

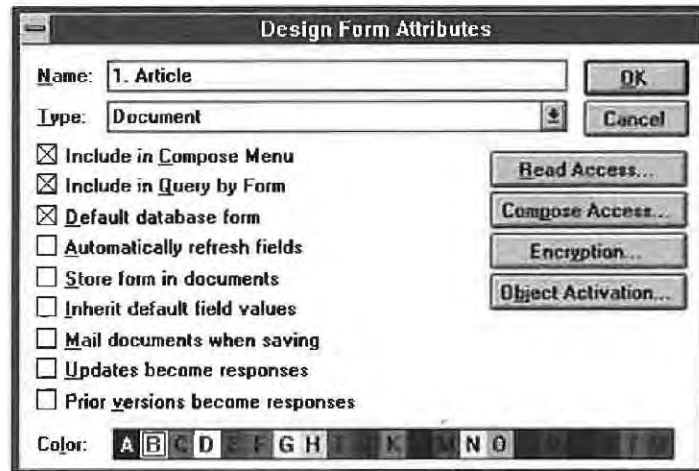
32 characters can appear in menus and dialog boxes. Form names appear in the Compose menu in alphabetical order, which might not always be the order in which you would like them listed. You can override this by preceding the form names with numbers (1 before the name of the form you want to appear first, 2 before the form that should appear second, and so on).

- Use the Type drop-down list to select the appropriate type for the document. Choose Document for a main-topic form, Response To Document for a response form, or Response To Response for a response-to-response form.
- Check Default Database Form if this will be the default form for the database.
- Click on OK to accept the settings and close the dialog box.

There are many other options you can control in the Design Form Attributes dialog box. For more information, refer to Chapter 6 in the Notes *Application Developer's Reference*.

Let's change the name of the Document form in the My Articles database:

1. Edit the Document form (choose **Design, Forms**; select **Document**; and click on **Edit**).
2. Choose **Design, Form Attributes** to display the Design Form Attributes dialog box. You will change the name of this form to something more meaningful.
3. In the Name box, select the text **Document** (if necessary) and then type **1. Article** (see Figure 8.7). The name of the form will be Article, and it will appear first in the Compose menu.
4. Click on **OK** to close the dialog box. The new form name now appears in the title bar.
5. Press **Esc** to close the form design window and click on **Yes** to save changes to the form.
6. Choose **Compose** to view the compose menu. *1. Article* now appears instead of *Document*.
7. Click on **Compose** again to close the menu.

**Figure 8.7**      **Renaming a form**

### PRACTICE YOUR SKILLS

1. Edit the Response form.
2. Display the Design Form Attributes dialog box.
3. Change the name of the form to **2. Comments**.
4. Close the dialog box, and then close and save changes to the form.
5. Observe the new form name in the Compose menu and then close the menu.



### ADDING OR MODIFYING STATIC ITEMS ON A FORM

Static text (text that never changes) and graphics can make forms easier to use. You can use static text to label fields or to provide information. Adding and editing static items on a form is like working in a large rich-text field. Here are some things you should bear in mind as you edit static items:

- To add text, place the insertion point and type.
- To create a new line, place the insertion point and press Enter.
- To change the appearance of text, select it and then use the Text menu, the SmartIcon bar, or keyboard shortcuts to apply formatting.



## MODIFYING FIELD DEFINITIONS

You modify fields by using the Field Definition dialog box. The definition of a field has many aspects, including the name of the field, its format, and its default value. To modify an existing field,

- Edit the form that contains the field in which you are interested.
- Double-click on the field that you want to modify (or select the field and then choose Design, Field Definition).
  - In the Name box, enter a name for the field. Field names can contain up to 32 characters, including letters, numbers, and the symbols \_ and \$. They cannot contain spaces. You should try to make your field names as short yet descriptive as possible.
  - In the Help Description box, enter a one-line help message that will appear whenever a user is entering information in the field (as long as the Show Field Help command is in effect). Try to make help descriptions useful; for example, in a keyword field, you might use "Press [Enter] to see a list of available keywords" as the help description.
  - Use the Data Type drop-down list to select a data type for the field. The data type you choose will affect the other options that are available in the dialog box. For example, the Format button is available only for Keyword, Number, and Time data types.
  - Use the Field Type box to specify that a field be computed (data is entered automatically when you compose, modify, or display the document) or editable (the user enters the data).
- Click on OK to accept the field definition.

We will discuss some of the other options that are available through the Field Definition dialog box as we move through the chapter. This is, however, a very large subject. For more comprehensive information, refer to Chapter 7 in the *Notes Application Developer's Reference*.

### Modifying a Keyword Field

You can modify a keyword field to change the list of available keywords. To do so,

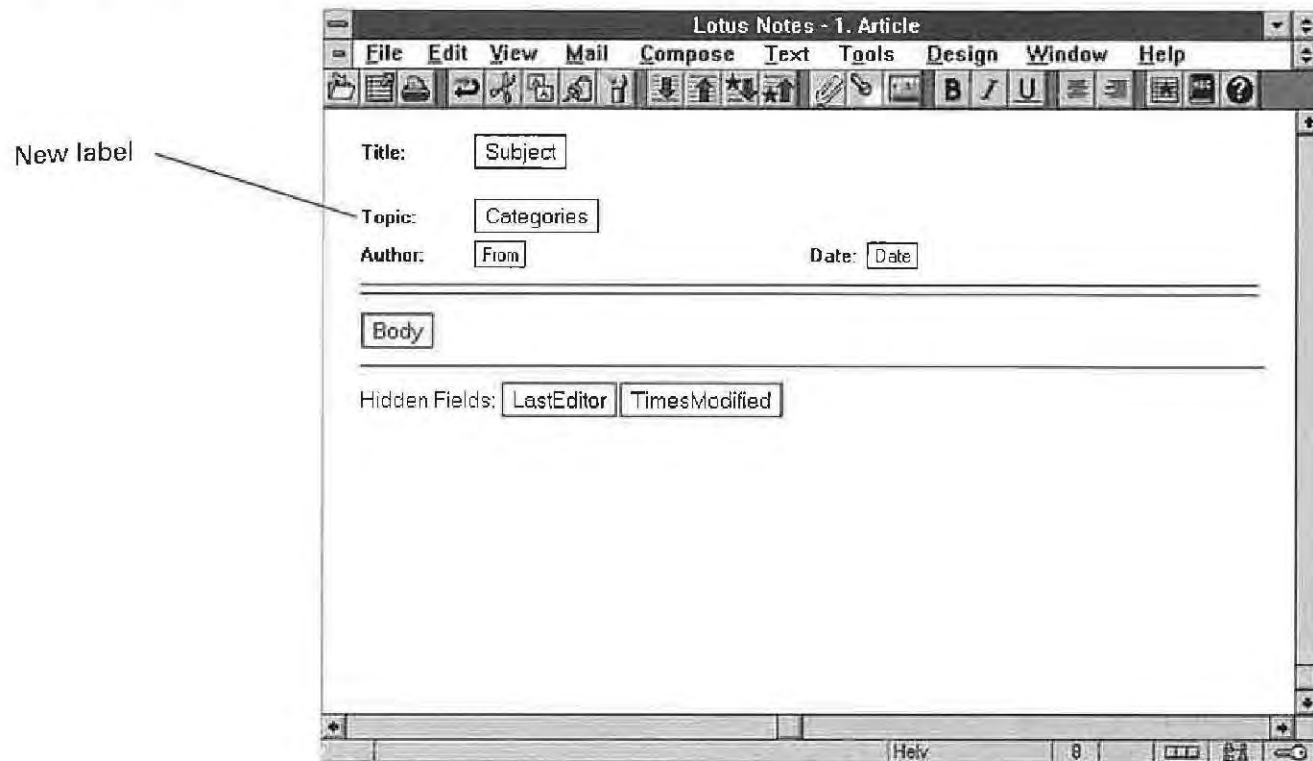
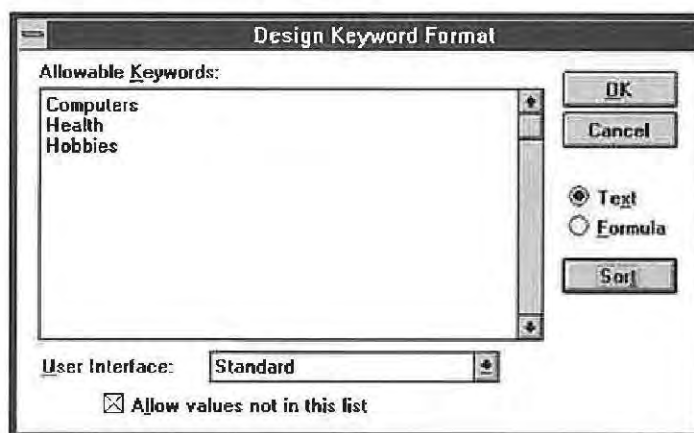
- Display the Field Definition dialog box for the field.
- Click on **Format** to display the Design Keyword Format dialog box. You can create either a list of keywords or a formula that will “look up” keyword values in a database.
- To create a list of keywords, click on the *Text* option and then type the keywords in the Allowable Keywords box (separate individual keywords by pressing Enter after each one).
- If you want to be able to use the first-letter technique to select the keywords, click on *Sort* to sort the list alphabetically.
- Click on **OK** twice to close the dialog boxes.

Let's change the label of the Categories field to *Topic*:

1. Edit the 1. Article form (choose **Design, Forms**; select **\*1. Article**; and click on **Edit**).
2. Select the static text **Category** (the static text, not the field). You will change the label for the Categories field to *Topic*.
3. Type **Topic** to replace the label for the Categories field (see Figure 8.8).

Now let's create a list of keywords for the field:

1. Double-click on the **Categories** field to open the Field Definition dialog box.
2. Click on **Format** to display the Design Keyword Format dialog box. Right now, a formula is being used to generate a list of keywords; you will replace this formula with your own list of keywords.
3. Select all the text in the Allowable Keywords box, type **Health**, and press **Enter**. You separate individual items in a keyword list by pressing Enter between them.
4. Type **Computers**, press **Enter**, and then type **Hobbies** to complete the list of keywords.
5. Select the **Text** option to indicate that this is a text list and not a formula, and then click on **Sort** to sort the list alphabetically. Your dialog box should resemble Figure 8.9.

**Figure 8.8** Changing static text**Figure 8.9** Creating a keyword list

6. Click on **OK** to close the Design Keyword Format dialog box, and then select all the text in the Help Description box.
7. Type **Press [Enter] to see a list of topics**. When you change a field, you should consider changing its help description, as well.
8. Click on **OK** to close the Field Definition dialog box.
9. Click on the **File Save** SmartIcon to save the form (it is the first SmartIcon on the left).

### Modifying a Time Field

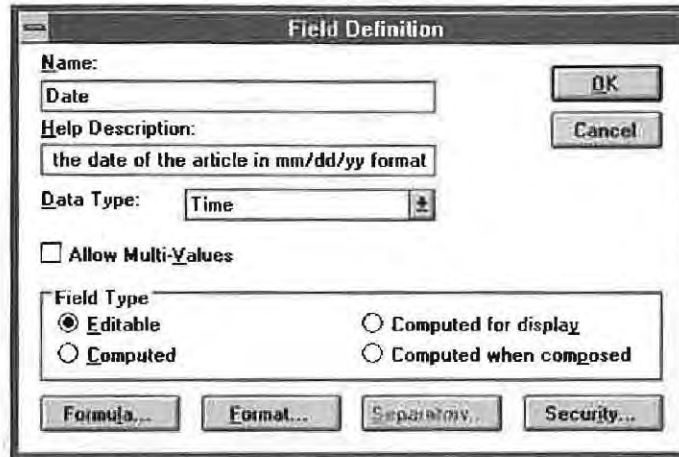
Many of the Time fields you encounter will be computed fields. Sometimes, however, you might want to make a Time field editable. For example, if you had a database for to-do items, you would want to be able to enter due dates for each of them. Another way you might wish to modify a Time field is to change the format in which it is displayed. To modify a Time field,

- Display the Field Definition dialog box for the field.
- Click on **Format** to display the Design Time Format dialog box. You can change the display of dates and times, and you can choose to display only the date, only the time, or both the date and time.
- Click on **OK** twice to close the dialog boxes.

Right now, the Date field in the Article form is a computed field that shows the date the document was composed. Let's change this field so that you can enter the date of the article:

1. Double-click on the **Date** field to open its Field Definition dialog box. Notice that this is a computed field.
2. In the Field Type box, select **Editable**.
3. Select all the text in the Help Description box, and then type **Enter the date of the article in mm/dd/yy format** (see Figure 8.10).

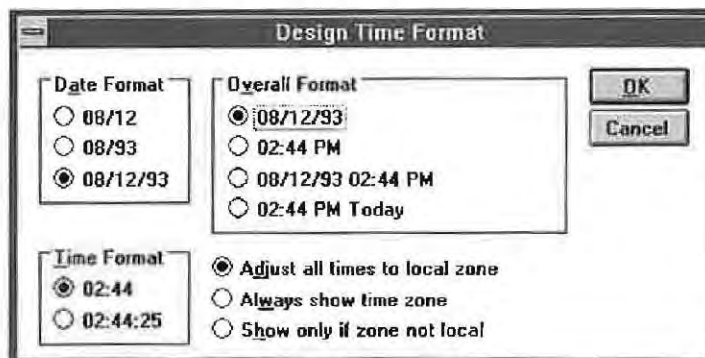
**Note:** The format that is used for dates depends on how OS/2 is set up on your server. If you discover that your server expects dates in *mm-dd-yy* format, you should change this help description accordingly.

**Figure 8.10**      **Changing a time field definition**


The **Field Definition** dialog box is shown. It has the following fields and controls:

- Name:** A text box containing "Date".
- Help Description:** A text box containing "the date of the article in mm/dd/yy format".
- Data Type:** A dropdown menu set to "Time".
- Allow Multi-Values:** An unchecked checkbox.
- Field Type:** A group box containing four radio buttons:
  - ☒ Editable
  - ☐ Computed
  - ☐ Computed for display
  - ☐ Computed when composed
- At the bottom are four buttons: **Formula...**, **Format...**, **Separately...**, and **Security...**.
- On the right side are **OK** and **Cancel** buttons.

4. Click on **Format** to display the Design Time Format dialog box. You can control date and time formats individually. You also can display the date, the time, or both.
5. In the Date Format box, select the date that is in *mm/dd/yy* format. The dates and times you see in this dialog box will be your current date and time (isn't that clever?).
6. In the Overall Format box, select the date-only format. Except for the date and time, your screen should resemble Figure 8.11.

**Figure 8.11**      **Changing time formats**


The **Design Time Format** dialog box is shown. It has the following fields and controls:

- Date Format:** A group box containing three radio buttons:
  - ☐ 08/12
  - ☐ 08/93
  - ☒ 08/12/93
- Time Format:** A group box containing two radio buttons:
  - ☒ 02:44
  - ☐ 02:44:25
- Overall Format:** A group box containing four radio buttons:
  - ☒ 08/12/93
  - ☐ 02:44 PM
  - ☐ 08/12/93 02:44 PM
  - ☐ 02:44 PM Today
- Below the Overall Format group box are three checkboxes:
  - ☒ Adjust all times to local zone
  - ☐ Always show time zone
  - ☐ Show only if zone not local
- On the right side are **OK** and **Cancel** buttons.

7. Click on **OK** to close the dialog box (but leave the Field Definition dialog box open).

### Field Formulas

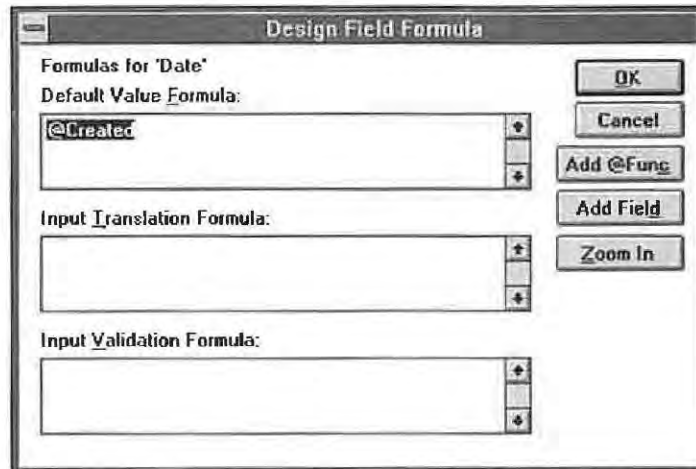
Notes uses field formulas to calculate field values for display, to translate entered information into a different form, and to check the validity of entered information. To see the formulas for a field, display the Field Definition dialog box and click on Formula. A field definition can include any combination of three types of formulas:

- You use a *default value formula* to provide an initial value for any type of editable field. This formula also provides the value for computed fields.
- You use an *input translation formula* to modify or translate entered data into a specific value or format. For example, a database designer might use this type of formula to trim extra spaces from entered data.
- You use an *input validation formula* to verify that entered data meets certain criteria. For example, you might use this type of formula to verify that a number falls within a particular range. You can also use this formula to create required fields by having the formula verify that something has been entered in the field.

We will not be creating field formulas in this book. If you're interested in more information, refer to Chapter 7 in the *Notes Application Developer's Reference*.

Because the original Date field in our Article form was computed, it still has a default value formula associated with it. We do not want a value to appear in this field when we compose documents, so let's get rid of this formula:

1. Click on the **Formula** button to display the Design Field Formula dialog box (see Figure 8.12). The current default value formula will enter the date the document is composed.
2. Press **Del** to delete the default value formula.
3. Click on **OK** twice to close the dialog boxes.
4. Click on the **File Save** SmartIcon to save the form without closing it.

**Figure 8.12** The Design Field Formula dialog box

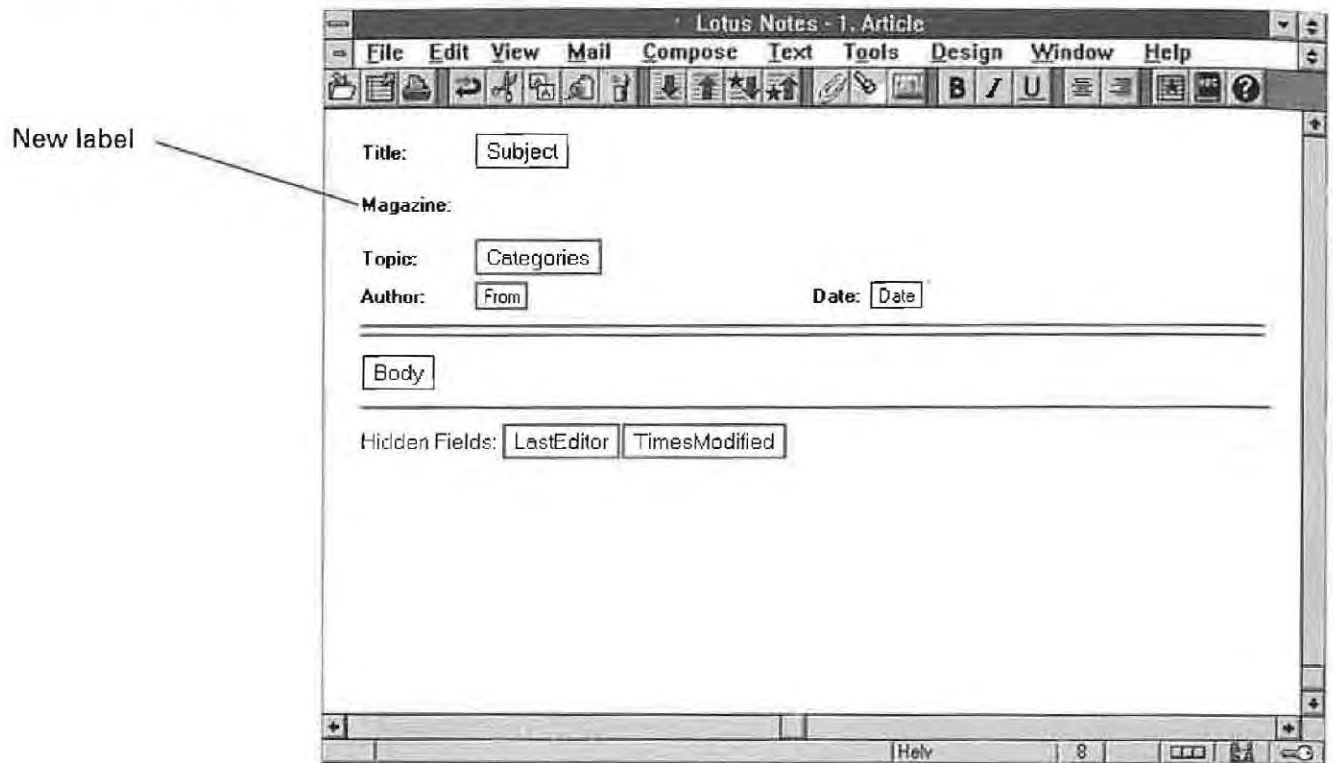
## ADDING A NEW FIELD TO A FORM

To add a new field to a form,

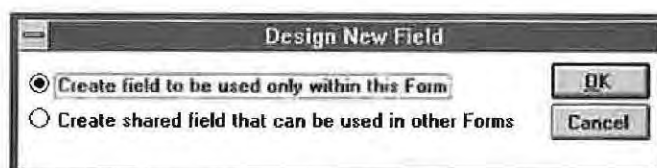
- Place the insertion point where you want the new field to appear.
- Choose *Design, New Field* to display the Design New Field dialog box.
- To create a field that will be used only in this one form, select *Create Field To Be Used Only Within This Form*; to create a field that will be shared with other forms, select *Create Shared Field That Can Be Used In Other Forms*.
- Click on OK to open the Field Definition dialog box.
- Complete the field definition and click on OK.

Let's create a new field for the magazine name:

1. Place the insertion point after the Subject field and press **Enter** twice to create two blank lines in the form.
2. Choose **Text, Font** to display the Font dialog box.
3. Check the **Bold** option, select the box labeled **3** in the Color bar, and click on **OK**. You are setting the format for the static text that will label the new field.
4. Type **Magazine:** and then press **Tab**. Your form should resemble Figure 8.13.

**Figure 8.13** The label for the new field

5. Choose **Text, Font** to display the Font dialog box once again. You will use slightly different formatting for the field than you used for the static text.
6. Choose **10** from the size drop-down list, uncheck **Bold**, select the box labeled **K** in the Color bar, and click on **OK**.
7. Choose **Design, New Field** to create a new field. Notes displays a dialog box asking if this will be a shared or single-use field (see Figure 8.14). By default, new fields will be single use.

**Figure 8.14** Creating a new field

8. Click on **OK** to accept the default and to display the Field Definition dialog box.
9. In the Name box, type **Magazine** to name the new field.
10. In the Help Description box, type **Enter the magazine that the article is in.**
11. Click on the drop-down arrow next to the Data Type box and choose **Text** to indicate the data type for the field. Your dialog box should resemble Figure 8.15.

**Figure 8.15** The new field definition

12. Click on **OK** to accept the new field definition and close the dialog box. The new field appears in the form (see Figure 8.16).
13. Close and save the form.



## TESTING THE NEW FORM

After you modify a form, you should compose a few documents to see if it works properly. Having several sample documents in your database will also help you test any view modifications that you make. Let's compose a new Article document:

1. Choose **Compose, 1. Article** to display a blank Article form.

**Figure 8.16** The form with the new field

New field

Lotus Notes - 1. Article

File Edit View Mail Compose Text Tools Design Window Help

Title: Subject

Magazine: Magazine

Topic: Categories

Author: From Date: Date

Body

Hidden Fields: LastEditor TimesModified

Helv 10

2. Enter **Using Notes** in the field labeled Title, enter **Groupware Week** in the field labeled Magazine, and then press **Tab** to move to the field labeled Topic. Field help indicates that you can press **Enter** to see a list of topics.
3. Press **Enter** to see a list of topics, select **Computers**, and click on **OK** to enter the keyword in the field.
4. In the Date field, enter **8/14/93**, and then press **Tab** to move to the body field.
5. Type **Good article on designing Notes databases**. Your document should resemble Figure 8.17.
6. Close and save the document. The new document appears in the view.
7. Open the **Using Notes** document. Only the information in the body field is displayed when you read the document. We would like to be able to see the other information about the article, as well.
8. Close the document.

**Figure 8.17** Composing a document in the new form

Lotus Notes - New Document

File Edit View Mail Compose Text Tools Design Window Help

Title: \* Using Notes

Magazine: \* Groupware Week

Topic: \* Computers

Author: Adam Wilcox/Organization Name Date: \* 8/14/93

\* Good article on designing Notes databases.

Enter the text (or a description) of the document.

Helv 10



## HIDING OR UNHIDING PARTS OF A FORM

You can control whether parts of a form are hidden under various circumstances. We've seen examples of fields you can see when editing but not when reading a document, as well as fields that are visible only when you edit a form. To specify that part of a form be hidden under certain conditions,

- Edit the form.
- Select the parts of the form that you wish to have hidden (or for which you wish to change the Hide When status).
- Choose *Text, Paragraph* to display the Text Paragraph dialog box.
- In the Hide When box, check the situations in which you want the selected information to be hidden.
- Click on OK.

Let's modify our Article form so that the information we wish to see is no longer hidden when reading documents:

1. Edit the 1. **Article** form.

2. Select everything in the form from the static text **Title:** through the field **Date** (see Figure 8.18). This part of the form is currently hidden when the user is reading documents.

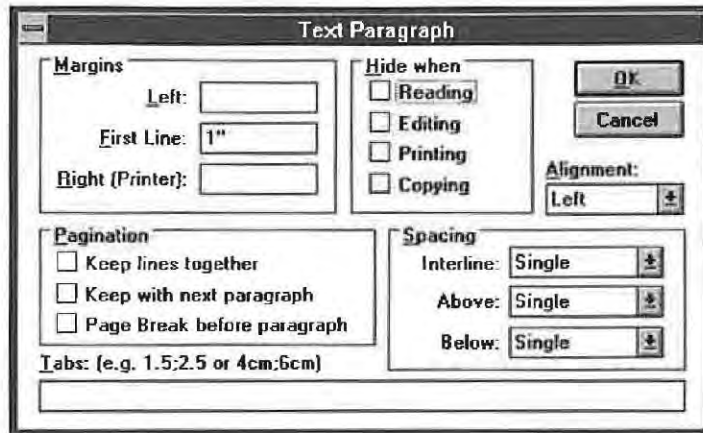
**Figure 8.18** Preparing to change the Hide When status of part of the form

The screenshot shows the Lotus Notes interface for editing a form titled "1. Article". The menu bar includes File, Edit, View, Mail, Compose, Text, Tools, Design, Window, and Help. The toolbar contains various icons for editing and formatting. The form fields are as follows:

- Title: Subject
- Magazine: Magazine
- Topic: Categories
- Author: From
- Date: Date
- Body
- Hidden Fields: LastEditor, TimesModified

3. Choose **Text, Paragraph** to display the Text Paragraph dialog box. Whether a part of the form is hidden is considered to be part of the paragraph formatting in the form.
4. In the Hide When box, uncheck Reading to specify that the selected part of the form *not* be hidden when you are reading documents (see Figure 8.19).
5. Click on **OK** to close the dialog box, and then close and save the form.
6. Open the document **Using Notes**. You can now see all the information in the document.
7. Close the document.

**Figure 8.19** Changing the Hide When status of part of the form



## PRACTICE YOUR SKILLS

1. Create two more Article documents in the database. Try to use each of the other two keywords and different dates. (Don't feel like you need to use real magazine articles or magazines.)
2. Examine the main view. Your screen should resemble Figure 8.20, although your documents will be different.

## MORE ABOUT CREATING VIEWS

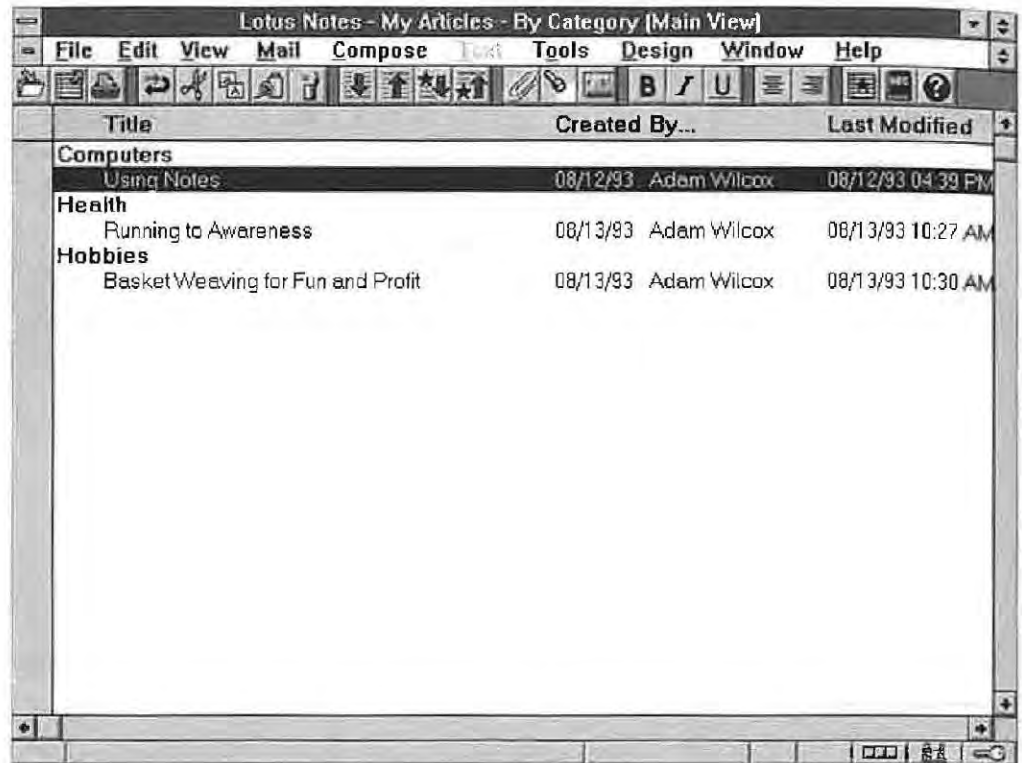
As we discussed in the last chapter, you can create your own views to see document information just the way you want. In that chapter, we created a new view based on an existing one. In this chapter, you will create a new view from scratch that displays article titles in one column, and the magazine and date in another column.



### CREATING A NEW VIEW

To create a new view (not a copy of an existing view),

- Open the Design Views dialog box for the appropriate database.
- Click on New to display a blank, untitled view design window.
- Make any changes and additions that you desire, then close and save the view.

**Figure 8.20**      **The sample documents in the Main View**


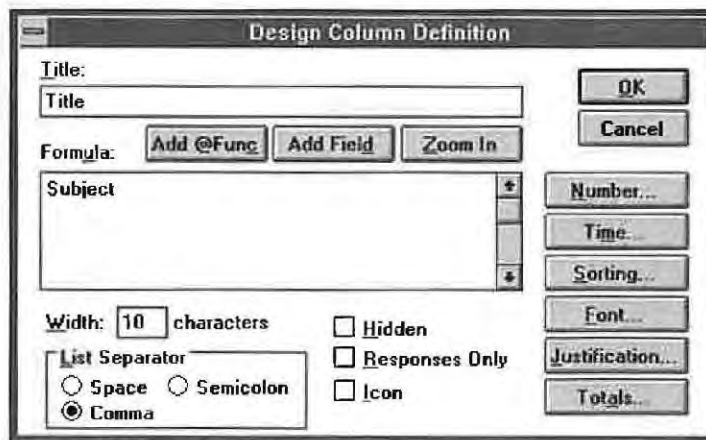
| Title                             | Created By...        | Last Modified     |
|-----------------------------------|----------------------|-------------------|
| <b>Computers</b>                  |                      |                   |
| Using Notes                       | 08/12/93 Adam Wilcox | 08/12/93 04:39 PM |
| <b>Health</b>                     |                      |                   |
| Running to Awareness              | 08/13/93 Adam Wilcox | 08/13/93 10:27 AM |
| <b>Hobbies</b>                    |                      |                   |
| Basket Weaving for Fun and Profit | 08/13/93 Adam Wilcox | 08/13/93 10:30 AM |

Let's create a new view in the My Articles database:

1. Choose **Design, Views** to display the Design Views dialog box.
2. Click on **New** to display a blank view design window. When you create a new view, the first column is defined to display the document number (it has the column heading #). We do not want this column in our view.
3. Click on the column heading # and then press **Del**. Notes asks if you really want to delete the column.
4. Click on **Yes** to delete the column, and then double-click on the single, large column heading remaining in the view. Notes displays the Design Column Definition dialog box.
5. In the Title box, type **Title**. You will display article titles in the first column of this view.
6. Click in the Formula box and then click on **Add Field** to display a list of available field names.

7. Select **Subject** and click on **Paste** to paste the field name into the formula (see Figure 8.21). Although you are using *Title* as the heading of this column, the name of the *field* containing this information is Subject.

**Figure 8.21** Defining a new column



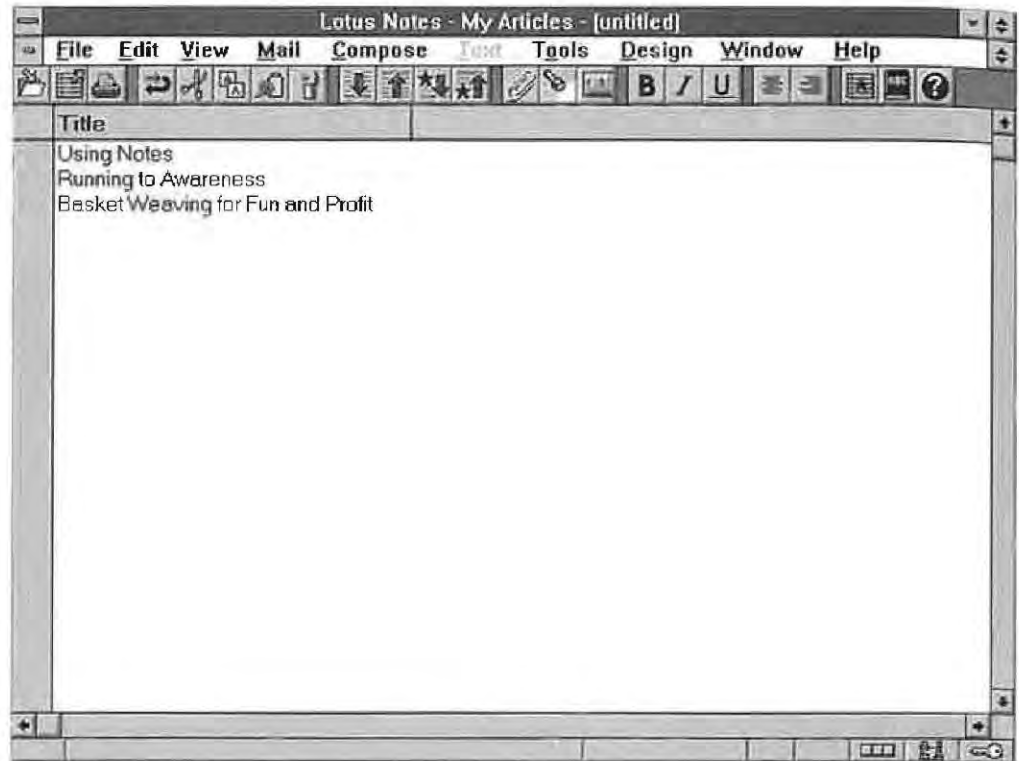
8. Click on **OK** to accept the column definition and then click on the **Calculate** button to refresh the view. Do the article titles fit in the column?
9. If necessary, drag the right-hand border of the Title column until it is wide enough to display all the text in the column (see Figure 8.22).



## MORE ABOUT COLUMN DEFINITIONS

We've seen several examples of column definitions that display information from a single field. You can also create column definitions that alter field information or combine information from two or more fields. To combine information from two or more fields, separate the field names with a plus sign (+). For example, to combine information from fields called Subject and Author, you could use the formula

Subject + Author

**Figure 8.22** The new column in the view

This formula will work as long as the fields you are combining are of the same data type; that is, you can combine two text fields. To combine a text field with a number field, however, you would first have to convert the number to text. You can use certain @Functions to convert one type of data to another. For example, to convert a time field called Composed to text, you could use the formula

`@Text(Composed)`

You also can combine your own text elements (text that does not come from any field) with column definitions. To do this, you should surround the text with quotation marks. We saw an example of this earlier in a column that displayed a last name, a comma, and then a first name. That column used the formula

`LName + ", " + FName`

To get a comma and a space to appear between the two fields, these characters are enclosed in quotation marks.

Let's create a column in our new view that displays information from both the Magazine and Date fields:

1. Double-click on the blank column heading to the right of the Title column to display the Design Column Definition dialog box.
2. Type **Magazine** in the Title box. This will be the column heading for the new column.
3. Click in the Formula box and then click on **Add Field** to display a list of field names.
4. Select **Magazine** and click on **Paste** to paste the field name into the formula.
5. Type **+**, press **Spacebar**, and then type **" "** (make sure there is a space between the quotation marks). In Notes formulas, the plus sign (+) is the *concatenation* operator. This means you can use it to combine fields or text within a formula. The space between the quotation marks will provide a space between the Magazine field information and the Date field information that we are about to add to the formula.
6. Press **Spacebar**, type **+**, press **Spacebar** again, and then click on **Add @Func** to display a list of @Functions. Because the Magazine and Date fields are different data types, we will use the function @Text to convert the Date field to text.
7. Select **Text()** (you will need to scroll) and click on **Paste** to paste the function into the formula.
8. Place the insertion point between the parentheses and then click on **Add Field**.
9. Select **Date** and click on **Paste** to paste the field name into the formula. Your formula should resemble what you see in Figure 8.23 (spaces that are not enclosed in quotation marks are ignored in Notes formulas; if your formula does not match what you see, edit it so that it does). Most @Functions require information between the parentheses—called *arguments*—on which to act. In the case of the @Text function, the argument is the name of the field that you wish to convert to text (Date).
10. Click on **OK** to define the new column and then click on the **Calculate** button to refresh the view.

**Figure 8.23** A formula that combines two data types

**Design Column Definition**

Title: Magazine

Formula: Magazine + " " + @Text( Date )

Width: 10 characters

List Separator: ☒ Comma ☐ Space ☐ Semicolon

☐ Hidden ☐ Responses Only ☐ Icon

Buttons: OK, Cancel, Number..., Time..., Sorting..., Font..., Justification..., Totals...

11. Widen the Magazine column so that all the information in the column is visible. Your view should resemble Figure 8.24, although your document information will be different.

**Figure 8.24** The new view with the Magazine column

Lotus Notes - My Articles - (untitled)

| Title                             | Magazine                |
|-----------------------------------|-------------------------|
| Using Notes                       | Groupware Week 08/14/93 |
| Running to Awareness              | New Age Health 06/15/93 |
| Basket Weaving for Fun and Profit | Crafts Galore 07/07/93  |

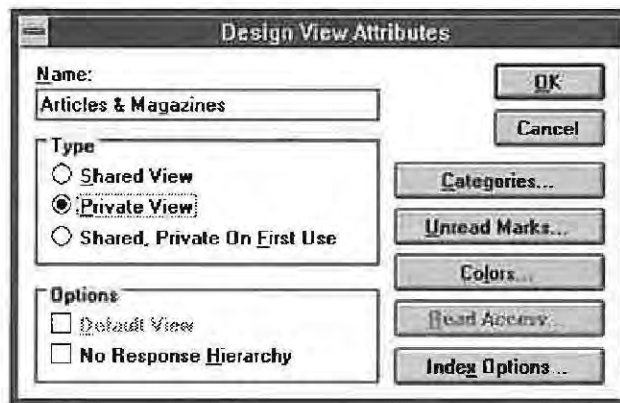


## MORE ABOUT MODIFYING VIEW ATTRIBUTES

As we've seen before, you use the Design View Attributes dialog box to control various aspects of the view as a whole. Let's give our new view a name and specify that it be a private view:

1. Choose **Design, View Attributes** to display the Design View Attributes dialog box.
2. Type **Articles & Magazines** in the Name box, and then click on **Private View** in the Type box (see Figure 8.25).

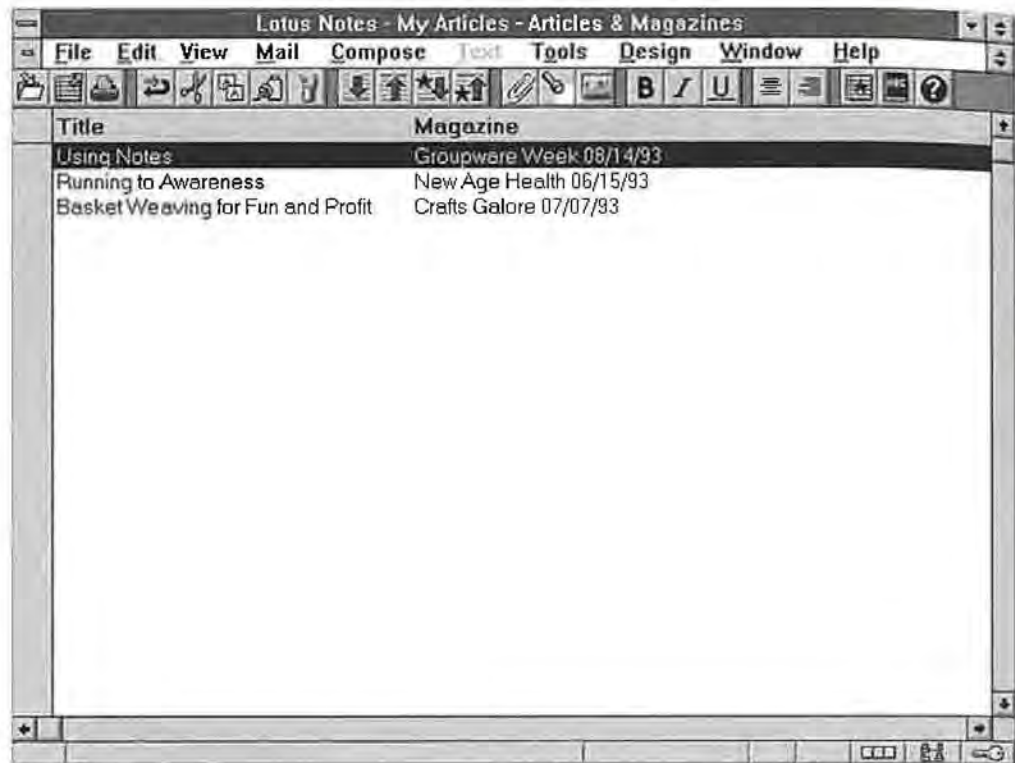
**Figure 8.25**      **Setting view attributes**



3. Click on **OK** to accept the view attributes and then close and save the view.
4. Choose **View, Articles & Magazines** to observe the new view (see Figure 8.26).
5. Close the database.

## TESTING THE DATABASE

After you complete a database, you will need to test and debug it. You won't usually need a formal test plan, but you should at least create several documents using each form, and verify that all forms and views work the way you want them to.

**Figure 8.26**      **The new view**

You should consider the following questions as you test the forms in a database:

- Can users enter information in editable fields? If not, check the Field Type box in the Field Definition dialog box.
- Is field information displayed correctly when you read documents? If not, check the formulas in the Design Field Formula dialog box. You also might check the Hide When box in the Text Paragraph dialog box.
- Are computed fields computed correctly? If not, check the default value formula in the Design Field Formula dialog box.
- Are keyword fields working properly? If not, check the Design Keyword Format dialog box.

Consider the following questions as you test the views in a database:

- Does the view display main-topic and response documents correctly? If not, check the options you have selected in the View Attributes dialog box.

- Does the view display the correct documents? If not, check the selection formula for the view.
- Is the information in each column correct? If not, check the column definitions.

Testing a shared database is a bit more complicated than testing a private database. We will discuss some of these considerations in the next chapter, but you should remember the following important rule: *Never post anything to the server without first consulting your Notes administrator.*

For more information on design review and testing, refer to Chapter 10 in the *Notes Application Developer's Reference*.

## SUMMARY

In this chapter, you learned how to create a private database based on a template. You learned how to modify forms, including how to change form attributes, modify fields, add fields, and add static items. You also learned how to create a new view. Finally, we discussed considerations involved in testing a database.

The following table summarizes some of the techniques you learned in this chapter:

| Desired Result                           | How to Do It                                                                                                                                                  |
|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create new database based on template    | Choose <b>File, New Database</b> ; select template; enter file name and title; uncheck <b>Inherit Future Design Changes</b> (if desired); click on <b>New</b> |
| Edit About <i>Database Name</i> document | Choose <b>Design, Help Document, About Database Name</b>                                                                                                      |
| Edit form                                | Select or open database; choose <b>Design, Forms</b> ; select form; click on <b>Edit</b>                                                                      |
| Delete form                              | Select or open database; choose <b>Design, Forms</b> ; select form; click on <b>Clear</b> ; click on <b>Yes</b>                                               |
| Change form attributes                   | Edit form; choose <b>Design, Form Attributes</b> ; make desired changes; click on <b>OK</b>                                                                   |

| <b>Desired Result</b>                   | <b>How to Do It</b>                                                                                                                  |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Add static text to form                 | Edit form, place insertion point, type                                                                                               |
| Modify field definition                 | Edit form; select field; choose <b>Design, Field Definition</b> (or double-click on field); make desired changes; click on <b>OK</b> |
| Modify keyword list                     | Edit form, display Field Definition dialog box, click on <b>Format</b> , make desired changes, click on <b>OK</b> twice              |
| Specify format for Date field           | Edit form, display Field Definition dialog box, click on <b>Format</b> , select desired format(s), click on <b>OK</b> twice          |
| Observe field formulas                  | Edit form, display Field Definition dialog box, click on <b>Formula</b>                                                              |
| Add new field                           | Place insertion point; choose <b>Design, New Field</b> ; click on <b>OK</b> ; use Field Definition dialog box to define field        |
| Change Hide When status of part of form | Edit form; select section of form; choose <b>Text, Paragraph</b> ; specify Hide When options; click on <b>OK</b>                     |
| Create new view                         | Select or open database; choose <b>Design, Views</b> ; click on <b>New</b>                                                           |

In the next chapter, you will learn about the things you need to consider when you make a database public (that is, when you copy it to a server). We will discuss access control in greater detail and you will learn how to make a template from a database. We will also discuss replication settings.

## IF YOU'RE STOPPING HERE

If you wish to stop here, please choose **File, Exit** to exit Notes (you will need to restart Notes when you begin Chapter 9). If you wish to proceed directly to Chapter 9, please do so now.



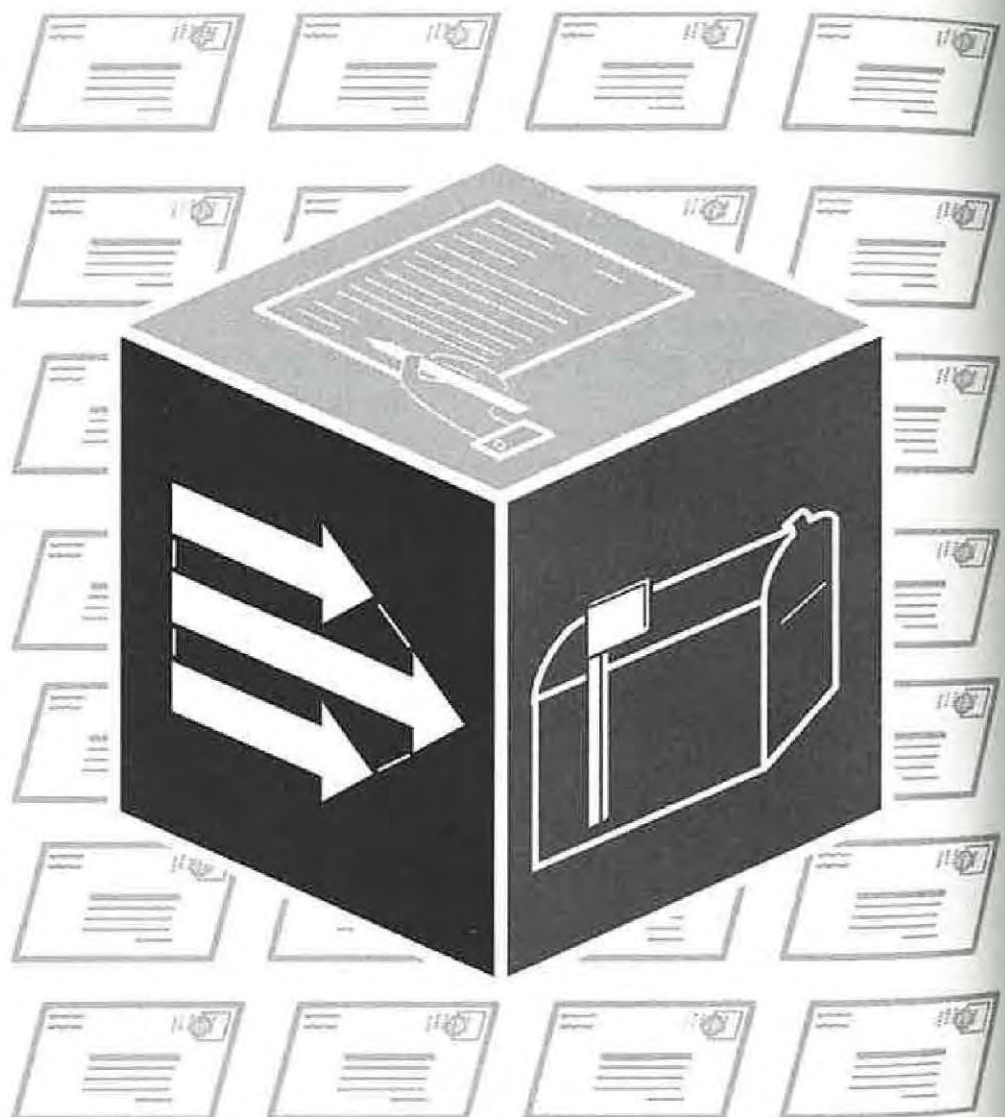
---

# CHAPTER 9: MAKING A DATABASE PUBLIC

More about  
Access Levels

Preparing to Roll  
Out a Database

Making the  
Database  
Available to Other  
Users



---

**T**here are several considerations to take into account before you decide to make a database public. In this chapter, we will discuss some of the steps you need to go through before and after copying a database to a server. (When you are ready to make a database public, you should first contact your Notes administrator. All the steps discussed in this chapter should be done in conjunction with the administrator. In many cases, your administrator might choose to do these steps for you—if you're lucky!) You will learn more about Access Control Lists, as well as how to make a template copy of a database. Finally, we will discuss how to control replication settings for a database.

This chapter's information will be important to you if you think you might be designing shared databases at some point in the future. If this is something you don't think you'll be doing, feel free to skip ahead to Chapter 10. Skipping this chapter will not affect anything in the rest of the book.

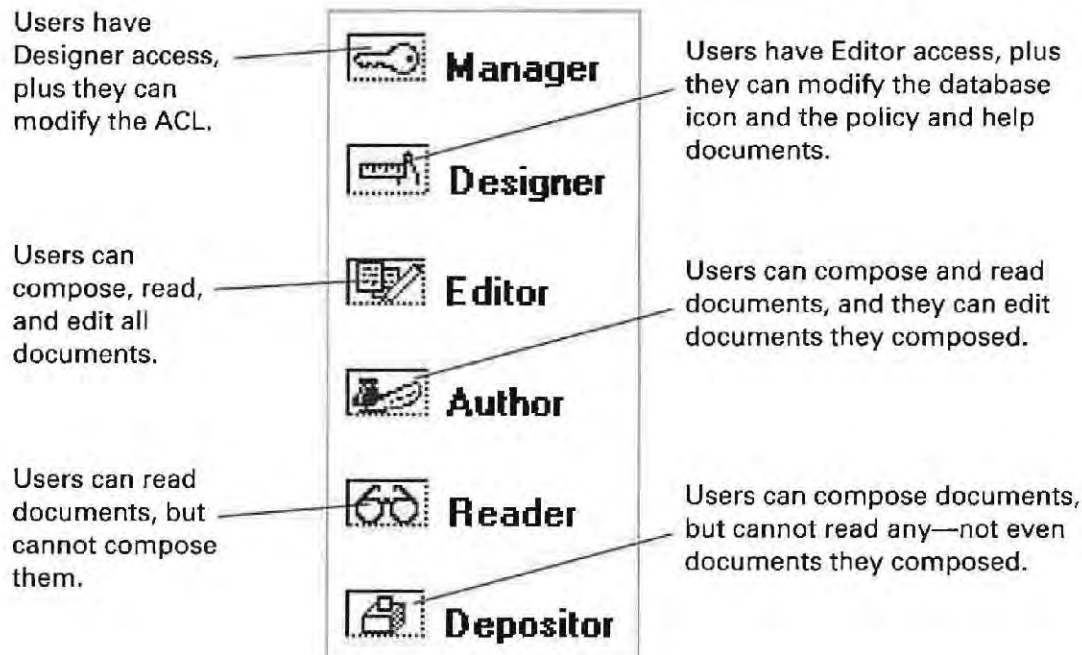
When you're done working through this chapter, you will know

- How to create an Access Control List
- How to make a template from a database
- About replication settings

## MORE ABOUT ACCESS LEVELS

As we discussed in Chapter 5, access levels provide the primary means of security in Notes. Before you make a database public, you must assign access levels to appropriate users, designers, and managers. Figure 9.1 lists the Notes access levels, along with their associated icons and rights. (The icons appear on the right side of your Status bar when you open a database, indicating your access level.)

**Figure 9.1** Access levels and icons





## CREATING AN ACCESS CONTROL LIST

When you create an ACL, the first decision you should make is what the *-Default-* access level will be. If you are creating a database for use by everyone in your company, a default access level of Author might be appropriate. On the other hand, if the database will contain information that only certain people should see, the default access level should be No Access. If you are unsure, you should specify the lowest level of access you think might be appropriate. If it turns out that a higher level is desirable, you can always change it in the future.

At least one other person besides you should have Manager access to the database. This is to ensure that the database can be managed when you are not available. Anyone who will be involved in design changes should have Designer access. The Author access level should suffice for most general users. You should give Editor access only to users who have a real, ongoing need to edit other users' documents.

**Note:** In addition to *-Default-*, Notes provides two other standard group names in the ACL. *LocalDomainServers* is a group that represents the servers in the same domain as the server you are using. *OtherDomainServers* represents the servers outside the domain of your server. Set access levels for these groups so that you can control what can be done to replicas of your database residing on different servers.

Imagine that you are creating a sales tracking database for your company. What access levels would you give to various users? Table 9.1 lists some hypothetical users of such a database and what their appropriate access levels *might* be.

**Table 9.1 Hypothetical Access Levels**

| User                                                                                    | Access Level                                                                            |
|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| Bill, a vice president who reads documents to find out what is happening in the company | The Reader access level should be all Bill needs, unless he will be creating documents. |

**Table 9.1 Hypothetical Access Levels (Continued)**

| User                                                                                                       | Access Level                                                                            |
|------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| Jeanie, a sales representative who composes, reads, and updates her own documents                          | Jeanie will need Author access.                                                         |
| Todd, a janitor who cleans the computer room                                                               | Todd should have the No Access access level.                                            |
| Larry, a senior sales representative who may read or update any document                                   | Because Larry will need to modify other users' documents, he should have Editor access. |
| Edie, an administrative assistant who fills in for Larry and adds or modifies views based on users' needs  | Edie will need Designer access to modify views or forms.                                |
| Louann, a systems support manager who fills in for Edie and who determines access control for the database | Louann will need to have Manager access in order to modify the ACL.                     |
| Marie, a secretary who inputs data for other staff who collect information                                 | Marie can probably get by with Depositor access.                                        |

To modify the ACL for a database,

- Select or open the database.
- Choose *File, Database, Access Control* to display the Database Access Control List dialog box.
- To set an access level for a new user,
  - Click in the edit box below the People, Servers, Groups box, and then type the user or group name for which you want to assign an access level.
  - Select the appropriate access level and click on *Add* to add the user or group to the ACL.

- To modify an existing user or group's access level,
  - Select the user or group name in the People, Servers, Groups box.
  - Select the appropriate access level and click on *Update* to change the access level for the user or group.
- Click on OK to close the dialog box.

Let's modify the ACL for the My Articles database in preparation for making it public:

1. Select the **My Articles** database icon (but do not open the database).
2. Choose **File, Database, Access Control** to open the Database Access Control List dialog box (we examined this thing back in Chapter 5, remember?).
3. In the People, Servers, Groups box, select **-Default-** (if necessary). The default access level in this database is currently Author.
4. In the Access Level box, select **No Access** and then click on **Update** to change the default access level (see Figure 9.2). If there are *any* users who should not have access to the database, you should select No Access as the default access level.

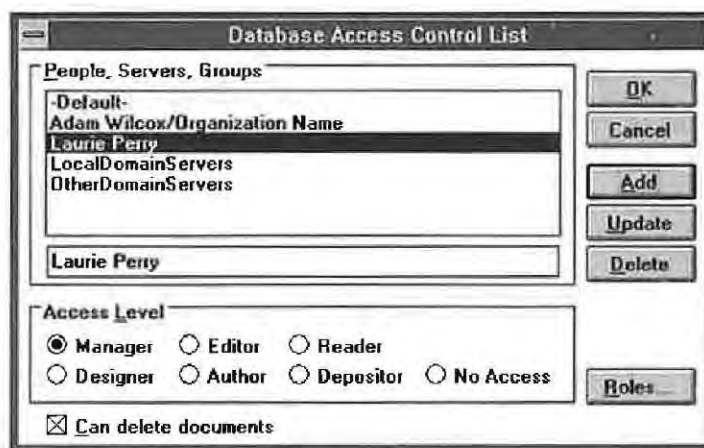
**Figure 9.2** Changing the default access level



5. Select your name in the People, Servers, Groups box. Because you created this database, your access level is Manager by default. At least one other person should have Manager access to a shared database.
6. Select your name in the edit box below the People, Servers, Groups box, and then type your Notes buddy's user name. You will make your Notes buddy a manager for the database.
7. Click on **Add** to add your Notes buddy to the ACL (see Figure 9.3). Notice the Can Delete Documents check box at the bottom of the dialog box. You can control the right to delete documents separately from a user's access level.
8. Click on **OK** to close the dialog box.

Figure 9.3

## Adding a user to an ACL



## PREPARING TO ROLL OUT A DATABASE

Chapter 11 of the *Notes Application Developer's Reference* describes a nine-step process for preparing to make a database public. We won't go into that kind of detail here, but we will discuss a couple of the more important considerations.



## MAKING A TEMPLATE FROM THE DATABASE

Before making a database available to other users, you should create a template copy of it for design revision purposes. If you—or any other designer for the database—decide that changes should

be made to the database, these changes should be made to the template copy. The changes should then be incorporated into the actual database by using the *Design, Replace Design* command.

To make a template copy of a database,

- Select the database from which you wish to make a template.
- Choose *File, Database, Copy* to open the Database Copy dialog box.
- Select *Local* from the Server drop-down list.

**Note:** You initially create the template on your hard drive, then you copy it to the server to make it available to other designers, managers, and administrators.

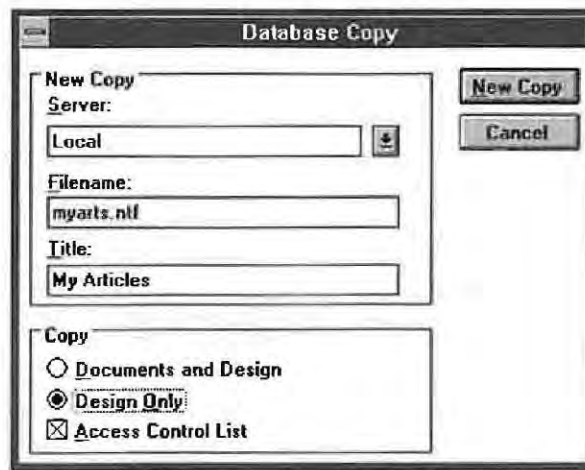
- In the File Name box, enter a file name for the template. The name can include up to eight characters and must end with the .NTF extension. You must type the extension to distinguish the database as a template. If you do not type the .NTF extension, Notes will automatically add the .NSF extension, and you will have created a regular copy instead of a template.
- In the Copy box, select *Design Only* and verify that Access Control List is checked. A template need contain only the structure—and not the documents—of a database. You should include the ACL so that only people with appropriate access can alter the template.
- Click on *New Copy* to create the template copy of the database.

Let's make a template copy of the My Articles database:

1. If necessary, select the **My Articles** database icon.
2. Choose **File, Database, Copy** to display the Database Copy dialog box.
3. In the Filename box, type **myarts.ntf**. The .NTF extension indicates that this will be a template database.
4. In the Copy box, select **Design Only** to indicate that you do not wish to copy the documents in the database. Compare your screen to Figure 9.4.
5. Click on **New Copy** to create a template copy of the database on your hard drive. The new database icon appears in your workspace. If you were really going to make this database public (we're not), your next step would be to copy the

template to the server. Because we created this template for demonstration purposes only, we will now remove the template from your hard drive.

**Figure 9.4**      **Creating a template copy of a database**



6. Select the database icon for the template copy of the My Articles database (this would be the icon that just appeared in your workspace).
7. Choose **File, Database, Delete**. Notes asks if you really want to delete the database.
8. Be sure the database you are about to delete is MYARTS.NTF (as opposed to MYARTS.NSF), and then click on **Yes** to delete the database.

## MAKING THE DATABASE AVAILABLE TO OTHER USERS

The final stages of making a database available to other users involve copying the database to the server or servers, setting up replication, and informing other users that the database is available. Again, these actions should be taken only with the consent or participation of your Notes administrator.

Copying the database to the server is like copying a database to your hard drive, except that you select the server name in the Server box of the Database Copy dialog box.



## EXAMINING REPLICATION SETTINGS

If you want *replicas* of a database to be available on other servers, a *replica stub* must exist on each server where you want to store a replica copy. In general, only your Notes administrator can set up replica stubs. As database manager, however, you might be responsible for setting up the type and frequency of replication for the database.

To control replication settings,

- Select or open the database.
- Choose *File, Database, Information* to display the Database Information dialog box.
- Click on *Replication* to display the Replications Settings dialog box.
- Make any changes you desire and then click on OK.

Replication is a complex subject, and in most cases will be handled by your Notes administrator. For complete information on replication, replica stubs, and replication settings, refer to Chapter 14 in the *Notes Application Developer's Reference*.

Let's take a look at the replication settings for the My Articles database:

1. Select the **My Articles** database icon.
2. Choose **File, Database, Information** to display the Database Information dialog box (see Figure 9.5). You can use this dialog box to get information about a database. You can also use it to change a database's title.
3. Click on **Replication** to display the Replication Settings dialog box (see Figure 9.6). This is where you control the frequency and manner in which server databases are exchanged with their replica copies on other servers or workstations. There is also an option that allows you to automatically delete documents saved more than a certain number of days ago.
4. Click on **Cancel** twice to close both dialog boxes.

Figure 9.5

The Database Information dialog box

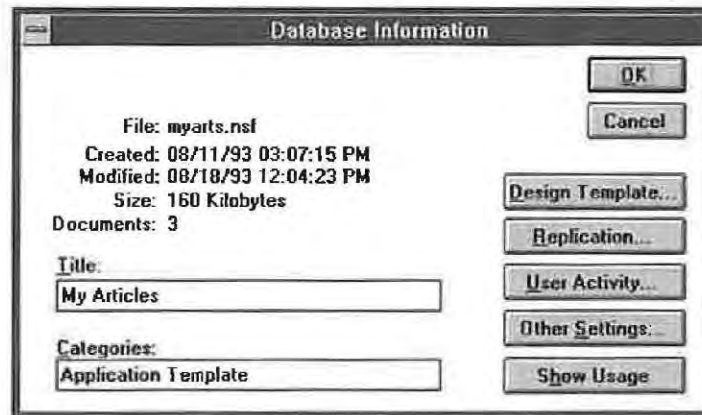
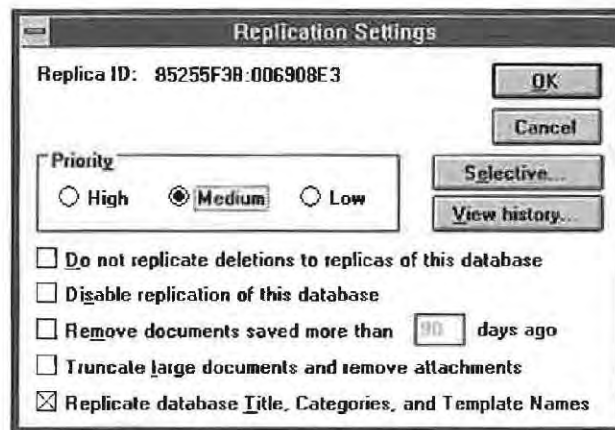


Figure 9.6

The Replications Settings dialog box



## NOTIFYING OTHER USERS THAT THE DATABASE IS AVAILABLE

The last step in making a database available is to let other users know that it's there. You can use Notes Mail to do this. One useful way to get people to use a new database is to send them a mail document that contains a DocLink to a document in the new database. That way, users can add the new database to their workspaces simply by double-clicking on the DocLink.

## SUMMARY

In this chapter, you learned about some of the considerations for making a database public. You learned more about access control,

including how to update an ACL. You also learned how to make a template copy of a database. Finally, we discussed replication settings and how to notify other users that a database is available.

The following table summarizes some of the techniques you learned in this chapter:

| <b>Desired Result</b>          | <b>How to Do It</b>                                                                                                                                                                                                             |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add user to ACL                | Select or open database; choose <b>File, Database, Access Control</b> ; type name of new user and click on appropriate access level; click on <b>Add</b>                                                                        |
| Update user in ACL             | Select or open database; choose <b>File, Database, Access Control</b> ; select name of user and select new access level; click on <b>Update</b>                                                                                 |
| Make template copy of database | Select database from which to make template; choose <b>File, Database, Copy</b> ; select <b>Local</b> from Server list; enter file name ending in <b>.NTF</b> ; select <b>Design Only</b> in Copy box; click on <b>New Copy</b> |
| Get database information       | Choose <b>File, Database, Information</b>                                                                                                                                                                                       |
| Examine replication settings   | Choose <b>File, Database, Information</b> and click on <b>Replication</b>                                                                                                                                                       |

In the next chapter, you will learn several ways to customize your workstation. You will learn how to change various user and mail options and how to customize database icons and Smart-Icons. We'll also talk about how you can use macros to perform certain actions.

## IF YOU'RE STOPPING HERE

If you wish to stop here, please choose **File, Exit** to exit Notes (you will need to restart Notes when you begin Chapter 10). If you wish to proceed directly to Chapter 10, please do so now.

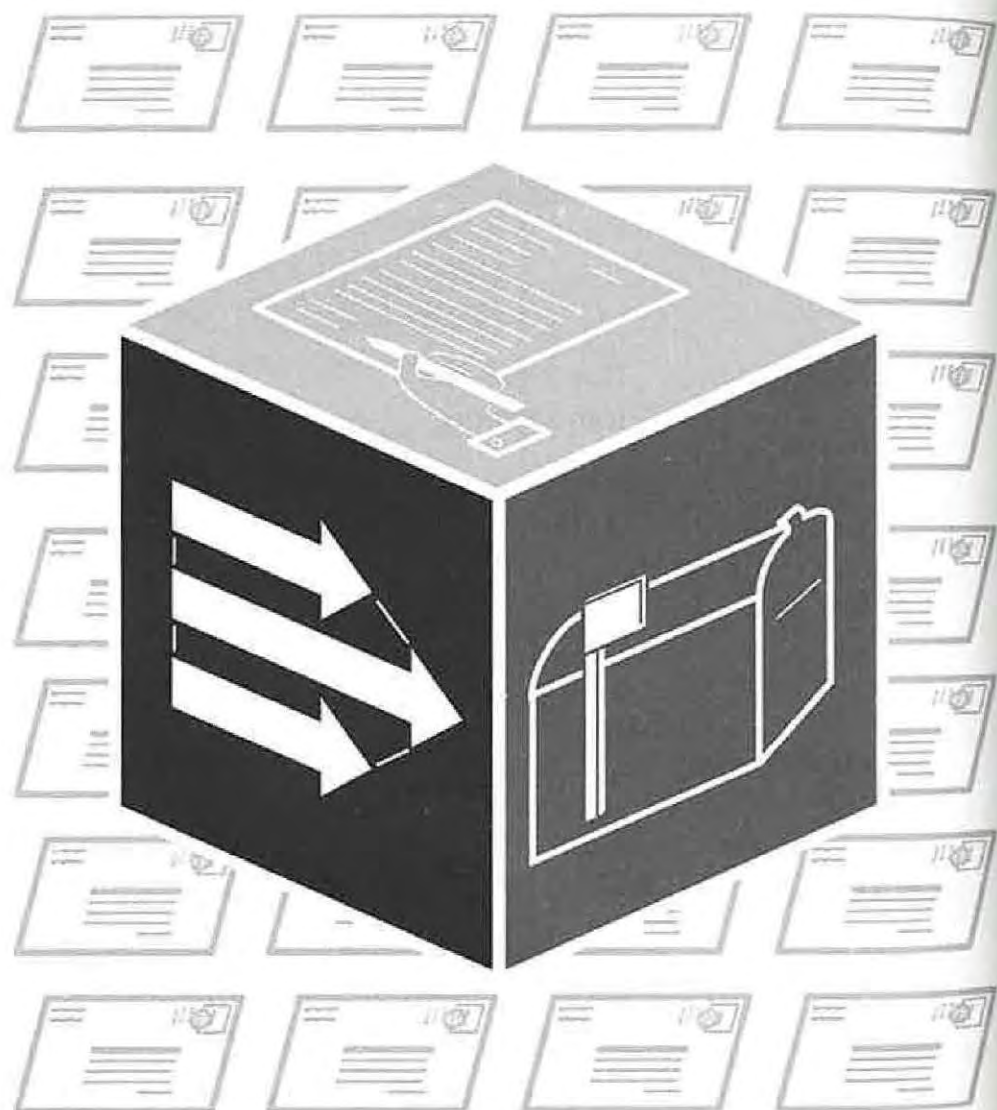
---

# CHAPTER 10: CUSTOMIZING YOUR WORKSTATION

Changing User  
and Mail Options

Customizing Icons

Creating Macros



---

**N**otes has many features that allow you to customize your workstation. In this chapter, we'll learn how to change various user and mail setup options to control the way Notes works. We'll also learn how to customize database icons and SmartIcons. Finally, we'll discuss how you can use macros to manage your databases and to place buttons on forms.

When you're done working through this chapter, you will know

- How to scan for unread documents at startup
- How to change your password
- How to change mail setup options
- How to change a database icon
- How to customize SmartIcons
- How to create and run macros

## CHANGING USER AND MAIL OPTIONS

You can use the Tools menu to control how Notes runs. In particular, the *Tools, Setup* submenu will allow you to change how the workspace looks and what options are in effect when you run Notes. The *Tools, User ID* submenu gives you control over many aspects of your User ID, including the ability to change your password.



### MORE ABOUT SCANNING FOR UNREAD DOCUMENTS

In Chapter 5, you learned how to use the Scan Unread command to browse unread documents in your workspace. You can use the User Setup dialog box to scan for unread documents each time you start Notes. To do so,

- Choose *Tools, Setup, User* to display the User Setup dialog box.
- In the Startup Options box, check *Scan For Unread*.
- Click on OK.

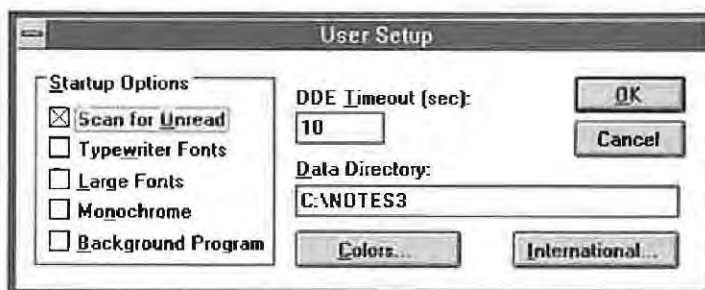
The next time you run Notes, the Scan Unread dialog box will appear, displaying the name of your first preferred database. Remember, to select your preferred databases, choose *Tools, Scan Unread, Choose Preferred*.

Let's try using the Scan For Unread startup option:

1. Choose **Tools, Setup, User** to display the User Setup dialog box.

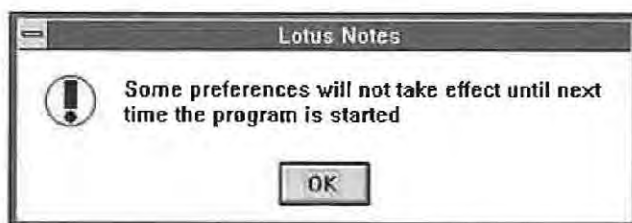
2. In the Startup Options box, check **Scan For Unread** to make Notes scan for unread documents when you start the program (see Figure 10.1).

**Figure 10.1** Using the Scan For Unread startup option



3. Click on **OK**. Notes warns you that this option may not take effect until next time you start the program (see Figure 10.2). You will get this message whenever you change startup options.

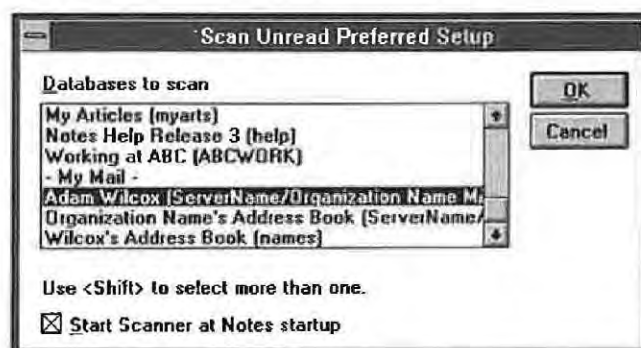
**Figure 10.2** Changing a startup option



4. Click on **OK** to accept the message.
5. Choose **Tools, Scan Unread, Choose Preferred** to display the Scan Unread Preferred Setup dialog box. This is where you determine which databases are acted on by the Scan Unread command.
6. Deselect **ABC News** and any other databases that are currently selected (click on each of them), and then select your Mail database (its name will include your name and the name of the server on which it is stored). Notice that the Start

Scanner At Notes Startup option is checked (see Figure 10.3). Checking this option is the same as choosing Scan For Unread in the Startup Options box in the User Setup dialog box.

**Figure 10.3**      **Choosing preferred databases**



7. Click on **OK** to close the dialog box.
8. Exit and restart Notes. Notes prompts you to enter your password, because it is scanning your Mail database for unread documents.
9. Enter your password and click on **OK**. The Scan Unread dialog box appears, displaying the name of your Mail database and its unread document count. (If you don't remember how to use this dialog box, refer back to Chapter 5.)
10. Click on **Done** to close the Scan Unread dialog box.



## EXAMINING OTHER USER SETUP OPTIONS

You can use the User Setup dialog box to control some other options that you may find useful. These include

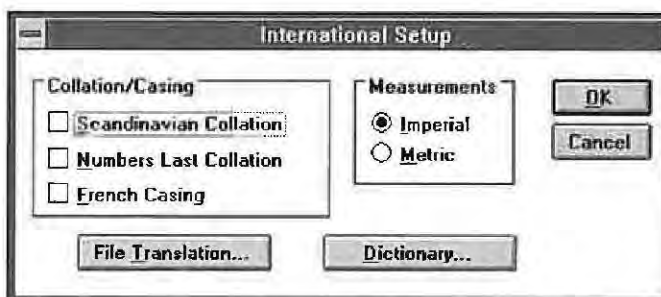
- *Data Directory*, which you can use to specify the directory in which your Notes databases are stored.
- *DDE Timeout (Sec)*, which you can use to control how long Notes will wait to establish *Dynamic Data Exchange* (DDE) connections. (The next chapter contains further information on DDE.)
- *Colors*, which you can use to control the workspace color setup.

- *International*, which you can use to control various international settings, including whether metric or imperial measurements are used.

Let's take another look at the User Setup dialog box:

1. Choose **Tools, Setup, User** to display the User Setup dialog box.
2. Observe the Startup Options box. The Typewriter Fonts option displays all Notes text in *monospaced*, rather than *proportional*, fonts. The Large Fonts option displays database titles, views, and documents in a font slightly larger than the default. The Monochrome option will cause the workspace to appear in black and white. The Background Program option runs background macros and deals with replication.
3. Click on the **Colors** button to display the Color Setup dialog box, which you can use to control the color of various parts of the workspace.
4. Click on **Cancel** to close the dialog box and then click on the **International** button to display the International Setup dialog box (see Figure 10.4). You can use this dialog box to choose between metric and imperial measurements (among other things).
5. Click on **Cancel** twice to close both dialog boxes.

**Figure 10.4**      **The International Setup dialog box**





## EXAMINING USER ID INFORMATION AND CHANGING YOUR PASSWORD

You can get information about and change your User ID by using the Tools, User ID submenu. Some of the commands in this menu are

- *Information*, which you can use to get information about your password or to change your user name.
- *Encryption Keys*, which you can use to create encryption keys or delete them from your ID file.
- *Password*, which displays a submenu you can use to set, clear, or change your password.

For security reasons, you should change your Notes password from time to time (every three to six months should suffice). Passwords are case-sensitive and can comprise up to 31 characters, including letters, numbers, symbols, and spaces. They must be at least eight characters long. To change your password,

- Choose *Tools, User ID, Password, Set*. Notes prompts you to enter your current password.
- Type your password and click on OK to display the Set Password dialog box.
- Type your new password and click on OK. To be sure you typed correctly, Notes asks you to repeat this step.

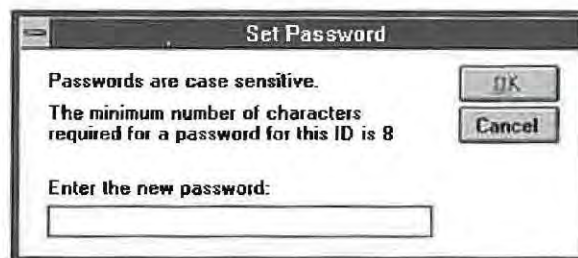
Let's examine your User ID information and see how to change your password:

1. Choose **Tools, User ID, Information** to display the User ID Information dialog box (see Figure 10.5; your dialog box will show different information). You can use this dialog box to change your user name, but you should do so only with the consent of your Notes administrator.
2. Click on **OK** to close the dialog box.
3. Choose **Tools, User ID, Password, Set**. Notes asks you to enter your password.
4. Enter your password and click on **OK** to display the Set Password dialog box (see Figure 10.6).

**Figure 10.5**      **The author's User ID Information dialog box**



**Figure 10.6**      **Changing your password**



5. Enter your *current* password again and click on **OK** (we're not really changing your password). Notes asks you to enter the password again to confirm that you typed it correctly.

**Note:** Because this is only a demonstration, we are not actually changing your password. If you are very sure you want to change your password right now, you can type your new password. Keep in mind, however, that if you forget your password, there is no way to retrieve it. If your Notes administrator has a backup copy of your original user ID—don't bet on this!—he or she will be able to give you a new user ID, but you still might lose access to some documents.

6. Click on **Cancel**. (If you *really* want to change your password, retype it here and click on **OK**.)



## CHANGING MAIL SETUP OPTIONS

You can use the *Tools, Setup, Mail* command to control default mail options. When you choose this command, Notes displays a dialog box with several options. *Save Sent Mail* causes the Save Mail option to be checked when you send mail. *Sign Sent Mail* causes the Sign Mail option to be checked when you send mail. Signing a mail document—attaching a unique electronic “signature” to it—assures the recipient that you were its author. *Encrypt Sent Mail* causes sent mail to be encrypted so that only the intended recipient can read it. *Encrypt Saved Mail* causes saved mail to be encrypted. Finally, *Check For New Mail* allows you to specify how frequently Notes should check your Mail database for new mail.

Let's take a look at your mail setup options:

1. Choose **Tools, Setup, Mail** to display the Mail Setup dialog box.
2. Uncheck all the options except **Check For New Mail Every 15 Minutes**. Your dialog box should resemble Figure 10.7, except that you will see a different name in the Mail File box. If you save a copy of most memos that you send, you might want to check the Save Sent Mail option, as well (after you've worked with Notes a while, you'll want to set your Mail setup options to suit the way you work).
3. Click on **OK** to accept the changes and close the dialog box.

**Figure 10.7**      **The author's Mail Setup dialog box**



## CUSTOMIZING ICONS

You can customize both database icons and SmartIcons. By doing so, you can create a workstation that best suits the way you work.

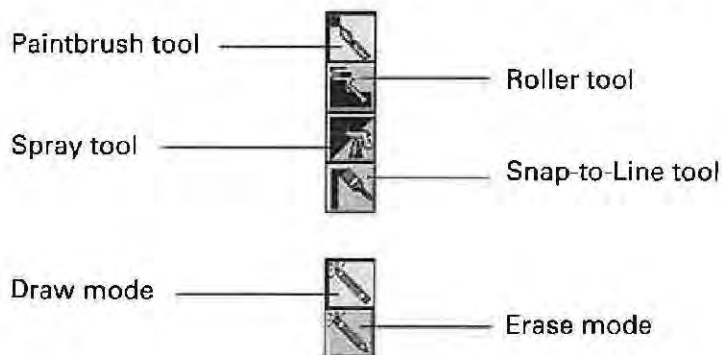


### EDITING A DATABASE ICON

If you have at least Designer access to a database—as will be the case for any private database and for your Mail database, if not for most shared databases—you can modify its icon. Changing database icons isn't the most important thing you can do in Notes, but it can be a lot of fun. To edit a database icon,

- Select the appropriate database icon, then choose *Design, Icon* to display the Design Icon dialog box.
- Make any desired changes to the icon. Figure 10.8 shows the tools that are available in this dialog box.
  - Select a color from the Color palette and then click on the *Paintbrush* tool to apply that color one *pixel* (small square) at a time.

**Figure 10.8** The Design Icon dialog box tools



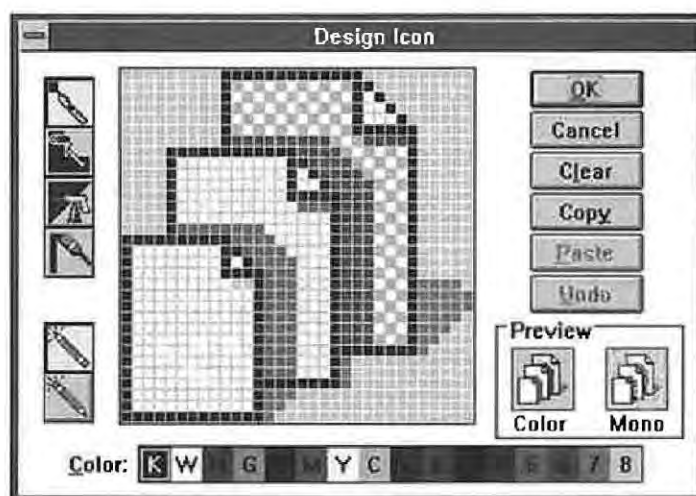
- Use the *Roller* tool to apply the selected color to an area that begins with the pixel on which you click. The four adjacent pixels are also colored, provided their color is the same as the original color of the pixel on which you click. This process continues until no adjacent pixels meet this requirement.

- Use the *Spray* tool to apply the selected color to all eight adjacent pixels, provided they are the same color as the pixel on which you click. This process continues until no adjacent pixels meet this requirement. This tool fills slightly more area than the Roller tool, because the fill moves diagonally as well as horizontally and vertically.
- Use the *Snap-to-Line* tool to draw either horizontal or vertical lines with the selected color.
- Use *Draw mode* and *Erase mode* to toggle between drawing and erasing. Erasing returns pixels to the background color.
- Use the *Clear* button to clear the entire icon.
- Use the *Undo* button to undo the last action you took.
- Click on OK to close the dialog box and save changes to the icon; click on Cancel to close the dialog box without saving changes to the icon.

Let's edit the icon for the My Articles database:

1. Select the **My Articles** database icon.
2. Choose **Design, Icon** to display the Design Icon dialog box, which includes a pixel-by-pixel view of the database icon, as well as several tools for editing it (see Figure 10.9).

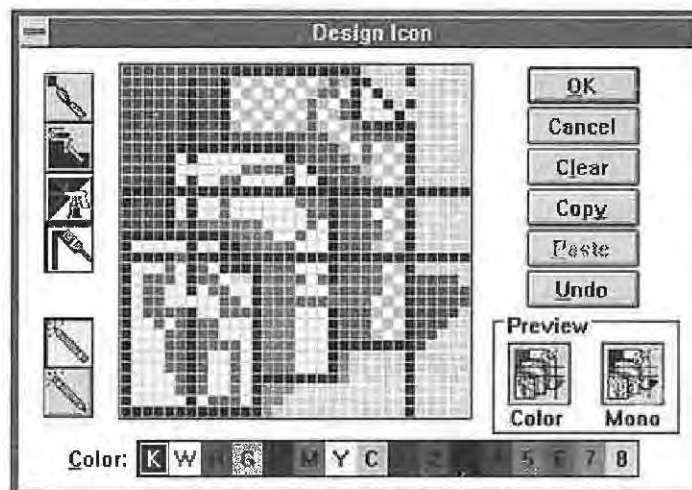
**Figure 10.9**      **The Design Icon dialog box**



3. Click on the **Paintbrush** tool (the top tool on the left). You can use this tool to color the icon one pixel at a time.
4. Point inside the icon and then drag the mouse over the pixels whose color you want to change. The pixels change to the color that is selected in the Color palette at the bottom of the dialog box.
5. Click on the **Undo** button to undo the last action you took (if you dragged the mouse more than once in step 4, only the last dragging action will be undone).
6. Click on the **Snap-to-Line** tool (the fourth tool from the top; it looks more like a paintbrush than the Paintbrush tool!). This tool will draw only straight lines of pixels.
7. Point inside the icon and then drag the mouse to draw a straight line of the selected color.
8. Click on the **Roller** tool and then select a color you like from the Color palette at the bottom of the dialog box.
9. Click inside one of the pictures of a document that make up the icon to change the color of the entire area to the color you selected.
10. Click on the **Undo** button to undo the last action you took (with the Roller tool).
11. Click on **OK** to close the dialog box. The database icon reflects your changes.

## PRACTICE YOUR SKILLS

1. Open the Design Icon dialog box for the My Articles database and experiment with the tools to create your own custom icon. As a painter might say, use broad strokes; this is your chance to have some fun. How does your icon compare with the author's in Figure 10.10?
2. Return to the workspace.

**Figure 10.10** The author's custom icon

### COPYING A DATABASE ICON

You can also copy icons from one database to another. To do so,

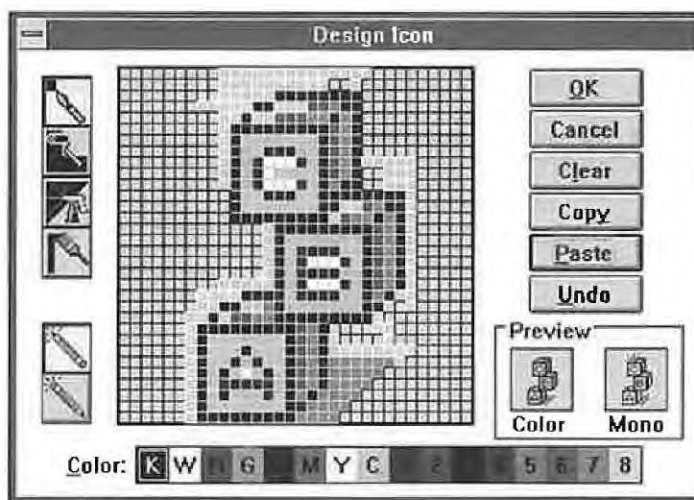
- Select the database icon you wish to copy, then choose **Design, Icon** to display the Design Icon dialog box.
- Click on the **Copy** button to place a copy of the icon on the Clipboard, then click on **OK** to close the dialog box.
- Select the database icon onto which you want to paste the copied icon, then choose **Design, Icon** to display the Design Icon dialog box.
- Click on the **Paste** button to paste the copied icon into the dialog box, and then click on **OK**.

Let's copy the database icon for the **Working At ABC** database to the **My Articles** database:

1. Select the **Working At ABC** database icon.
2. Choose **Design, Icon** to open the Design Icon dialog box. Notice that the **Paste** button is dimmed (unless you've already copied something to the Clipboard), meaning that it is not available.
3. Click on the **Copy** button to place a copy of the icon on the Clipboard.
4. Click on **OK** to close the dialog box.

5. Select the **My Articles** database icon, and then choose **Design, Icon** to display the Design Icon dialog box. Notice that the Paste button is now available.
6. Click on the **Paste** button to paste the icon from the Clipboard into the dialog box (see Figure 10.11).

**Figure 10.11** Pasting a database icon



7. Click on **OK** to accept the change to the icon and to close the dialog box. The new icon for the My Articles database appears in the workspace.

### Copying a Database Icon from an Icon Library Database

It is also possible that there is a database containing various database icons on your server. If so, it is probably called something like Icon Library. To use one of the icons in such a database,

- Add the database to your workspace and then open one of the documents within the database.
- Select the desired icon and choose Edit, Copy (or click on the Edit Copy SmartIcon).
- Close the database and then display the Design Icon dialog box for the database icon onto which you wish to paste the copied icon.
- Click on Paste and then click on OK.



## CUSTOMIZING SMARTICONS

Notes allows you to customize the SmartIcon bar in several ways. In addition to the seven built-in sets of SmartIcons, you can also customize sets and even create your own. To customize a SmartIcon set,

- Choose **Tools, SmartIcons** to display the SmartIcons dialog box.
- Select the set you wish to customize from the drop-down list at the top of the dialog box.
  - To add a SmartIcon to the set, drag it from the Available Icons list to the desired location in the set list.
  - To remove a SmartIcon from the set, drag it out of the set list (it doesn't matter where you drop it).
  - To change the position of the set, select the desired location from the Position drop-down list on the right side of the dialog box.
- Click on **OK** to accept your changes and to close the dialog box.

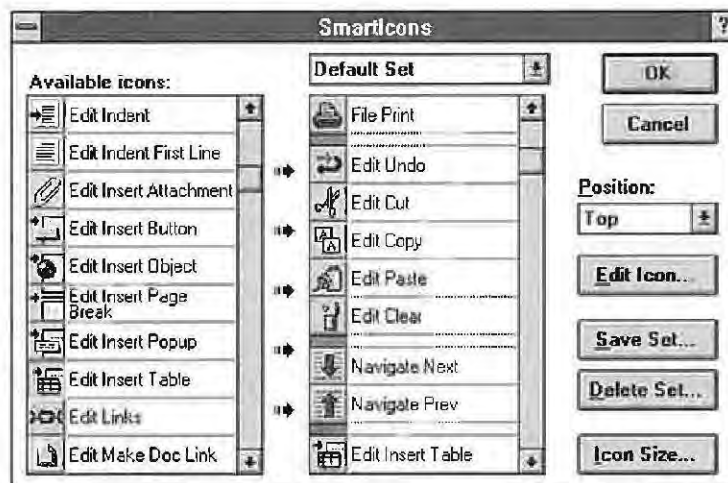
When you next run Notes, the SmartIcon bar will remain as you last left it. If you wish to save custom SmartIcon bar sets in addition to the standard seven, you can click on the **Save Set** button in the SmartIcons dialog box. This will open a dialog box in which you can give the current setup a title and a file name (much as you would a database).

Let's customize the default set of SmartIcons:

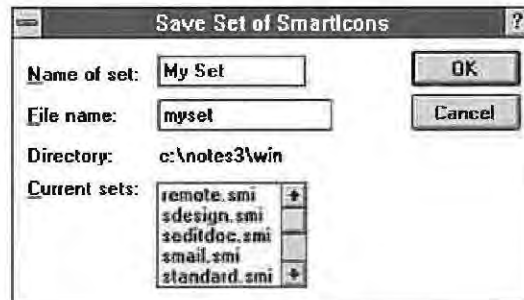
1. Choose **Tools, SmartIcons** to display the SmartIcons dialog box. The list on the right shows the SmartIcons that are currently on the Default Set bar. The drop-down list at the top of the dialog box allows you to select a different set to customize. The list on the left shows other SmartIcons that you can add to the bar.
2. In the list of Default Set SmartIcons, point to the **Navigate Next Unread** SmartIcon (you'll need to scroll down in the list) and drag it out of the list. It doesn't matter where you drop it, just so long as you get it out of there.
3. Drag the **Navigate Prev Unread** SmartIcon out of the Default Set list.

4. Scroll down in the Available Icons list until you can see the Edit Insert Table SmartIcon. You will drag this SmartIcon into the Default Set list.
5. Drag the Edit Insert Table SmartIcon from the Available Icons list to just above the Edit Insert Attachment SmartIcon in the Default Set list. Your dialog box should resemble Figure 10.12, although you might need to drag the new SmartIcon around in the Default Set list to get it exactly where you want it.

**Figure 10.12** Customizing a SmartIcon set



6. Click on the **Save Set** button to display the Save Set Of SmartIcons dialog box, which you can use to save your own custom sets.
7. In the Name Of Set box, replace *Default Set* with **My Set**. This will be the title for your customized set of SmartIcons.
8. In the File Name box, type **myset**. As with databases, Notes will add the file name extension automatically. Your dialog box should resemble Figure 10.13.
9. Click on **OK** twice to close both dialog boxes. The My Set SmartIcon bar now appears in the workspace.
10. Click on the **SmartIcons** button on the Status bar to display a list of available SmartIcon Sets (it is the third button from the right, and looks like three ice cubes in a row). My Set is included in the list.

**Figure 10.13** Saving a set of SmartIcons

11. Click in the workspace to close the list of SmartIcon sets.

## PRACTICE YOUR SKILLS

1. Use the SmartIcons dialog box to customize the My Set SmartIcons as you see fit.
2. Close the dialog box and then use the SmartIcons button on the Status bar to switch back to the Default Set SmartIcons. (If you want to keep using the My Set SmartIcons, feel free to do so. We recommend, however, that you take some time to see how you work in Notes before you switch to a custom SmartIcon set.)

## CREATING MACROS

In Notes, you can create macros that will either take action on some or all documents in a database, or perform some menu command or a combination of commands. In general, you create macros by writing macro formulas. You will need different access levels, depending on the kind of macro you wish to create.

In this chapter, we will look at two kinds of macros. First, we'll discuss *button macros*, which allow you to place on forms buttons that will perform menu commands. You can use this kind of macro to place a reply button on a form so that users can reply to documents without going through the menu.

Later, you will learn to use macros that select documents in a database and then edit, create, or delete field information from those documents. You might use this kind of macro to categorize all the documents in a database that contain a particular text string.



## USING BUTTON MACROS

A button macro performs a menu command or action whenever the user clicks on the button. You can use this kind of macro to do things like addressing and sending mail memos, or replying to documents. You can run a button macro only from the document that contains it.

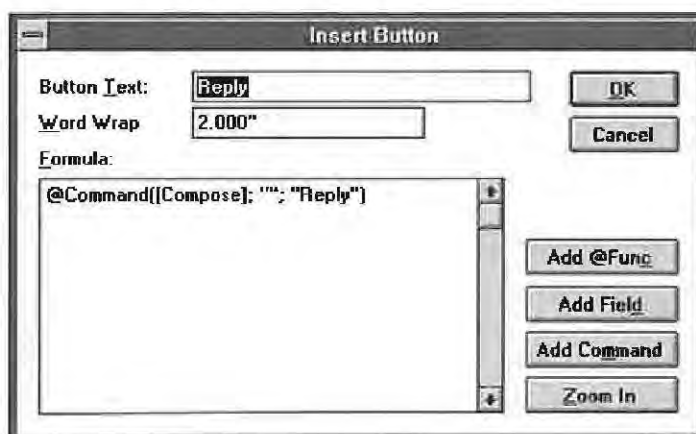
### Examining a Macro Button

You have already used macro buttons a couple of times in this book. The Send and Reply buttons on the memo form are both examples. To examine how a macro button works, you must examine the formula that defines the button. To do so,

- Edit the form that contains the button you wish to examine.
- Double-click on the button in which you are interested.
- Click on Cancel when you are finished.

Let's examine one of the buttons in the Memo form in your Mail database:

1. Choose **Mail, Open** to open your Mail database.
2. Choose **Design, Forms** to display the Design Forms dialog box.
3. In the Forms box, select **\*Memo** and then click on **Edit**. Notes warns you that any changes you make to this form may be lost.
4. Click on **OK** to accept the message and display the form design window for the Memo form. There are four buttons in the upper-right corner of the form.
5. Double-click on the **Reply** button to display the Insert Button dialog box (see Figure 10.14). This is the dialog box where you define a button macro. The Button Text box contains the text that appears on the button. The Word Wrap box determines the maximum length of the button. The Formula box is similar to other formula boxes you've seen in this book; it contains a combination of @Functions and text that determine how the button behaves.
6. Click on **Cancel** to close the dialog box.

**Figure 10.14** Examining a macro button formula

7. Press **Esc** to close the form design window (do not save changes if you are prompted to do so), and then close your Mail database.

### Creating a Button Macro

You can create a button macro in any rich-text field of a document, or in a form. To create a button macro,

- If you are creating a button in a rich-text field, place the document in edit mode; if you are creating a button in a form, edit the form.
- Place the insertion point where you want the button to appear.
- Choose *Edit, Insert, Button* to display the Insert Button dialog box.
  - In the Button Text box, enter the text you want to appear on the button.
  - In the Word Wrap box, enter the length of the button in inches. If the button text does not fit within this length, it will wrap onto a second line.
  - In the Formula box, enter the button macro formula.
- Click on OK.

Macro formulas work in much the same way as do other formulas you have seen in Notes. Because button macros perform actions, most of their formulas will use the *@Command* function, which is

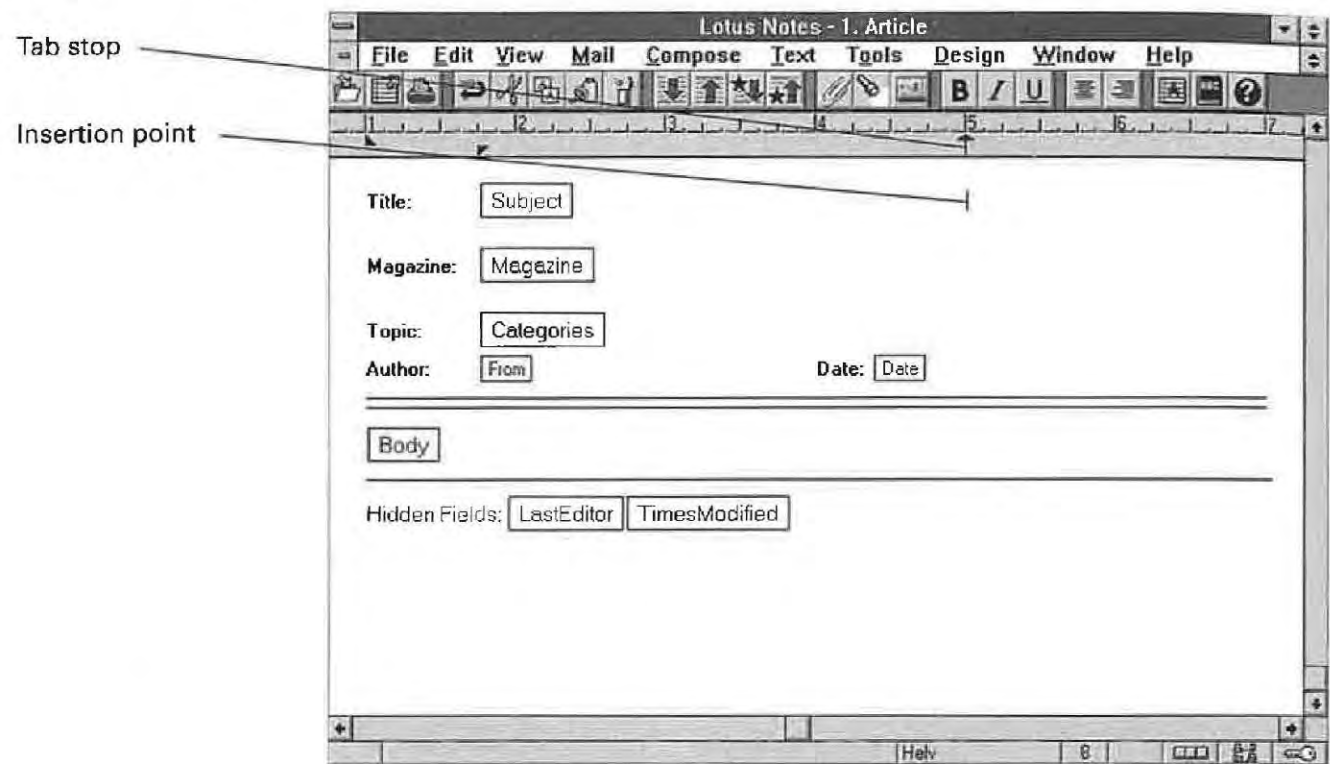
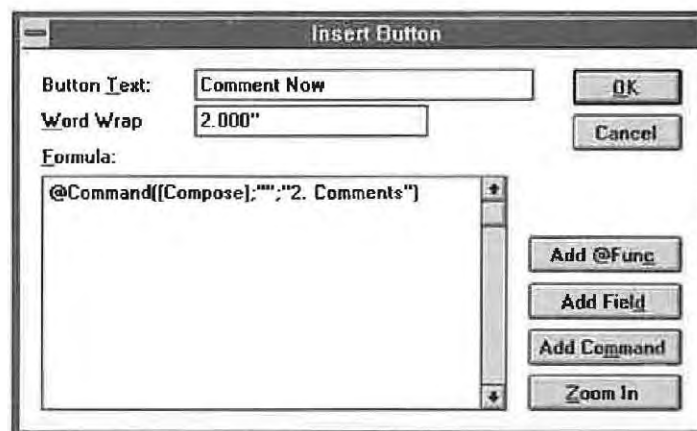
used to execute Notes commands. The macro formula you just examined uses the following @Command function:

```
@Command([Compose];"";"Reply")
```

This function has three arguments. The first is the name of the menu you wish to use, which must be enclosed in brackets. The second argument is the name of the database on which you wish the command to act. In this case, the double quotation marks specify no particular database, which means the command will affect the current database. The third argument is the name of the command you wish to choose from the menu—in this case, the name of the form you wish to choose from the Compose menu. The second and third arguments must be enclosed in quotation marks.

Let's go back to the My Articles database and place a button on the Article form that we can use to compose a Comments response document:

1. Select the **My Articles** database icon, then choose **Design, Forms** to display the Design Forms dialog box.
2. Double-click on **\*1. Article** to display the form design window for this form.
3. Place the insertion point immediately after the Subject field, and then click on the **View Show Ruler** SmartIcon to display the ruler. You will use the ruler to set a tab stop at which you will place the new button (remember Chapter 6?).
4. Click at the 5-inch mark on the ruler to place a tab stop there, and then press **Tab** to move the insertion point to the new tab stop (see Figure 10.15).
5. Choose **Edit, Insert, Button** to display the Insert Button dialog box.
6. In the Button Text box, type **Comment Now**. This will be the text that appears on the button.
7. Type **@Command([Compose];"";"2. Comments")** in the Formula box. Carefully compare your dialog box with Figure 10.16; if the formula is not exactly correct, the button won't work.

**Figure 10.15** Preparing to insert a new button**Figure 10.16** Creating a button macro formula

8. Click on **OK** to create the new button on the form (see Figure 10.17).
9. Close and save the form.

**Figure 10.17** The new button on the form

Lotus Notes - 1. Article

File Edit View Mail Compose Text Tools Design Window Help

Title: Subject

Magazine: Magazine

Topic: Categories

Author: From Date: Date

Body

Hidden Fields: LastEditor TimesModified

Comment Now

### Testing a Macro Button

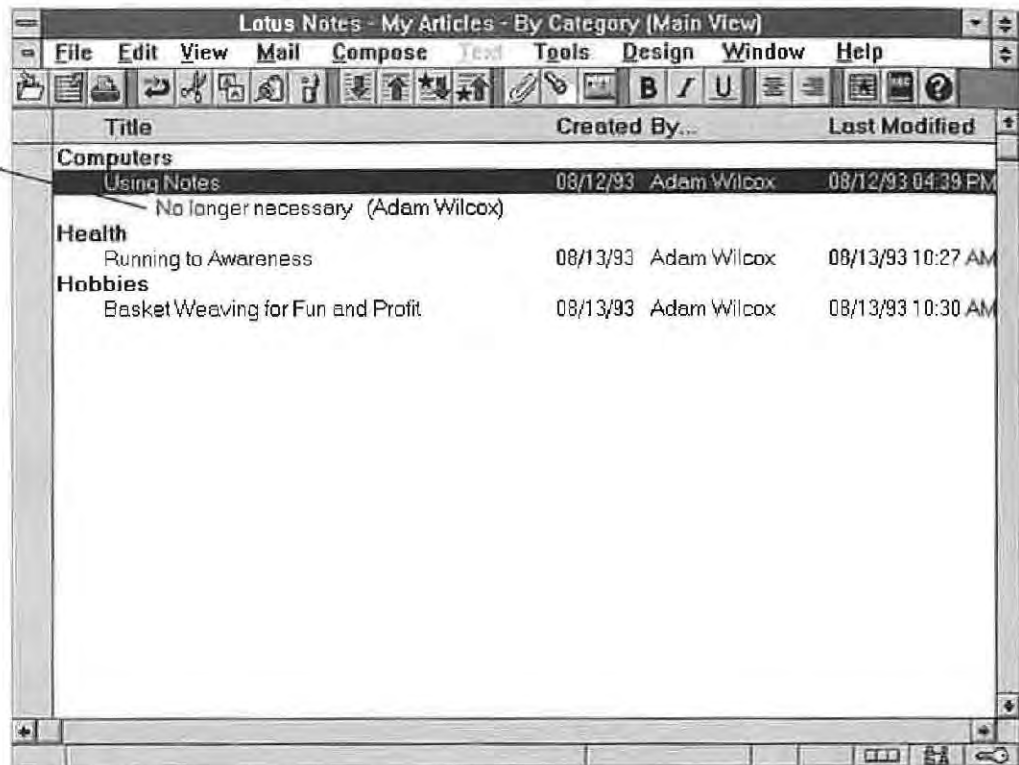
You should always test your macro buttons to be sure they work properly. Let's test the new button in the Article form:

1. Open the **My Articles** database and change to the By Category view.
2. Open the **Using Notes** document. The new button appears in the document.
3. Click on the **Comment Now** button. A new Comments response form appears on your screen. Clicking on the macro button worked the same way as choosing the *Compose, 2. Comments* command.
4. In the Key Thought field, type **No longer necessary**.
5. In the body field, type **Everything in this article seems to be covered in PC Learning Labs Teaches Lotus Notes 3.0!**

6. Close and save the new Comments document, and then close the Using Notes document. The new document appears in the view as a response to the original (see Figure 10.18).
7. Close the My Articles database.

**Figure 10.18** The new document in the view

New response document



| Title                             | Created By...        | Last Modified     |
|-----------------------------------|----------------------|-------------------|
| <b>Computers</b>                  |                      |                   |
| Using Notes                       | 08/12/93 Adam Wilcox | 08/12/93 04:39 PM |
| No longer necessary (Adam Wilcox) |                      |                   |
| <b>Health</b>                     |                      |                   |
| Running to Awareness              | 08/13/93 Adam Wilcox | 08/13/93 10:27 AM |
| <b>Hobbies</b>                    |                      |                   |
| Basket Weaving for Fun and Profit | 08/13/93 Adam Wilcox | 08/13/93 10:30 AM |



## USING MACROS TO MANAGE DOCUMENTS

You also can create macros that will take action on some or all of the documents in a database. You create these macros by writing a macros formula that selects documents and then edits, creates, or deletes field information from them. You can create macros that run automatically when a document is saved or mailed to a database, or that run on a group of documents when you choose a menu command.

This kind of macro is useful for tasks such as categorizing incoming mail or updating a single field in a number of documents. For example, you might want all Mail documents that contain the text *meeting* in the Subject field to be categorized under Meetings, or

you might need to change the Manager field on all the documents in the database because a new manager has been hired. These are good uses for macros.

### Creating a Macro to Manage Documents

To create most document-management macros, you must have at least Editor access. To create this kind of macro,

- Select or open the appropriate database.
- Choose *Design, Macros* to display the Design Macros dialog box.
- Click on *New* to open the Design New Macro dialog box.
  - Type a name for the macro in the Name box. The name can contain up to 32 characters, including spaces.
  - If you want to be able to run the macro from the menu, check *Include In 'Tools Run Macros' Menu*.
  - Use the *Run Options* drop-down list to specify under what conditions the macro should run.
  - Use the *Operation* drop-down list to specify the kind of operation that will take place.
  - Use the *Run Macro On* drop-down list to specify on which documents the macro should act.
  - Click on the *Formula* button to display the Formula box, where you construct the macro formula. In general, this formula will select certain documents and then act on certain fields in those documents.
- Click on OK to accept the formula and then click on OK to define the macro.

This kind of macro formula selects documents that meet certain conditions by using a SELECT statement similar to the ones used in view selection formulas. You can use the function @Contains to select documents that contain certain information in a specific field. For example, the statement

```
SELECT @Contains(Subject;"Notes")
```

would select documents whose Subject field contains the text *Notes*. It is important to remember that the @Contains function is case-sensitive.

To take actions on a particular field, you use a **FIELD** statement, which allows you to define a field to be equal to a value. For example, the statement

```
FIELD Categories := "Notes"
```

would set the **Categories** field for selected documents equal to the text *Notes*.

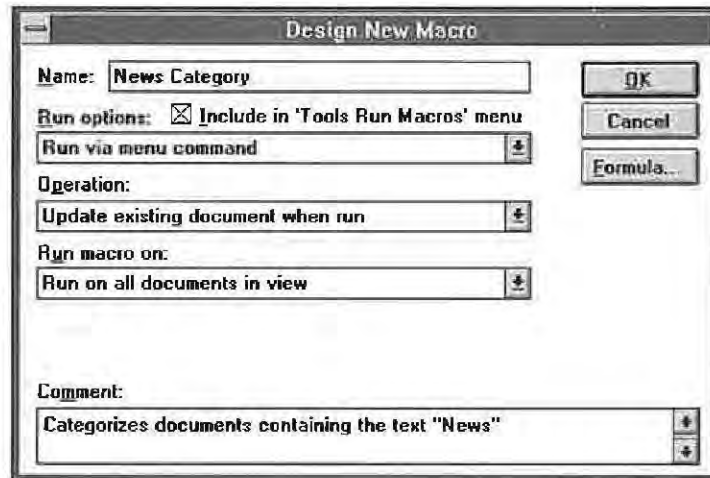
You separate **SELECT** and **FIELD** statements in a macro formula by using a semicolon (;).

This is probably getting confusing, so let's look at an example. Let's create a macro that will put any Mail documents that contain the text *News* in their **Subject** fields in a category called *News*:

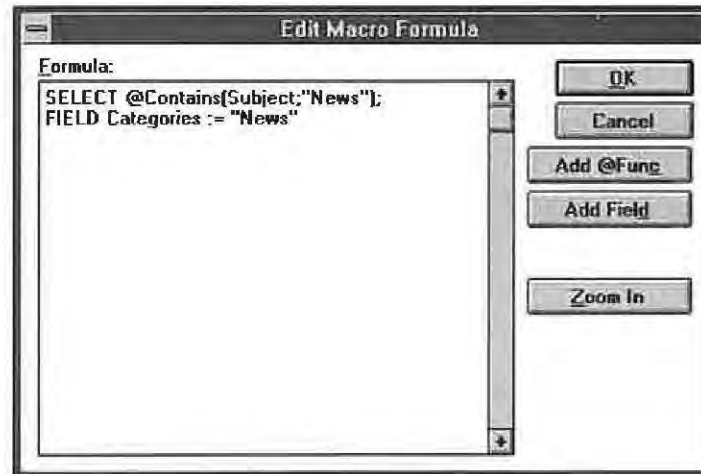
1. Choose **Mail, Open** to open your Mail database.
2. Choose **Design, Macros** to open the Design Macros dialog box. There are currently no macros defined for this database.
3. Click on **New** to open the Design New Macro dialog box.
4. In the Name box, type **News Category**. This will be the name for the macro.
5. Click on the drop-down arrow next to the Run Options box, observe the options, and then select **Run Via Menu Command**. You can define macros that run when you choose them from the menu, that run periodically in the background, or that run when documents are pasted or mailed to the database.
6. Click on the drop-down arrow next to the Operation box, observe the options, and then select **Update Existing Document When Run**. You also can have the macro either select documents or create new ones.
7. Click on the drop-down arrow next to the Run Macro On box, observe the options, and then select **Run On All Documents In View**. This is where you determine which documents are acted on by the macro.
8. In the Comment box, type **Categorizes documents containing the text "News"**. You can use this box to provide a

description of the macro. Your dialog box should resemble Figure 10.19.

**Figure 10.19** The Design New Macro dialog box



9. Click on the **Formula** button to display the Edit Macro Formula dialog box.
10. Type **SELECT @Contains(Subject;"News")** in the Formula box. This part of the macro formula will select documents that contain the text *News* in the Subject field.
11. Place the insertion point after the parentheses, type **;**, and press **Enter**. You separate statements within a formula by using a semicolon. Pressing Enter provides a new line and is ignored by the formula.
12. Type **FIELD Categories := "News"**. This FIELD statement enters the text *News* in the Categories field of the selected documents. This will cause these documents to appear in a category called News.
13. Carefully compare your dialog box to Figure 10.20, make any changes necessary to make them match, and then click on **OK** twice to accept the formula and define the macro.

**Figure 10.20**    **The macro formula**

### Running a Macro from the Menu

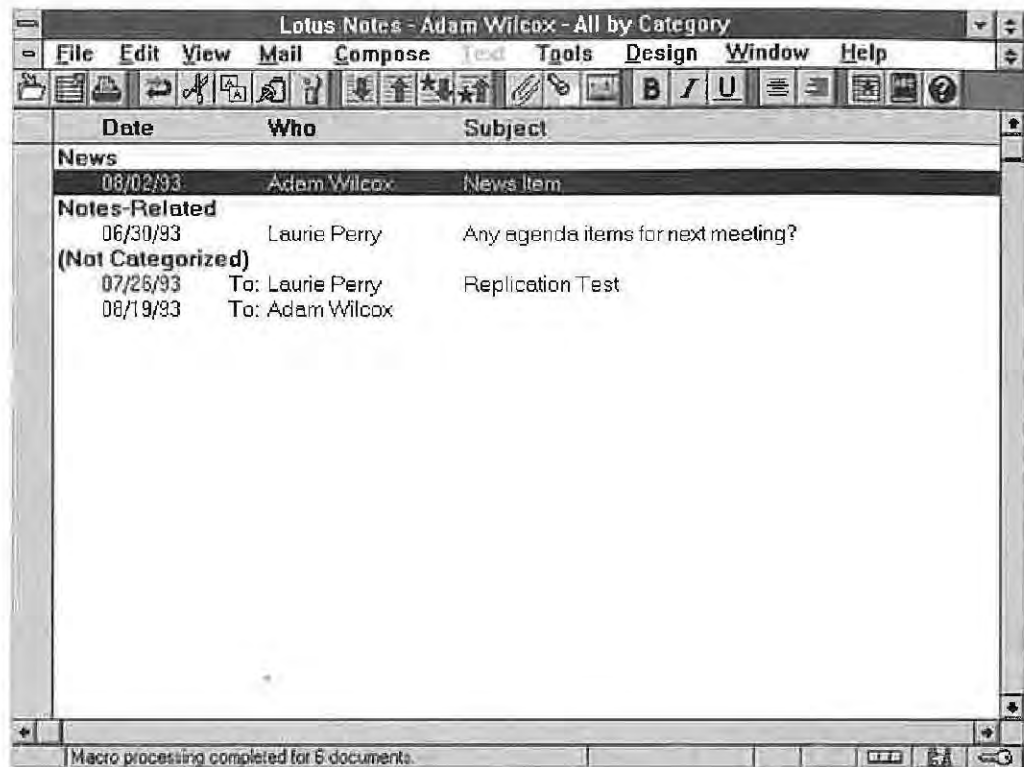
To run a macro from the menu, all you do is choose the macro from the *Tools, Run Macros* submenu. Let's run our new macro:

1. Choose **Tools, Run Macros, News Category** to run the News Category macro.
2. Examine the view (see Figure 10.21). The News Item document you sent yourself now appears in a category called News. The macro selected this document because it contains the text *News* in its Subject field, and then it entered the text *News* in its Categories field.

### Modifying a Macro to Run Automatically

You can also make a macro run automatically when a document is saved or mailed to a database. To do so,

- Select or open the appropriate database.
- Choose Design, Macros to display the Design Macros dialog box.
- Select the macro you wish to modify and click on Edit (or click on New to create a new macro).
- Select *Run When Documents Pasted/Mailed Into Database* from the Run Options drop-down list.

**Figure 10.21 A document categorized by the macro**

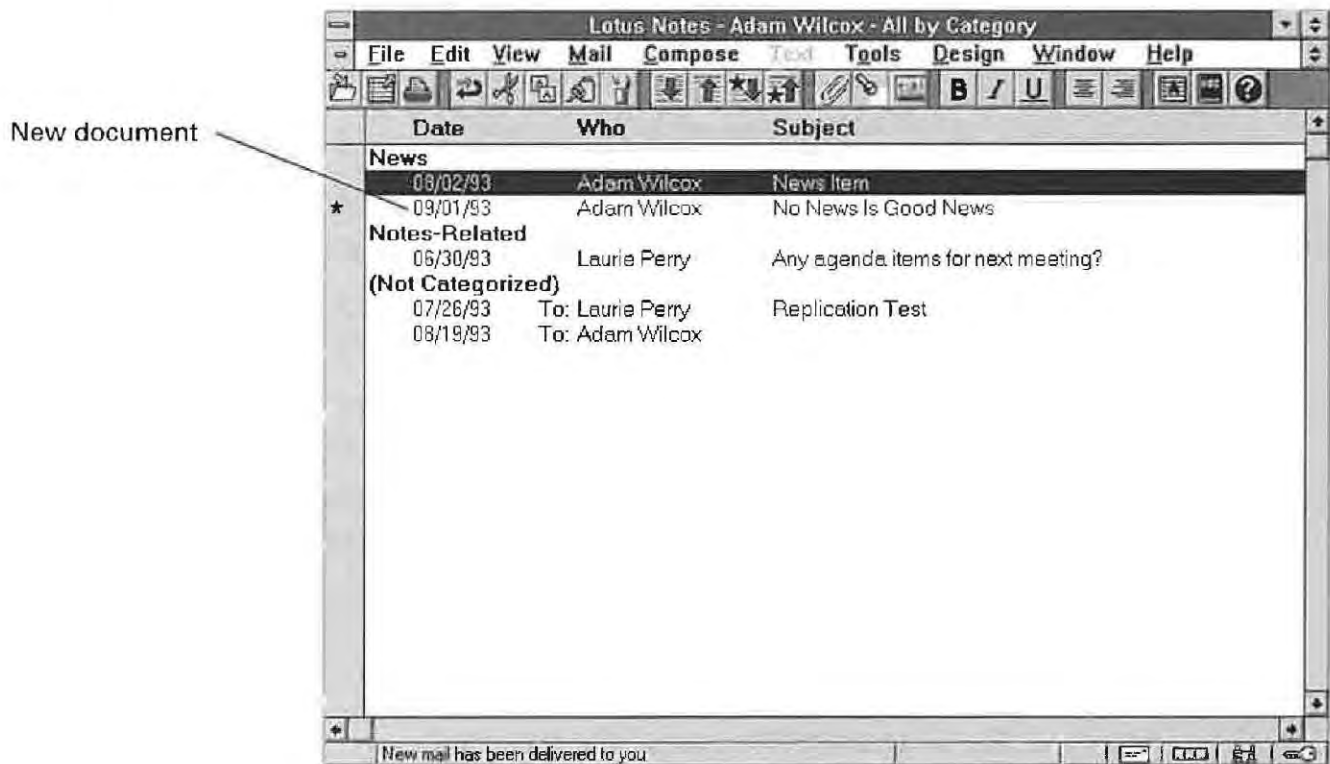
- Click on OK to save your changes to the macro. Notes displays a warning that you can have only one mail/paste macro per database.
- Click on OK to accept the message.

Let's modify our News Category macro so that it automatically categorizes documents when they are mailed to the database:

1. Choose **Design, Macros** to display the Design Macros dialog box. The News Category macro appears in the Macros list.
2. In the Macros list, select **News Category** and then click on **Edit** to open the Edit Existing Macro dialog box.
3. Click on the drop-down arrow next to the Run Options box and select **Run When Documents Pasted/Mailed Into Database**.
4. Click on **OK** to accept your changes. Notes displays a warning that you can have only one of this type of macro per database (see Figure 10.22).
5. Click on **OK** to accept the message.

**Figure 10.22** Creating a mail/paste macro

6. Send yourself a Mail document with the text *News* in the Subject field. Be sure to use an uppercase *N*; the @Contains function in the macro formula is case-sensitive.
7. Wait a minute and then press **F9** to refresh your Mail database (you might need to do this a couple of times). The new document appears in the view already categorized (see Figure 10.23).
8. Close the database.

**Figure 10.23** The new document automatically categorized by the macro

## SUMMARY

In this chapter, you learned some ways in which you can customize your workstation. You learned how to scan for unread documents at startup, how to change your password, and how to change various user and mail setup options. You also learned how to customize database icons and SmartIcons. Finally, we discussed creating button macros and macros that you can use to manage documents.

The following table summarizes some of the techniques you learned in this chapter:

| <b>Desired Result</b>       | <b>How to Do It</b>                                                                                                                                                                                       |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Change User Setup options   | Choose <b>Tools, Setup, User</b> ; select desired options; click on <b>OK</b>                                                                                                                             |
| Examine User ID information | Choose <b>Tools, User ID, Information</b>                                                                                                                                                                 |
| Change password             | Choose <b>Tools, User ID, Password, Set</b> ; enter password and click on <b>OK</b> ; enter new password and click on <b>OK</b> ; confirm new password                                                    |
| Change mail setup options   | Choose <b>Tools, Setup, Mail</b> ; select desired options; click on <b>OK</b>                                                                                                                             |
| Edit database icon          | Select icon; choose <b>Design, Icon</b> ; make desired changes; click on <b>OK</b>                                                                                                                        |
| Copy database icon          | Select icon to be copied; choose <b>Design, Icon</b> ; click on <b>Copy</b> ; click on <b>OK</b> ; select icon to be pasted onto; choose <b>Design, Icon</b> ; click on <b>Paste</b> ; click on <b>OK</b> |
| Customize SmartIcon set     | Choose <b>Tools, SmartIcons</b> ; select desired set; drag desired SmartIcons into or out of set; click on <b>OK</b>                                                                                      |
| Save SmartIcon set          | Customize set as desired; click on <b>Save Set</b> button in SmartIcons dialog box; enter title and file name for set; click on <b>OK</b>                                                                 |

| Desired Result                   | How to Do It                                                                                                                                                                  |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create button macro              | Place insertion point in rich-text field or edit form; choose <b>Edit, Insert, Button</b> ; specify button text, word wrap, and macro formula; click on <b>OK</b>             |
| Create document-management macro | Select or open database; choose <b>Design, Macros</b> ; click on <b>New</b> ; specify macro options; click on <b>Formula</b> ; create macro formula; click on <b>OK</b> twice |
| Run macro from menu              | Choose <b>Tools, Run Macros</b> and choose macro name from submenu                                                                                                            |

In the next chapter, you will learn about using other forms of data in Notes. We'll discuss object linking and embedding (OLE), exporting documents and views, and importing other file formats.

## IF YOU'RE STOPPING HERE

If you wish to stop here, please choose **File, Exit** to exit Notes (you will need to restart Notes when you begin Chapter 11). If you wish to proceed directly to Chapter 11, please do so now.



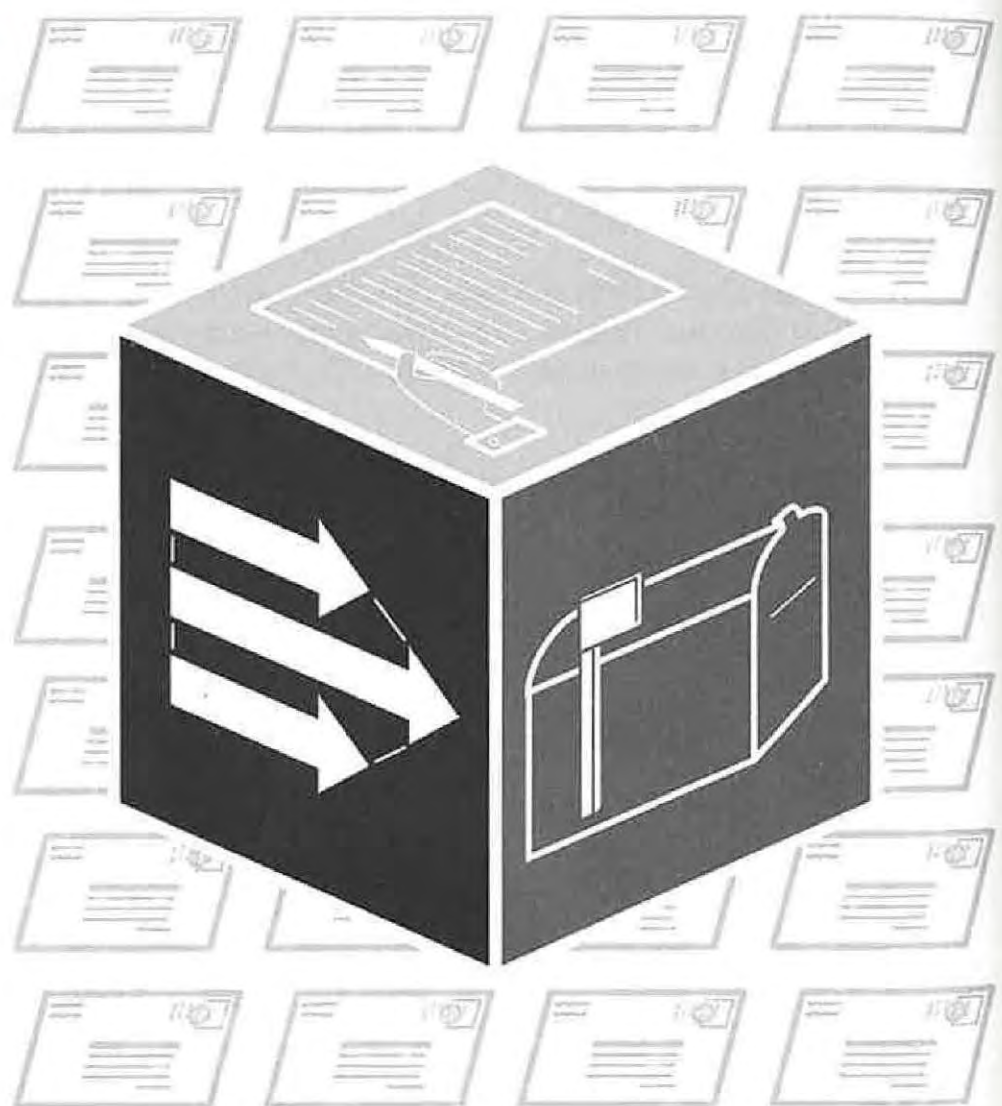
---

# CHAPTER 11: INCORPORATING OTHER FORMS OF DATA

Object Linking and  
Embedding

Exporting  
Documents and  
Views

Importing Other  
File Formats



---

**N**otes allows you to use data from other sources within documents and also to *export* data from Notes so that it can be used in other programs. In this chapter, you will learn how to use object linking and embedding (OLE) to paste information from a different Windows application into a Notes document. You will also learn how to export a Notes document to create a text file that can be used in most word processors, and how to export a view to create a spreadsheet file. Finally, we will discuss *importing* other file formats into Notes.

When you're done working through this chapter, you will know

- How to create a linked object
- How to create an embedded object
- How to export a document to a text file
- How to export a view to a spreadsheet file
- About importing other file formats into Notes

## OBJECT LINKING AND EMBEDDING

Object linking and embedding (OLE) lets you paste information, called *objects*, created in one Windows application into another Windows application. The advantage of OLE over normal copy-and-paste procedures is that you can edit the linked or embedded object in its source application, without ever leaving the document containing the object.

To use OLE, both Windows applications must support the technology. An application that can be a source of objects is called an *OLE server*; an application that can be a recipient of objects is called an *OLE client*. Notes can act as an OLE client, but not as an OLE server. This makes it possible for you to put OLE objects—such as spreadsheet or word-processor data—into Notes documents, while maintaining the ability to edit the objects in their source applications.



### CREATING A LINKED OBJECT

When you *link* an object, it maintains a relationship—called a link—with the original data, which is called the *source*. If you change the source data, the linked object will change, as well. For example, if you link an object created in a Lotus 1-2-3 spreadsheet to a Notes document, and then change data in the original spreadsheet, the linked object in the Notes document will reflect those changes. This process is called *Dynamic Data Exchange*, or *DDE*.

To create a linked object in a Notes document,

- Place the document in edit mode and place the insertion point in a rich-text field.

- Switch to the application in which you will create the object. To switch to another application,
  - Press Ctrl+Esc to display the *Windows Task List*.
  - Select the application to which you want to switch, and click on *Switch To*. To launch a new application, switch to Program Manager and then launch the application as you would any other. (You can cycle quickly through open Windows applications by holding down Alt and pressing Tab until the desired application name appears.)
- Select the information to be in the object and choose Edit, Copy to place the information on the Clipboard. (This procedure may vary in some applications. For more information, consult the reference manual for the particular application.)
- Switch back to Notes.
- Choose *Edit, Paste Special* to display the Paste Special dialog box.
- Under Display As, select the format in which you want to display the object. The options available depend on the source application.
- Click on *Link* to place the object in the Notes document and create a link.

Let's try placing a linked object in a document in the ABC Discussion database:

1. Open the **ABC Discussion** database and then choose **Compose, Main Topic** to begin composing a new document.
2. In the Topic field, type **Logos**. We will place a picture of a possible project logo in this document.
3. In the body field, type **Here is the logo I've been working on in the Paintbrush program:** and then press **Enter** twice to provide a blank line. (We're leaving the General Topic field blank, because none of the keywords suit this topic well.)
4. Press **Ctrl+Esc** to display the Windows Task List, select **Program Manager**, and then click on **Switch To** to switch to Program Manager. The logo we want is in a bitmap file. We will use the Windows Paintbrush program to view this file.

5. Find and open the program group containing the Paintbrush program. If you have the default Windows setup, Paintbrush will be in the Accessories group; if not, you might need to search for the program.
6. Run the **Paintbrush** program and maximize its window.
7. Choose **File, Open** to display the Open dialog box, and then change to your Notes directory. (To do this, double-click on the root directory in the Directories box to display its subdirectories; then double-click on your Notes directory. Your root directory is probably called C:\, and your Notes directory is probably called NOTES.)
8. In the File Name box, double-click on **project.bmp** to open the bitmap file (see Figure 11.1).

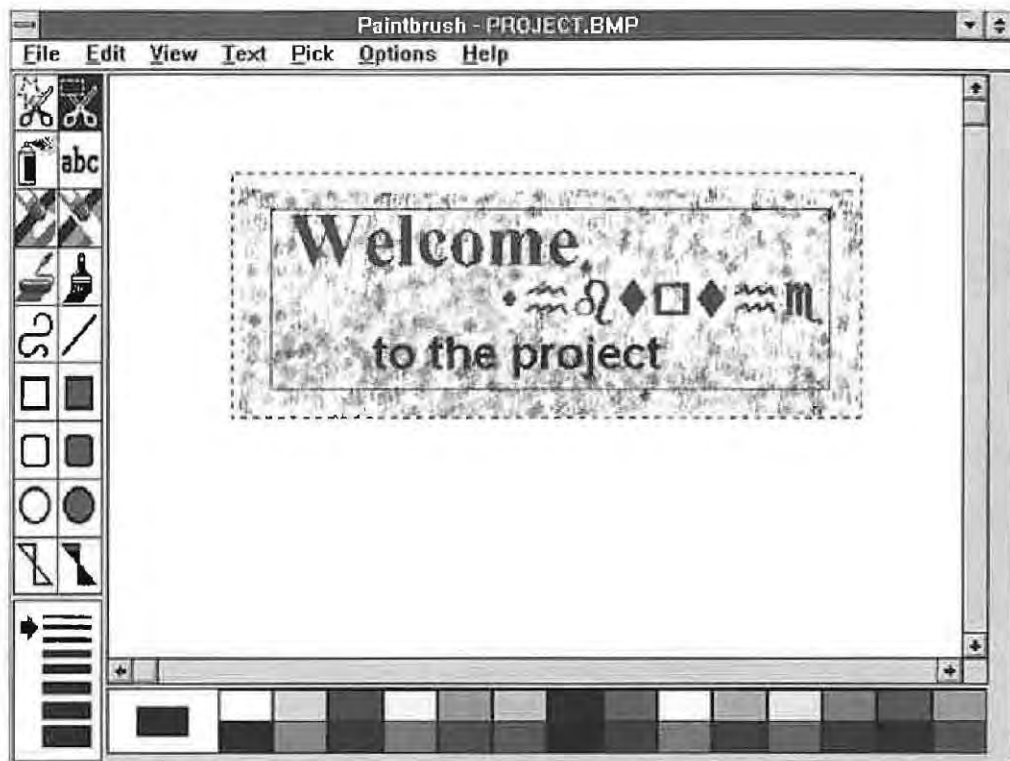
**Figure 11.1**      **The bitmap file in Paintbrush**



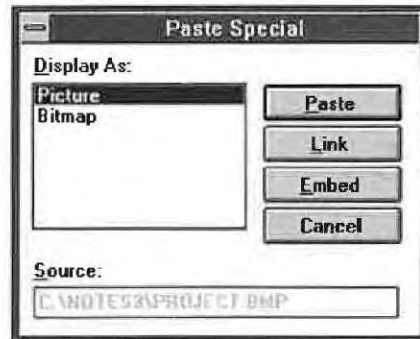
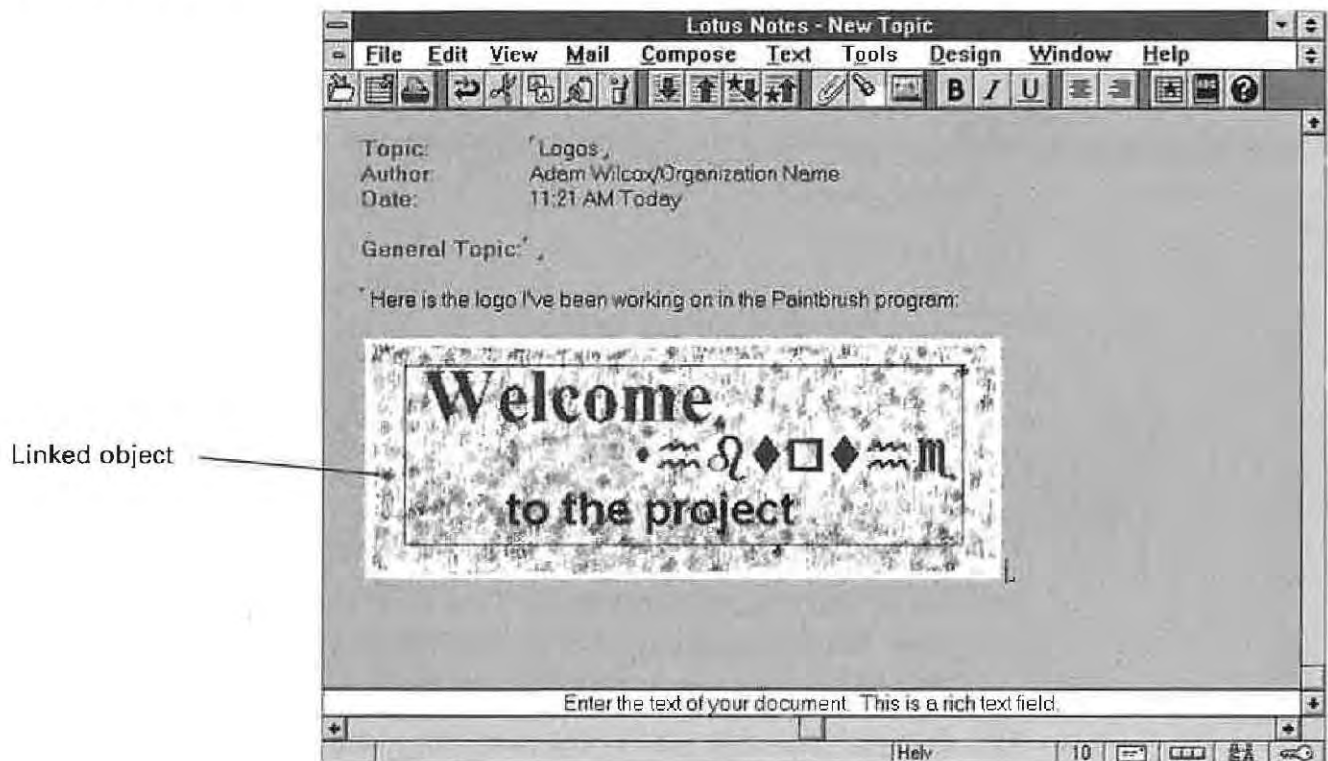
9. In the Paintbrush tool palette on the left side of the screen, click on the **Pick** tool (it is the top-right tool, as shown in Figure 11.1). This is the Paintbrush tool you use to select parts of a picture.

10. Drag from the upper-left corner of the logo to the lower-right corner to select the entire logo. A dotted line appears around the logo (see Figure 11.2).

**Figure 11.2**      **Selecting the logo**



11. Choose **Edit, Copy** to copy the selection to the Clipboard.
12. Press **Ctrl+Esc** to display the Task List, select **Lotus Notes - New Topic**, and then click on **Switch To** to switch back to the document you are composing in Notes.
13. Be sure the insertion point is at the end of the body field, and then choose **Edit, Paste Special** to display the Paste Special dialog box (see Figure 11.3). You have the choice of displaying the object as a picture or as a bitmap. In this example, we'll use the picture option, but in the future, you should experiment with Display As options to see what format works best.
14. Click on **Link** to paste a linked copy of the contents of the Clipboard into the document (see Figure 11.4).

**Figure 11.3** Pasting an object**Figure 11.4** A linked object

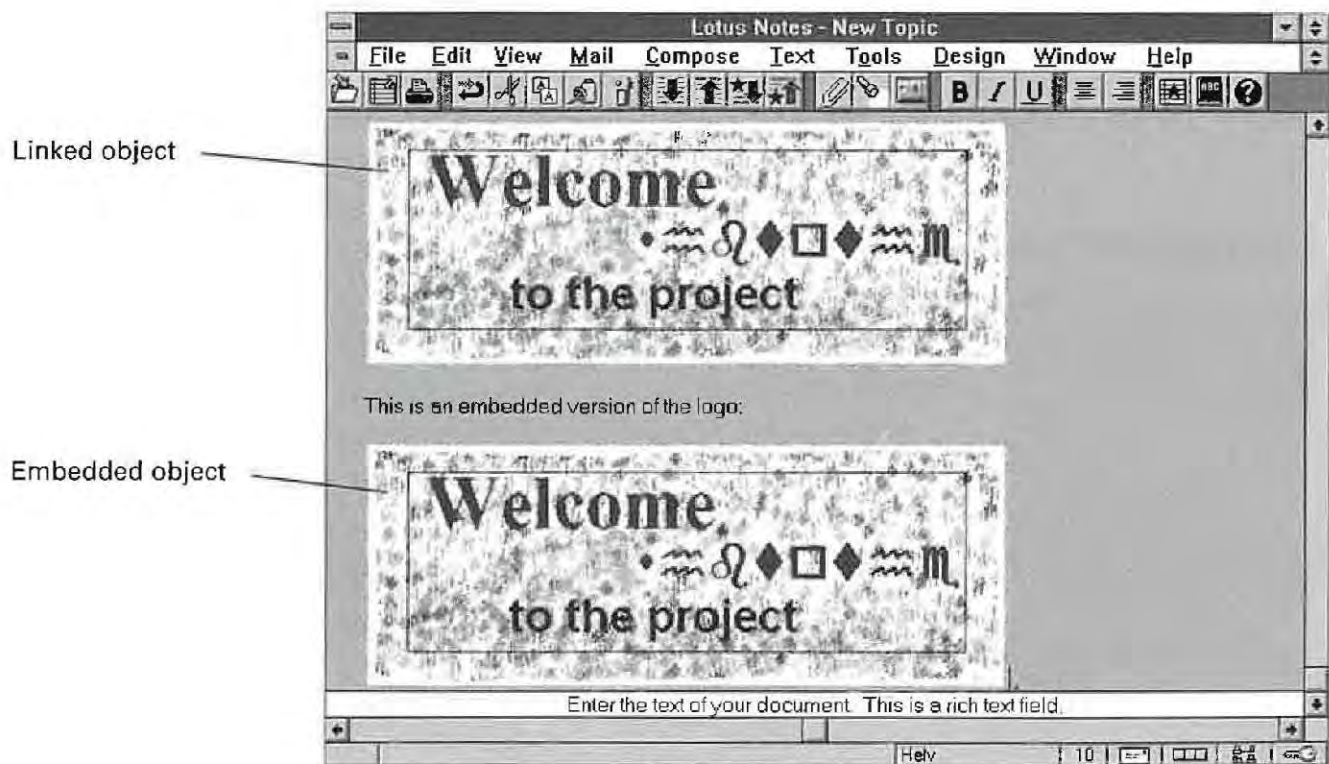
## EMBEDDING AN OBJECT

Embedding an object differs from linking one in that the object is not connected to the original document. It is, however, still connected to its source application. We will see this difference demonstrated shortly.

The procedure for embedding an object in a Notes document is the same as that for linking an object, except that you click on the *Embed* button in the Paste Special dialog box. Let's place an embedded copy of the logo below the linked version in our document:

1. Verify that the insertion point is at the end of the body field and then press **Enter** twice to provide a blank line.
2. Type **This is an embedded version of the logo:** and then press **Enter** twice to provide another blank line.
3. Choose **Edit, Paste Special** to display the Paste Special dialog box, then click on **Embed** to embed a copy of the contents of the Clipboard in the document (see Figure 11.5).
4. Close and save the document.

**Figure 11.5**      **The document with the linked and embedded objects**





## EXAMINING THE LINKED AND EMBEDDED OBJECTS

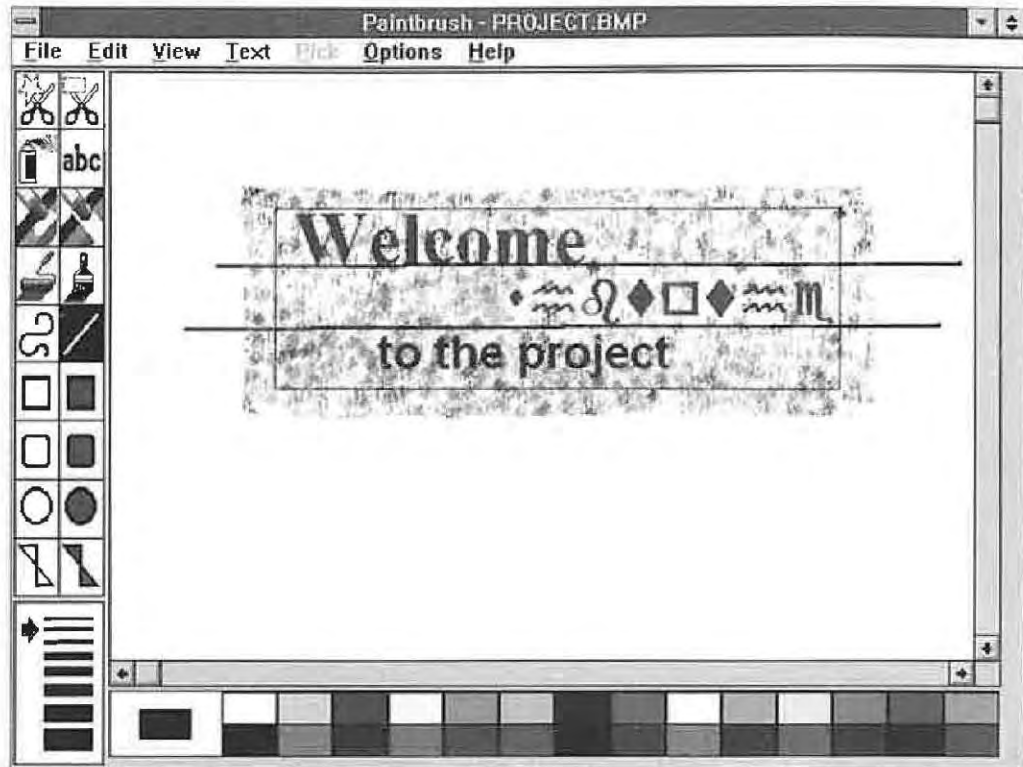
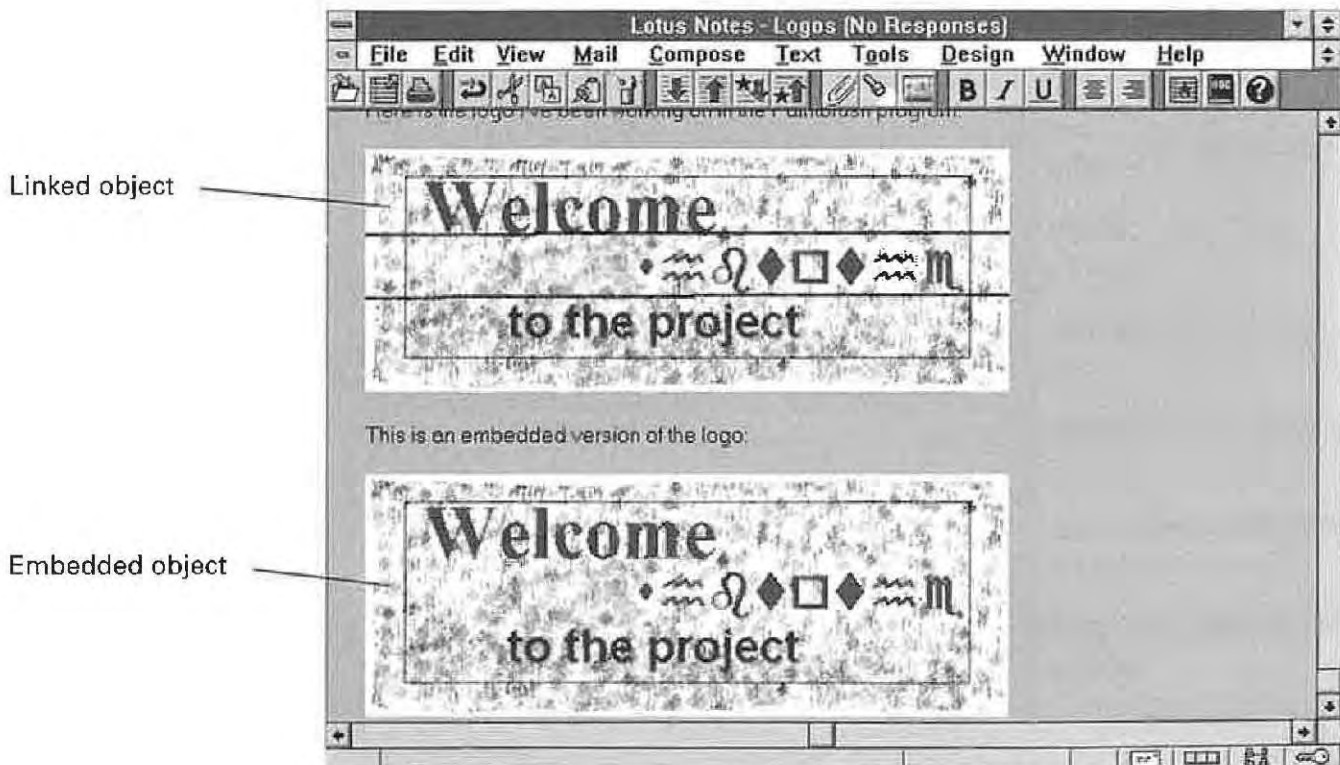
Linked and embedded objects behave in slightly different ways. When you place a linked object in a Notes document, you can edit it in two ways:

- From the Notes document, double-click on the linked object to start the source application and open the original document. Make any changes you like, and then choose **File, Exit And Return To *Document Name*** (this command may vary, depending on the server application).
- Open the source application and edit the source document. When you next open the Notes document containing the linked object, it will reflect the changes you made to the source document.

An embedded object does not maintain a relationship with the source document, but you can still edit the object in its source application by double-clicking on it. When you do so, the object's source application will open with a *copy* of the embedded object, as opposed to the source document itself.

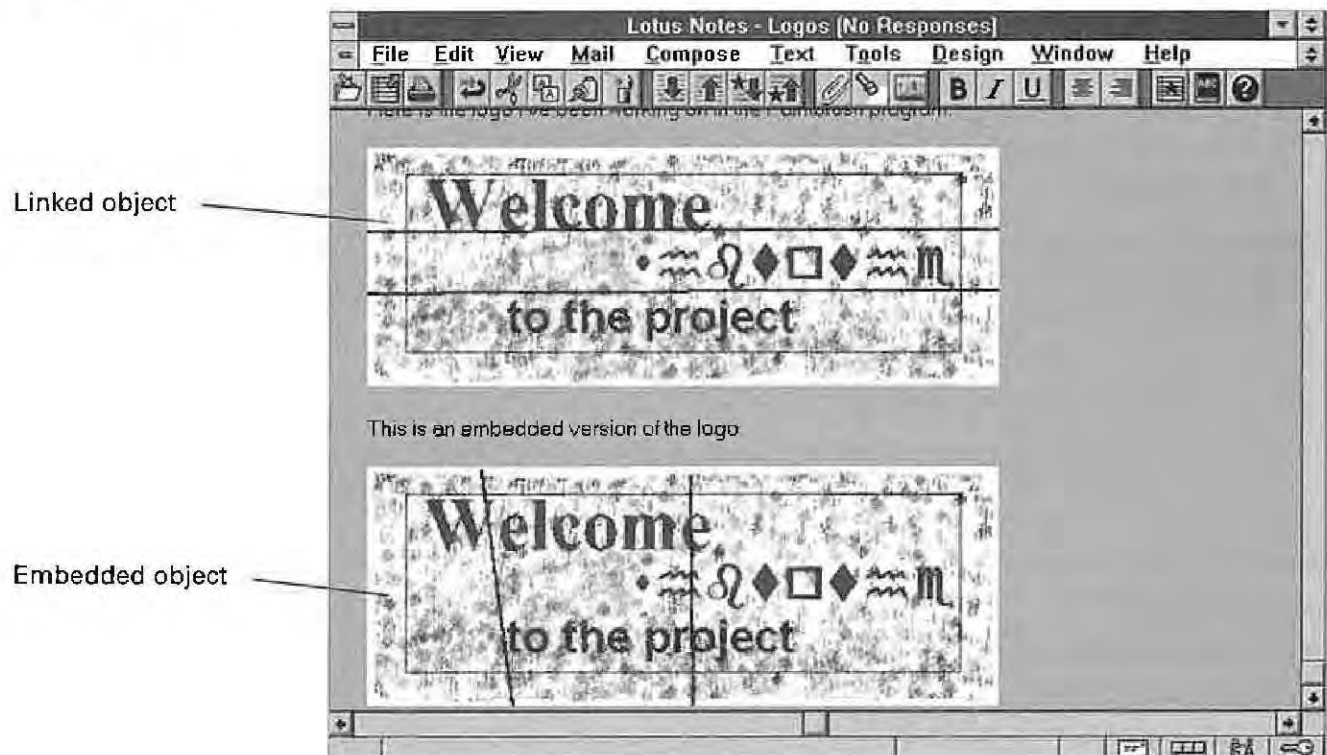
Let's take a look at the difference between our linked and embedded objects:

1. Switch to the Paintbrush program (press **Ctrl+Esc**, select **Paintbrush**, and click on **Switch To**).
2. Select the **Line** tool (it looks like a diagonal line, as shown in Figure 11.1). You use this tool to draw straight lines in Paintbrush.
3. Drag across the logo a couple of times to create a couple of horizontal lines on the logo. Your screen should resemble Figure 11.6, although it is not important that it match exactly.
4. Choose **File, Save** to save your changes to the logo; then choose **File, Exit** to exit Paintbrush.
5. If necessary, switch to Notes.
6. Open the **Logos** document. Because this document contains a linked object, Notes asks if you want to refresh the link.
7. Click on **Yes** to refresh the link and open the document, then scroll down so that you can see both the linked and embedded objects (see Figure 11.7). The linked object reflects the changes you made to the source document, but the embedded object does not.

**Figure 11.6** Drawing lines in Paintbrush**Figure 11.7** The linked and embedded objects

8. Double-click on the embedded object (the lower of the two objects) to open it in its source application, Paintbrush. The Title bar for this window says *Paintbrush Picture In Logos*. You can now edit the picture in Paintbrush, and your changes will be reflected in the Notes document.
9. Click on the **Line** tool and then drag over the logo to create a couple of vertical lines. It's not important what you draw, as long as it's different from what you did last time.
10. Choose **File, Exit & Return To Logos (No Responses)**. A message appears, asking if you want to update the open embedded object.
11. Click on **Yes** to accept the message. The embedded object reflects your changes. The linked object, however, does not reflect your changes, because you were not editing the original source document (see Figure 11.8).
12. Close and save the document, and then close the database.

**Figure 11.8**      **The linked and embedded objects, one more time**



## EXPORTING DOCUMENTS AND VIEWS

You can export documents and views to many other file formats, making it possible to use Notes data in other applications. For example, you might want to export a document to a format that can be read by a word processor so that you can format the document in a way that is not possible in Notes. You might also wish to export view information so that it can be read by a spreadsheet or a database program, where you could analyze the information in ways to which Notes is not well suited.



### EXPORTING A DOCUMENT TO A TEXT FILE

You can export documents to many different formats. The format to which you export a document will depend on what you want to do with the document. ASCII Text is a format that most word-processing programs can read. To export a Notes document to an ASCII Text file,

- Open the document that you want to export and choose *File, Export* to open the Export dialog box.
- Use the Drives and Directories boxes to select the destination drive and directory for the exported file.
- Select ASCII Text from the Save File As Type drop-down list.
- In the File Name box, type a file name for the exported file.
- Click on Export. Notes will display a dialog box in which you can specify the number of characters that constitute a new line.
- Specify the number of characters that constitute a new line and click on OK (the default of 75 should be fine).

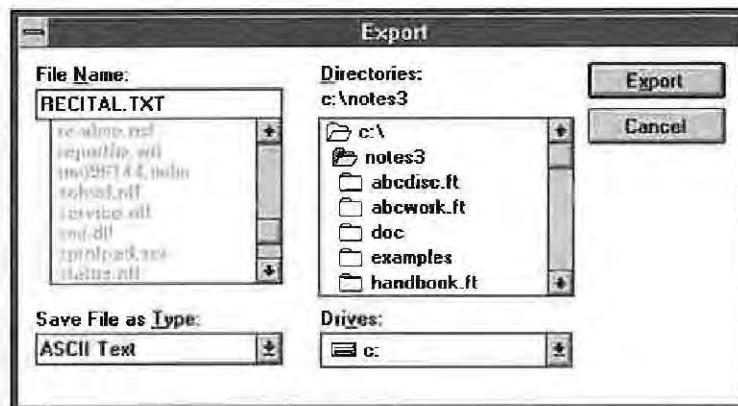
Notes creates an ASCII Text file with the name you specified. You can then open this file in most any word processor.

Let's export a document from the ABC News database to an ASCII Text file:

1. Open the **ABC News** database, and then open the **Faculty Chamber Recital** document. We will export this document.
2. Choose **File, Export** to open the Export dialog box. Notice that the current directory is your Notes directory.

3. Click on the drop-down arrow next to the Save File As Type box, observe the available choices, and then choose **ASCII Text**. You can export documents directly to many word-processing formats. ASCII Text files are useful because they can be read by most programs.
4. In the File Name box, type **recital.txt**. Your dialog should resemble Figure 11.9, although you might see different file and directory names.

**Figure 11.9** Exporting a Notes document



5. Click on **Export**. Notes displays a dialog box in which you can specify the number of characters that should precede a line break. In most cases, the default of 75 should work well.
6. Click on **OK** to accept the message and create the ASCII Text file RECITAL.TXT in your Notes directory. You could now open this file in almost any word processor.
7. Close the document and the database.



### EXPORTING A VIEW TO A LOTUS 1-2-3 FILE

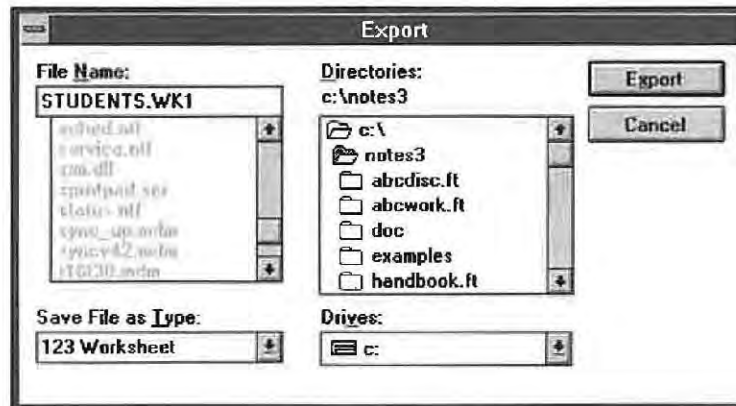
You can export a view to a Lotus 1-2-3 spreadsheet file, or to a format that can be read by another spreadsheet or database program. This might be useful if you wanted to create a chart based

on the information in a view, or if you wanted to do some analysis on that information. To export a view to a Lotus 1-2-3 file,

- Open the view you wish to export and choose **File, Export** to display the Export dialog box.
- Use the Drives and Directories boxes to select the destination drive and directory for the exported file.
- Select **123 Worksheet** from the Save File As Type drop-down list.
- In the File Name box, type a file name for the exported file. For the file to be readable by Lotus 1-2-3, it should end with the **.WK1** extension.
- Click on **Export**. Notes will display a dialog box in which you can specify that all documents or only selected documents be included in the exported file.
- Click on **OK** to create a Lotus 1-2-3 file.

Let's export a view of the **ABC Students** database to a Lotus 1-2-3 file:

1. Open the **ABC Students** database and switch to the Student Listing view (if necessary).
2. Choose **File, Export** to open the Export dialog box. The Notes directory is current.
3. Click on the drop-down arrow next to the Save File As Type box, observe the available choices, and then choose **123 Worksheet** (you might need to scroll up). You can also export a view as an Agenda STF, Structured Text, or Tabular Text file. These last two file types can be read by many database and spreadsheet programs.
4. In the File Name box, type **students.wk1** to indicate the file name for the exported file. Your dialog box should resemble Figure 11.10, except that you may see different file and directory names.
5. Click on **Export** to open the Worksheet Export Settings dialog box. You can export either all documents in a view or only selected documents.
6. Click on **OK** to export all the documents in the view to a Lotus 1-2-3 worksheet file.
7. Close the database.

**Figure 11.10**     **Exporting a view**

## IMPORTING OTHER FILE FORMATS

You can use the *File, Import* command to import data from other sources into Notes documents and views. You can import word-processor files, spreadsheet files, graphics, and ASCII Text files into documents; and you can import spreadsheet files into views.

Table 11.1 shows the file formats that can be imported into a rich-text field in a document.

**Table 11.1**     **Formats That Can Be Imported into Documents**

| Category               | File Format                                                                                                                                     |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Word processing        | ASCII Text, Lotus AmiPro, Lotus Manuscript, Microsoft Rich Text Format, IBM DisplayWrite DCA, WordPerfect, MicroPro WordStar, Borland Multimate |
| Graphics               | Lotus 1-2-3, Lotus Symphony, ANSI Metafile, Scanned (Bitmapped), Windows/PM Clipboard, Macintosh Clipboard (Pict), PC Paintbrush                |
| Worksheet and Database | Lotus 1-2-3, Lotus Symphony, Tabular Text, Structured Text                                                                                      |

You also can import Lotus 1-2-3, Lotus Symphony, Lotus Agenda, Tabular Text, and Structured Text files directly into views. When

you import directly into a view, each row becomes a new document in the database. Setting up a database to accept data imported in this manner is difficult, but can be useful. See the Notes Help system for more information on importing.

## SUMMARY

In this chapter, you learned how to use other forms of data with Notes. You learned how to create linked and embedded objects, and how to export documents and views. We also discussed importing other file formats into Notes.

The following list summarizes some of the techniques you learned in this chapter:

| <b>Desired Result</b>            | <b>How to Do It</b>                                                                                                                                                                                                                      |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create linked or embedded object | Place insertion point in rich-text field; switch to source application; select data to be in object; choose <b>Edit, Copy</b> ; switch to Notes; choose <b>Edit, Paste Special</b> ; select format; click on <b>Link</b> or <b>Embed</b> |
| Edit linked or embedded object   | Double-click on object (if linked object, you also can edit source document)                                                                                                                                                             |
| Export document or view          | Open document or view; choose <b>File, Export</b> ; select destination drive and directory; select file format; enter name for exported file; click on <b>Export</b>                                                                     |

## IF YOU'RE STOPPING HERE

If you wish to stop here, please feel free to do so: You've earned it! If you would like further information about Notes, you might want to browse through the appendices.

---

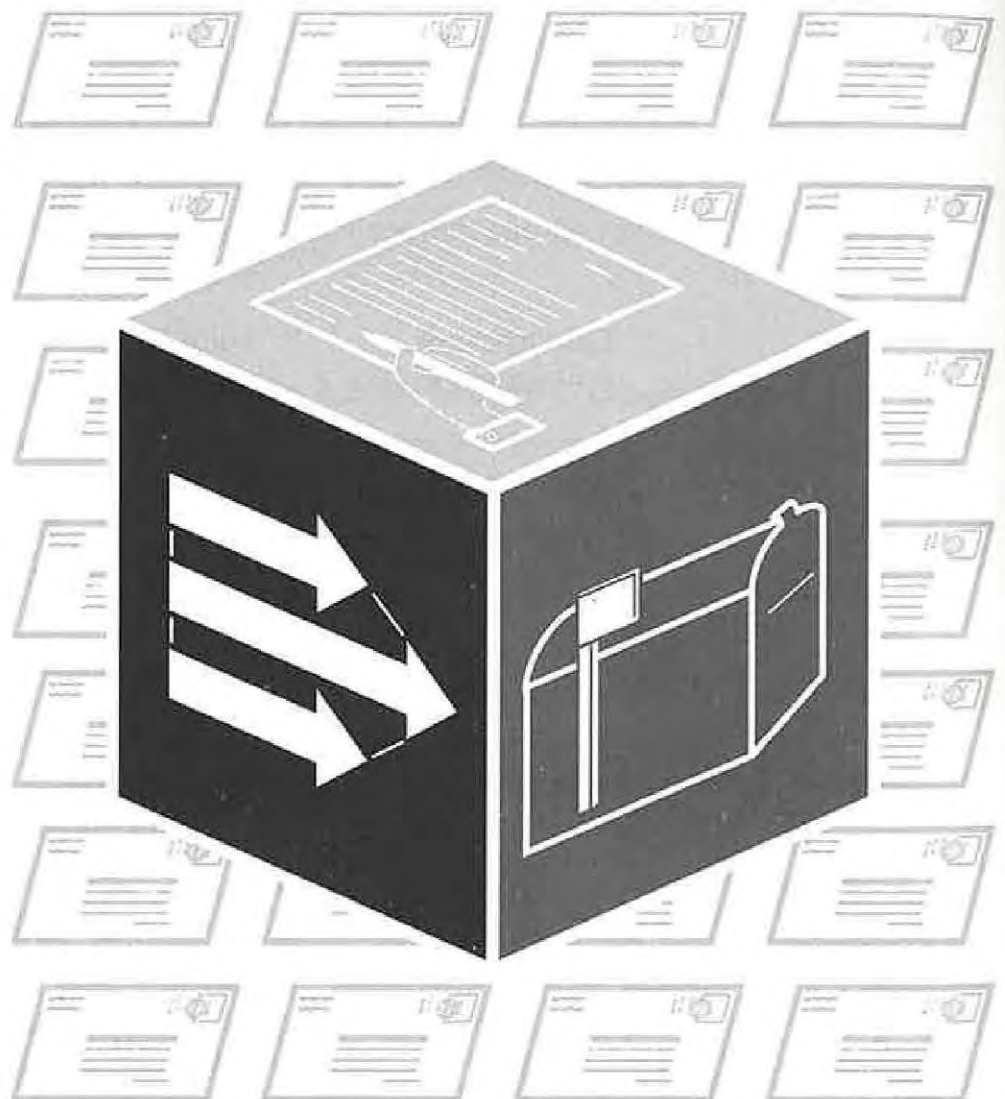
# APPENDIX A: KEYSTROKE REFERENCE

General  
Commands

Reading  
Documents

Editing Documents

Working with Views



---

T

here are only two Notes tasks that absolutely require a mouse: using the ruler and designing a database icon. Other than these things, you can do most anything with your keyboard. This appendix lists keystrokes you can use to accomplish various Notes tasks.

## GENERAL COMMANDS

| Action                                     | Key or Key Combination                     |
|--------------------------------------------|--------------------------------------------|
| Access context-sensitive help              | Press <b>F1</b>                            |
| Clear private user information             | Press <b>F5</b>                            |
| Refresh fields, view, or unread counts     | Press <b>F9</b>                            |
| Refresh unread counts for entire workspace | Press <b>Shift+F9</b>                      |
| Minimize (or maximize) all open windows    | Press <b>Ctrl+F9</b> (or <b>Ctrl+F10</b> ) |
| Access menus                               | Press <b>F10</b>                           |
| Print                                      | Press <b>Ctrl+P</b>                        |

## READING DOCUMENTS

| Action                             | Key or Key Combination                           |
|------------------------------------|--------------------------------------------------|
| Move to left edge of line          | Press <b>Home</b>                                |
| Move to right edge of line         | Press <b>End</b>                                 |
| Move to top of document            | Press <b>Ctrl+Home</b>                           |
| Move to bottom of document         | Press <b>Ctrl+End</b>                            |
| Move up (or down) one line         | Press <b>Up Arrow</b> (or <b>Down Arrow</b> )    |
| Move left (or right) one character | Press <b>Left Arrow</b> (or <b>Right Arrow</b> ) |
| Move up (or down) one screen       | Press <b>Page Up</b> (or <b>Page Down</b> )      |

## EDITING DOCUMENTS

| <b>Action</b>                                                   | <b>Key or Key Combination</b>           |
|-----------------------------------------------------------------|-----------------------------------------|
| Toggle between edit mode and read-only mode                     | Press <b>Ctrl+E</b>                     |
| Undo last action                                                | Press <b>Ctrl+Z</b>                     |
| Close document                                                  | Press <b>Esc</b> (or <b>Ctrl+W</b> )    |
| Save document                                                   | Press <b>Ctrl+S</b>                     |
| Begin new paragraph                                             | Press <b>Enter</b>                      |
| Move to first editable field                                    | Press <b>Ctrl+Home</b>                  |
| Move to last editable field                                     | Press <b>Ctrl+End</b>                   |
| Move to next tab stop (in rich-text field only)                 | Press <b>Tab</b>                        |
| Move to next (previous) field (from any field except rich-text) | Press <b>Tab</b> (or <b>Shift+Tab</b> ) |
| Move to beginning of next word                                  | Press <b>Ctrl+Right Arrow</b>           |
| Move to beginning of previous word                              | Press <b>Ctrl+Left Arrow</b>            |
| Extend selection one character to right                         | Press <b>Shift+Right Arrow</b>          |
| Extend selection one character to left                          | Press <b>Shift+Left Arrow</b>           |
| Extend selection one word to right                              | Press <b>Ctrl+Shift+Right Arrow</b>     |
| Extend selection one word to left                               | Press <b>Ctrl+Shift+Left Arrow</b>      |
| Extend selection to end of line                                 | Press <b>Shift+End</b>                  |
| Extend selection to beginning of line                           | Press <b>Shift+Home</b>                 |
| Cut selection to Clipboard                                      | Press <b>Ctrl+X</b>                     |
| Copy selection to Clipboard                                     | Press <b>Ctrl+C</b>                     |

| <b>Action</b>                                                              | <b>Key or Key Combination</b>                |
|----------------------------------------------------------------------------|----------------------------------------------|
| Paste Clipboard contents at insertion point                                | Press <b>Ctrl+V</b>                          |
| Append selection to Clipboard                                              | Press <b>Ctrl+Shift+Ins</b>                  |
| Delete selection permanently                                               | Press <b>Del</b>                             |
| Apply plain text style                                                     | Press <b>Ctrl+T</b>                          |
| Apply bold style                                                           | Press <b>Ctrl+B</b>                          |
| Apply italic style                                                         | Press <b>Ctrl+I</b>                          |
| Apply underline style                                                      | Press <b>Ctrl+U</b>                          |
| Enlarge (reduce) selected text to next higher (lower) available point size | Press <b>F2</b> (or <b>Shift+F2</b> )        |
| Display Font dialog box                                                    | Press <b>Ctrl+K</b>                          |
| Indent (outdent) first line of paragraph                                   | Press <b>F7</b> (or <b>Shift+F7</b> )        |
| Indent (outdent) entire paragraph                                          | Press <b>F8</b> (or <b>Shift+F8</b> )        |
| Create hanging indent                                                      | Press <b>F8</b> , then press <b>Shift+F7</b> |
| Insert page break                                                          | Press <b>Ctrl+L</b>                          |
| Display Text Paragraph dialog box                                          | Press <b>Ctrl+J</b>                          |

## WORKING WITH VIEWS

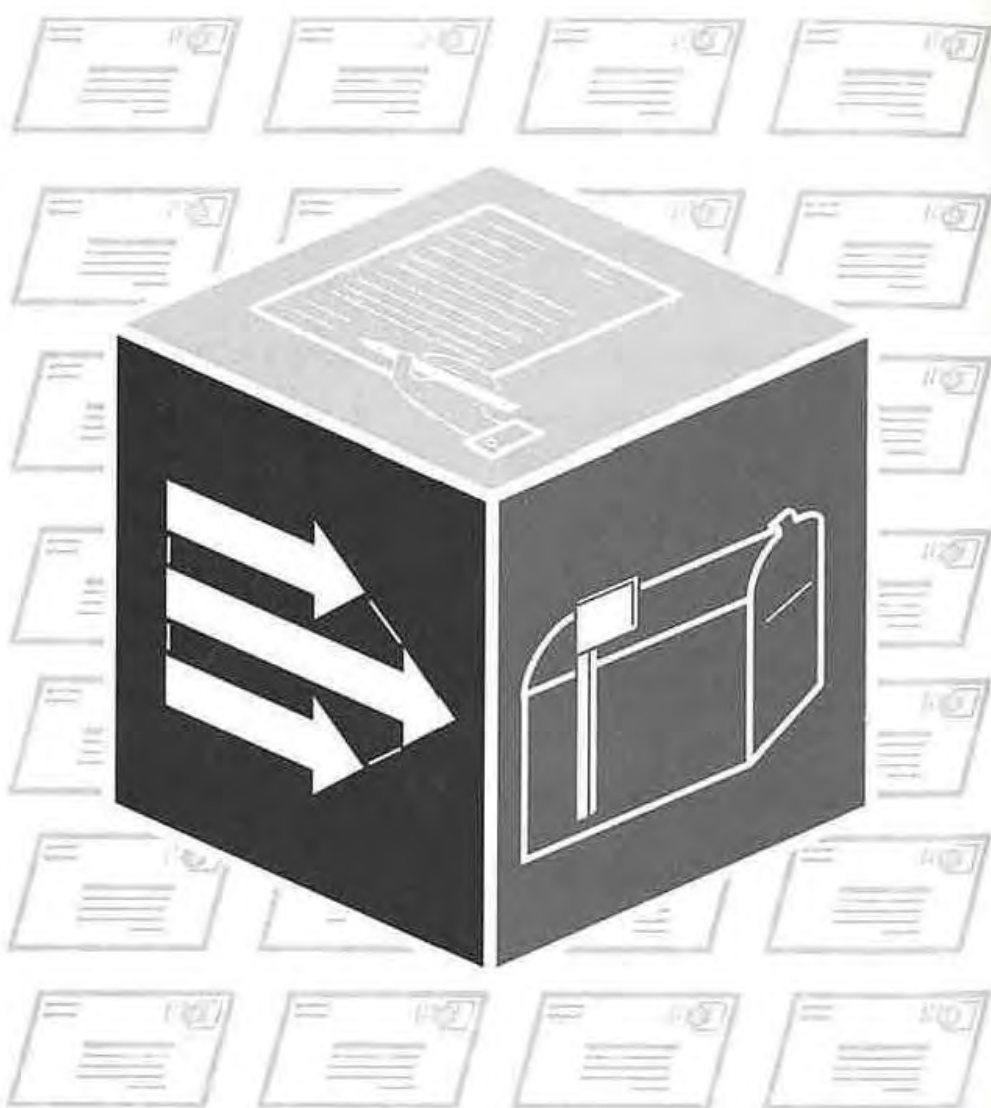
| <b>Action</b>                          | <b>Key or Key Combination</b>     |
|----------------------------------------|-----------------------------------|
| Expand all documents (or categories)   | Press <b>Shift++</b> (plus sign)  |
| Collapse all documents (or categories) | Press <b>Shift+-</b> (minus sign) |

| <b>Action</b>                             | <b>Key or Key Combination</b>                                              |
|-------------------------------------------|----------------------------------------------------------------------------|
| Expand selected document (or category)    | Press <b>+</b> (plus sign)                                                 |
| Collapse selected document (or category)  | Press <b>-</b> (minus sign)                                                |
| Move to next (previous) document          | Press <b>Down Arrow</b> (or <b>Up Arrow</b> )                              |
| Move to next (previous) unread document   | Press <b>Tab</b> or <b>F4</b> (press <b>Shift+Tab</b> or <b>Shift+F4</b> ) |
| Move to next (previous) selected document | Press <b>F3</b> (or <b>Shift+F3</b> )                                      |
| Move to first (last) column in view       | Press <b>Home</b> (or <b>End</b> )                                         |
| Move to first (last) document in view     | Press <b>Ctrl+Home</b> (or <b>Ctrl+End</b> )                               |

---

# APPENDIX B: NOTES DATABASE TEMPLATES

Notes Application  
Templates



---

**N**otes provides several database templates you can use to develop applications. You can use a template as is, or you can customize it to better suit your purposes. This appendix provides a list of Notes application templates.

## NOTES APPLICATION TEMPLATES

| Template                 | Use                                                                                                                                             |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Correspondence           | Provides a shared repository for names and addresses and gives you easy-to-use mechanisms for creating letters, mail-merge documents, and faxes |
| Customer Tracking        | Tracks activity between your company and its customers and prospects                                                                            |
| Discussion               | Offers a forum for the exchange of ideas and opinions (we created the ABC Discussion database by using this template)                           |
| Document Library         | Serves as an electronic filing cabinet for storing documents for future reference (we used this template to create the My Articles database)    |
| Meeting Tracking         | Generates and distributes agendas and minutes, tracks action items, and serves as a meeting information knowledge base                          |
| News                     | Distributes news throughout an organization                                                                                                     |
| Reservation Scheduler    | Schedules reservations, such as for conference rooms or special equipment                                                                       |
| Service Request Tracking | Provides service and support groups with a tool to manage and track their workloads                                                             |
| Status Reports           | Tracks the progress of people on any type of project                                                                                            |
| Things To Do             | Creates and tracks a list of items on which a person or group is working                                                                        |

Before you begin to design a database, you should explore the available templates. Chances are that one of them will provide at least a starting point for your application. To get more information about a template,

- Choose *File, New Database* to display the New Database dialog box.
- Select the template in which you are interested and click on *About*.



# INDEX

*Note: Page numbers in italic denote figures or tables.*

- \* (asterisk), 26–27, 161
- (hyphen), 161
- (minus sign), 30
- + (plus sign), 29, 259
- ? (question mark), 161
- ; (semicolon), 302

## A

- @Command function, 297–298
- @Contains function, 301–303
- @Functions, 212, 218, 259
- About *Database Name* command, Help, 47
- About *Database Name* document, 21–24, 23, 233
  - editing, 235
  - examining, 235–236
  - reopening, 37
- Access Control List (ACL), 145–146, 235, 267
  - access levels and icons, 268
  - adding user to, 272
  - creating, 269–272
  - dialog box, 148
  - modifying for a database, 270–271
  - standard group names in, 269
  - using File menu to examine, 146–149
  - viewing, 172

- access levels
  - creating Access Control Lists, 269–272
  - icons for, 268
  - modifying, 270
  - setting or changing Default, 271, 271
  - setting for new users, 269–270

Accessories icon, 8

ACL. *See* Access Control List (ACL)

Add Encryption Key dialog box, 192, 193

Add Icon command, 38–39

Application Control Menu box, 10

Applications icon, 8

application templates, Notes, 334–335

application types, Notes, 38, 231

ASCII text, saving file as, 321–322

asterisk (\*), as unread marker in Notes Mail, 26–27

Attachment icon, 117

## B

bcc field, 101

body field, 101

Broadcast application, examining, 38, 231

By Keyword view, 42

Chronological view (default view), 41–42

button macros

arguments, 297

creating, 294, 296–298

examining, 296

formula for, 298–300, 299

testing, 298–299

using, 295–296

## C

Calculate button, in view, 215

calculated field, refreshing, 63

Cascade, 21, 24

Categorize dialog box, 124–127

categorizing Notes Mail documents, 124–127

cc field, 100

- character formatting
  - applying, 178–179
  - shortcut keys, 178
  - Text menu for, 177–179
- check-box keyword field, 64
- Clipboard, moving and pasting text with, 79
- closing document, 67–70
- Compose menu, 25–26
  - displaying, 41
  - editable fields in, 58
  - field types in, 58
- composing new document, 59–70
- computed fields, in Compose menu, 58
- concatenation operator. *See* + (plus sign)
- context-sensitive help, 47, 48
- control menu box, 8, 9
- copying text in document, 80–81, 82
- Current Task. *See* context-sensitive help

## D

- data, using field formulas to set parameters for, 248–249
- Database Access Control List dialog box, 269
- Database Copy dialog box, creating template copy with, 273, 274
- database documents, browsing through, 26–29
- database file names, 142
- database icons, 11
  - copying, 290–291
  - copying from Icon Library Database, 291–292
  - moving, 12–13
  - organizing, 11–13
  - pasting, 291
  - removing from workspace, 149–150
  - techniques for using, 12
- Database Information dialog box, 275
- databases, 151–158
  - adding to workspace, 38–39
  - closing, 37
  - copying to server, 274
  - creating index for, 169–171
  - creating new from template, 232–235
  - creating template copy of, 273–274
  - deleting, 158–159
  - file name extensions, 232
  - incorporating changes into, 272
  - opening, 20–21
  - planning, 230–232
  - replicating, 155–158, 158
  - replication settings for, 274–276
  - searching, 159–168
  - structure of, 30
  - testing new forms in, 261–263
- database templates, 230–232
- Data Disk, installing, xxiv–xxviii
- date
  - formats of, 62
  - setting on computer, 7
- Date field, 101, 246–247
- DDE. *See* Dynamic Data Exchange (DDE)
- deleting
  - database, 158–159
  - data in text field, 60–61
- deletion
  - confirming, 128
  - marker in document, 127
- Delivery Priority field, memo form, 103
- Delivery Report field, memo form, 103
- Design Column Definition dialog box, 211, 222, 257
  - adding new column headings with, 256
  - controlling column aspects, 220–221
- Design Column Sort dialog box, 221
- Design Field Formula dialog box, 248–249, 249
- Design Form Attributes dialog box
  - displaying, 240–241
  - renaming form with, 242
- Design Forms dialog box, 209
  - deleting a form with, 239–240, 240
  - new forms with, 208–209, 236
- Design Icon dialog box, 287–292
  - copying database icons with, 290–291
  - editing icons with, 287–290
  - tools, 288

Design Keyword Format dialog box, 239  
     creating Keyword list or lookup formula with, 244  
     sorting lists in, 244

Design Macros dialog box  
     creating new macros with, 301–304  
     modifying macros to run automatically, 304–306

Design New Field dialog box, adding new field with, 249–251, 250

Design New Macro dialog box, 301, 303

Design Selection Formula dialog box, 212, 217, 219

Design View Attributes dialog box, 211, 212,, 215  
     displaying, 213  
     modifying view attributes with, 261

Design Views dialog box, 209–210  
     creating new views with, 255–257

Discussion applications, 38, 40–41, 231

DocLinks  
     creating, 183–185  
     in Help, 48–49, 51  
     pasting into document, 185  
     viewing document with, 186

Document form, structure of, 238

documents  
     changing appearance of, 74  
     changing text appearance, 176–181  
     composing, 58–70  
     copying text in, 80–81  
     deleting and undeleting, 127–129  
     examining structure of, 208–209  
     field data types, 58–59  
     finding, 84–85  
     forwarding, 121–122  
     managing, 300–304  
     marking read or unread, 85–87  
     moving text in, 79  
     required fields in, 59  
     saving and closing, 67, 69  
     selecting multiple, 83–84  
     types of, 24

document window, closing, 29

Draw mode, 288

Dynamic Data Exchange (DDE), 312  
     setting timeout, 282

## E

editing  
     document appearance (formatting), 74  
     documents, 74–81  
     keyboard shortcuts, 77  
     saved documents, 74  
     with SmartIcons, 74

edit mode  
     identifying, 74  
     opening document in, 76  
     shortcut key for, 74, 76

Edit Table Format dialog box, 189–190

Edit, Undo command, 79

electronic mail, Notes compared to, 2–3

Electronic Privacy Act of 1986, 100

embedded objects, 316–317  
     editing, 318  
     vs. linked objects, 318–320

encryption  
     Add Encryption Key dialog box, 193  
     for security, 190–192  
     User ID Encryption Keys dialog box, 192

Encryption Key List box, 195

encryption keys, 190–192  
     accepting into ID file, 197–200  
     adding to document, 193–194  
     creating, 192–193  
     deleting, 200  
     sending to other users, 195–197  
     using, 191

envelope icon, as new mail waiting signal, 116

Erase mode, 288

error message, Notes, 69

Export dialog box, 321–324

exporting  
     Notes documents for word processors, 321–322, 322  
     view 1–2–3 file, 322–324

**F**

- field data types, 58–59
- Field Definition dialog box, 238
  - changing keyword lists with, 244–246
  - changing Time field with, 246–247, 247
  - creating keyword list in, 244
  - creating new field definition with, 249–251
  - modifying fields and field definitions with, 243
- field formulas, 248–249
- Field Help, 59
- field information, with column definitions, 257–260
- fields
  - calculating, 62
  - moving between, 60
- FIELD statement, 302–303
- File Attachment Information dialog box, 117–118
- file name extensions, for database template copies, 273
- Find dialog box, 84
- Font dialog box, to format text, 177–179, 179
- formatting
  - documents, 74
  - SmartIcons, 178
  - table, 189–191
  - with text Font dialog box, 177
- forms
  - adding or modifying static text items on, 242, 245
  - changing attributes of, 240–242
  - in Compose menu, 58–59
  - composing documents in new, 253
  - deleting, 239–240, 240
  - fields in, 58
  - hiding and unhiding parts of, 253–255
  - modifying, 236
  - testing new, 251–252, 261–263
- formula operators, 259
- From field, 101
- Full Text Create Index dialog box, 169, 170
- full-text index, checking for, 159
- Full Text Information dialog box, 159, 160

**G**

- graphical user interface (GUI), 2, 5
- groupware, 1–17
- GUI, 2, 5

**H**

- Help
  - About Notes, 47–48
  - commands, 47
  - context-sensitive, 47, 48
  - Index, 50
  - shortcut key for, 48
- Help Document submenu, 236
- Help Index, 47–48, 50–51
- Help menu, 47–51
- Help system, 49–51
  - navigation buttons, 48
- Hide When box
  - changing status of form with, 253–254, 255
  - in Text Paragraph dialog box, 253

**I**

- Icon Library, copying icons from, 291–292
- icons
  - coloring, 288
  - copying database, 290–291
  - customizing, 287–290
  - editing, 287–290
  - program, 7–9
- importing, other file formats into Notes, 324–325, 324
- indenting paragraph text, 179–181
- index
  - creating for database, 169–171
  - creating with Full Text Create Index dialog box, 169
  - statistics, 171
  - updating, 173
- indexed database, examining, 171
- indexing
  - access control level required for, 168

databases, 168–171

Index statistics, 171

Insert Attachment(s) dialog box, 112, 113

Insert Button dialog box, 296

insertion point, 59

Insert Table dialog box, 187–189, 188

International Setup dialog box, 283

choosing measurements with, 283

## J

Justify Column dialog box, 190

## K

Keystroke Reference, 327–331

for editing documents, 329–330

general commands, 328

for reading documents, 328

for working with views, 330–331

Keyword field, 59, 63

selecting options in, 63–66

types of, 64

Keyword formulas, 244

keyword list, 244, 245

keywords category, 42

## L

labeling

new field, 250

Workspace pages, 13–15

LAN. *See* local area network (LAN)

line spacing. *See* paragraph formatting; Text  
Paragraph dialog box

linked object

creating, 312–316

vs. embedded objects, 318–320

editing, 318

pasting from Clipboard to document, 315, 316

local area network (LAN), 3–5

logical operators, using for searches, 162

Lotus Notes program icon, 8. *See also* Notes

Lotus 1–2–3, file extension, 323

## M

macro button, testing, 298–299

macros

creating, 294–295

creating mail/paste, 306

modifying to run automatically, 304, 304–306,

preparing to insert new, 297–298, 298

running from menu, 304

testing, 299–300

using, 295–296

Mail Address dialog box, 109, 129–132

Mail Attachments

detaching from memo, 117–119

launching attached files, 118

Mail databases, 97

Mail Send dialog box, 106

opening, 97–99

saving document in, 105

mail-delivery options, 103–104

Mail Encryption Key dialog box, 195, 196

Mail Groups

composing, 129–130, 131

sending memo to, 132

Mail options, changing, 286

Mail, Scan Unread command, 105–106

Mail Server, 96

Mail Setup dialog box, 286, 287

Main icon, 8

main-topic documents, 24, 71

response form, 72

Main view, 25, 26, 31

many-to-many communications, 3

marker, unread document, 26–27

Maximize All command, 22, 24

memo document

blank form, 102

composing, 101–102

delivery options, 103–104

fields, 100–101

forwarding, 121–122

sending, 104–107

memos, 99  
     addressing with Name & Address Book, 107–109  
     attaching file to, 112–113, 117–119  
     composing, 100–102  
     forwarding, 121–123  
     mail delivery options, 103–104  
     mailing saved, 115–116  
     pasting different document into, 109–112  
     replying to, 119–120  
     saving without mailing, 113–115  
     sending, 104–107  
 Minimize All command, 21  
 minimize button, 10  
 minus sign (–), 30  
 mouse skills review, 5–6

## N

Name & Address Book  
     addressing memos with, 96, 107–109  
     creating Mail groups in, 129–130  
     inserting names from, 110  
     types, 96  
 New Database dialog box, 232  
     Inherit Future Design Changes option, 233  
 new mail indicator, 116  
 New Replica dialog box, 152, 153  
 Notes  
     browsing database documents in, 19–24  
     exiting, 16  
     full-text search, 159–160  
     on-line help system, 51  
     passwords, 7  
     program icon, 7–9  
     starting and running, 6–9  
     text strings definition, 159  
     Window menu commands, 21–22  
     workspace, 9–11  
 Notes applications  
     advantages, 305  
     general categories, 231  
     types, 38–46

Notes Help Release 3. *See* Help; Help menu  
 Notes Mail, 5, 96–134  
     addressing with group names, 131–132  
     categorizing documents in, 124–127  
     creating a new category in, 125  
     deleting a document from, 127–129  
     Domain, 96  
     Mail Send dialog box, 106, 115  
     Name & Address Book, 96  
     New Reply form, 120  
     opening, 98  
     saving documents in, 105  
     sending documents, 106–107  
     sending documents to other mail databases, 96  
 Notes Security. *See also* encryption  
     Access Control, 145–149  
     access levels and icons, 268  
     access levels and rights, 146  
     for databases, 150–151  
 Notes server, 3  
 Notes system, 4  
 Notes 3.0, starting, 9  
 Notes workspace, 10  
     exploring, 9–11  
     labeling pages in, 13–15  
     opening database from, 21  
 Notes workstation, 3  
 .NSF file extension, 273  
 .NTF file extension, 273  
 number field, 58  
     entering data in, 66

## O

object linking and embedding (OLE), 312  
 one-to-many communications, 2–3  
 Open Database dialog box, 20, 22, 38–39

## P

Paintbrush  
     bitmap file in, 314  
     selecting picture for linking, 315

- tools, 287–288
- paragraph formatting, 179–181
  - shortcut keys, 180
- passwords, 7
  - changing, 284–285, 285
- Paste Special dialog box
  - object embedding with, 315–317
  - object linking with, 313
- Personal Categories, memo form, 103
- plus sign (+), 29, 259
- preferred databases, choosing, 282
- printing, 87–89
- program groups, storing icons in, 8–9
- Program Manager, 8–9

## Q

- Query Builder
  - constructing boolean searches with, 162
  - dialog box, 161, 162, 163, 164
  - searching databases with, 160–165

## R

- radio-button keyword field, 64
- Receipt Report, memo form, 103
- Reference applications, 38, 43–44, 231
- replica database, 152–155, 155
- replica stubs, setting up, 274–276
- replication, 151–158
- replication settings, 275–276
- Replication Settings dialog box, 275, 276
- Replication Statistics dialog box, 157, 158
- response documents, 24, 70–73
  - composing response to, 73
  - displayed in a view, 72
  - editable fields, 71
  - response form, 72
- Restore button, Notes workspace, 10
- rich-text field, 58
  - entering data in, 67
  - maximum size, 67
- Roller tool, Paintbrush, 287–289

## S

- Sample Database, 23–26, 37
- Save Attachment dialog box, 117, 119
- saving document, 67–70
- saving mail documents, 105
  - without sending, 114–115
- Scan Unread dialog box, 142, 144
- search bar, displaying, 161
- searches
  - boolean, 160
  - using a form, 167–168, 168
  - with logical operators, 162
  - proximity, 160
  - using Query Builder dialog box, 162–165
  - refining, 165–166, 166
  - using search bar, 161
  - using wildcards, 161
- searching
  - dialog box for, 84
  - documents and views, 84–85
- Select Keyword dialog box, 65
- semicolon (;), 302
- server name
  - displaying, 141
  - using View menu to find, 139–142
- server software, 3
- Set Password dialog box, 285
  - changing passwords with, 284–285
- setup options, 280–286
  - changing for Mail, 286
  - controlling, 282–283
- shortcut keys
  - for character formatting, 178
  - for correcting text field information, 60–61
  - for displaying Windows Task List, 313
  - for editing documents, 74, 76, 77, 329–330
  - for expanding or collapsing views, 30–32
  - general commands, 328
  - Help, 48
  - for moving to end of field, 81
  - for moving to next editable field, 60
  - for reading documents, 328

- for Tools menu user logoff, 150
- for viewing documents, 27
- View, Refresh Fields, 62
- for working with views, 330–331
- SmartIcon bar, 9–11
- SmartIcons
  - available icons list, 75
  - button in status bar, 75
  - changing to different set, 75
  - for copying text, 80–81
  - creating your own set, 75
  - customizing, 75, 292–294, 293
  - default bar, 74, 75
  - dialog box, 75, 76
  - displaying sets, 76
  - document navigation, 27
  - editing documents with, 74–76
  - finding name of, 27, 29
  - for moving text, 79–80
  - Position box, 75
  - saving set of, 294
  - SpellCheck, 81–83
- SmartIcons dialog box, 292–294
- Snap-to-Line tool, Paintbrush, 288–289
- sorting columns, 221
- Spell Checking, 81–83, 83
- Spray tool, Paintbrush, 288
- standard keyword field, 64
- startup option, changing, 281
- static text, changing, 245
- status bar, 9–11
- Student Profile form, 60
- Subject field, 101
- Subject view, in Reference application, 43–44

## T

- Table Of Contents, for help topics, 47
- tables
  - entering text in, 188
  - formatting, 189–191
  - inserting in rich-text field, 187–189
  - moving insertion point in, 188

- tab stops, setting, 179, 181–183, 183
- template forms, examining default, 236–239
- Templates, Notes Application, 334–335
- testing
  - composing documents for, 253
  - forms, 251–252, 261–263
  - macros, 298–299
  - view modifications, 251–253
- text field, 58
  - creating new line in, 61
  - entering data in, 60
  - making corrections to, 60–61
- Text Paragraph dialog box, 180, 255
  - displaying, 253
  - hiding and unhiding text with, 253–255
- Tile command, 21
- Tiling, view and document, 28
- time
  - formats, 62
  - setting, 7
- time/date field, 59
  - format, 62
- Time field, 246, 247
- title bar, Notes workspace, 10
- toggles, 35
- Tools menu, 142–144, 143, 144
  - user logoff command, 150
  - Tools Replicate dialog box, 156, 158
- tracking applications, 38, 44–46, 231
  - typical uses of, 44
- trash can icon, 127
- Type drop-down list, 241

## U

- unread document markers, 26–27
- unread documents
  - displaying count using View menu, 138–139, 140
  - reading without opening database, 138–142
  - scanning for, 142–145
- User ID Encryption Keys dialog box, 192
- User ID, examining, 284–285

User ID Information dialog box, 284–285, 285  
 user options, changing, 280–285  
 User Setup dialog box, 280–285  
 Using *Database Name* command, Help for, 47

## V

viewing, main-topic documents or categories, 30–32

View menu, 25

- to get database information, 138–142
- restricting the current view with, 34–37

View, Refresh Fields command, 62, 68  
 shortcut key for, 62

Views

- accessing documents through, 20
- calculate button, 215
- categorized, 29–30, 32–34, 33
- changing column definition in, 220–225, 223
- changing order of columns in, 215–217
- collapsing and expanding, 29–32, 34
- columns in, 215–216
- composing new using formulas, 258–259
- composing selection formula in, 218
- creating new, 255–257
- creating new column in, 257–260, 258
- creating private copy of, 213–215
- examining the structure of, 209–212
- expanding, 30–32
- Hierarchical, 24–25, 30
- moving column in, 216
- new untitled, 214
- pasting field name in, 219
- private, 211, 212–215
- removing columns from, 215
- restricting, 34–37
- shared, 211
- types of, 30–32, 34–35

window control menu box, 10

Windows

- mouse techniques, 6
- starting, 7–8

Windows Task List, shortcut key for displaying, 313

Worksheet Export Settings dialog box, 323

workspace, adding databases to, 38–39

Workspace Page Name dialog box, 13, 15

workspace pages, 13–15, 14

workstation software, 3

## W

Window menu commands, 21–22, 21–24

window-control elements, 9–11, 10

# Imagination. Innovation. Insight.

## The How It Works Series from Ziff-Davis Press

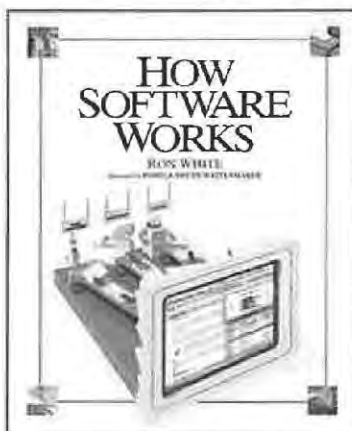
"... a magnificently seamless integration of text and graphics ..."

Larry Blasko, The Associated Press, reviewing *PC/Computing How Computers Work*

No other books bring computer technology to life like the *How It Works* series from Ziff-Davis Press. Lavish, full-color illustrations and lucid text from some of the world's top computer commentators make *How It Works* books an exciting way to explore the inner workings of PC technology.

### PC/Computing *How Computers Work*

A worldwide blockbuster that hit the general trade bestseller lists! *PC/Computing* magazine executive editor Ron White dismantles the PC and reveals what really makes it tick.



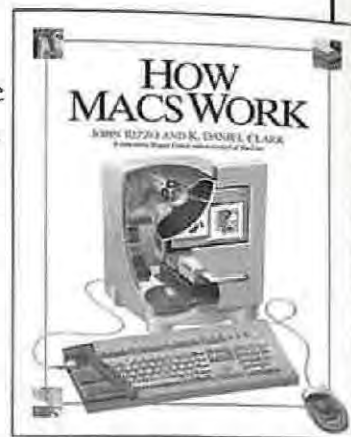
ISBN: 133-1 Price: \$24.95

### How Macs Work

A fun and fascinating voyage to the heart of the Macintosh! Two noted *MacUser* contributors cover the spectrum of Macintosh operations from startup to shutdown.

### How Software Works

This dazzlingly illustrated volume from Ron White peeks inside the PC to show in full-color how software breathes life into the PC. Covers Windows™ and all major software categories.



ISBN: 146-3 Price: \$24.95

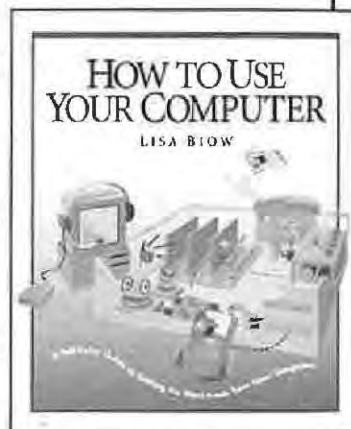
### How to Use Your Computer

Conquer computerphobia and see how this intricate machine truly makes life easier. Dozens of full-color graphics showcase the components of the PC and explain how to interact with them.

### All About Computers

This one-of-a-kind visual guide for kids features numerous full-color illustrations and photos on every page, combined with dozens of interactive projects that reinforce computer basics, making this an exciting way to learn all about the world of computers.

Available at all fine bookstores or by calling 1-800-688-0448, ext. 100. Call for information on the Instructor's Supplement, including transparencies, for each book in the *How It Works* Series.



ISBN: 155-2 Price: \$22.95

### HOW COMPUTERS WORK

RON WHITE



ISBN: 094-7 Price: \$22.95

### HOW NETWORKS WORK

FRANK DREIER, JR. AND LESTER D. BROWN



ISBN: 129-3 Price: \$24.95

### How Networks Work

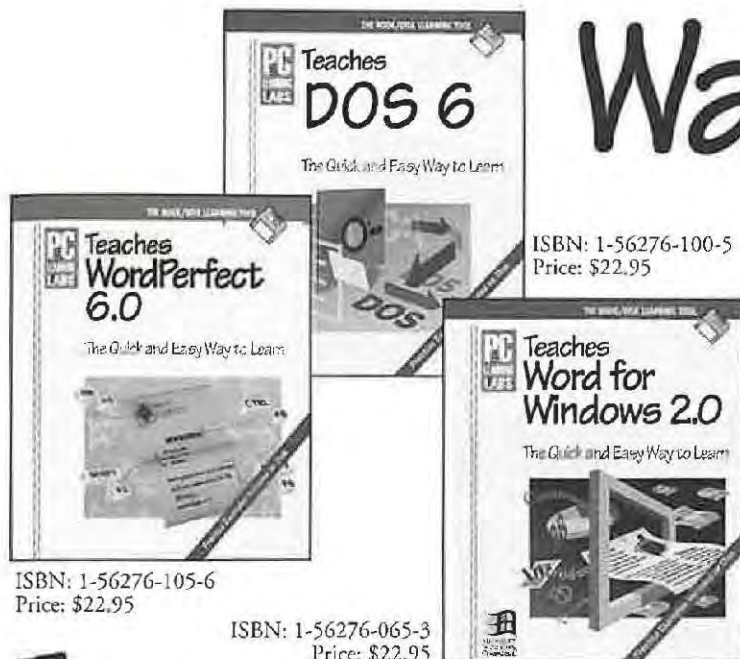
Two of the most respected names in connectivity showcase the PC network, illustrating and explaining how each component does its magic and how they all fit together.



ISBN: 166-8 Price: \$15.95



# The Quick and Easy Way to Learn.



We know that PC Learning Labs books are the fastest and easiest way to learn because years have been spent perfecting them. Beginners will find practice sessions that are easy to follow and reference information that is easy to find. Even the most computer-shy readers can gain confidence faster than they ever thought possible.



The time we spent designing this series translates into time saved for you. You can feel confident that the information is accurate and presented in a way that allows you to learn quickly and effectively.



ISBN: 1-56276-122-6  
Price: \$22.95



ISBN: 1-56276-042-4  
Price: \$22.95



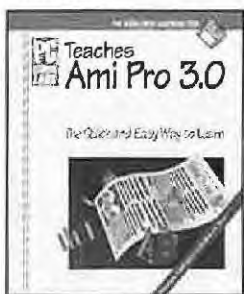
ISBN: 1-56276-148-X  
Price: \$22.95



ISBN: 1-56276-135-8  
Price: \$22.95



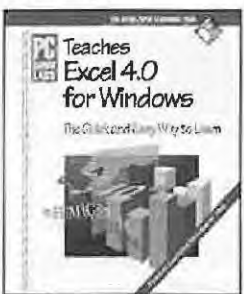
ISBN: 1-56276-032-7  
Price: \$22.95



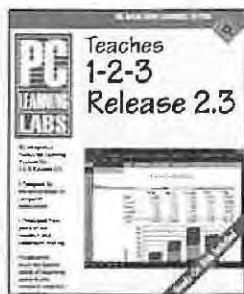
ISBN: 1-56276-134-X  
Price: \$22.95



ISBN: 1-56276-124-2  
Price: \$22.95



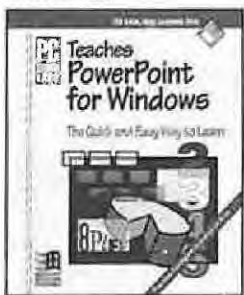
ISBN: 1-56276-074-2  
Price: \$22.95



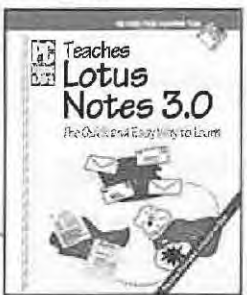
ISBN: 1-56276-033-5  
Price: \$22.95



ISBN: 1-56276-051-3  
Price: \$22.95



ISBN: 1-56276-154-4  
Price: \$22.95

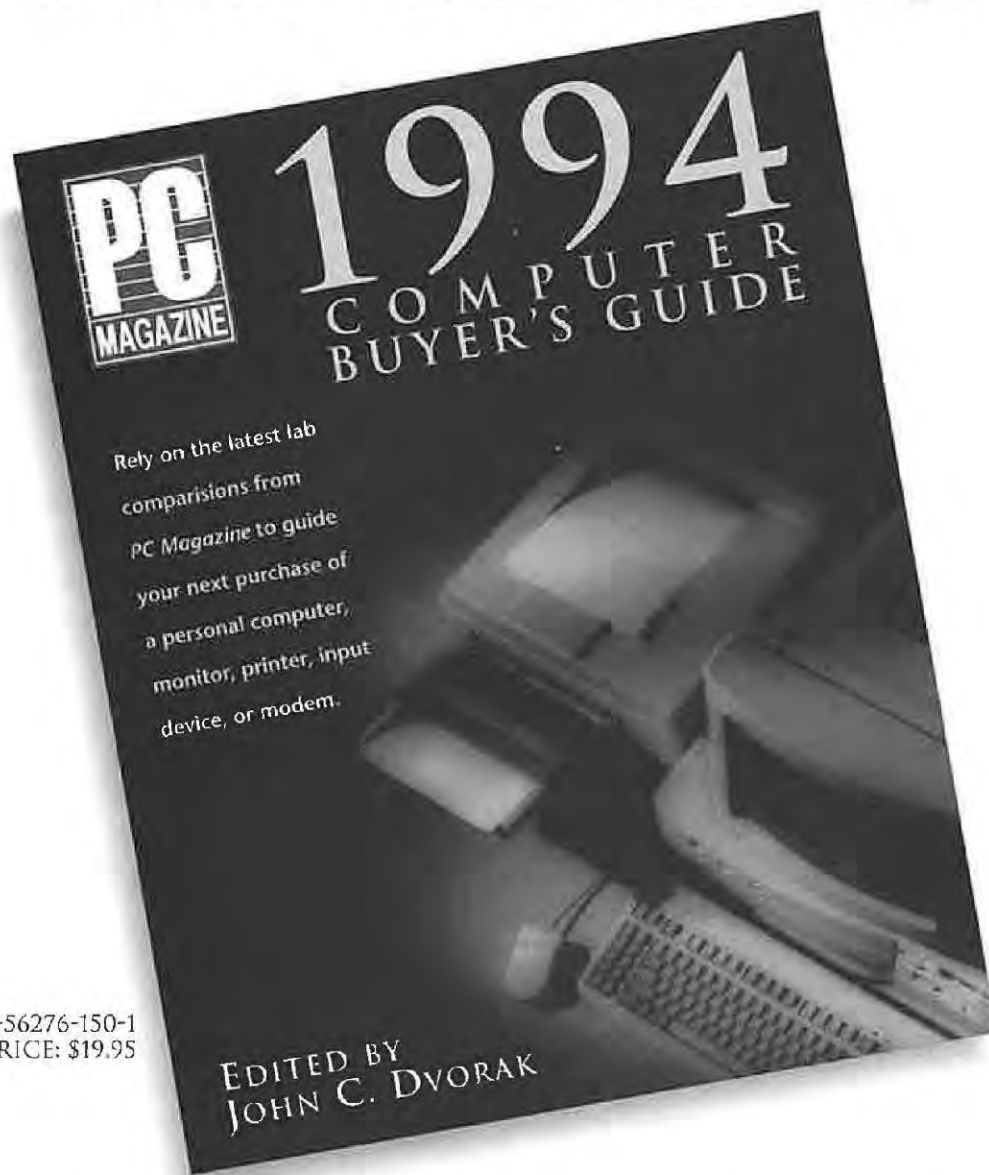


ISBN: 1-56276-138-2  
Price: \$22.95 Avail.: November



Available at all fine bookstores, or by calling 1-800-688-0448, ext. 103.

# FOR THOSE HARD CHOICES.



ISBN: 1-56276-150-1  
PRICE: \$19.95

Negotiating today's crowded hardware scene isn't easy. That's why *PC Magazine* and John C. Dvorak have teamed up to produce *PC Magazine 1994 Computer Buyer's Guide*. It's your one-stop source for unbiased analyses and easy-to-read comparison charts for hundreds of PCs, monitors, printers, input devices, and modems, all benchmark-tested in the world's most modern computer research facility.

Combining the latest laboratory results from *PC Magazine* with Dvorak's no-holds-barred commentary, *PC Magazine 1994 Computer Buyer's Guide* is an indispensable shopper's companion that will save you money and help you find the hardware that meets your computing needs.

AVAILABLE AT ALL FINE BOOKSTORES  
OR BY CALLING 1-800-688-0448, EXT 110.



## Ziff-Davis Press Survey of Readers

Please help us in our effort to produce the best books on personal computing.  
For your assistance, we would be pleased to send you a FREE catalog  
featuring the complete line of Ziff-Davis Press books.

### 1. How did you first learn about this book?

- Recommended by a friend ..... ☐ -1 (5)  
 Recommended by store personnel ..... ☐ -2  
 Saw in Ziff-Davis Press catalog ..... ☐ -3  
 Received advertisement in the mail ..... ☐ -4  
 Saw the book on bookshelf at store ..... ☐ -5  
 Read book review in: \_\_\_\_\_ ☐ -6  
 Saw an advertisement in: \_\_\_\_\_ ☐ -7  
 Other (Please specify): \_\_\_\_\_ ☐ -8

### 2. Which THREE of the following factors most influenced your decision to purchase this book? (Please check up to THREE.)

- Front or back cover information on book .. ☐ -1 (6)  
 Logo of magazine affiliated with book ..... ☐ -2  
 Special approach to the content ..... ☐ -3  
 Completeness of content ..... ☐ -4  
 Author's reputation ..... ☐ -5  
 Publisher's reputation ..... ☐ -6  
 Book cover design or layout ..... ☐ -7  
 Index or table of contents of book ..... ☐ -8  
 Price of book ..... ☐ -9  
 Special effects, graphics, illustrations ..... ☐ -0  
 Other (Please specify): \_\_\_\_\_ ☐ -x

### 3. How many computer books have you purchased in the last six months? \_\_\_\_\_ (7-10)

### 4. On a scale of 1 to 5, where 5 is excellent, 4 is above average, 3 is average, 2 is below average, and 1 is poor, please rate each of the following aspects of this book below. (Please circle your answer.)

- |                                      |   |   |   |   |   |      |
|--------------------------------------|---|---|---|---|---|------|
| Depth/completeness of coverage       | 5 | 4 | 3 | 2 | 1 | (11) |
| Organization of material             | 5 | 4 | 3 | 2 | 1 | (12) |
| Ease of finding topic                | 5 | 4 | 3 | 2 | 1 | (13) |
| Special features/time saving tips    | 5 | 4 | 3 | 2 | 1 | (14) |
| Appropriate level of writing         | 5 | 4 | 3 | 2 | 1 | (15) |
| Usefulness of table of contents      | 5 | 4 | 3 | 2 | 1 | (16) |
| Usefulness of index                  | 5 | 4 | 3 | 2 | 1 | (17) |
| Usefulness of accompanying disk      | 5 | 4 | 3 | 2 | 1 | (18) |
| Usefulness of illustrations/graphics | 5 | 4 | 3 | 2 | 1 | (19) |
| Cover design and attractiveness      | 5 | 4 | 3 | 2 | 1 | (20) |
| Overall design and layout of book    | 5 | 4 | 3 | 2 | 1 | (21) |
| Overall satisfaction with book       | 5 | 4 | 3 | 2 | 1 | (22) |

### 5. Which of the following computer publications do you read regularly; that is, 3 out of 4 issues?

- Byte ..... ☐ -1 (23)  
 Computer Shopper ..... ☐ -2  
 Corporate Computing ..... ☐ -3  
 Dr. Dobb's Journal ..... ☐ -4  
 LAN Magazine ..... ☐ -5  
 MacWEEK ..... ☐ -6  
 MacUser ..... ☐ -7  
 PC Computing ..... ☐ -8  
 PC Magazine ..... ☐ -9  
 PC WEEK ..... ☐ -0  
 Windows Sources ..... ☐ -x  
 Other (Please specify): \_\_\_\_\_ ☐ -y

Please turn page.

6. What is your level of experience with personal computers? With the subject of this book?

|                    | <u>With PCs</u>                  | <u>With subject of book</u>      |
|--------------------|----------------------------------|----------------------------------|
| Beginner. ....     | <input type="checkbox"/> -1 (24) | <input type="checkbox"/> -1 (25) |
| Intermediate. .... | <input type="checkbox"/> -2      | <input type="checkbox"/> -2      |
| Advanced. ....     | <input type="checkbox"/> -3      | <input type="checkbox"/> -3      |

7. Which of the following best describes your job title?

|                                          |                                  |
|------------------------------------------|----------------------------------|
| Officer (CEO/President/VP/owner).....    | <input type="checkbox"/> -1 (26) |
| Director/head. ....                      | <input type="checkbox"/> -2      |
| Manager/supervisor. ....                 | <input type="checkbox"/> -3      |
| Administration/staff. ....               | <input type="checkbox"/> -4      |
| Teacher/educator/trainer. ....           | <input type="checkbox"/> -5      |
| Lawyer/doctor/medical professional. .... | <input type="checkbox"/> -6      |
| Engineer/technician. ....                | <input type="checkbox"/> -7      |
| Consultant. ....                         | <input type="checkbox"/> -8      |
| Not employed/student/retired. ....       | <input type="checkbox"/> -9      |
| Other (Please specify): _____            | <input type="checkbox"/> -0      |

8. What is your age?

|                  |                                  |
|------------------|----------------------------------|
| Under 20. ....   | <input type="checkbox"/> -1 (27) |
| 21-29. ....      | <input type="checkbox"/> -2      |
| 30-39. ....      | <input type="checkbox"/> -3      |
| 40-49. ....      | <input type="checkbox"/> -4      |
| 50-59. ....      | <input type="checkbox"/> -5      |
| 60 or over. .... | <input type="checkbox"/> -6      |

9. Are you:

|              |                                  |
|--------------|----------------------------------|
| Male. ....   | <input type="checkbox"/> -1 (28) |
| Female. .... | <input type="checkbox"/> -2      |

Thank you for your assistance with this important information! Please write your address below to receive our free catalog.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Fold here to mail.

1382-07-01



NO POSTAGE  
NECESSARY  
IF MAILED IN  
THE UNITED  
STATES



**BUSINESS REPLY MAIL**

FIRST CLASS MAIL PERMIT NO. 1612 OAKLAND, CA

POSTAGE WILL BE PAID BY ADDRESSEE



**Ziff-Davis Press**

5903 Christie Avenue  
Emeryville, CA 94608-1925  
Attn: Marketing



## ■ TO RECEIVE 5<sup>1</sup>/<sub>4</sub>-INCH DISK(S)

---

The Ziff-Davis Press software contained on the 3<sup>1</sup>/<sub>2</sub>-inch disk included with this book is also available in 5<sup>1</sup>/<sub>4</sub>-inch format. If you would like to receive the software in the 5<sup>1</sup>/<sub>4</sub>-inch format, please return the 3<sup>1</sup>/<sub>2</sub>-inch disk with your name and address to:

**Disk Exchange**  
Ziff-Davis Press  
5903 Christie Avenue  
Emeryville, CA 94608

## ■ END-USER LICENSE AGREEMENT

**READ THIS AGREEMENT CAREFULLY BEFORE BUYING THIS BOOK. BY BUYING THE BOOK AND USING THE PROGRAM LISTINGS, DISKS, AND PROGRAMS REFERRED TO BELOW, YOU ACCEPT THE TERMS OF THIS AGREEMENT.**

The program listings included in this book and the programs included on the diskette(s) contained in the package on the opposite page ("Disks") are proprietary products of Ziff-Davis Press and/or third party suppliers ("Suppliers"). The program listings and programs are hereinafter collectively referred to as the "Programs." Ziff-Davis Press and the Suppliers retain ownership of the Disks and copyright to the Programs, as their respective interests may appear. The Programs and the copy of the Disks provided are licensed (not sold) to you under the conditions set forth herein.

License. You may use the Disks on any compatible computer, provided that the Disks are used on only one computer and by one user at a time.

Restrictions. You may not commercially distribute the Disks or the Programs or otherwise reproduce, publish, or distribute or otherwise use the Disks or the Programs in any manner that may infringe any copyright or other proprietary right of Ziff-Davis Press, the Suppliers, or any other party or assign, sublicense, or otherwise transfer the Disks or this agreement to any other party unless such party agrees to accept the terms and conditions of this agreement. This license and your right to use the Disks and the Programs automatically terminates if you fail to comply with any provision of this agreement.

U.S. GOVERNMENT RESTRICTED RIGHTS. The disks and the programs are provided with **RESTRICTED RIGHTS**. Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software Clause at DFARS (48 CFR 252.277-7013). The Proprietor of the compilation of the Programs and the Disks is Ziff-Davis Press, 5903 Christie Avenue, Emeryville, CA 94608.

Limited Warranty. Ziff-Davis Press warrants the physical Disks to be free of defects in materials and workmanship under normal use for a period of 30 days from the purchase date. If Ziff-Davis Press receives written notification within the warranty period of defects in materials or workmanship in the physical Disks, and such notification is determined by Ziff-Davis Press to be correct, Ziff-Davis Press will, at its option, replace the defective Disks or refund a prorata portion of the purchase price of the book. **THESE ARE YOUR SOLE**

### **REMEDIES FOR ANY BREACH OF WARRANTY.**

**EXCEPT AS SPECIFICALLY PROVIDED ABOVE, THE DISKS AND THE PROGRAMS ARE PROVIDED "AS IS" WITHOUT ANY WARRANTY OF ANY KIND. NEITHER ZIFF-DAVIS PRESS NOR THE SUPPLIERS MAKE ANY WARRANTY OF ANY KIND AS TO THE ACCURACY OR COMPLETENESS OF THE DISKS OR THE PROGRAMS OR THE RESULTS TO BE OBTAINED FROM USING THE DISKS OR THE PROGRAMS AND NEITHER ZIFF-DAVIS PRESS NOR THE SUPPLIERS SHALL BE RESPONSIBLE FOR ANY CLAIMS ATTRIBUTABLE TO ERRORS, OMISSIONS, OR OTHER INACCURACIES IN THE DISKS OR THE PROGRAMS. THE ENTIRE RISK AS TO THE RESULTS AND PERFORMANCE OF THE DISKS AND THE PROGRAMS IS ASSUMED BY THE USER. FURTHER, NEITHER ZIFF-DAVIS PRESS NOR THE SUPPLIERS MAKE ANY REPRESENTATIONS OR WARRANTIES, EITHER EXPRESS OR IMPLIED, WITH RESPECT TO THE DISKS OR THE PROGRAMS, INCLUDING BUT NOT LIMITED TO, THE QUALITY, PERFORMANCE, MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE OF THE DISKS OR THE PROGRAMS. IN NO EVENT SHALL ZIFF-DAVIS PRESS OR THE SUPPLIERS BE LIABLE FOR DIRECT, INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE USE OF OR INABILITY TO USE THE DISKS OR THE PROGRAMS OR FOR ANY LOSS OR DAMAGE OF ANY NATURE CAUSED TO ANY PERSON OR PROPERTY AS A RESULT OF THE USE OF THE DISKS OR THE PROGRAMS, EVEN IF ZIFF-DAVIS PRESS OR THE SUPPLIERS HAVE BEEN SPECIFICALLY ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. NEITHER ZIFF-DAVIS PRESS NOR THE SUPPLIERS ARE RESPONSIBLE FOR ANY COSTS INCLUDING, BUT NOT LIMITED TO, THOSE INCURRED AS A RESULT OF LOST PROFITS OR REVENUE, LOSS OF USE OF THE DISKS OR THE PROGRAMS, LOSS OF DATA, THE COSTS OF RECOVERING SOFTWARE OR DATA, OR THIRD-PARTY CLAIMS. IN NO EVENT WILL ZIFF-DAVIS PRESS' OR THE SUPPLIERS' LIABILITY FOR ANY DAMAGES TO YOU OR ANY OTHER PARTY EVER EXCEED THE PRICE OF THIS BOOK. NO SALES PERSON OR OTHER REPRESENTATIVE OF ANY PARTY INVOLVED IN THE DISTRIBUTION OF THE DISKS IS AUTHORIZED TO MAKE ANY MODIFICATIONS OR ADDITIONS TO THIS LIMITED WARRANTY.**

Some states do not allow the exclusion or limitation of implied warranties or limitation of liability for incidental or consequential damages, so the above limitation or exclusion may not apply to you.

General. Ziff-Davis Press and the Suppliers retain all rights not expressly granted. Nothing in this license constitutes a waiver of the rights of Ziff-Davis Press or the Suppliers under the U.S. Copyright Act or any other Federal or State Law, international treaty, or foreign law.



Years of experience at PC Learning Labs prove that hands-on learning works best. *PC Learning Teaches Lotus Notes 3.0* makes it easy by including on-disk examples that work together with instructions in the book. You'll save countless hours by working with the extensive sample data on the disk. Here are some of the ways you'll use the sample data:

**Opening a database:** Open a sample Notes database for a school named ABC and explore various database viewing options (Chapter 2).

**Exploring types of Notes applications:** Examine a sample "discussion application" in which students and faculty at the school exchange opinions, and a "broadcast application" through which the school distributes its newsletter (Chapter 2).

**Composing a document:** Create your own imaginary "student profile" using a data-entry form that the sample database provides, and add your profile to the database (Chapter 3).

**Attaching a file to a memo:** Compose a Notes mail memo and "attach" a report created in the Write program so that recipients of the memo will receive the report as well (Chapter 4).

**Forwarding a document:** Open a memo discussing an on-site day-care program and forward it to another Notes user (Chapter 4).

**Searching a database:** In the sample database, find all documents pertaining to full-time employees; that is, all documents containing the words "full-time" (Chapter 5).

**Indexing a database:** Have Notes index part of the ABC data behind the scenes so that you can perform full-text searches on it (Chapter 5).

**Customizing the point of view:** Create a new way of looking at student data in the sample database (Chapter 7).



# Teaches Lotus Notes 3.0

**PC Learning Labs**, the world leader in computer instruction in the classroom, has created an interactive book/disk learning tool that you can use to learn Lotus Notes at your own pace, in the comfort of your own home or office. Because *PC Learning Labs Teaches Lotus Notes 3.0* is based on the same classroom training that tens of thousands of beginners have successfully completed at PC Learning Labs sites across the United States, you can be sure that you will learn in the easiest, quickest, and most effective way.

Why? Because the best way to learn is by doing, and in *PC Learning Labs Teaches Lotus Notes 3.0* you'll start doing right away. Just follow the step-by-step instructions, which are designed to work with the example-filled disk included with the book. You'll be learning the smart way—the way that has been proven to work through extensive research and hands-on experience teaching tens of thousands of beginners at PC Learning Labs.

**TURN TO THE BACK FLAP TO SEE  
HOW THE DISK WORKS!**



ISBN 1-56276-138-2



Lotus Notes is a registered trademark of Lotus Development Corporation.

U.S. \$22.95  
Canada \$31.95  
U.K. £21.32 (Inc VAT) Net

BOOKSHELF CATEGORY  
Communications/Lotus Notes

ISBN 1-56276-138-2