize the Welcome Page in a couple of different ways. You can choose exactly how many frames of information the page contains, and you can change each frame's content.

To modify the layout or content of a Welcome Page, first select the Welcome Page you want to change from the Welcome page style drop-down list and then click the Options button. The Page Options dialog box appears.



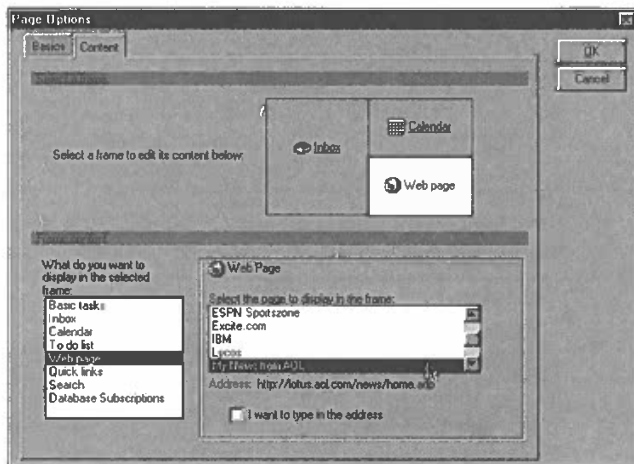
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To modify the layout of the Welcome Page, follow these steps:

1. In the Page Options dialog box, click the button for the number of frames and the presentation style that you want the Welcome Page to use. You may choose any one of the six layouts — but remember that the more frames you have, the less information you can see in each.
2. (Optional) Enter new text in the Give your page a title box, if you want to change the Welcome Page's name.
3. Click **OK** when you finish customizing the page's layout.

Here's how to change the content of the Welcome Page:

1. Click the Content tab on the Page Options dialog box.



2. Click the frame that has the content you want to change.
3. Select what you want the frame to show from the Frame content list.
 - **Basic tasks** shows the Open Mail/Open Calendar/Open Address Book buttons.
 - **Inbox** shows the Inbox folder in your e-mail database.
 - **Calendar** shows your meetings and appointments.

- **To-do list** shows your tasks.
- **Web page** shows a Web page. To do so, you also must select or enter the page's URL.
- **Quick links** enables you to display a set of links to your favorite places.
- **Search** presents the Notes search options.
- **Database Subscriptions** shows the results of your subscriptions (if any).

4. Click **OK** when you finish customizing the page's content.

The good news is that it's pretty hard (impossible, actually) to screw this up, so the best approach is to experiment with the various layout and content styles until you find one that you like. You can change from one style to another anytime you want.

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Techie Talk

@Function: A formula element containing preprogrammed calculations that make writing a formula much easier. Examples are @Sum, @UserName, @Now.

Accelerator key: A keystroke combination used to accomplish the same thing as choosing a menu item. Ctrl+Z is the accelerator key for Edit⇨Undo.

Access Control List (ACL): The part of every Notes database that determines who can do what in that database. See also *Author*, *Depositor*, *Designer*, *Editor*, *Manager*, *No Access*, and *Reader*.

Actions: Tasks that normally involve several keystrokes and that are assigned to buttons and/or a special menu and then associated with views, forms, and folders so that you can easily perform them. Actions are what happen when you click buttons in the Action bar.



Administrator: The person who is in charge of running the Domino servers at your company and to whom you should turn if you have questions or problems.

Agent: A miniprogram or set of instructions that automates tasks in Notes. (Formerly called *macros*.)

Alarm: A visual or audible reminder of a scheduled event in your calendar.

Application designer: The person at your company who created the database(s) you use. Also known as *Database manager* and *Application manager*.

Application server: (1) A Domino server that is only used for application databases — in other words, it does not have anybody's e-mail database on it. (2) A computer application used to create data linked to or embedded in Notes documents.

Archive: A special copy of an e-mail or another database containing documents selected for storage away from current active documents.

Archive log: A summary of the documents that have been put in an archive database.

Archive profile: A special form used to set the criteria for determining which documents should be put in an archive.

Attachment: A file (Lotus 1-2-3 worksheet, Microsoft Word document, and so on) that has been included in a Notes document. You can only put attachments in a rich-text field.

Author: (1) The person who composes a document and (usually) the only person who can edit or delete it. (2) A level of access you can have to a database. As an author, you can read documents, compose new documents, edit your own documents, and delete your own documents. (3) Someone like the fine people who wrote this book.

Balloon help: The things that show you what each SmartIcon does. Normally a Macintosh term, balloon help is becoming more common in Windows programs.

Bookmark: A pointer to a Notes item (a search or database, for example) or an item on the World Wide Web.

Browse: The official, more dignified term for surfing or cruising the Internet. Call it what you want; it means you look for information or just wander around (electronically, of course) to see what there is to see.

Browser: A program used to view Web pages on the Internet. Notes has a built-in browser. Browsers are also available from other companies, including Microsoft and Netscape.

Button: A rectangular picture that, when clicked with the mouse, launches some action or task.

Calendar: A section of your e-mail database containing time-related documents (appointments, meetings, birthdays).

Category: A line in a view that doesn't represent a document, but rather data that is the same in a given field in all documents listed below the category. For example, all documents with *Nebraska* in the state field could be listed below a line containing *Nebraska*.

cc:Mail: Another program from Lotus Development Corporation that's used for e-mail. At many companies, some people use Notes for e-mail and others use cc:Mail.

Certificate: A special "stamp" for your USER.ID that your administrator gives to you. You have to have a certificate specific to your company to use the servers at your company.

Client: Another term for *workstation*, the version of Notes installed on users' computers.

Clipboard: A section of computer memory used to hold something you have copied or cut and plan to paste somewhere else.

Common name: The part of your Notes User Name that sounds like what your mother calls you. For example, if your User Name is Stephen Londergan/Lotus, your common name is just Stephen Londergan.

Compound document: A document containing information from more than one program.

Connection document: A document in your personal Name & Address Book that tells your workstation when and how to call the server.

Database: In Notes, a collection of Notes documents, folders, views, agents, and other design elements. In general, any organized collection of information.

Database template: A shell of a database that you use as a starting point to create your own database. A real timesaver.

DDE (Dynamic Data Exchange): A copy of a document created in another application and placed in a Notes document. It retains a link to the original document, so changes to the original are reflected in the copy.

Default: A decision about an action or condition the program makes for indecisive users or users who have not expressed a specific preference. Default text color, for example, is black.

Delivery report: A return message that tells you when a message you sent was delivered to the recipient's e-mail database.

Depositor: A level of access that you can have to a database. As a depositor, you can only add documents to a database. You cannot read, edit, or delete them.

Designer: A level of access that you can have to a database. In addition to having all the rights that editors have, designers can change a database's forms and views.

Designer client: Separate Notes software that enables users and designers to modify database elements.

DESKTOP.DSK: The file on your workstation that keeps track of what databases are on your workspace and which documents in them you have already read.

DocLink: An icon in one document that you can double-click to quickly go to a different document.

Document: (1) An individual item in a Notes database. In other database programs, a document would be called a *record*. (2) A file created in a word-processing program, such as Microsoft Word.

Domain: (1) All the Domino servers at your company. (2) What a king or queen is in charge of.

Domino: Used synonymously with "Notes." More specifically, the term refers to the aspects of Notes that relate to working with the World Wide Web.

Edit mode: The status of an on-screen document in which you can change the contents of fields. The opposite of *Read Mode*.

Editor: A level of access that you can have to a database. Editors can read documents, compose documents, and edit documents, even if they didn't compose the documents in the first place.

Electronic signature: A special numeric code added to a document to prove that it really was written by the person who sent it.

E-mail: An electronic mail message.

Embedded object: Information included in a Notes document that came from another program. You can double-click an object to edit it, if you have the originating program on your computer.

Encryption: A procedure in which a document or part of a document is scrambled until opened by a person who has the proper key.

Encryption key: The numeric code used to scramble and unscramble a document or part of a document.

Error message: A dialog box that Notes shows when you make those all-too-frequent mistakes.

Export: A way to turn Notes documents into files for use in other programs, like Lotus 1-2-3 or WordPerfect.

Fax: A process of sending a picture of a document over a phone line.

Field: A place in a database form for specific, individual pieces of information. *First Name* could be a field in a personnel data form.

Folder: A database element that lists documents in a database. You put documents in and remove documents from a folder.

Footer: Text that appears at the bottom of every printed page.

Form: What you use to compose, edit, and read documents.

Frameset: A design element of a database that enables designers to display several types of information in their own sections of a Web page.

Full-text index: Part of a database that locates words and phrases in all documents in a database, so that you can later search for text in those documents.

Full-text search: Searching for text or phrases in documents in a database.

Fuzzy search: A command issued before executing a search in which you tell the Notes search engine to look for variations in or phrases similar to the text you're searching for.

Gateway: See *Mail transfer agent*.

Group: A collection of users' names, defined in either a public or personal Name & Address Book. Using group names saves having to type the individual names of people in a group when you send them e-mail.

Groupware: Software that enables several people to work together on computers.

Header: (1) Text that appears at the top of every printed page. (2) What you take when you fall over something.

Headlines: A database you configure to remind you of the most important new e-mail messages, calendar events, tasks, and modified Web pages.

Help document: A special collection of tips about how to use a database.

Hierarchical name: A user name that includes not only your common name but also your organization and the level or department in that organization.

Home page: (1) The opening screen in Notes containing tasks you can perform and locations to which you can navigate. (2) A main page of a Web site from which you can navigate to other pages in the site.

Home server: The one and only Domino server that has your e-mail database on it.

Hotspot: (1) A location in a form or graphic that, when clicked with the mouse, launches an action. (2) A place where you shouldn't sit.

HTML (HyperText Markup Language): The text and code that formats and displays information on Web pages.

Icon: A graphic used to represent a database, a program, or an action.

IMAP (Internet Message Access Protocol): An e-mail protocol that allows clients running it to retrieve e-mail from a host server that also runs the protocol (similar to POP3 with some additional features).

Import: What you do when you want to turn a foreign file, such as a Lotus 1-2-3 worksheet, into documents in a Notes database.

Index: Shorter name for the *full-text index*. Also refers to the background process by which views are updated to be sure they display current information.

Input validation formula: A formula included in a form that checks to be sure that you entered data in a field and that it's the right data type.

Install: A process or program that places a usable copy of a program on a hard disk.

Internet: A huge collection of computers all connected in a vast global network.

Intranet: Computer network with restricted access, usually set up within a company for employees only.

ISDN (Integrated Services Digital Network): International communication standard for sending voice, data, and video over digital telephone lines. Faster than modems.

ISP (Internet service provider): A company that provides members with Internet access.

Keyword field: A special kind of field that presents you with a list of choices for data input.

LAN (local area network): Rhymes with *man*. It's really just a bunch of wires that connect your computer to other computers.

LAN workstation: A computer that (1) has Notes installed on it and (2) is plugged into the network.

LDAP (Lightweight Directory Access Protocol): A set of protocols for accessing information directories.

Letterhead: Fancy graphics that you can include in mail database forms.

License: A right to use Notes. Here are the four types of Notes licenses: Server, Regular, Notes Mail, and Desktop.

Link: A graphic representation in one document of another document, database, or view. Click the link to open the other document, database, or view.

LMBCS (Lotus Multi-Byte Character Set): A set of characters including standard keyboard characters and characters not found on keyboards.

LN:DI (Lotus Notes Document Imaging): Pronounced *lindy*, this special program lets you include scanned images in a Notes document.

Location: A name and accompanying data that define the places where you use Notes, such as on the LAN at the office, on a modem at home, or not connected at all in the shower. *Locations* are defined in *location documents* in your Personal Name & Address Book.

Lotus Notes: The program that this book is about.

Macro: A minicomputer program of Notes commands. This is the old name for what are now called *agents*.

Mail database: The database that holds all your incoming and outgoing e-mail messages. No one but you can read the documents in your mail database.

Mail server: A Domino server that has mail databases on it.

Mail Transfer Agent (MTA): A special program that runs on a Domino server and converts Notes e-mail messages that are destined for other mail systems, such as the Internet or even a fax machine.

MAIL.BOX: A special kind of Notes database that holds messages that are pending delivery.

Manager: The highest level of access available for a database.

MIME (Multipurpose Internet Mail Extensions): Software that enables you to attach nontext files to Internet mail messages.

Modem: Hardware that enables you to use your Notes workstation to place a phone call to your Domino server. Useful if you need to read your e-mail and other Notes databases when you're at home or on a business trip.

Modem command file: A special ASCII file that Notes requires to use a modem. Every brand of modem has its own modem command file.

Mood stamp: Not to be confused with mood rings, a picture that Notes adds right at the top of a message, so that your reader knows what frame of mind you were in when you sent the message.

Mouse: A device that moves a pointer around your screen so that you can make selections without using the keyboard.

Name & Address Book: See *Personal Name & Address Book* and *Public Name & Address Book*.

Navigator: A database element that substitutes graphics and associated commands for normal menu items, making a database more user friendly.

NetBIOS: A network protocol sometimes used for Notes.

Network: A collection of computers that are connected by wires and that use a network operating system.

Network operating system (NOS): A type of software used to connect computers. Some common network operating systems include Windows NT, Novell, Banyan, and Pathworks.

Newsletter: A special memo that is automatically generated to notify users of new documents in a database.

NLM: An operating system used only on some Domino servers but never on workstations.

NNTP (Network News Transfer Protocol): Protocol that supports reading newsgroups, posting new articles, and transferring articles between news servers.

No Access: A level of access to a database. If you have No Access to a database, you can't use that database. Period!

Notes data directory: The directory on your computer's hard disk that contains your local databases, DESKTOP.DSK, and modem command files.

Notes data folder: The folder on your Macintosh that contains your local databases, DESKTOP.DSK, and modem command files.

Notes log: A special Notes database that keeps track of all the phone calls you make from your remote workstation — if you make any, that is.

NOTES.INI: An ASCII file on every Notes workstation that holds configuration information for that workstation.

Object: See *Embedded object*.

OLE (Object Linking and Embedding): Part of the operating system that lets you include information from other programs in a Notes document. Pronounced *OLAY*. See *Embedded object*.

Operating system: The program that runs your computer. Notes runs with the Windows, Windows NT, OS/2, UNIX, and Macintosh operating systems.

Page: On the Web, a screenful of information. In Notes, a page is a screenful of database-related information generally used as an opening screen.

Page break: A code you insert in a long document to instruct Notes to print subsequent text on a new sheet of paper. Normally, page breaks are not visible.

Pane: A section of a Notes window (window pane, get it?). The number, name, and purpose of the panes vary depending on the context.

Password: A secret code that you have to enter every time you use your user ID.

Permanent pen: (1) A unique font used to make editorial comments in a document. (2) A writing implement specifically designed to stain your clothes.

Person document: One kind of document in a Name & Address Book. In the public N&A Book, a Person document exists for each user at your company. You can also compose a Person document in your personal N&A Book to give one of your friends an e-mail nickname or to help you remember someone's complicated e-mail address.

Personal Name & Address (N&A) Book: A database on your computer's hard disk in which you can enter person, group, and connection documents.

Platform: Computereze that means the same as operating system.

Policy document: A document that describes the purpose of a database and the rules for its use. (Also called the About This Database document.)

Pop-up: A part of a Notes document that has hidden text associated with it. You view this hidden text by clicking on the word.

POP3: An e-mail protocol that allows clients running it to retrieve mail from a host server that also runs the protocol.

Port: The name for the part of your computer where your network or modem is plugged in. Some computers have more than one port; yours may have one port for the network and one port for the modem.

PowerBook: A portable Macintosh computer.

Power tie: A knot tied around the neck symbolizing extreme corporate fealty, but mistaken for a symbol of corporate authority.

Preferences document: The Macintosh equivalent of NOTES.INI.

Private key: The part of your user ID that's used to decrypt and encrypt your e-mail messages. See also *Encryption key*.

Private view: A view that's only on your workstation.

Properties box: (1) In Notes, a series of dialog box pages, each represented by a tab and each related to features (properties) of a given item. (2) A place to keep your childhood treasures.

Protocol: A techie term for the part of your network operating system that connects your Notes workstation with your Domino servers. You may hear about protocols called NetBIOS, SPX, or TCP/IP. Then again, you may never hear protocols mentioned.

Public key: The part of your user ID that other people use to encrypt e-mail messages for you.

Public Name & Address (N&A) Book: The database on the Domino server that defines all the Notes users, servers, groups, and connections at your company.

Query Builder: A dialog box you fill out that makes it easy to define the criteria for a full-text search.

Query by Form: A way to enter the criteria for a full-text search, using the same form that was used to enter the document in the first place.

Read Access List: A way to control which people can read a document that you compose. You set a document's Read Access List in the Document Properties box, on the page with the key tab.

Reader: A level of access that you can have to a database. As a reader, you can only read the documents that other people compose; you can't compose your own.

Relational database: A database program that allows the full sharing of data between databases and between forms within databases.

Remote workstation: A Notes workstation that is not connected to a Domino server via a network. Instead, remote workstations often use a modem to talk to the Domino server.

Replica ID: A special serial number that every database has that identifies it as the same database, even if copies of it exist on other servers.

Replication: The process used to synchronize two copies of a database between two servers or between a server and a workstation.

ResEdit: The program you use on a Macintosh to edit your Notes Preferences document.

Return receipt: A special kind of e-mail message that tells you when a recipient read an e-mail that you sent.

Rich text: A special field type that can include more than one font and formatting (such as bold and italics) and can contain embedded objects and attachments.

Ruler: The part of the Notes screen that you can use (if you choose to display it) to set margins and tabs in a rich-text field.

Search bar: The dialog box at the top of the screen (if you choose to display it) that enables you to specify the text to search for and rules for the search.

Section: Part of a Notes form or document with its own fields. It may be *collapsible*, meaning the user can choose to display or conceal its contents, and it may have *restricted access*, which means only designated people can edit its fields.

Selecting: (1) Designating text or data to be deleted, copied, or changed in some way. (2) Choosing documents in a view for such group treatment as categorizing, printing, or deletion.

Selection formula: A Notes formula used to designate which documents will be replicated.

Server: A shared computer that stores Notes databases.

Server-based e-mail: A setting you use that causes Notes to send off your messages immediately; the opposite of *workstation-based e-mail*.

Signature: Also called an *electronic signature*; a way for you to guarantee to the recipient that a message really, honestly, absolutely came from you.

SmartIcon: A picture representing an action you can take. Click the SmartIcon to initiate the action.

SmartIcon palette: A collection of SmartIcons.

Sort: (1) To put items in a list in order. (2) To match your socks.

Spam: Junk e-mail, or e-mail sent to too many people. Examples are hysterical notices that you are asked to “send to everyone you know” about Web-based viruses that eat hard disks for lunch and e-mails from Hot Stuff who has a personal message for you at her Web site.

SSL: Security protocol for the Internet and intranets.

Static text: Text in a form that doesn’t change. The title of a form is an example of static text.

Stationery: A template of various types of messages you may send.

Status bar: (1) A line of information at the bottom of the Notes window, part of which you can use to change parts of your document. (2) A drinking establishment on Main Street where they have cold beer and hot tunes. Closed Sundays; shoes and shirt required.

Styles: Named collections of paragraph attributes that you can assign to a paragraph all at once.

Subform: A section of a form — with its own fields, text, graphics, and design — that designers can use in multiple forms.

Subscription: An instruction you issue to Notes to send you a memo listing new information in Notes and Web locations that you specify.

Tables: (1) Small spreadsheets that you can insert into Notes documents. (2) A place to put your cold beer while you’re listening to the hot tunes at the Status bar.

Task button: One of the oval buttons above the Notes window work area; each button represents an open window in Notes and contains a short name of the window plus an X that’s used to close the task.

Task Center: The page in Notes containing the “portholes” that represent tasks you can do and places to which you can navigate.

Template: A special kind of Notes database used to create other Notes databases.

Type-ahead: The feature in Notes that gives you the ability to start typing something, such as the name of an addressee in a memo, and have Notes automatically recognize and finish it for you.

Universal Navigator bar: Have you noticed the number of bars in Notes? This one is located near the top of the Notes window and contains icons that enable you to perform tasks you associate with the Web, such as searching, going forward, going back, and stopping a process.

UNIX: One of the operating systems that supports the use of Notes workstations and servers.

Unread marks: Stars or colored text used in views to show you which documents you haven't read yet.

URL (Uniform Resource Locator): The address of any particular Web page.

Vacation profile: Special feature that you can use to reply automatically to messages you receive when you're on vacation.

View: A summary of the documents in a database. Most databases have more than one view.

WAN (wide-area network): A bunch of computers connected in some other way than by network cables — most frequently phone lines, satellites, and tin cans with string.

Web page: A document on a Web server that can contain graphics, links to other documents or pages, text, attached files, and multimedia features.

Web server: A computer somewhere on the Internet that hosts Web pages.

Welcome Page: Default screen in Notes that you can customize for easy access to commonly used tasks.

Window: One of the workpages that you open in a program. Each Notes window represents a separate Notes document, view, Web page, or task you perform. A task button near the top of the Notes screen represents each Notes window.

Windows: An operating environment that supports the use of Notes workstations and servers.

Workflow: Features added to a Notes database that enable users to assign tasks, to notify others of their responsibilities, and to track completion of tasks.

Workspace: (1) A Notes screen that contains the tabbed pages and database icons. (2) Any Notes window. (3) The place where your boss lets you work when you're good.

Workstation: The computer at your desk or (if you have a laptop) the computer in your briefcase. A workstation is the computer that each person uses to work with Notes.

Workstation-based e-mail: A setting that you use when your computer is not connected to a LAN, which causes Notes to queue up your outgoing e-mail until you place a phone call to a Domino server.

World Wide Web (WWW): A collection of computers on the Internet that have special pages you can view. See *Web page*.

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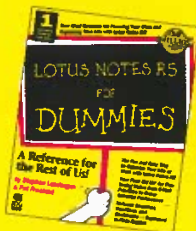
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