

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

Creating a new folder

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

1. Choose Create➪Folder.
2. Name your new folder in the Create Folder dialog box.
3. Click OK.

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

Deleting a folder

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

1. Select the folder in the Navigation pane.
2. Choose Actions➪Folder Options➪Delete Folder.



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

Finding documents

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

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

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

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

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

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



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

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

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



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

Forwarding messages

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

- Choose Actions⇨Forward.
- Click the Forward button.



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

Opening a folder to see what's in it

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

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

Putting a document in a folder

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

1. Select the message(s).
2. Choose Actions⇨Folder⇨Move to Folder.
3. Select the folder name from the Move to Folder dialog box.
4. Click Move.



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

Replying

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

- Reply directly by choosing Create⇨Reply or by clicking the Action bar's Reply button.
- Return the document to the originator by choosing Create⇨Reply With History or by clicking the Reply With History button.

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



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

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

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

Distinguishing views from folders

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

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

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

Part III

Your Calendar

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

In this part . . .

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



Managing Your Calendar

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

Opening your calendar

You have three ways to open your calendar:

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



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



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



Opening somebody else's calendar

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

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



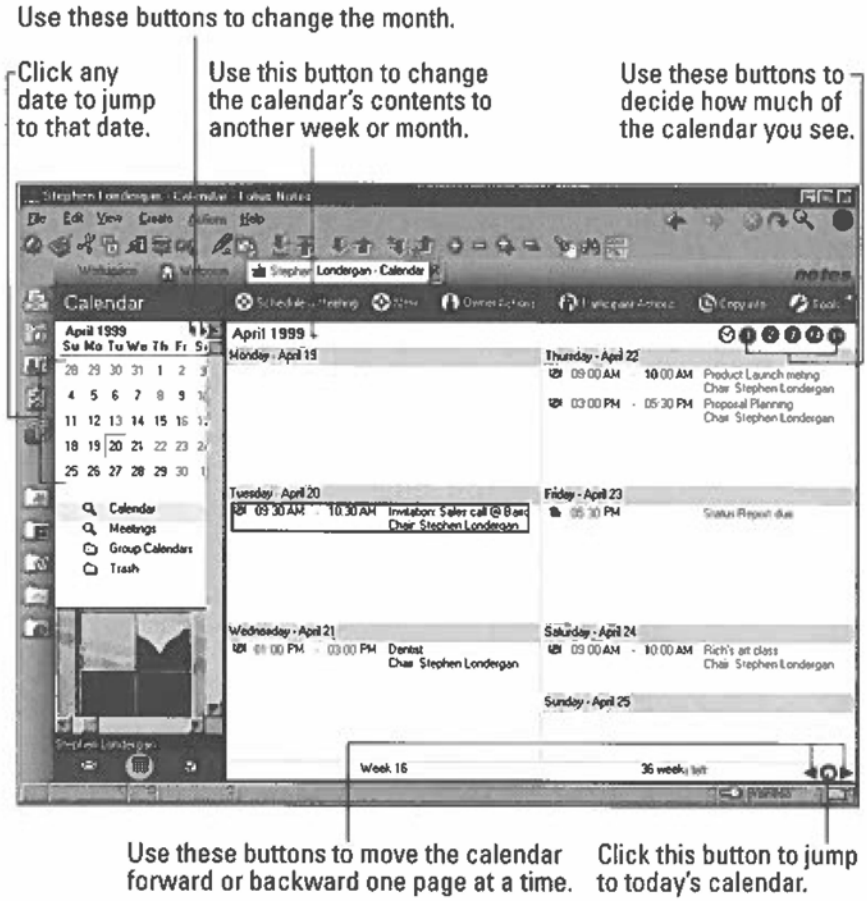
If you need to open another person's calendar regularly, drag the Task button for the person's calendar into your Bookmark bar, so that you can easily find it in the future.

Viewing your calendar

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

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

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



Setting calendar preferences

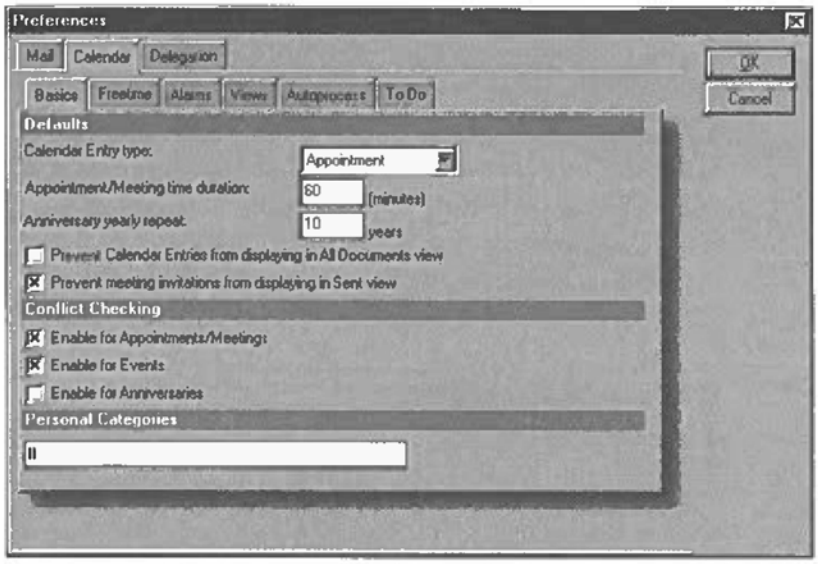
You can manage some of the finer points of how your calendar behaves — such as the default duration for new meetings, the names of the people who can view your calendar, and so on —

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

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

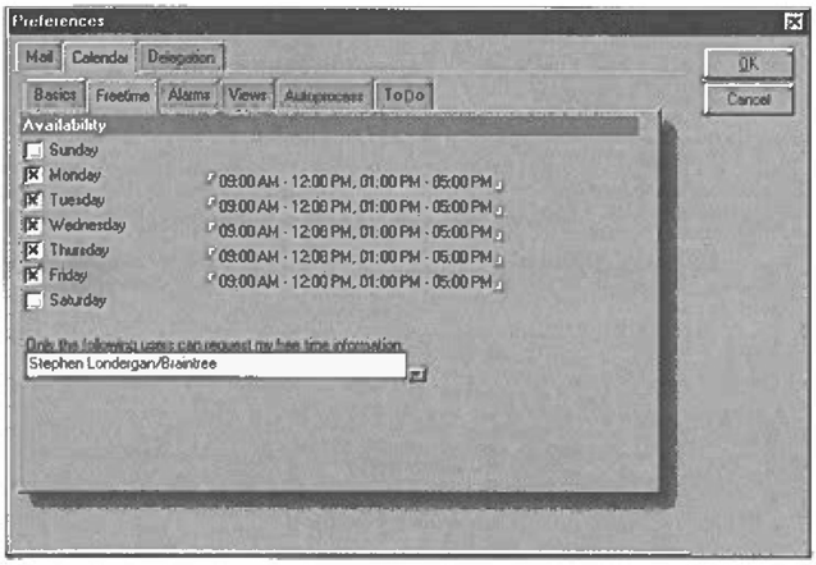
You probably don't have to worry about most of the options in the Preferences dialog box, but we'd be neglecting our duties if we didn't describe, in mind-numbing detail, each and every one of them:

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

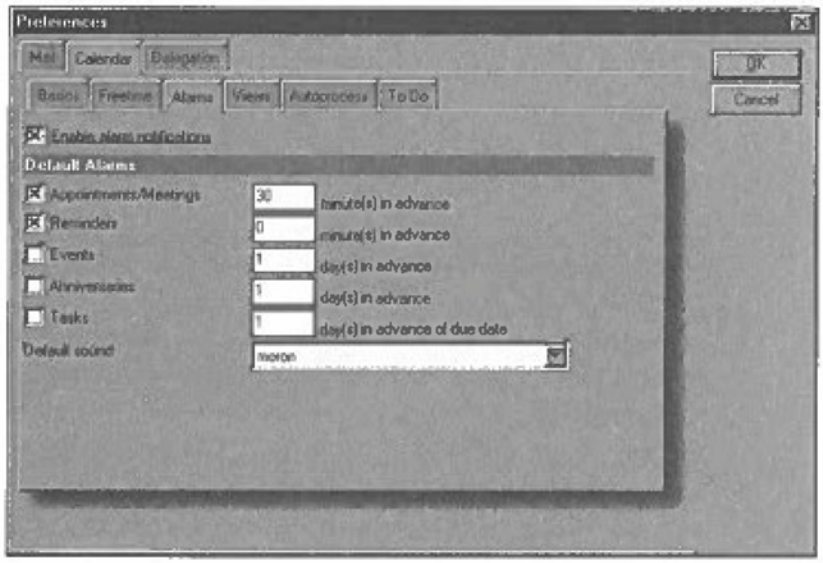


The Calendar/Freetime Tab

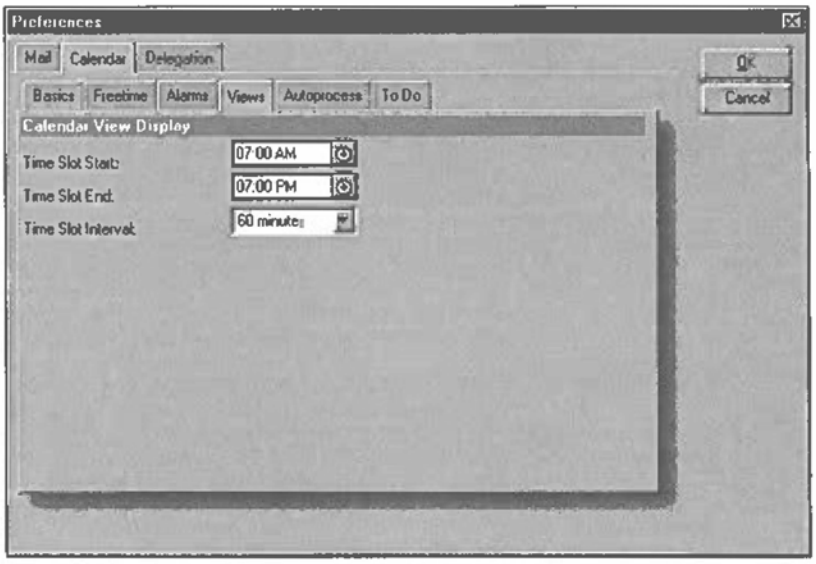
Days and times	Determines the days of the week and times of the day when you're generally available for meetings.
Only the following users can request my free time information	Determines the people who can review your availability. Enter their names in this text box or use the drop-down arrow next to the box to select their names from the Public Directory.



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

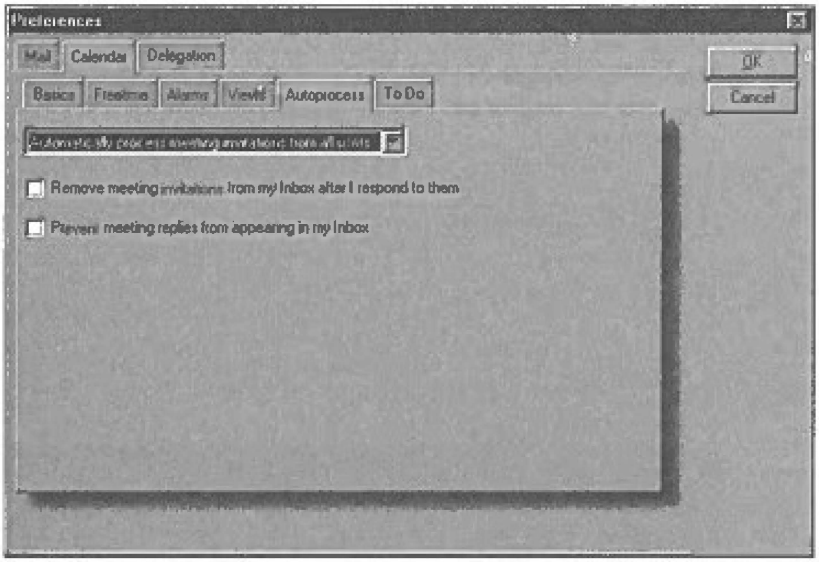


The Calendar/Views Tab	
Time Slot Start	Determines the beginning time that displays on each day of your calendar.
Time Slot End	Determines the ending time that displays on each day of your calendar.
Time Slot Interval	Determines the time slots that display on each day — 15, 30, or 60 minutes.



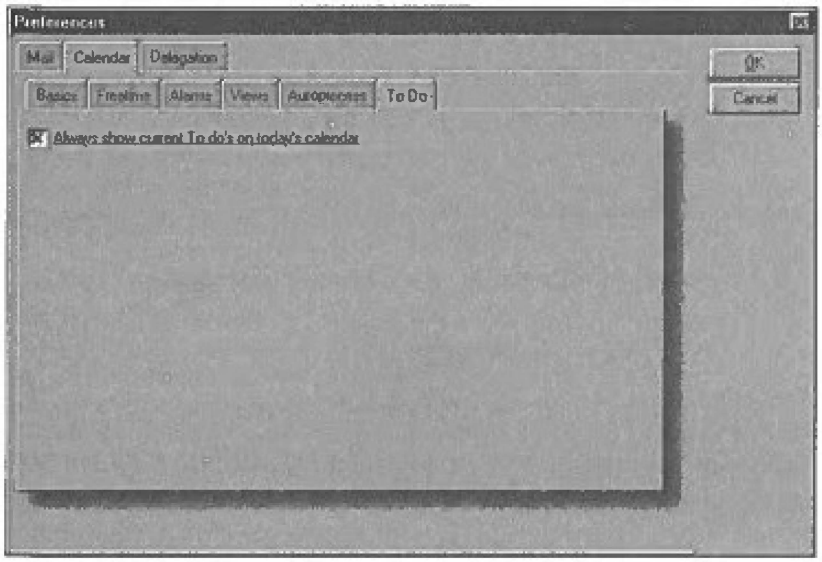
The Calendar/Autoprocess Tab

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

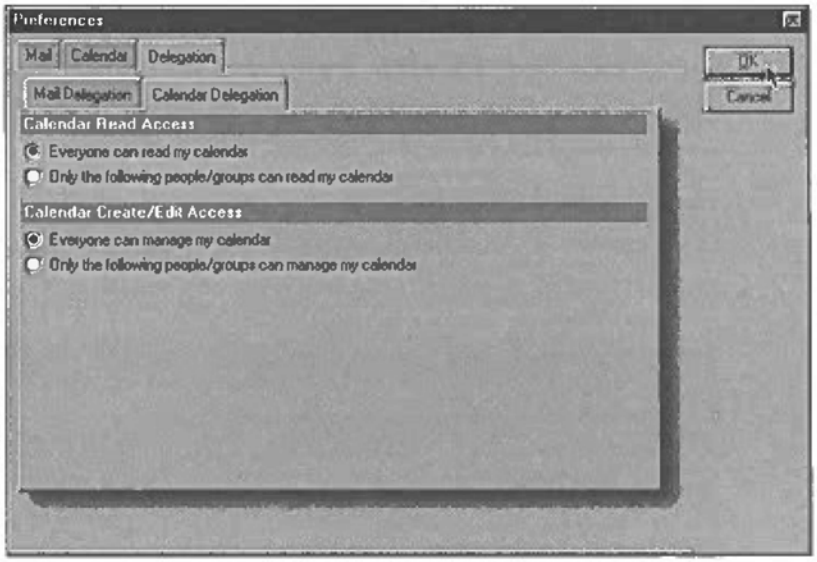


The Calendar/To Do Tab

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



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



Click OK when you finish editing your calendar preferences.

Printing your calendar

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

Click OK to print your calendar.



Modifying Your Calendar

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

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

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

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

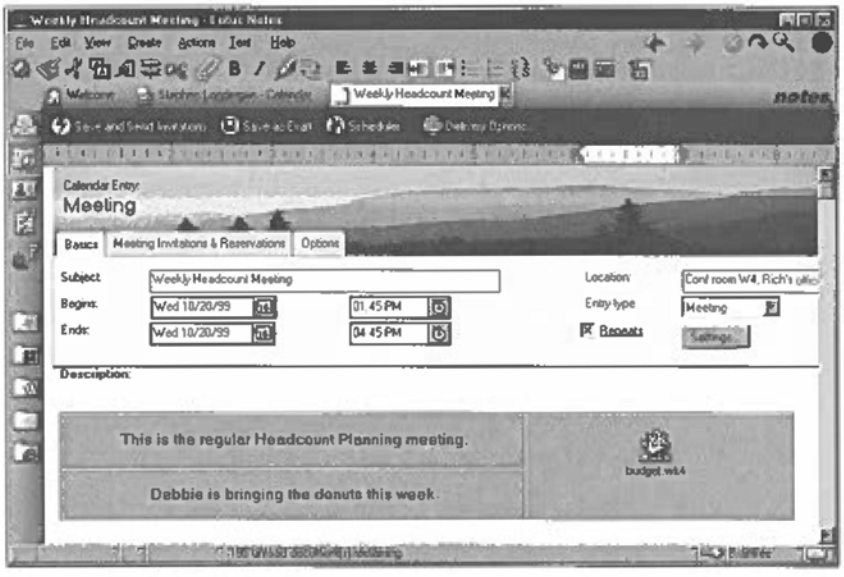
- **Reminders** are entries on your calendar that make sure you don't forget to do something at a particular time on a particular day. Just like events, reminders appear at the top of a day's schedule.
- **Anniversaries** are similar to reminders. Anniversaries aren't scheduled for a particular time,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

Adding a new meeting

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

To schedule a new meeting, follow these steps:

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



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

5. (Optional) Enter the meeting's location in the Location text box.

6. (Optional) Use the Description area of the Meeting form to add any information, attachments, and so on that pertain to the meeting.

7. If the meeting occurs more than once (such as a weekly staff meeting), check the Repeats check box and then click the Settings button to enter how often the meeting happens.

8. Use the options in the Meeting Invitations & Reservations tab of the Meeting form to enter the names of the people you hope can attend and to select a room and other resources for your meeting. If you enter names in the cc and bcc fields, those people get a notice of your meeting, but aren't required to respond to your invitation.



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

9. Click the Pencil in check box on the Options tab if the meeting has not yet been absolutely, positively confirmed, and you are willing to have another meeting supersede it. You can always uncheck this box later, after plans for the meeting firm up.

10. Click the Mark Private check box to make the meeting private and to keep people who have access to your calendar from seeing it. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.

11. Use the Notify me check box if you want Notes to remind you in advance of the meeting. You can also use the Alarm settings button to determine how much notice you're given and how, exactly, you are reminded.

12. Click the Action bar's Save and Send Invitations button. This saves the meeting on your calendar and dispatches invitations to the people you listed in the To, cc, and bcc fields.



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

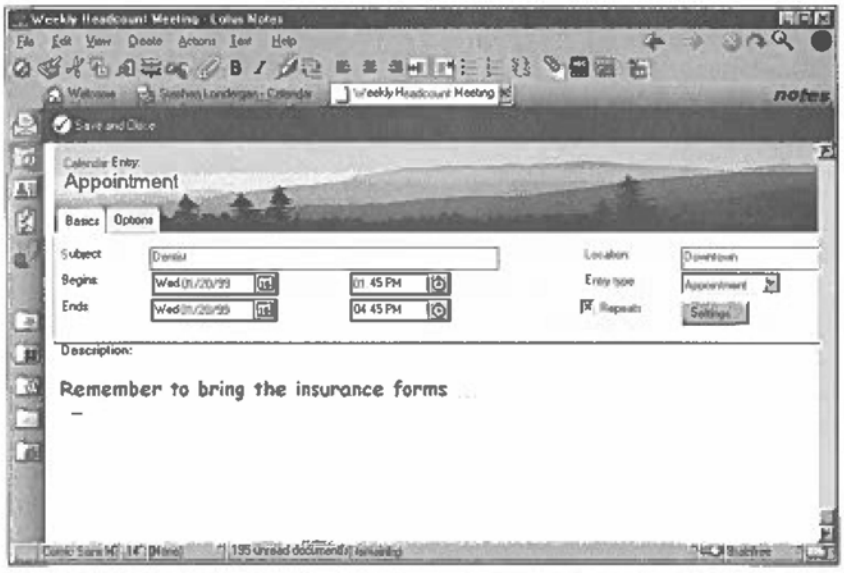
After you click the Save and Send Invitations button, Notes returns you to your calendar. Switch to the day of the meeting that you just scheduled to find it listed among the items for that day. You also receive, in most cases, e-mail notification from your invitees as they read your invitation and decide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

Adding a new appointment

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

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

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



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

7. If the appointment occurs more than once, check the Repeats check box and then click the Settings button to enter how often the appointment happens.

8. Click the Pencil in check box on the Options tab of the Appointment form if the time or date for the meeting has not yet been finalized. You can always uncheck this box later, after plans for the appointment firm up.

9. Click the Mark Private check box on the Options tab to make the appointment private and to keep the people who have access to your calendar from being able to see the appointment's title. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.

10. Use the Notify me check box if you want Notes to remind you in advance of the appointment. If you choose to do so, you can also use the Alarm settings button to determine how much notice you're given and how, exactly, you're reminded.

11. Click the Action bar's Save and Close button when you finish entering the details of your appointment.

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

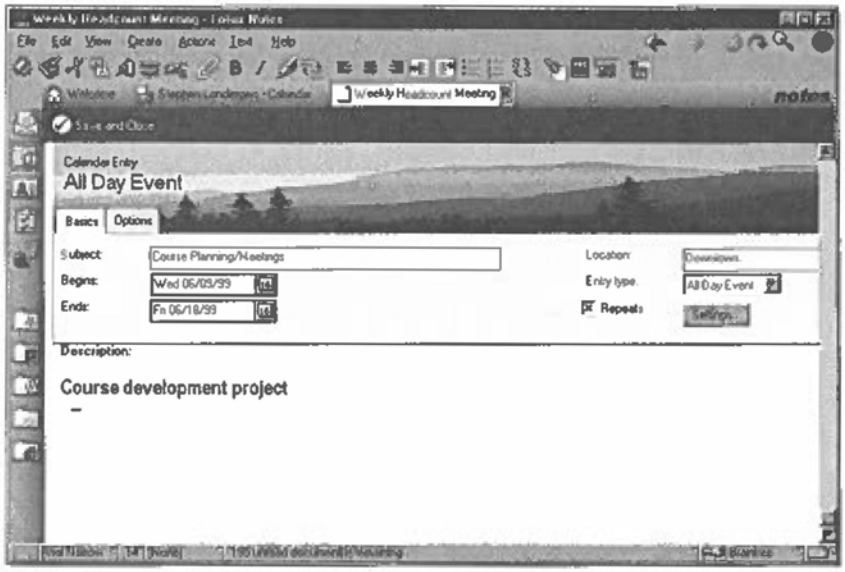
Adding a new event

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

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

1. Open your schedule.

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



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

10. Use the Notify me check box if you want Notes to remind you in advance of the event. You can also use the Alarm settings button to determine how much notice you're given and how, exactly, you're reminded.

11. Click the Action bar's Save and Close button when you finish entering the details of the new event.

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

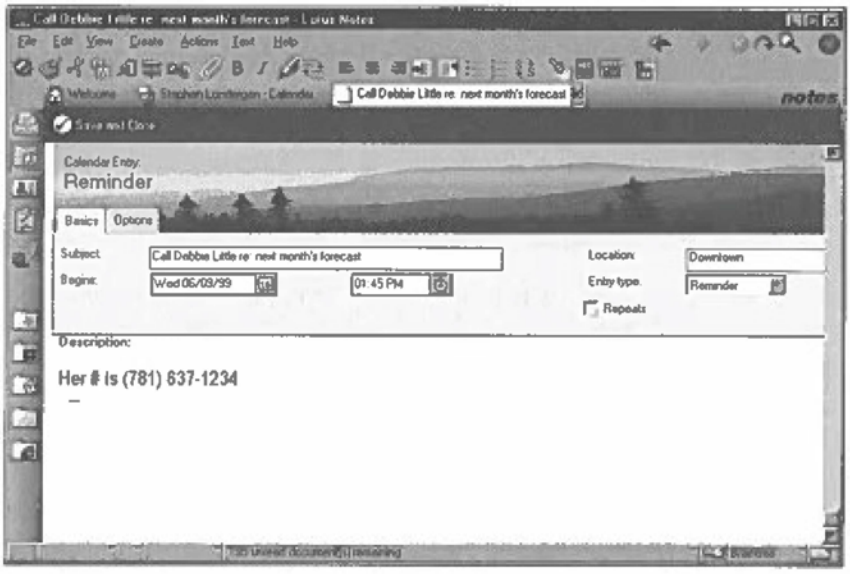
Adding a new reminder

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

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

1. Open your schedule.

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



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

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

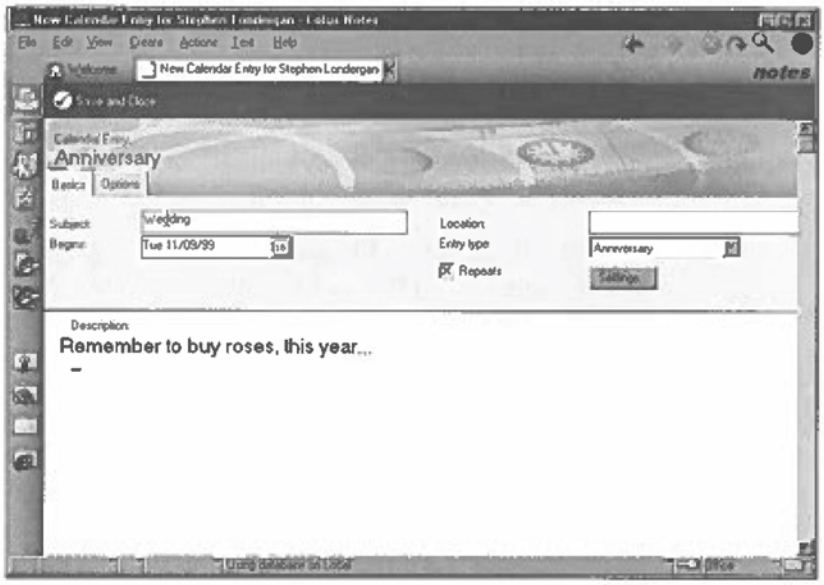
After you click the Save and Close button, Notes returns you to the calendar view; switch to the day of the reminder you just scheduled to find it listed at the top of the day's items.

Adding a new anniversary

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

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

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



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

4. Use the Begins date box to specify where you want the anniversary to appear on your calendar. If you prefer to select the date, click the little picture of a calendar that's immediately to the right of the box.

5. (Optional) Enter the anniversary's location in the Location box.

6. (Optional) Use the Description area of the Anniversary form to add any information, attachments, and so on that pertain to the anniversary.

7. If you want the anniversary to appear more than once on your calendar, check the Repeats check box and then use the Repeat options dialog box to determine the regularity with which the appointment repeats.

8. Click the Pencil in check box on the Options tab if the date for the anniversary has not yet been finalized. You can always uncheck this box later, after plans for the anniversary firm up.

9. Click the Mark Private check box on the Options tab to make the anniversary private and to keep people who have access to your calendar from seeing it. This option applies only to the people you have specifically granted access to your calendar via Delegation; the "rest of the world" can't see the contents of your calendar under any circumstances, whether you click this button or not.

10. Use the Notify me check box if you want Notes to remind you in advance of the anniversary. You can also use the Alarm settings button to determine how much notice you're given and how, exactly, you're reminded.

11. Click the Action bar's Save and Close button when you finish entering the details of the anniversary.

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



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

Editing an entry

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

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

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

Responding to an invitation

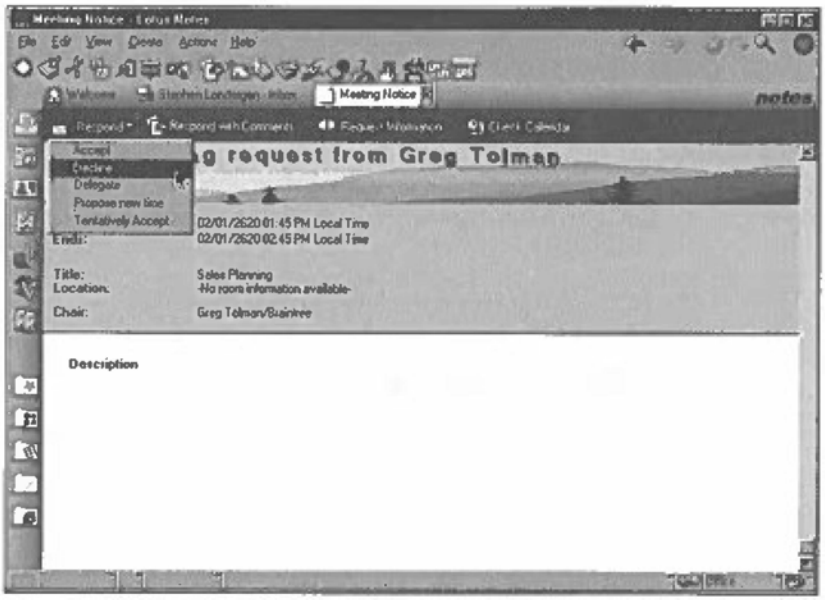
As you and your colleagues begin to use the calendar options, you may begin to receive invitations to meetings (unless you're very unpopular, of course, which we know isn't true!). Responding to these invitations is important so that the person who is trying to set up a meeting knows whether you plan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

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

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

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

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



Operating a Group Calendar

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

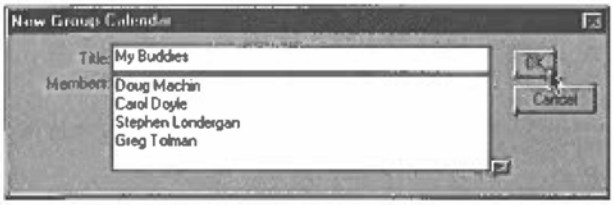
Creating a group calendar

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

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



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



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

6. Click OK to create the new group calendar.

Opening a group calendar

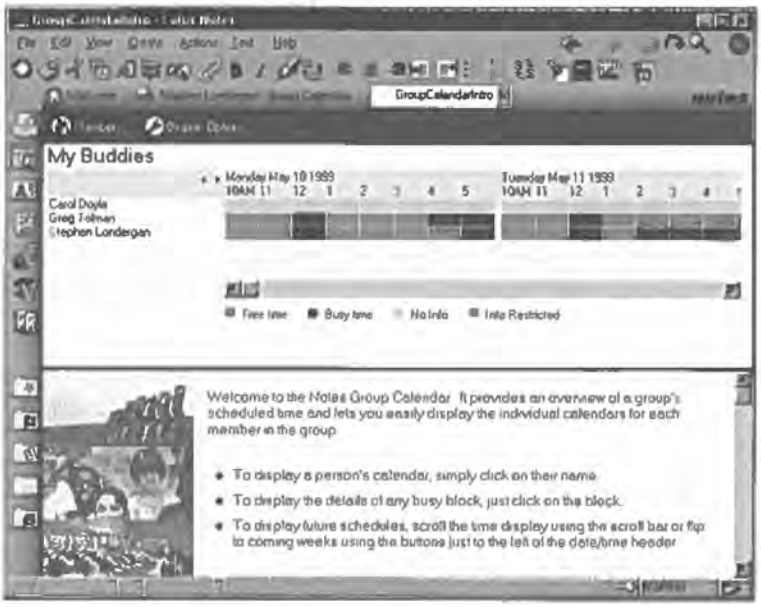
After you create a group calendar document, use it to easily open a collective view of the members' calendars. To see a group's calendar, follow these steps:

1. Open *your* calendar or e-mail.

2. Click on the Group Calendars folder in the Navigation pane.

3. Double-click in the View pane the group calendar you want to open.

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





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

Tracking To-Do's

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

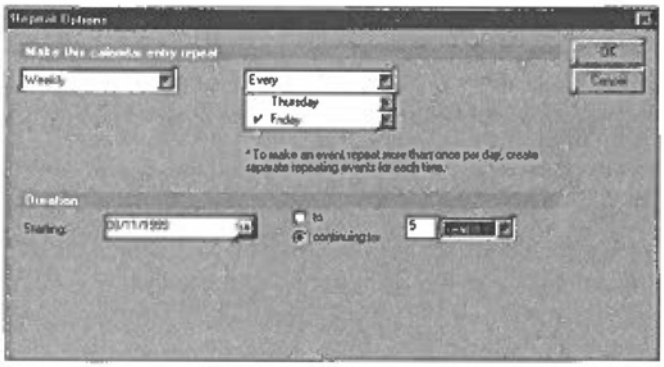
Creating a new group to-do

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

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

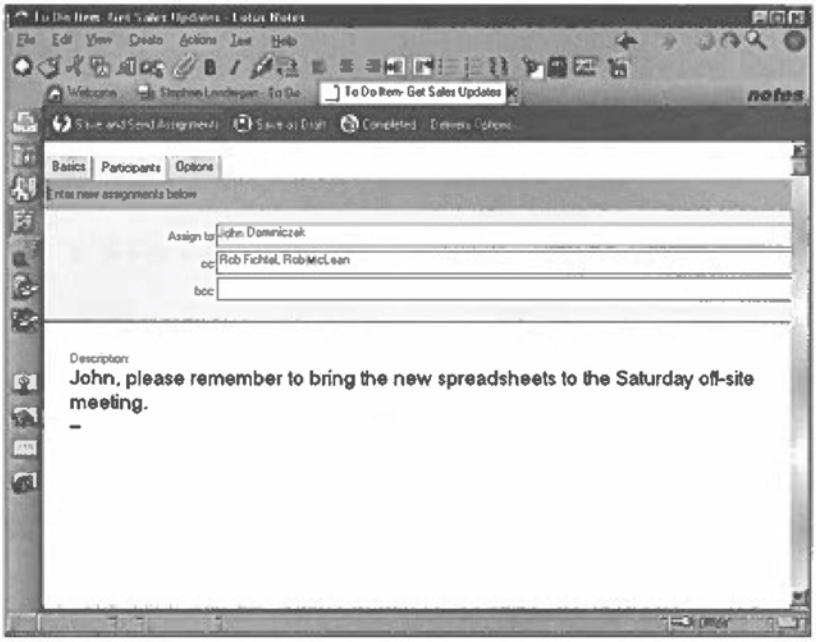


3. Enter a brief description of what needs to be done in the Subject field.
4. Indicate the item's importance by choosing a Priority: High, Medium, Low, or None. The Priority you choose determines how the item is listed in your To Do views. Top priority items ① appear at the top, medium priority items ② appear next, low priority items ③ appear next, and so on.
5. Enter the date when the task should begin in the Starts field.
6. Enter the date by which it needs to be finished in the Due field.
7. Choose Group To Do in the Type field.
8. If you want the to-do to be automatically entered on more than one date, use the Repeats button. (For example, you could add a to-do named "Take out the garbage" and then set it to automatically repeat every Friday.) Use the Repeat Options dialog box to specify how often the task is entered automatically and how long the task repeats.



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

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



Creating a new personal to-do

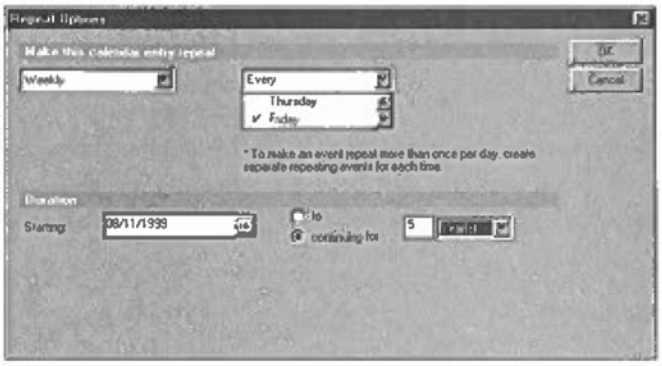
To add a new personal to-do (a task that involves you and only you), follow these steps:

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

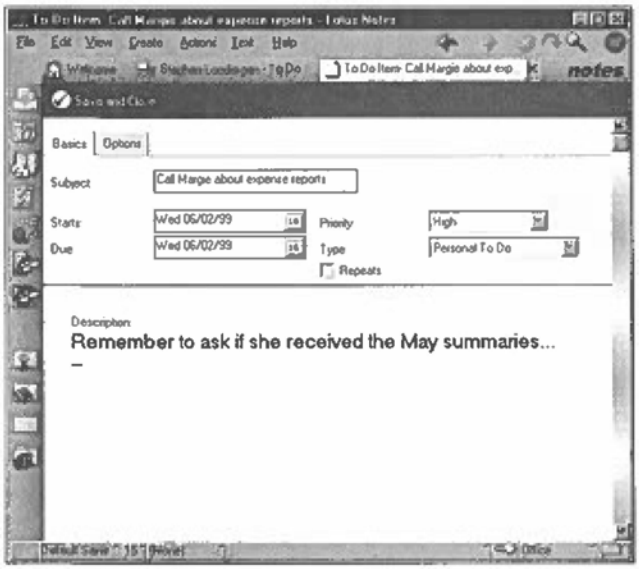


3. Enter a brief description of what needs to be done in the Subject field.
4. Indicate the item's importance by choosing a Priority: High, Medium, Low, or None. The Priority you choose determines how the item is listed in your To Do views. Top priority items ① appear at the top, medium priority items ② appear next, low priority items ③ appear next, and so on.
5. Enter the date when the task should begin in the Starts field.

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



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



Editing a to-do

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

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

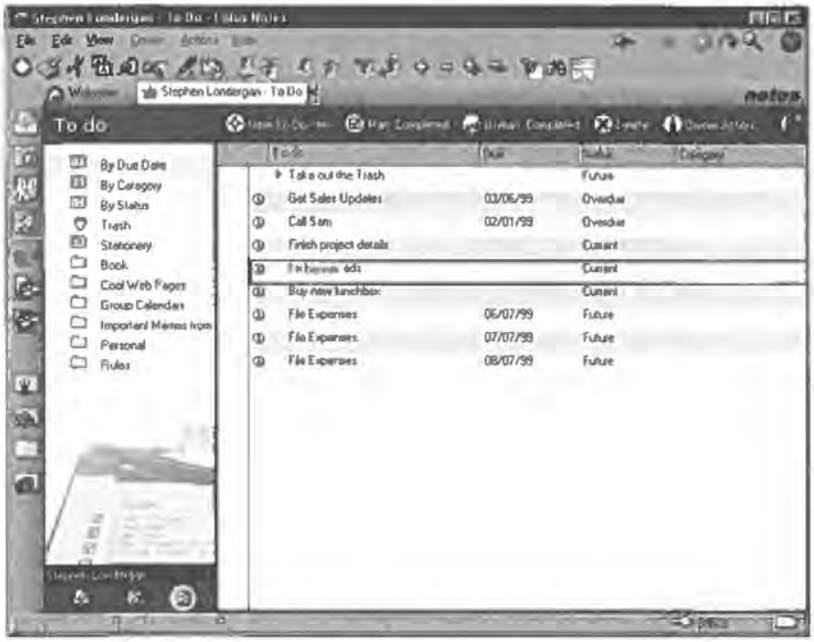
Updating your to-do's

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

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

Viewing your to-do's

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

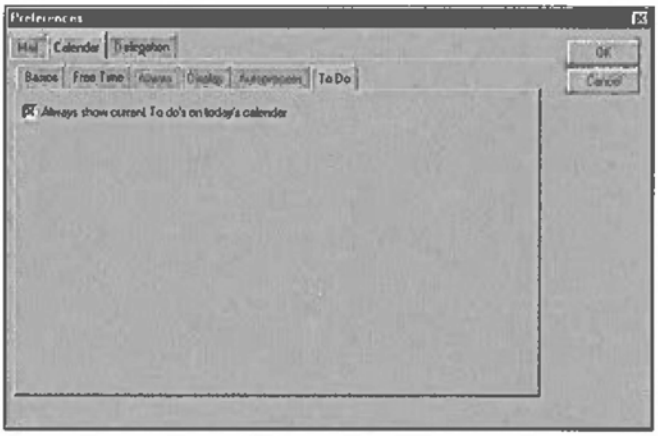


As you can see in the figure, the By Due Date view displays your tasks in order by the date upon which you're supposed to complete them. (If you've been remiss in your duties and let some of your Tasks become *Overdue*, the overdue to-do's always appear at the top.) As you may notice in the figure's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

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

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

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



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

Part IV

Dealing with Databases and the Data They Contain

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

In this part . . .

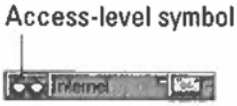
- **Creating a document**
- **Creating and modifying tables**
- **Editing a document**
- **Hiding a document**
- **Linking documents, views, and databases to a document**
- **Locating and opening Notes databases**
- **Navigating around a database**
- **Searching for text**
- **Working with documents**



Access

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

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



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

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

Bulleted Lists

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

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



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

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

Database Icons

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

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

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

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

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

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

78 Database Icons

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

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

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

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

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

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

   - **Open the database right away.** If you click Open (or double-click a database's title), Notes does four things. First, it adds that database to the list of bookmarked databases in your Databases folder so that you can open it in future Notes sessions without having to go through these steps again. Second, it adds the database to your Workspace (which is also in the Databases folder), giving you another way to open the database in future sessions. Third, it closes the Open Database dialog box. Finally, it opens the database you chose.

   - **Bookmark the database so that you can easily open the database later.** If you click the Bookmark button, you see a dialog box; use this dialog box to determine where the icon for the new database appears. Selecting Workspace, for instance, puts the icon on the Workspace, but not in any database folder. If you want the icon in a folder and on the Workspace, choose a folder; the icon appears in both places. If you want a new folder for your new icon, first click the name of the folder in which you want the new folder to appear, and then click New Folder and enter a name for the new folder in the Name text box of the dialog box that appears. Click OK and the database is added to the workspace and to your new folder.

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

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

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



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

Database Navigation

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

Switching from view to shining view

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

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

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

Navigating around a document in Edit mode

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

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

Opening a document

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

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

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

Seeing another document

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

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



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



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



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



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



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



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

Document Actions

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

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

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

Selecting and deselecting a document

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

Selecting a group of documents

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

Adding documents in a folder

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

- ✦ Click and drag a selected document to a folder.
- ✦ Choose Actions⇨Move to Folder. You need to specify the folder to which you want to add the document.



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

Deleting a document

To delete selected documents, follow these steps:

1. Press Delete.
2. Do one of the following:
   - Choose View⇨Refresh.
   - Press F9.
   - Close the database.

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

Forwarding a document

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

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

Printing a document

To print an open document, follow these steps:



1. Choose File⇨Print or click the File Print SmartIcon.
2. Click OK.

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

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

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

Removing documents from a folder

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



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

Document Edits

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

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



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

Enhancing text

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





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

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

Setting the permanent pen

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

1. Be sure that you are in a rich-text field.
2. Use the Text Properties box to set text properties for your editorial comments. Red, bold text, for example, makes your comments stand out from surrounding text.
3. Choose Text➪Permanent Pen➪Set Permanent Pen Style from the menu. You have now assigned your unique font selections to the permanent pen.
4. Position the cursor where you want to make your first comment.



5. Click the Permanent Pen SmartIcon.
6. Type your comment.
7. Move to a new location and type a comment there. The permanent pen is engaged until you turn it off.
8. Click on the Permanent Pen SmartIcon to turn off the permanent pen.

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



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

Document Hiding

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

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

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

Encryption

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

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



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

Creating your key

To create an encryption key, follow these steps:

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

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

4. If making a comment helps you remember details of the key, type the comment in the Comment text box.

Sending your key

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

1. Choose File⇨Tools⇨User ID and then click the Encryption button.

2. Select the key you want to send.

3. Click Mail to open the Mail Address Encryption Key dialog box.

4. Enter the name, names, or group to whom you're sending the key. You can send courtesy copies (cc:) to people who need to know that you sent the key, but those folks don't receive the key itself. The Subject line of the memo automatically contains whatever text is in the Subject box, but you may change that text if you want it to say something else. Happy with everything in the dialog box?

5. Click Send.



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

Attaching your key to a document

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

1. Choose Create to start a document. Of course, if you've already started the document you want to encrypt, you can ignore this step.

2. Choose File⇨Document Properties.

3. In the Properties box that appears, click the tab with the picture of a key to open the Security page.

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

Accepting a key

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

1. Open the memo with the attached encryption key.
2. Choose Actions⇨Accept Encryption.
3. Click Accept.

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

1. Choose File⇨Tools⇨User ID.
2. Click the Encryption icon.
3. Click Import.
4. Specify the drive, directory, and filename of the encryption key that you want to import and click OK.
5. Enter the password (if any) and then click OK.
6. Click Accept to merge the key with your user ID file and then click OK.

Fields

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

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

Find and Replace



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

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



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

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

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

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

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

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



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

Folders and Views

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

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

Creating folders

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

To create a folder, follow these steps:

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

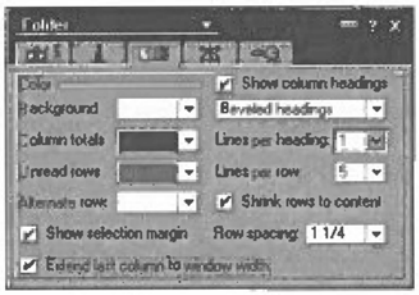


5. Click the name of a folder in the list under Select a location for the new folder, if you want the new folder to be "cascaded" under an existing view or folder. *Cascaded* means that a green arrowhead appears next to the existing view or folder. Clicking that arrowhead displays the name of your new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

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

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

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



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

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

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

Collapsing and expanding folders and views

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