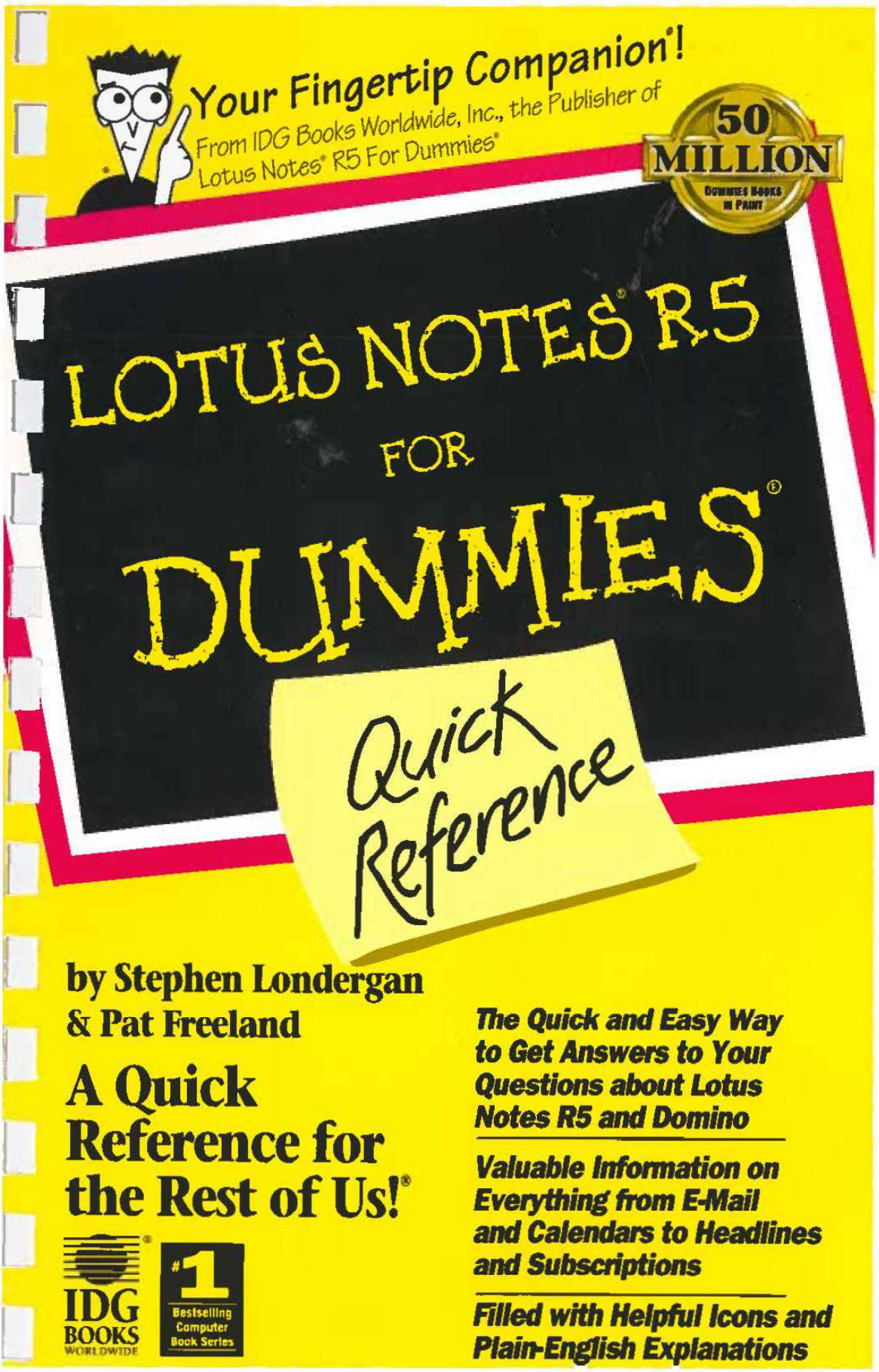
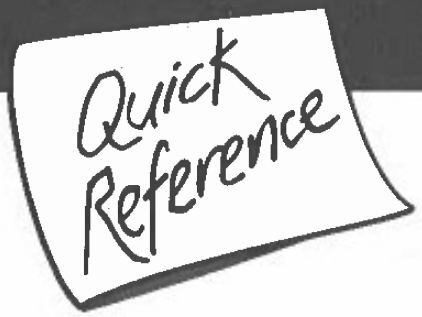


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LOTUS NOTES® R5 FOR DUMMIES®



by Stephen Londergan and Pat Freeland

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Dedication

For Engelbert Humperdinck.

— Stephen Londergan

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

— Pat Freeland

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How to Use This Book

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

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



How This Book Is Organized

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

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

Conventions Used in This Book

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



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

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

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

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

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

Icons That You Will Find

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



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



Ignore paragraphs with this icon at your own peril!



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



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

Off You Go, Then

And good luck!

Part 1

Getting to Know Notes

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

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

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

In this part . . .

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



Groupware and Notes

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

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



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

Working in Notes databases

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

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

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

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

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

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

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

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



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

Communicating with e-mail

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

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

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

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

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

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



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

Lotus Notes — What It Can and Can't Do

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

Knowing what Notes isn't

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

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

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

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

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

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

Knowing what Notes is

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

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

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

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

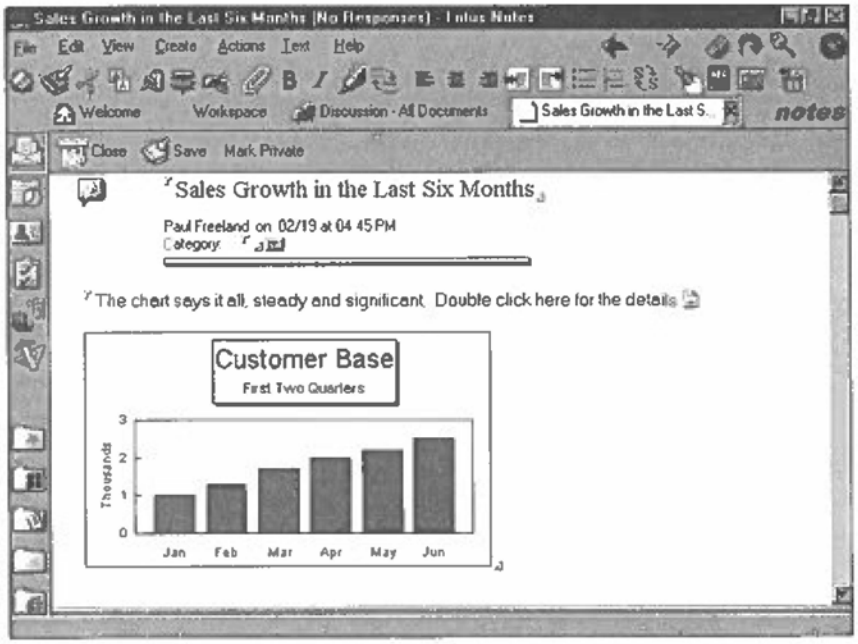
This, then, is Notes. More than just a program, more than just a database, more than just an e-mail facility, Notes is a dynamic tool that aids the sharing of knowledge throughout an organization.

Compound Documents

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

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

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



Notes and the Network

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

Understanding Domino servers

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

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

Understanding Notes Workstations

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

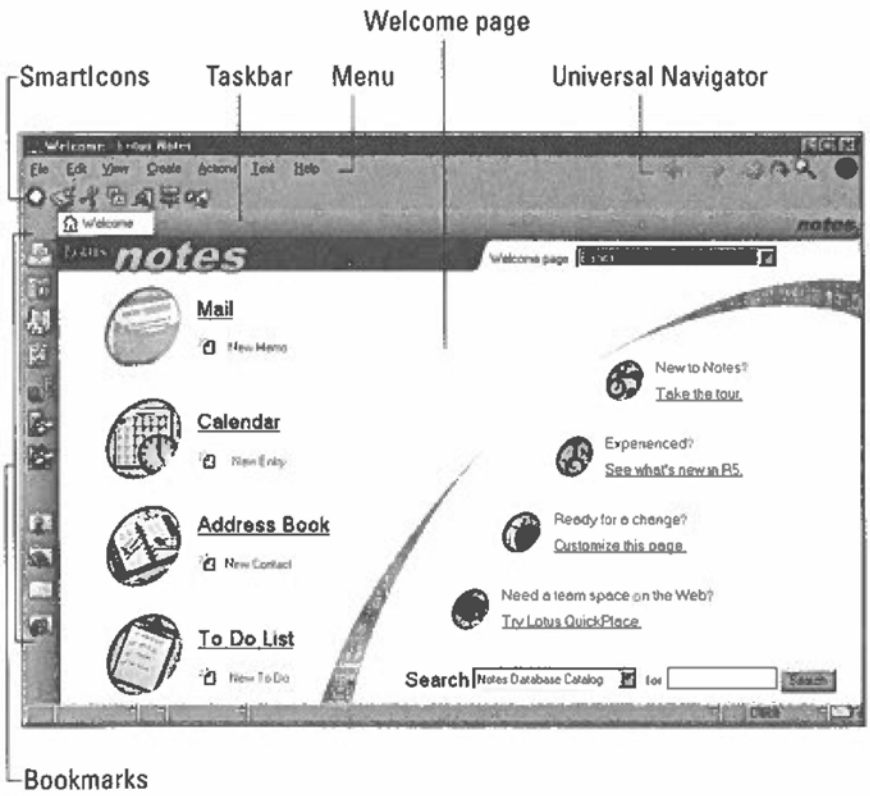
Not all workstations are connected to a server. If you go on a business trip and use your computer to connect to the server by phone line and modem, your computer is called a *remote workstation.* Some workstations are both local area network (LAN) and remote types. If you have a laptop, you can connect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

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

The Workspace

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

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



Ordering from the menu?

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

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

Working smart with SmartIcons

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

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



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

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

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

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

Selecting tasks on the Notes taskbar

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

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



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

Switching among tasks on the Welcome Page

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

Broadening your universe with the Universal Navigator Bar

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

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

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

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

Betting on Bookmarks

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

Opening a bookmark

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

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

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

Creating a bookmark

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

Deleting a bookmark

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

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

Moving a bookmark

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

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

Creating a bookmark folder

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

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

Deleting a bookmark folder

To remove an entire bookmark folder, follow these steps:

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

Windows and OS/2 Function Keys

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

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

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

Your User ID — Your Key to Notes

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



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

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

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

Part II

Your E-Mail

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

In this part . . .

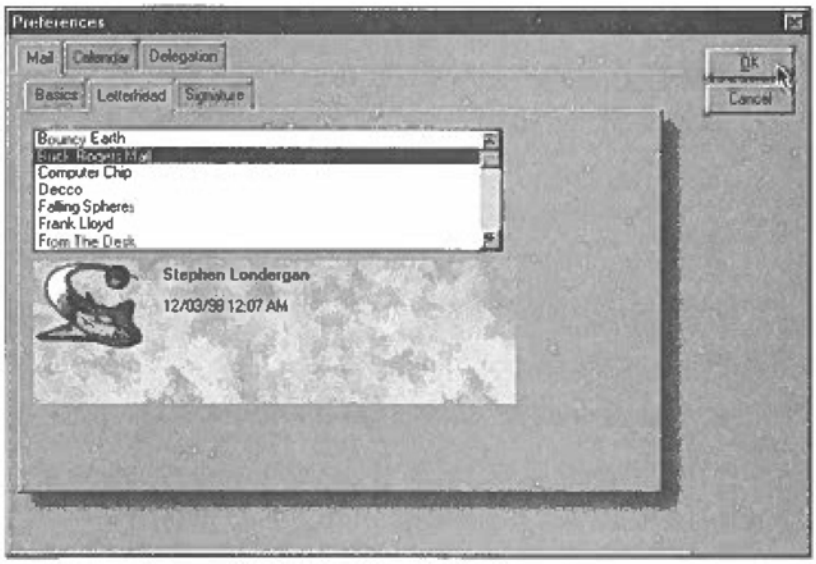
- **Choosing a letterhead**
- **Opening your e-mail and reading your messages**
- **Letting people know that you're on vacation**
- **Sending messages**
- **Using views and folders**
- **Using your Personal Name & Address book**



Choosing a Letterhead

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

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



Closing a Message

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

- ✦ Press Esc. The memo disappears, and you're back to the View pane.
- ✦ Click the little X in the message's task button.
- ✦ Choose File➪Close Window.
- ✦ Press Ctrl+W.

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

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



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

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

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

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

Letting People Know You're Out of the Office

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

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

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

   If you want to send a different memo to certain people — such as your boss, who may not need to know that you're off fishing — click the Special Message tab on the Out of Office dialog box.
6. Enter the names of the people who will receive this special message in the To field on the Special Message tab of the dialog box. Then, in the fields below, enter the unique subject and message for these special people.
7. If other people shouldn't receive any message at all, click the Exclusions tab on the Out of Office dialog box and then enter the names in the appropriate fields.

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

Remember: To turn off automatic replies, choose Actions⇨Tools⇨Out of Office and click the Disable button.

Opening Your E-Mail

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

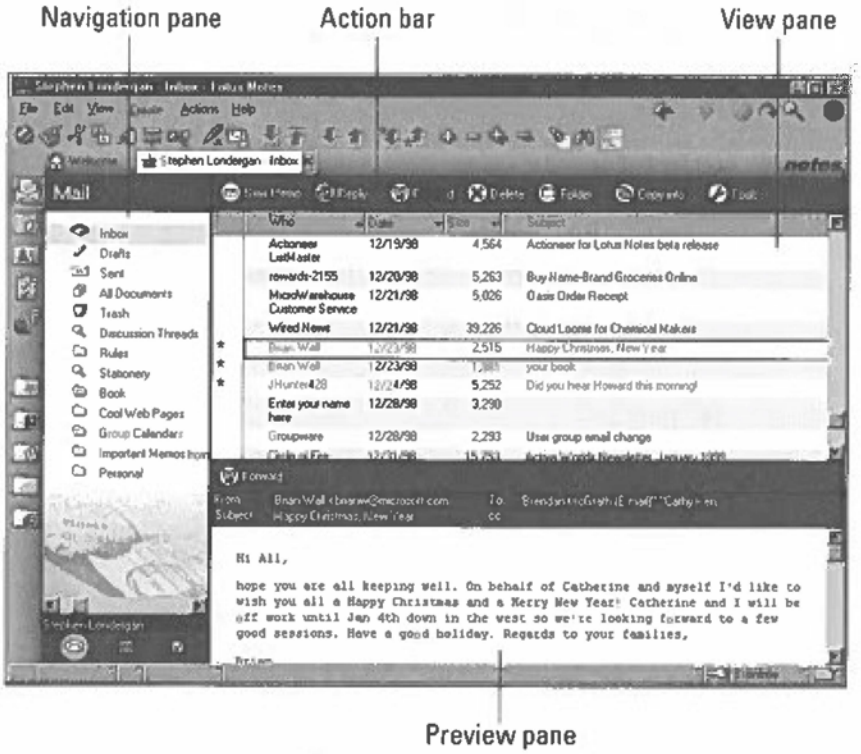
- ✦ Click the Mail bookmark (which is the first one in the Bookmark bar).
- ✦ Click the Open Mail button on the Welcome page.

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

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



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



Printing

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

26 Printing

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



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

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

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

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

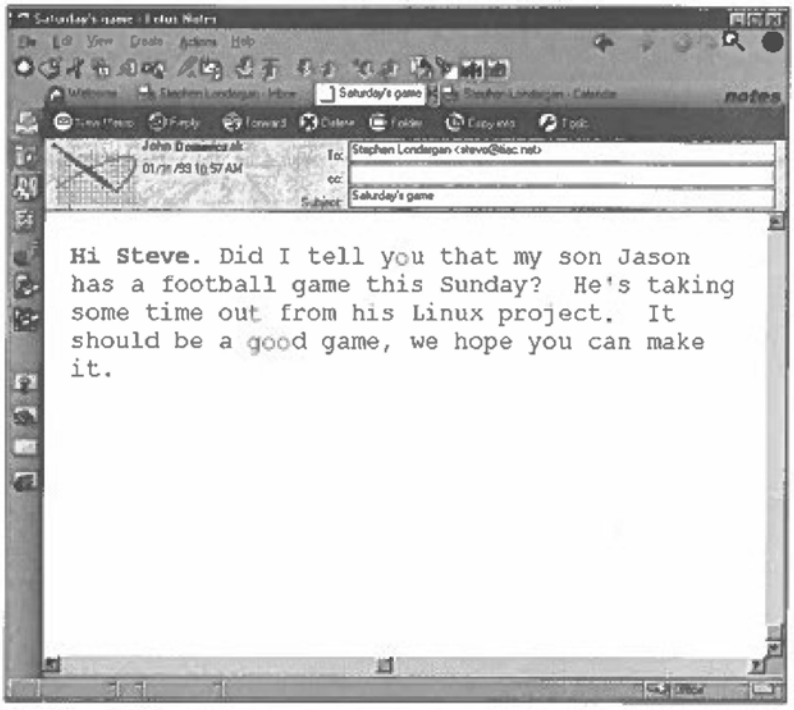
If you choose Page Break, you can also decide how to number the pages, assuming that you want to number the pages at all. Select Starting with page number 1 to have each new document start with a page number of 1. Otherwise, the first page of each new document gets the next consecutive page number.

Reading Your Messages

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

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

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



Selecting Messages

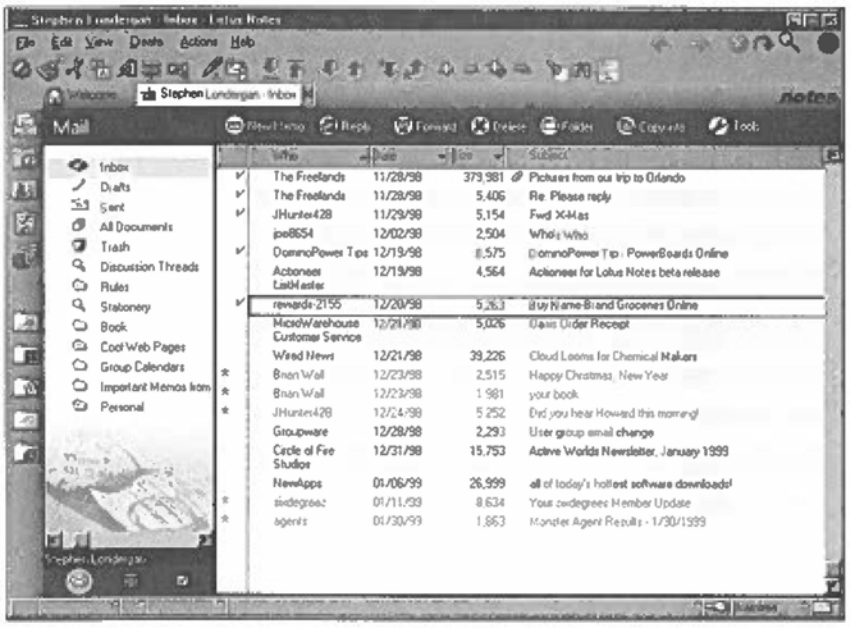
If you want to print, delete, or organize just one document, selecting it is easy. You can use either of these methods:

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

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

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

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



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

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

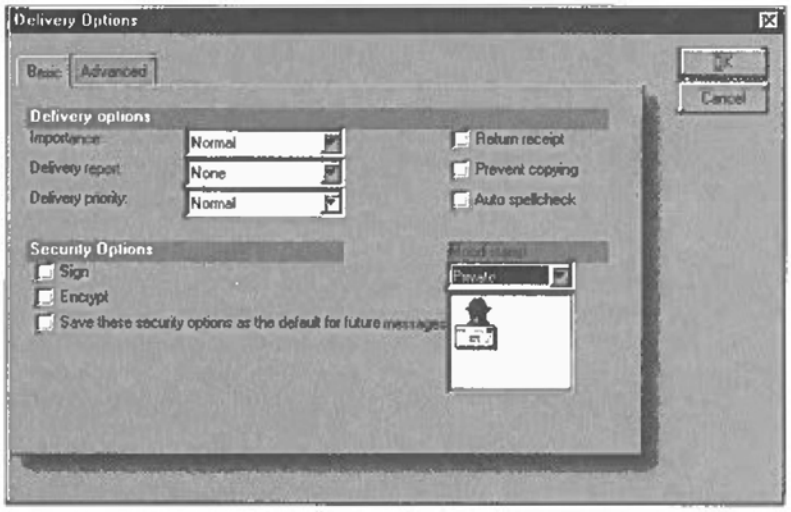
Sending a New Message

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

Choosing delivery options

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

- Choose Actions⇨Delivery Options.
- Click the Delivery Options button in the Action bar.



The Delivery Options dialog box includes several useful features:

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

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

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

✦ **Delivery priority:** The setting for this option determines how quickly your message is delivered:

- **High priority** tells Notes to deliver the message as quickly as possible.
- **Normal priority** tells Notes to send the message according to the regular delivery schedule, which is set by your Notes administrator.
- **Low priority** tells Notes to send the message in the middle of the night.



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

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



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

✦ **Prevent copying:** If you choose this option, you can be certain that the person who receives your message cannot forward it. You probably won't use this option.

✦ **Auto spell check:** This option means that Notes automatically spell checks the message before you send it.

✦ **Mood stamp:** The Mood stamp drop-down list provides a picture that Notes displays at the top of a message, so that your reader knows the frame of mind you were in when you sent the message. A message with a mood stamp is also

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

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

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



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

Preparing to write a new memo

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

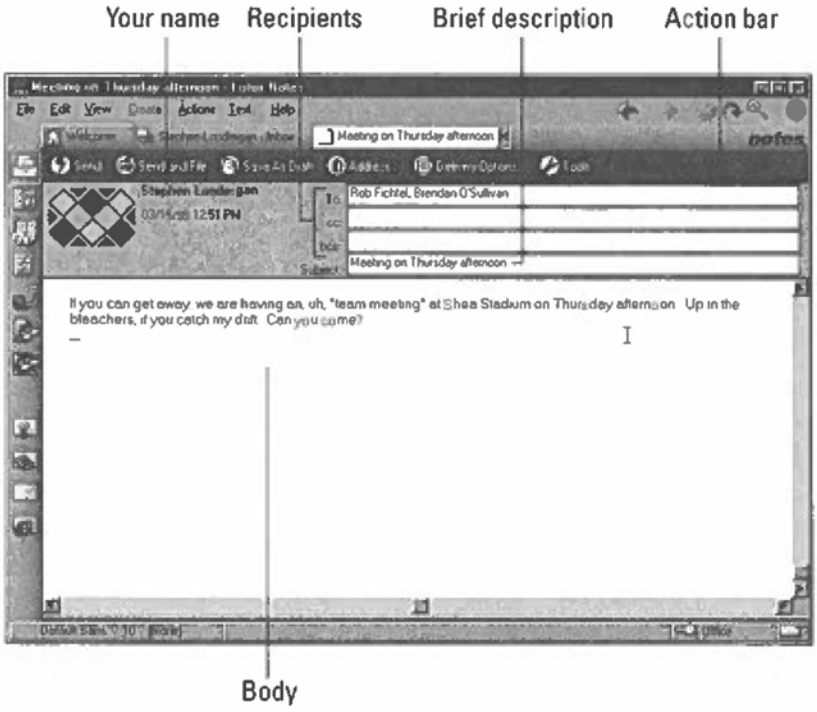
- Choose Create➪Mail➪Memo. If you already have your e-mail database open, click the Action bar's New Memo button.
- Click the Create Mail bookmark located inside the Create folder.

A blank memo form appears.

Every memo has four parts:

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

32 Sending a New Message





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

Addressing a message

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

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

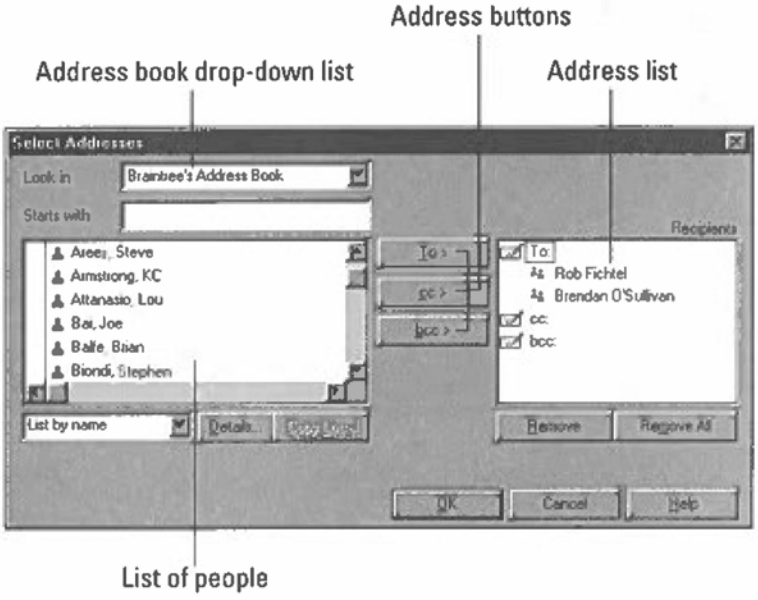
- **bcc:** The field that you use to send a *blind courtesy copy* of the memo — that is, to send someone a copy without having the other recipients know about the copy. Imagine, for example, that you send a memo asking a coworker to complete a certain job. You want your manager to know that you have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



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

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

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





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

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



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

Entering the body of a message

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

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



Sending a message

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

- Choose Actions➪Send.
- Click the Send button in the Action bar.

Off goes the memo.

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

1. Press Esc.
2. Choose Discard changes.

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

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

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

Filing a message

The only possible downside to using Actions➪Send is that the memo is *not* saved for you. It goes to the recipients, but you have no record of what you sent.

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

- Choose Actions➪Send and File.
- Click the Send and File button in the Action bar.

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

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





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

Switching Views and Folders

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

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

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

Using the View Pane

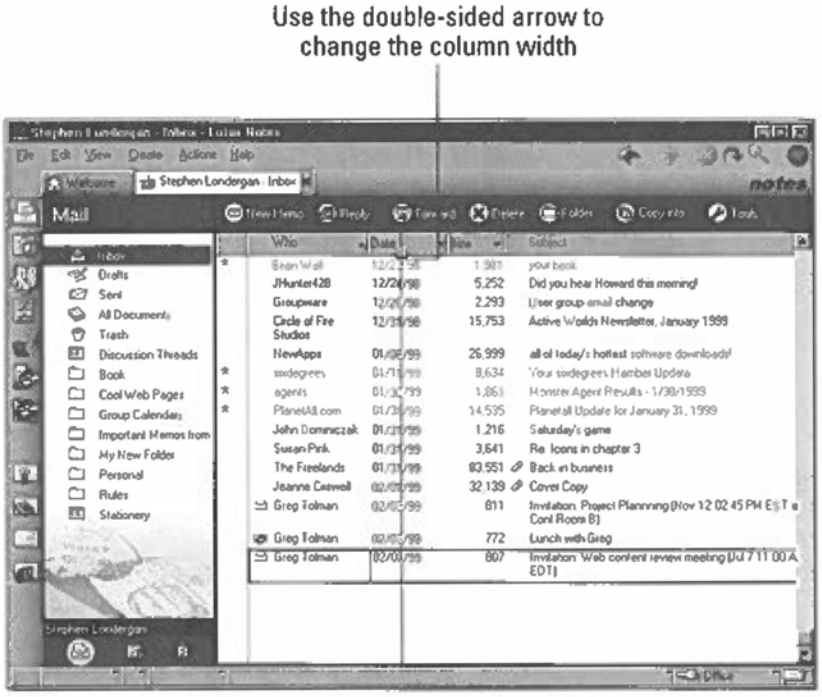
The View pane presents a summary of the documents in the view or folder that you select. When you press the up-arrow and down-arrow keys, you see the *message selector* move from one message to the next. (The message selector is the large black bar that highlights the messages in the View pane.) As you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

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

Changing a column width

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

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



Sorting your e-mail

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

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

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

Working in Your E-Mail Database

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

Deleting documents

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

To delete a message, do any of the following:

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

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

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

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

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

- Press F9 to update the database.
- Close the database.
- Choose Actions⇨Empty Trash.

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