THE BOOK/DISK LEARNING TOOL

PC LEARNING LABS

Teaches Lotus Notes 3.0

The Quick and Easy Way to Learn



Practice Examples Included on Disk

MSI215240-261

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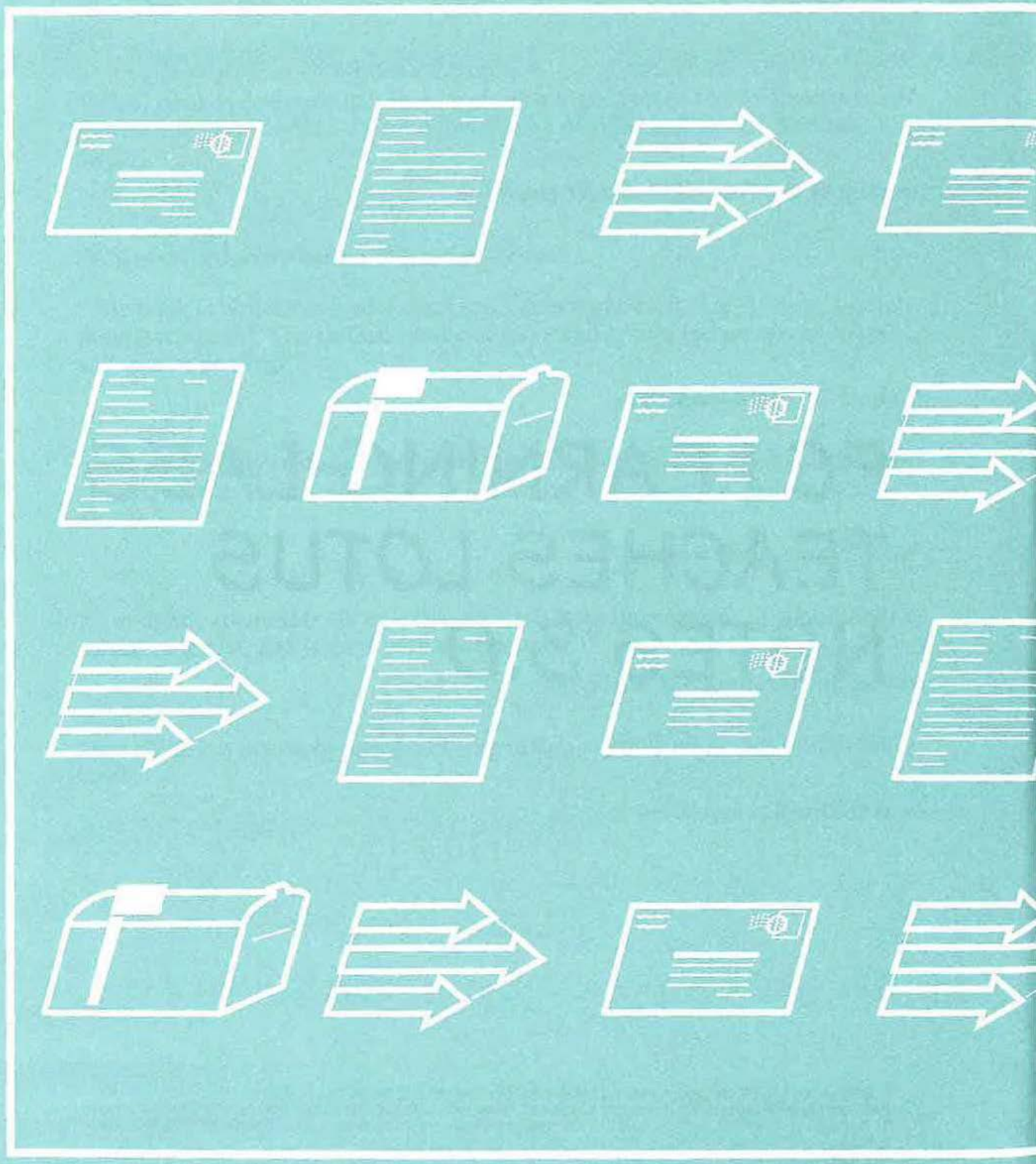
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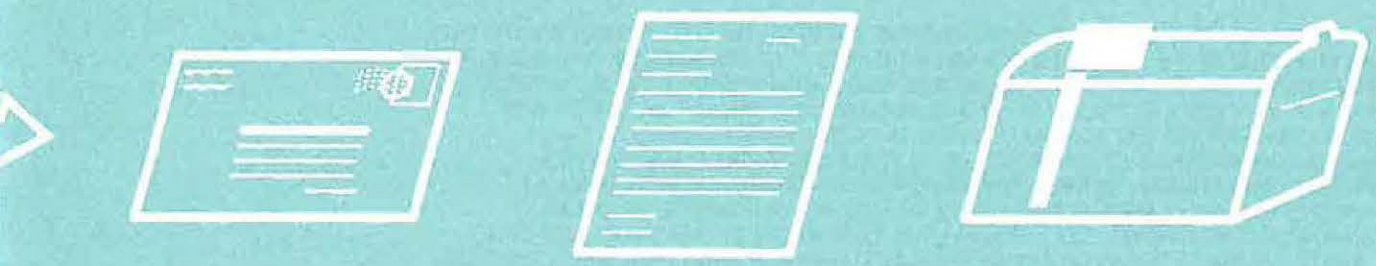
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PC LEARNING LABS TEACHES LOTUS NOTES 3.0

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Project Coordinator	B. Dahl
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INTRODUCTION

Welcome to *PC Learning Labs Teaches Lotus Notes 3.0*, a hands-on instruction book that will help you attain a high level of Notes fluency in the shortest time possible. And congratulations on choosing Lotus Notes 3.0, an easy-to-use, feature-packed program that will help you communicate and work with your colleagues more efficiently.

We at PC Learning Labs believe this book to be a unique and welcome addition to the ranks of how-to computer publications. Our instructional approach stems from a decade of successful teaching in a hands-on classroom environment. Throughout the book, we mix theory with practice by presenting new techniques and then letting you apply them in hands-on activities. These activities use specially prepared sample Notes databases, which are stored on the enclosed Data Disk.

Unlike a class, this book allows you to proceed at your own pace. And we'll be right there to guide you along every step of the way, providing landmarks to help you chart your progress and hold to a steady course.

When you're done working your way through this book, you'll have a solid foundation of skills in

- Understanding databases, views, and documents
- Composing and editing documents
- Using Notes Mail
- Managing databases and documents
- Using Notes security features
- Creating private views and databases

- Customizing your Notes workstation
- Incorporating other forms of data into Notes

READ THIS BEFORE YOU PROCEED!

We strongly recommend that you read through the rest of this Introduction before beginning Chapter 1. If, however, you just can't wait to dive in, make sure that you first work through the section "Creating Your Work Directory," which appears later in this Introduction. You must install the data files in order to perform the activities that appear throughout the book.

WHO THIS BOOK IS FOR

This book was written with the beginner in mind. Although experience with electronic communications and personal computers is certainly helpful, little or none is required. You need only know how to turn on your computer and use your keyboard. We explain everything beyond that.

HOW TO USE THIS BOOK

You can use this book as a learning guide, a review tool, and a quick reference.



AS A LEARNING GUIDE

Each chapter covers one broad topic or set of related topics. Chapters are arranged in order of increasing proficiency; you will use and elaborate on the skills you acquire in each chapter during later chapters. For this reason, you should work through the chapters in sequence.

Each chapter is organized into explanatory topics and step-by-step activities. Topics provide the theory you need to master Notes; activities allow you to apply this theory to practical, hands-on examples.

You get to try out many new skills on specially prepared sample Notes databases stored on the enclosed Data Disk. This saves you typing time and allows you to concentrate on the technique at hand. Through the use of sample files, hands-on activities, illustrations that give you feedback at crucial steps, and supporting background information, this book provides you with the structure to learn Notes 3.0 quickly and easily.



AS A REVIEW TOOL

Any method of instruction is only as effective as the time and effort you are willing to invest in it. For this reason, we encourage you to spend some time reviewing the book's more challenging topics and activities.



AS A QUICK REFERENCE

General procedures such as opening a database or composing a document are presented as a series of bulleted steps; you can find these bullets (•) easily by skimming through the book. These procedures can serve as a handy reference.

At the end of every chapter, you'll find a quick reference that lists the mouse and keyboard actions needed to perform the techniques introduced in that chapter.

WHAT THIS BOOK CONTAINS

This book is divided into the following 11 chapters and 2 appendices:

Chapter 1	Getting Started
Chapter 2	Introduction to Notes Databases
Chapter 3	Working with Database Documents
Chapter 4	Using Notes Mail

Chapter 5	Managing Databases
Chapter 6	More about Editing Documents
Chapter 7	Private Views
Chapter 8	Creating a Private Database
Chapter 9	Making a Database Public
Chapter 10	Customizing Your Workstation
Chapter 11	Incorporating Other Forms of Data
Appendix A	Keystroke Reference
Appendix B	Notes Database Templates

To attain full Notes fluency, you should work through all 11 chapters. The appendices are optional.



SPECIAL LEARNING FEATURES

The following features of this book will facilitate your learning:

- Carefully sequenced topics that build on the knowledge you've acquired from previous topics
- Frequent hands-on activities that sharpen your Notes skills
- Illustrations that show how your screen should look at key points during these activities
- The Data Disk, which contains all the files you will need to complete the activities (as explained in the next section)
- Easy-to-spot, bulleted procedures that provide the general, step-by-step instructions you'll need to perform Notes tasks

- A quick reference at the end of each chapter, listing the mouse and keyboard actions needed to perform the techniques introduced in the chapter



THE DATA DISK

One of the most important learning features of this book is the *Data Disk*, the 3½-inch floppy disk that accompanies the book. This disk contains the sample Notes files you'll work on throughout the book.

To perform the activities in this book, you will first need to copy the sample files from the Data Disk to your Notes directory (as explained in the upcoming section "Creating Your Work Directory"). This directory will also hold all the Notes files that you will be creating, editing, and saving during the course of this book.

WHAT YOU NEED TO USE THIS BOOK

To run Notes 3.0 and complete this book, you need a computer with a hard disk and at least one floppy-disk drive, a monitor, a keyboard, and a mouse (or compatible tracking device). A printer is not absolutely necessary.



COMPUTER AND MONITOR

You need an IBM or IBM-compatible personal computer and monitor capable of running Microsoft Windows (version 3.1 or higher). A 286-based system is technically sufficient, but both Windows and Notes will run somewhat slowly on it; we recommend you use a 386 or higher (486 and up) computer.

You also need a hard disk with at least 20 megabytes (20 million bytes) of free storage space if Notes 3.0 is not yet installed or 2 megabytes of free space if Notes 3.0 is installed. The amount of space Notes requires on your hard drive will vary depending on which features are installed.

Finally, you need an EGA or higher (VGA, SVGA, and so on) graphics card and monitor to display Windows and Notes at their intended screen resolution. (**Note:** The Notes screens shown in this book are taken from a VGA monitor. Depending on your monitor type, your screens may look slightly different.)



KEYBOARD

IBM-compatible computers come with various styles of keyboards that work the same but have different layouts. Figures I.1, I.2, and I.3 show the three main keyboard styles and their key arrangements.

Notes uses all main areas of the keyboard:

- The *function keys*, which enable you to use some Notes commands more easily. On the PC-, XT-, and AT-style keyboards, there are 10 function keys at the left end of the keyboard; on the 101-key Enhanced Keyboard there are 12 keys at the top.
- The *typing keys*, which you use to enter letters, numbers, and punctuation marks. These keys also include the Shift, Ctrl, and Alt keys, which are used in combination with other keys to perform certain actions. The typing keys are located in the main body of all the keyboards.
- The *numeric keypad*, which you can use either to enter numeric data or to navigate through a document. When the Num Lock key is turned on, you use the numeric keypad to enter numeric data, just as you would on a standard calculator keypad. When Num Lock is turned off, you use the numeric keypad to move through Notes by using the cursor-movement keys: Up, Down, Left, and Right Arrows; Home, End, PgUp (Page Up), and PgDn (Page Down). To turn Num Lock on or off, simply press the Num Lock key. To enter numeric data when Num Lock is off, use the number keys in the top row of the typing area.

Figure I.1 **The IBM PC–style keyboard**

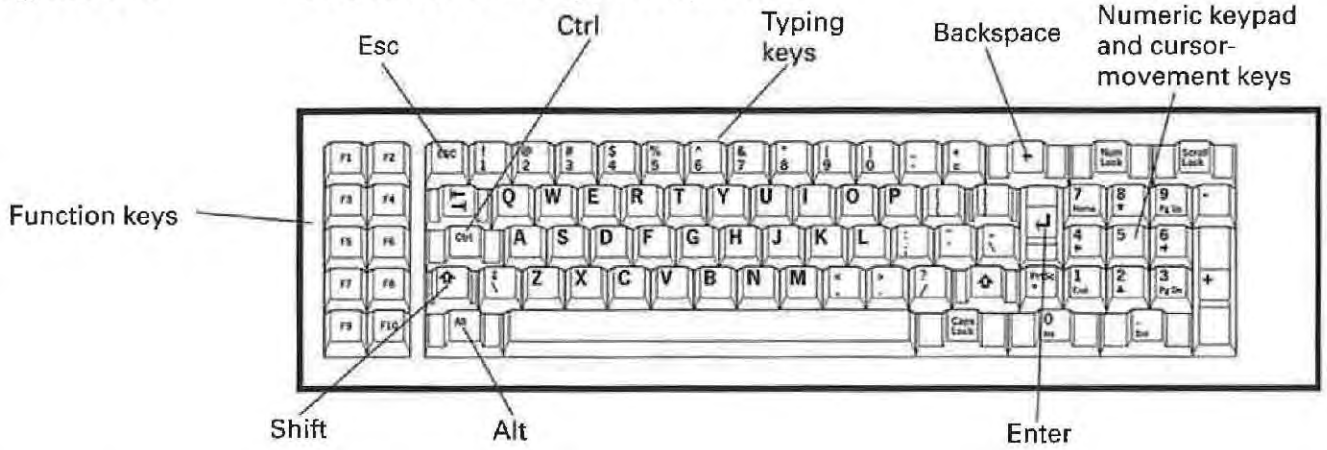


Figure I.2 **The XT/AT–style keyboard**

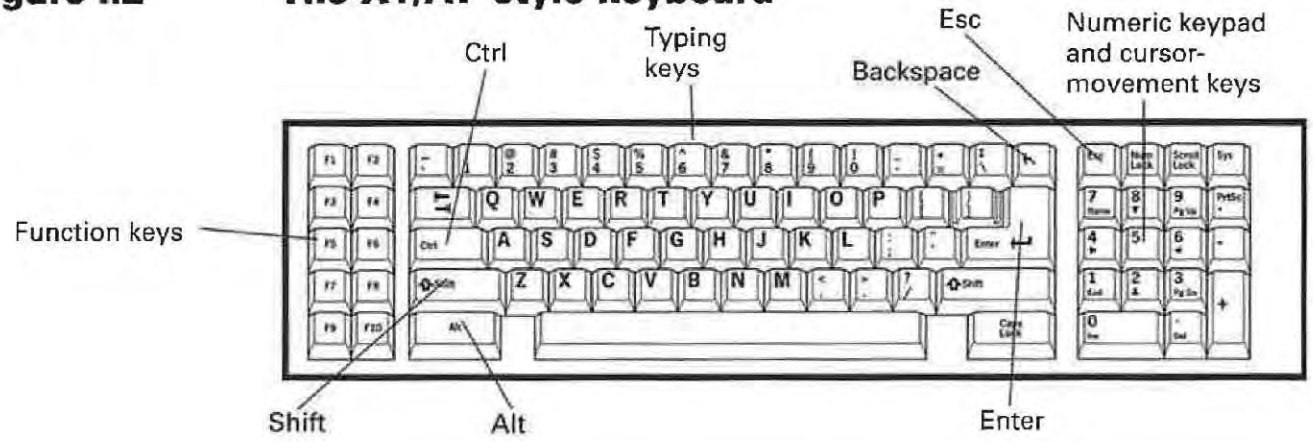
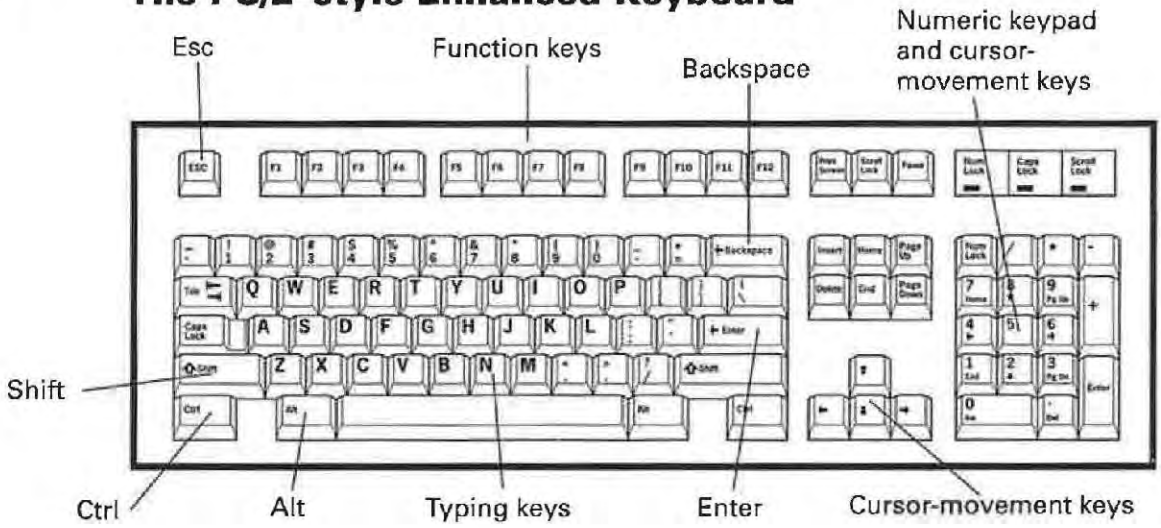


Figure I.3 **The PS/2–style Enhanced Keyboard**



- The *cursor-movement keypad*, which is available only on the Enhanced Keyboard, lets you move through Notes by using the Home, End, Page Up, and Page Down keys. The cursor-movement keypad works the same when Num Lock is turned on or off; this allows you to use the numeric keypad for numeric data entry (that is, to keep Num Lock on) and still have access to cursor-movement keys.



MOUSE OR TRACKING DEVICE

You need a mouse or other type of tracking device to work through the activities in this book. Any standard PC mouse or tracking device (a trackball, for example) will do.

Note: Throughout this book, we direct you to use a mouse. If you have a different tracking device, simply use your device to perform all the mousing tasks: pointing, clicking, dragging, and so on.



PRINTER

You don't need a printer to work through the activities in this book. In fact, one of the most important benefits of Notes is that it reduces the need for printed documents. If you do use a printer, a laser printer is ideal, but an ink-jet or dot-matrix will do just fine.

CONVENTIONS USED IN THIS BOOK

The conventions used in this book will help you learn Notes 3.0 easily and efficiently.

- Each chapter begins with a short introduction and ends with a summary that includes a quick-reference guide to the techniques introduced in the chapter.

- Main chapter topics (large, capitalized headings) and subtopics (headings preceded by a cube) explain Notes features.
- Hands-on activities allow you to practice using Notes features. In these activities, keystrokes, menu choices, and anything you are asked to type are printed in boldface. Here's an example from Chapter 3:

  1. Press **Enter** to display the Select Keywords dialog box.

  Activities adhere to a cause-and-effect approach. Each step tells you what to do (cause) and then what will happen (effect). From the example above,

```
Cause: Press the Enter key.
Effect: To display the Select Keywords dialog box.
```

- A plus sign (+) is used with the Shift, Ctrl, and Alt keys to indicate a multikey keystroke. For example, **press Ctrl+F10** means "Press and hold down the Ctrl key, then press the F10 key, and then release both."
- To help you distinguish between steps presented for reference purposes (*general procedures*) and steps to carry out at your computer as you read (*specific procedures*), we use the following system:

  - A bulleted step, like this, is provided for your information and reference only.

  2. A numbered step, like this, indicates one in a series of steps that you should carry out in sequence at your computer.

CREATING YOUR WORK DIRECTORY

Throughout this book, you will be working with several sample databases (and a few other files). In order to use the sample databases, you'll

need to copy them into your Notes directory. This directory is probably called "NOTES," but your Notes administrator may have named it something else. Before you proceed with the steps that follow, you should ask your Notes administrator for the name of this directory; you will need it to complete the installation steps.



INSTALLING YOUR DATA FILES

Follow these steps to install your data files. (**Note:** If Notes 3.0 is not currently installed on your computer, please ask your Notes administrator to install it for you. You should not attempt to install Notes without your administrator's help.)

1. Turn on your computer. After a brief internal self-check, your *operating environment* will load. If you are in Windows, go to step 2. If you are in DOS, skip to step 4. If you are in a non-Windows, non-DOS environment (GeoWorks, for example), exit to DOS and then skip to step 4; for help exiting to DOS, follow the on-screen instructions or refer to your user's guide. If you don't know what operating system you are in, ask a colleague or technician for help.

2. Within Windows, locate Program Manager. It can appear in two forms: as a *window* (rectangular box) with "Program Manager" written along the top in its title bar; or as an *icon* (small picture) with "Program Manager" written beneath it. If your Program Manager appears as a window, go to step 3. If your Program Manager appears as an icon, use the mouse to move the on-screen pointer to this icon, and then double-click (press the **left mouse** button twice in rapid succession) to open the icon into a window.

3. Use the mouse to move the on-screen pointer to the Program Manager's *Control Menu box*, the small, square box in the upper-left corner of the Program Manager window. Double-click

(press the **left mouse** button twice in rapid succession) on the dash within the Control Menu box. A message asking if you want to exit Windows will appear. Click the mouse pointer once on the **OK** button below this message. You have now exited from Windows to DOS. Skip to step 10.

4. You may see this prompt:

```
Current date is Tue Ø2-18-1994
Enter new date (mm-dd-yy):
```

(Your current date will be different.) If you do not see a date prompt, skip to step 7.

5. If the current date on your screen is wrong, type the correct date. Use a dash (-) to separate the month, day, and year (for example, 6-19-94).

6. Press **Enter**. After you type a command, you must press the Enter key to submit your command to the computer.

7. You may see this prompt:

```
Current time is Ø:25:32:56p
Enter new time:
```

(Your current time will be different.) If you do not see a time prompt, skip to step 10.

8. If the current time on your screen is wrong, type the correct time. Use the 24-hour format *hh:mm* (for example, 10:58 for 10:58 a.m., and 22:58 for 10:58 p.m.).

9. Press **Enter** to send the time you specified to the computer's internal clock.

10. The DOS prompt will appear:

```
C:\>
```

(Your DOS prompt may differ somewhat from this.)

11. Type **dir** and press **Enter**. The contents of the current disk directory are displayed, followed by a final line reporting the number of free bytes on your hard disk. If you have 2,000,000 or more free bytes, go to step 12. If you have fewer than 2,000,000 free bytes, you will not be able to install your data files and perform the hands-on activities in this book. Before you go any further, you must delete enough files from your hard disk to increase the free-byte total to at least 2,000,000. For help doing this, refer to your DOS reference manual. (**Note:** Make sure to back up all your important files before deleting them!)

12. Remove the Data Disk from its envelope at the back of this book. Insert the Data Disk (label up) into the appropriately sized disk drive. Determine whether this is drive A or drive B. (On a single floppy-disk system, the drive is generally designated as A. On a double floppy-disk system, the upper drive is generally designated as A and the lower as B.)

13. If the Data Disk is in drive A, type **a:**; type **b:** if the Data Disk is in drive B. Press **Enter** to change the current drive to that of the Data Disk.

14. Type **install c:**, press the **spacebar**, and then type the name of your Notes directory (it is probably "NOTES" or "NOTES3"; you can ask your administrator to be sure). For example, if your Notes directory is called "NOTES," you would type *install c: notes*. To install your data files on a hard-disk drive other than drive C, substitute your hard-disk drive letter for the *c* in this command. For example, to create your work directory on a drive-D hard disk, you would type *install d: notes*.

15. Press **Enter** to install your data files. If all goes well, the message

```
Installing data files.
Please wait ......................
```

will appear. When the procedure is complete, the message

```
Installation successfully completed!
```

will appear. If this message appears, go directly to the Important Note following this step.

If all does not go well, however, one of two messages will appear. The first message is

```
Installation failed! c: drive does not exist.
Reenter the INSTALL command using the correct drive.
```

(Your drive letter may be different.) This message indicates that the hard drive you specified in your step 14 command does not exist on your computer. If you get this message, simply repeat steps 14 and 15, making sure to specify the correct letter of your hard drive.

The second message is

```
Installation failed! c:\notes does not exist.
Reenter the INSTALL command using the correct Notes directory name.
```

(Your drive letter and/or directory name may be different.) This message indicates that you did not enter the correct name for your Notes directory. If this happens, repeat steps 14 and 15, specifying the correct name for the Notes directory. Your Notes administrator should be able to tell you the name of your Notes directory.

Important Note: The hands-on activities in this book were created with a Notes directory on drive C named NOTES3. If you specified a different

hard-disk drive or have a different Notes directory name, please remember to substitute this drive and/or name whenever we mention drive C or NOTES3.

BEFORE YOU START

Each chapter's activities proceed sequentially. In many cases, you cannot perform an activity until you have performed one or more of the activities preceding it. For this reason, we recommend that you allot enough time to work through an entire chapter in one continuous session.

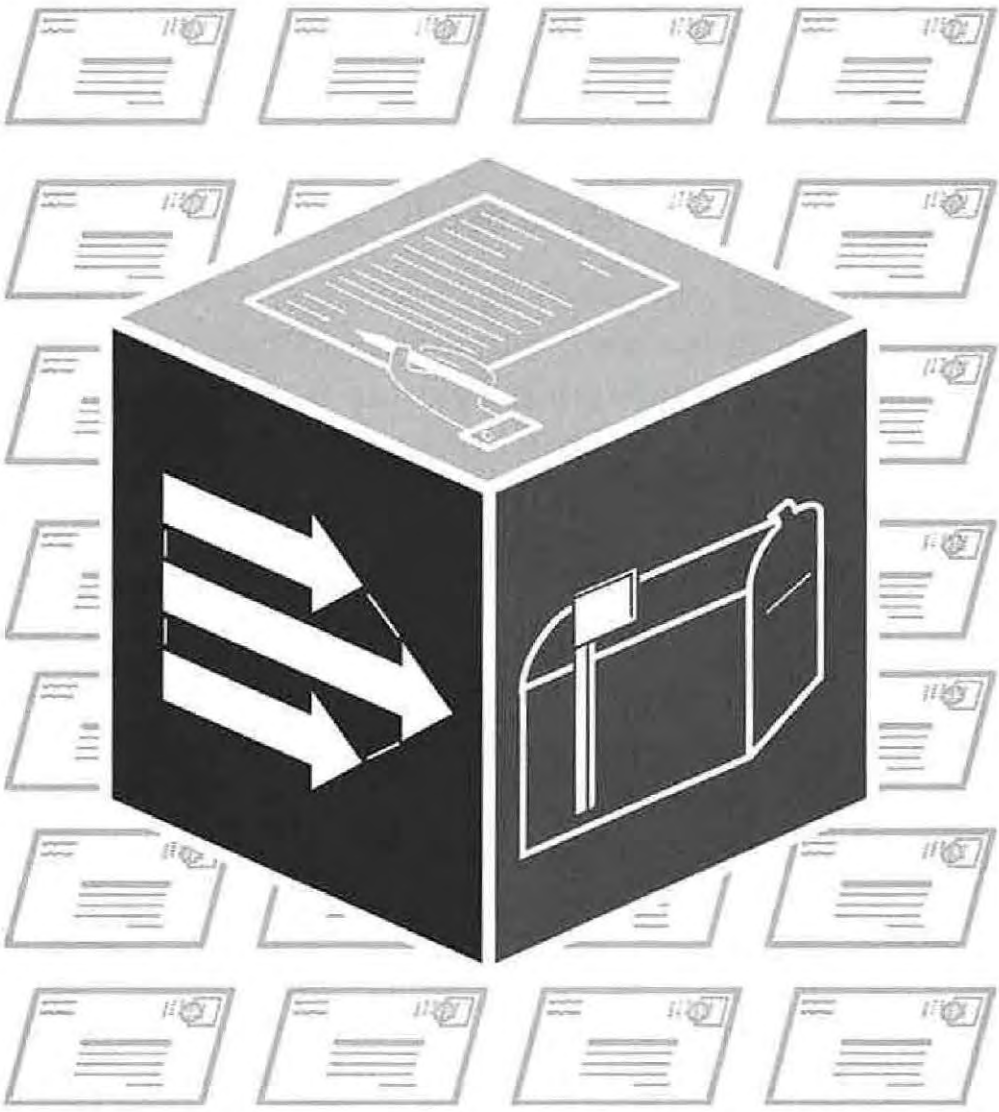
Feel free to take as many breaks as you need. Stand up, stretch, take a walk, drink some decaf; don't try to absorb too much information at one time. Studies show that people assimilate and retain information most effectively when it is presented in digestible chunks and followed by a liberal amount of hands-on practice.

You are now ready to begin. Good learning and...*bon voyage!*

CHAPTER 1: GETTING STARTED

An Overview of Notes

Touring the Notes Environment



Welcome to the world of Notes 3.0, a software environment that is likely to be quite different from any you have experienced. Notes is a *groupware* product that allows you to share work with your fellow employees electronically. In this chapter, we will introduce you to some of the basic concepts of groupware in general and Notes in particular. We will also take a quick look at the Notes environment.

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

- What groupware is and what Notes is
- About the Notes workstation environment
- How to manage database icons
- How to label workspace pages

AN OVERVIEW OF NOTES

Before they were connected by networks, personal computers were used mainly by people working independently. Although PCs made individuals more productive, they were not well suited to supporting the needs of groups. When PCs began to be linked together in networks, a new class of software, *groupware*, appeared in order to meet the needs of work groups.

Lotus Notes is a groupware program that manages information for many users on a computer network. Notes allows you and your colleagues to communicate electronically and to collect and share information by using your personal computers.



ABOUT THE NOTES ENVIRONMENT

How do you usually exchange information with your fellow employees? Chances are you write and receive memos, attend meetings, make phone calls, and send and receive faxes. Using Notes, you can exchange information electronically in *documents*. You create these documents by using text-editing tools in Notes's *graphical user interface*, or GUI. (A GUI lets you accomplish tasks by pointing to pictures and clicking on buttons, instead of by typing arcane commands.)

After creating a document at your computer, you save it to a central *database* that resides on a network. As long as they are also connected to the network, your fellow employees can then read your document, respond to it, or contribute documents of their own.

If you are familiar with electronic mail, it may seem that this is nothing special. But you might recall that electronic mail provides what is known as *one-to-many* communications. That is, you can send documents to many individuals who can then each send documents back to you. The difference with Notes is that it provides

many-to-many communications. Because you send documents to a central location, rather than to a single person's computer, anyone with access to that central location and the appropriate security clearance is free to read and respond to your documents.



THE NOTES WORKSTATION AND THE NOTES SERVER

Notes is actually made up of two programs: *workstation* software that runs at your computer (and at your workmates' computers), and *server* software that runs at a central location on the network. Notes workstations can also run other types of software (spreadsheets, word processors, and so on). A Notes server, however, is usually dedicated solely to coordinating the activities of the Notes workstations and to providing Notes services.

A Notes system is made up of Notes servers and workstations that run on a *local area network*, or LAN (see Figure 1.1). A Notes system can contain more than one Notes server and can run on more than one LAN. Additional Notes servers provide more space for databases and distribute the load of communications traffic. By using two or more LANs, a Notes system can extend over a wider geographic area. This can allow several branches of a company to share a single Notes system.



NOTES APPLICATIONS

A Notes database—or a group of Notes databases—that is designed for a particular purpose is called a Notes *application*. Members of a workgroup can use Notes applications for many purposes, including

- Exchanging ideas and opinions
- Building libraries of reference material
- Keeping a log of group activities
- Tracking client histories

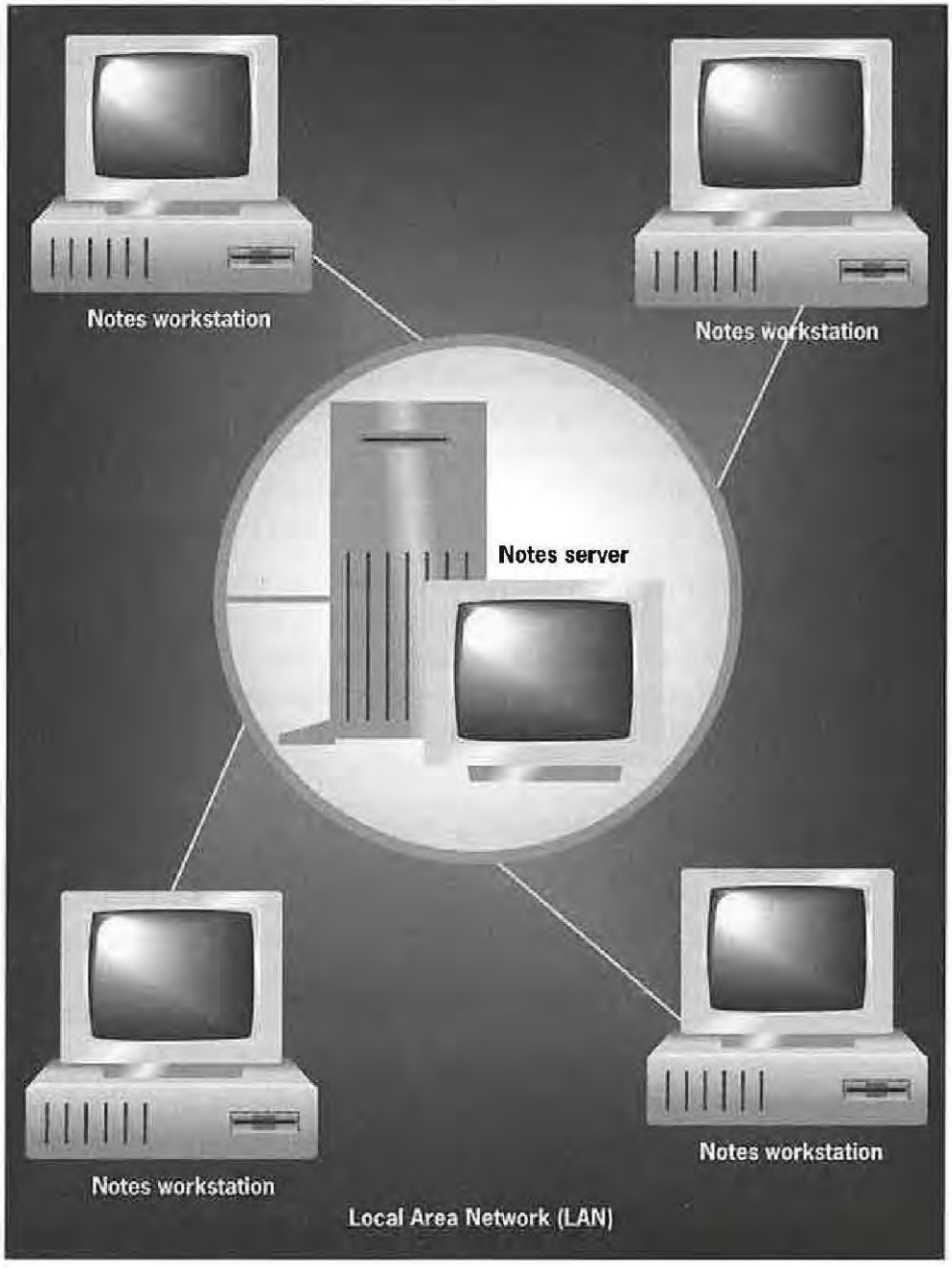
Using Notes applications provides many unique advantages over other ways of performing group activities. Consider the following:

- Because you store documents electronically in shared databases rather than as paper files, information is more readily

available to the entire group, more easily organized and maintained, more secure, and less redundant.

- Information can be shared without the complications involved in scheduling meetings. Notes also allows groups that are spread out over a large area to work together as a team.

Figure 1.1 **A Notes system**



- Because Notes information is stored in the form of documents rather than individual pieces of data, Notes provides a data format that resembles the familiar paper memos, reports, and proposals of the business world.
- Using Notes encourages collaboration and cooperation across all levels of an organization.



NOTES MAIL

Notes does provide an electronic-mail application called *Notes Mail.* Each Notes user has a mail database on the server to which other users can send documents. Only you, however, can read the documents that are sent to your mail database. Although mail is an important feature of Notes, you would be doing Notes (and yourself) a disservice by thinking of it as an electronic-mail package. We will discuss Notes Mail in detail in Chapter 4.

TOURING THE NOTES ENVIRONMENT

You can run Notes with or without connecting to a network. If you want to use shared databases, you must first attach to the LAN running the Notes server that stores the database you wish to use. You can also use Notes without connecting to a network, but only if you plan to work with private databases or with copies of shared databases that are stored on your hard drive.



QUICK REVIEW OF MOUSE SKILLS

If you are not familiar with Windows or with using a mouse, there are a few concepts we should discuss before you go any further. Windows is a GUI (graphical user interface) that runs on top of your computer's operating system, DOS. It allows you to perform many tasks in an intuitive way by manipulating pictures on your screen. In Windows, you use a mouse (or other pointing device, such as a track ball) to manipulate these pictures.

When you move the mouse on your desk or mousepad, a pointer—it usually looks like an arrow—moves around the screen. The action of placing the tip of the arrow over something is called *pointing.* Most Windows actions involve pointing to something

and then using one of the mouse buttons in one or more ways. Table 1.1 summarizes common mouse techniques that you will use throughout this book.

Table 1.1 Windows Mouse Techniques

Technique Name	Definition
Click	To press and quickly release a mouse button. In general, when we say "click," we mean the left mouse button; if we want you to click the right mouse button, we will say so.
Double-click	To press and release a mouse button twice in rapid succession.
Drag	To press and hold down the mouse button while moving the mouse.
Select	To point at and click on (or drag over) something with which you want to work. When you select something, it usually appears highlighted on the screen.



STARTING NOTES

To run Notes, you must first be running Microsoft Windows, and the Notes workstation software must be installed on your computer's hard drive. Notes installation is almost always performed by your Notes administrator. To perform the activities in this book, you need to have copied the files from the enclosed data disk to the Notes directory on your hard disk. If you have not already done this, please do so now (see "Creating Your Work Directory" in the Introduction).

After the software is installed, you can run Notes by double-clicking on the Lotus Notes application icon (the location of this icon will vary, depending on how Notes was installed).

Note: Depending on how Notes is installed and set up on your workstation, you may be required to enter your password when you start the program. If so, type your password and click on **OK** (if you do not know your password, ask your Notes Administrator). Notes passwords are case-sensitive.

Let's start Notes and examine the Notes environment:

1. Turn on your computer. After a brief internal self-check, your operating environment will load. If you find yourself in Windows at this point, please skip steps 2 through 6 and continue with step 7. If you are in DOS, continue with step 2.

2. You might see this prompt

   ```
   Current date is Mon 6-Ø7-1993
   Enter new date (mm-dd-yy):
   ```

   (Obviously, your current date will be different.) If you do not see a date prompt, skip to step 4.

3. If the current date is wrong, type the correct date in the specified format and press **Enter**. After you type a command in DOS, you must press the Enter key to send the command to the computer.

4. You might see this prompt

   ```
   Current time is Ø8:1Ø:32:24
   Enter new time:
   ```

   (Again, your time will be different.) If you do not see a time prompt, skip to step 6.

5. If the current time on your screen is wrong, type the correct time. (Use the format *hh:mm*, noting that most versions of DOS use a 24-hour clock. For example, to specify the time 1:45 p.m., you would type 13:45.) After you type the time, press **Enter** to send it to your computer's internal clock. The DOS prompt will appear on your screen; it will probably look something like this:

   ```
   C:\>
   ```

6. Type **win** and press **Enter** to start Windows. After a few moments of furious hard-disk activity, Windows will appear on your screen.

   Note: In order to start Notes 3.0, you must locate the program icon called *Lotus Notes*. An icon is a small on-screen

picture that represents a program or a group of programs. Because Windows is a customizable program, its appearance and setup can vary significantly from computer to computer. For this reason, we at PC Learning Labs cannot know exactly how your version of Windows is set up. Please bear with us as we search for the Lotus Notes program icon.

7. Look for the Lotus Notes program icon depicted in Figure 1.2. If you see this icon on your screen right now, please skip to step 11. If you do not see the icon, continue with step 8.

Figure 1.2 The Lotus Notes program icon



8. Program icons are stored in program groups, which are in turn stored in a Windows application called *Program Manager*. If Program Manager is running as an icon (a small picture with the words *Program Manager* beneath it), double-click on the icon to open it into a window. If Program Manager is running in a window (as in Figure 1.2), click on the title bar of the window to activate it.

9. Within Program Manager, program groups can appear as icons (Applications, Accessories, Main, and so on in Figure 1.2) or as windows (Lotus Notes in Figure 1.2). In the figure, the Lotus Notes program icon is stored in a program group that is also called Lotus Notes. If you see a program-group

icon with this name, double-click on the icon to open it into a window and skip to step 11.

10. If you do not have a Lotus Notes program group in your Program Manager window, you will have to search further for the Lotus Notes program icon. Double-click on a program-group icon that seems appropriate for an application program like Notes (Applications or Windows Applications would be good candidates). If you see the Lotus Notes program icon somewhere inside this window, skip to step 11. If not, double-click on the program-group window's Control Menu box (the small box in the upper-left corner of the window, as shown in Figure 1.2) to close the window. Repeat this step as many times as needed to find your elusive Lotus Notes program icon.

11. Double-click on the **Lotus Notes** program icon to start Notes 3.0.



EXPLORING THE NOTES WORKSPACE

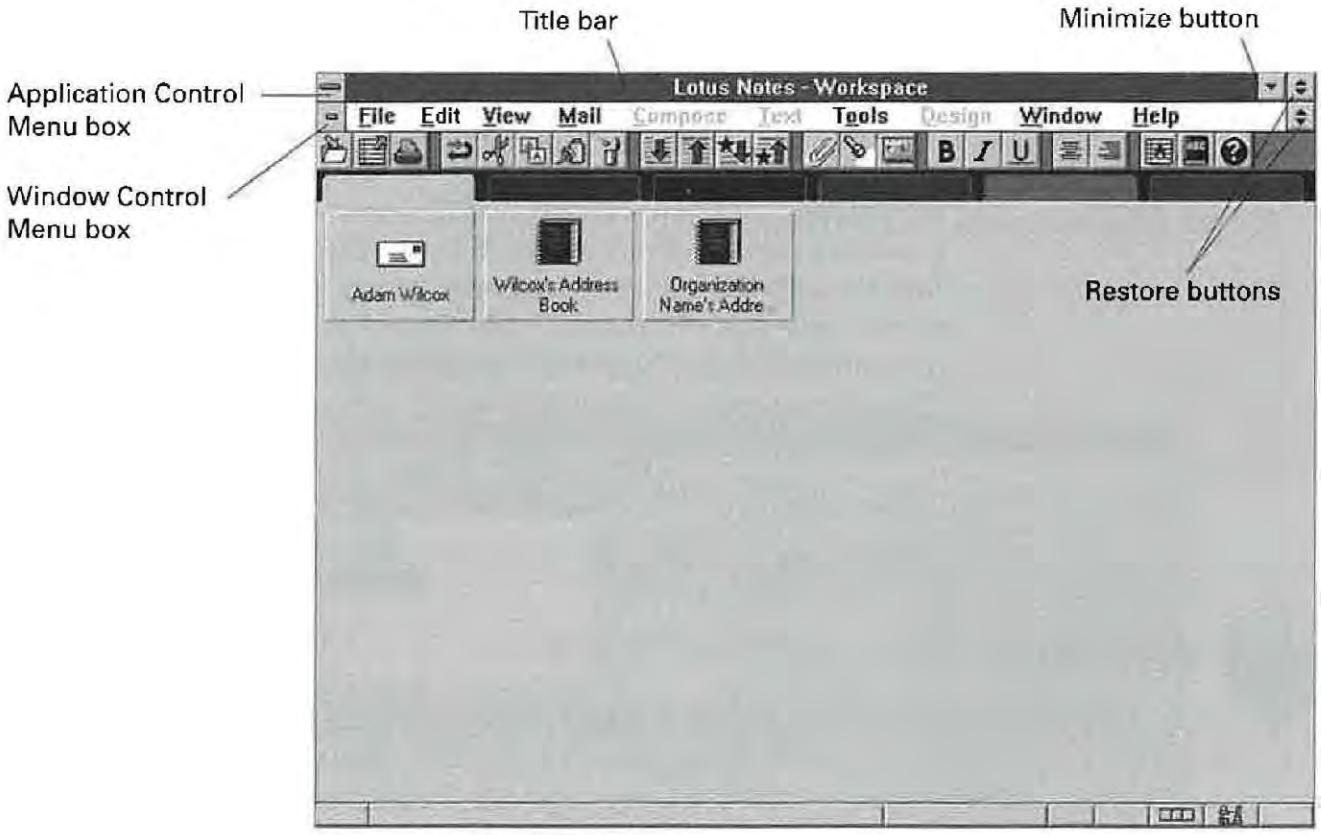
The Notes workspace is your dashboard for driving through the world of Notes applications. The workspace is made up of window elements that are common to all Windows programs (menus, scroll bars, and so on), six tabbed workspace pages, a SmartIcon bar that you can use to perform common actions, and a Status bar that provides information about what you are doing. We will discuss each of these elements in greater detail as we work through the book.

For now, let's take a quick look around the Notes workspace:

1. Click once on the **Control Menu** box for the Lotus Notes window to display the Control Menu, and then *choose* (click on) **Maximize**. The exact appearance of your Notes workspace will be slightly different than what you see in the figures in this book. For example, where you see the author's name in the figures, you will see your own name on your screen. You might also see different pictures on the workspace pages.

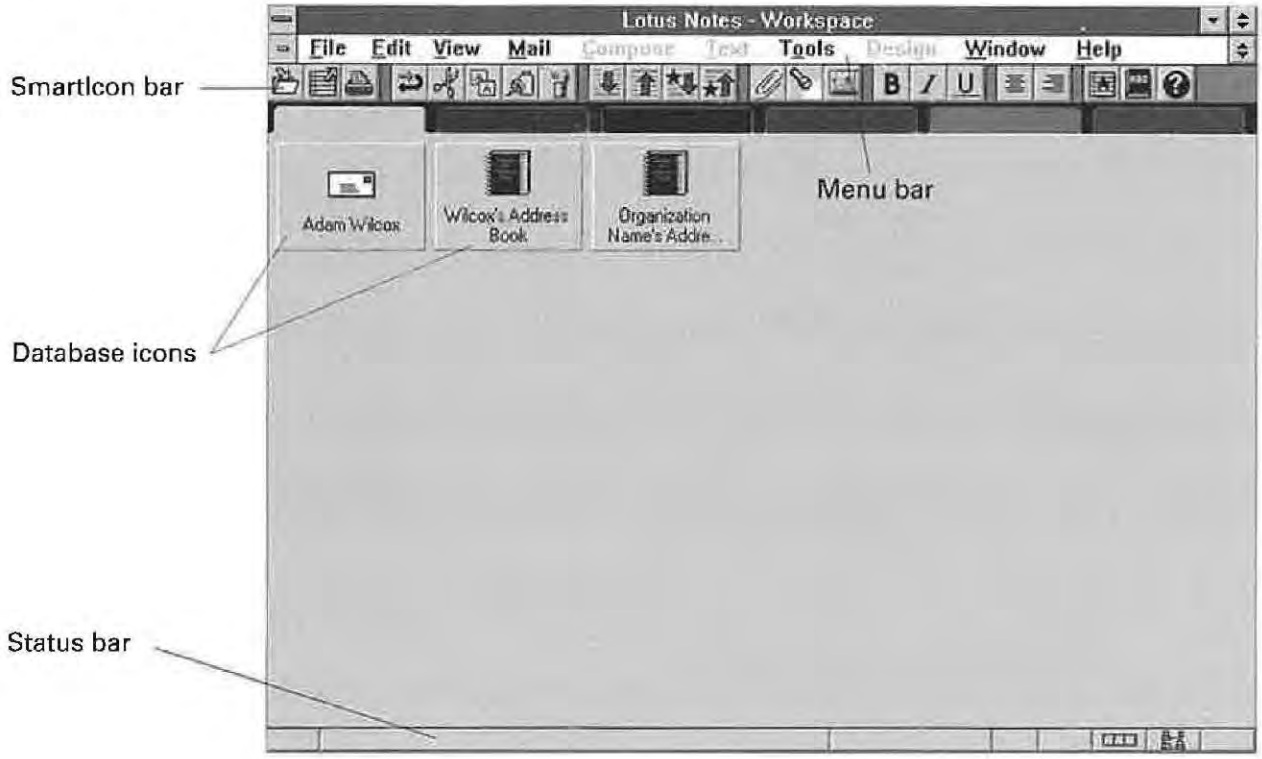
2. Examine the window-control elements of the Notes workspace (see Figure 1.3). You use window-control elements to size, arrange, and move through windows.

Figure 1.3 **The window-control elements of the Notes workspace**



3. Click on the **minimize** button for the Lotus Notes - Workspace window. The window is reduced to an icon on the Windows desktop.
4. Double-click on the **Lotus Notes - Workspace** icon to restore it to a window.
5. Examine the rest of the workspace (see Figure 1.4). You use the menu bar to choose commands within the Notes environment. The SmartIcon bar provides buttons (called SmartIcons) that you can click on to perform various common actions. The Status bar has many segments that provide information about what you are doing.
6. Examine the workspace pages. There are six pages in the Notes workspace that resemble tabbed pages in a file cabinet. You can use each page to store icons for various related databases.

Figure 1.4 **The Lotus Notes workspace environment**



7. Click on the tab for the second workspace page to activate it. When you activate a page it moves to the top, turns gray, and becomes the current page.
8. Activate the first workspace page by clicking on its tab.



ORGANIZING DATABASE ICONS

The large square buttons with pictures on the workspace pages are called *database icons*. You use these icons to open databases with which you wish to work. In addition to the picture on each icon, you will also see the name of the database (you will learn how to display other database information on the icons in Chapter 5). Table 1.2 summarizes some of the methods you can use to arrange database icons.

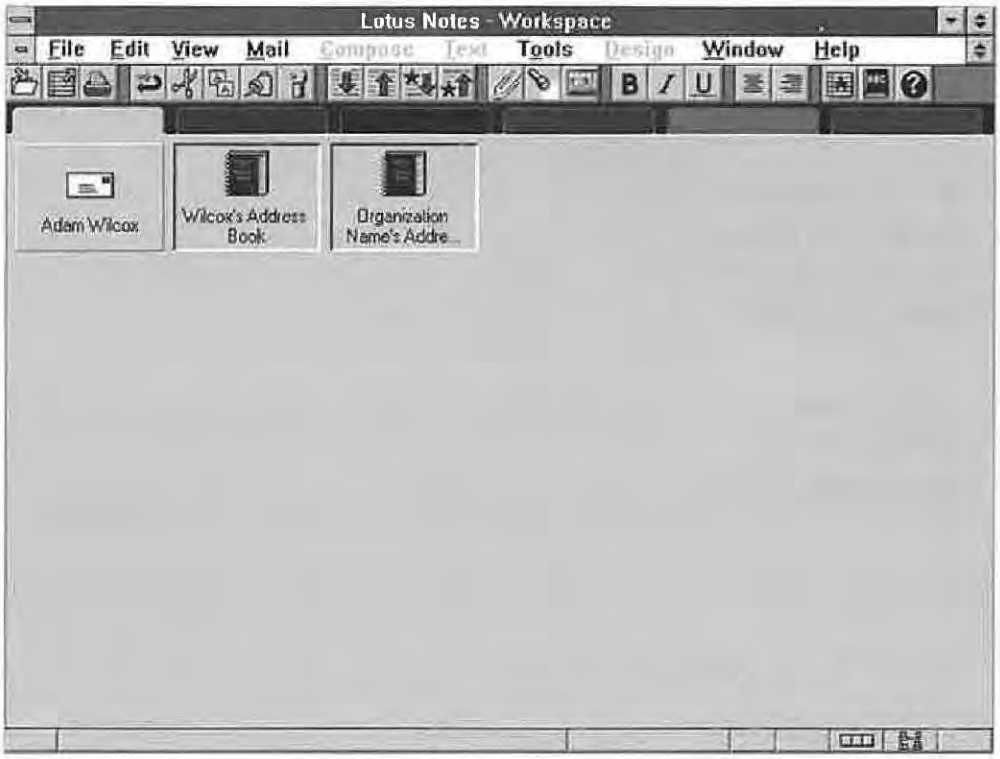
Table 1.2 Techniques for Working with Database Icons

Desired Result	How to Do It
Select a database icon	Click on it.
Select multiple database icons	Press and hold down the **Shift** key and click on each database icon you wish to select.
Move a database icon	Point to it and drag to a new location. To move a database icon to a different workspace page, drag it onto the tab for the desired page.
Arrange all the icons on a workspace page	Choose **View, Arrange Icons**.

Let's select some database icons and move them around in the Notes workspace:

1. Click on one of the database icons to select it. The icon now appears to be sunken into the workspace page rather than raised.
2. Press and hold the **Shift** key and click on one of the other database icons to add it to the selection. Two icons should now be selected (see Figure 1.5).
3. Click anywhere in the workspace page surrounding the database icons to deselect them.
4. Point to a database icon and drag it to another location on the page. You can place icons anywhere on the page.
5. Choose **View, Arrange Icons** to arrange the database icons on the active page. This command arranges the icons to fill the page, beginning in the upper-left corner and proceeding left to right and top to bottom.
6. Press and hold **Shift**, and then click on the database icons for your **Mail** and **Address Book** databases to select them (the names of these databases will also include your user name).

Figure 1.5 **Selecting more than one database icon**



7. Continue to hold down the **Shift** key, point to one of the selected icons, drag until the mouse pointer is over the tab for the second workspace page, and then release the mouse button. The database icons disappear from the first workspace page.
8. Click on the tab for the second workspace page to activate that page. Your screen should resemble Figure 1.6.

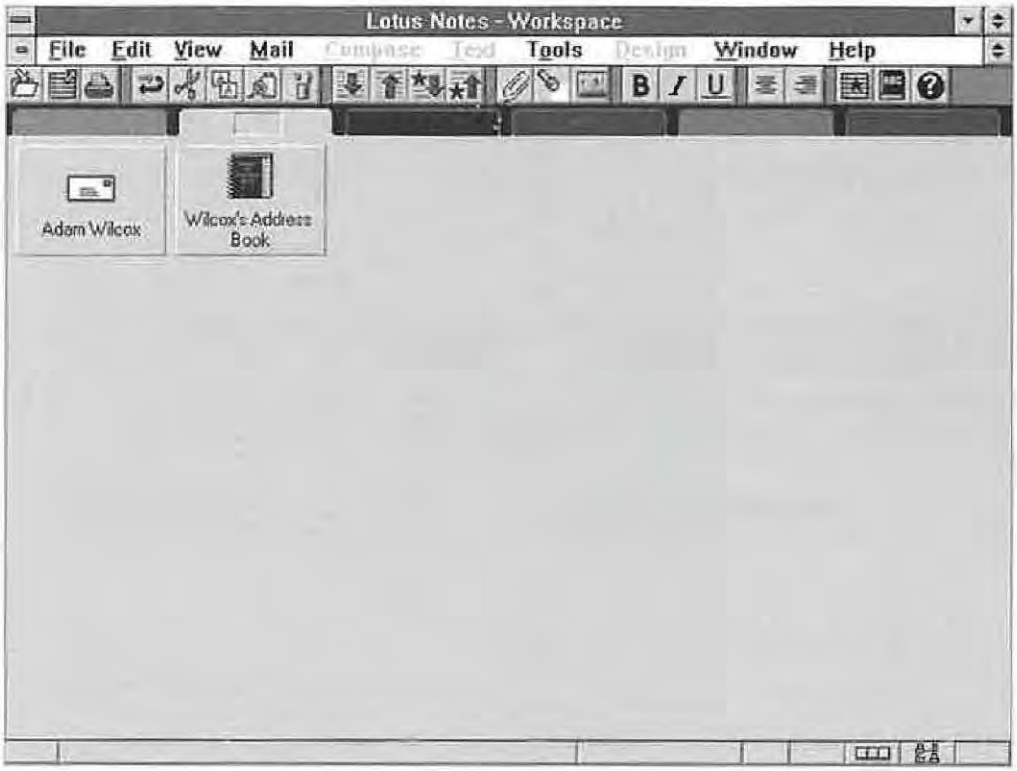


LABELING WORKSPACE PAGES

You can use the six workspace pages to keep groups of related database icons together. To make the pages easy to identify, you can label and change the colors of their tabs. To do so,

- Double-click on the tab that you wish to change. The Workspace Page Name dialog box appears.
- Type a label in the Name box and/or click on a color in the Color bar.
- Click on OK.

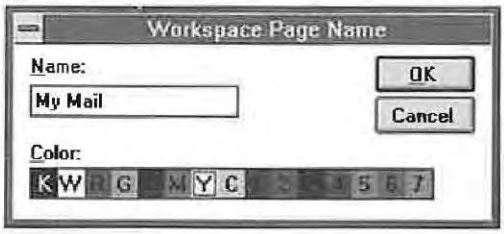
Figure 1.6 **Moving database icons to a different page**



Let's try it:

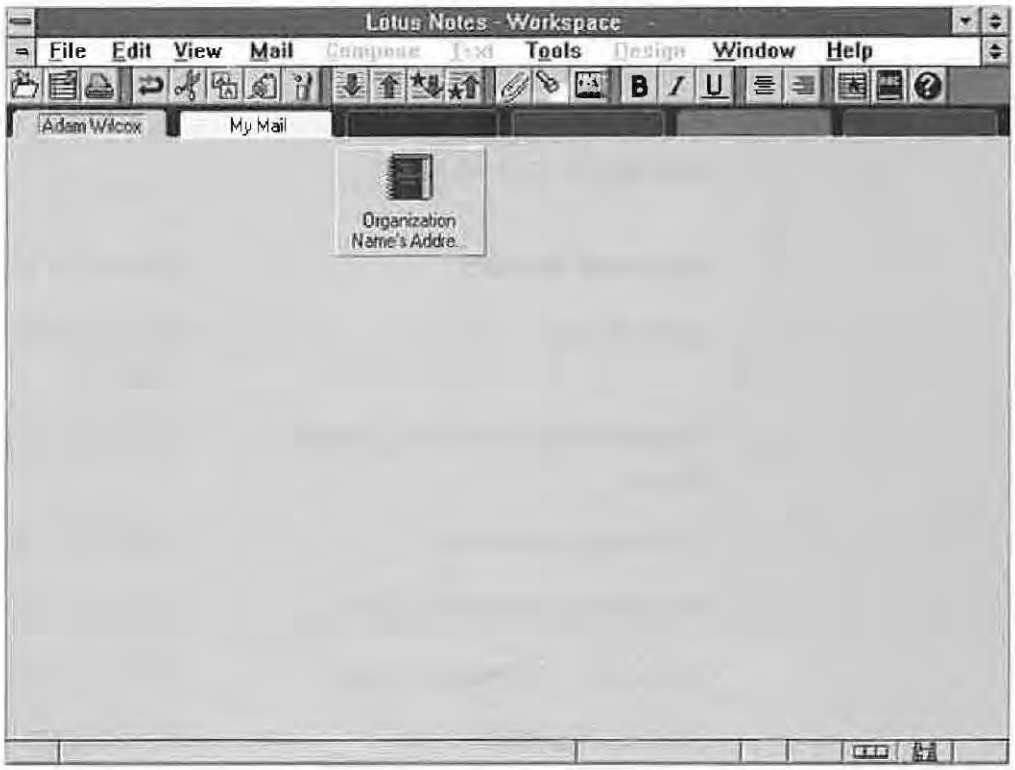
1. Double-click on the tab for the second workspace page to display the Workspace Page Name dialog box.
2. In the Name box, type **My Mail**.
3. In the Color bar, click on a color of your choice. Your screen should resemble Figure 1.7, although you may have selected a different color.

Figure 1.7 **Labeling a workspace page**



4. Click on **OK** to close the dialog box. The tab for the second workspace page now says *My Mail*. Notice, however, that the color you selected is not displayed. This is because the tab for the active workspace page always appears in the color of the workspace background. You will see the new color on the tab when you activate a different page.
5. Double-click on the tab for the first workspace page to display the Workspace Page Name dialog box and point to its Title bar; drag the dialog box down until you can see all the tabs. Now that the first page is active, the tab for the second page appears in its new color.
6. Type your name in the Name box and click on **OK**. Your screen should resemble Figure 1.8, except that you will see your name instead of the author's. (Your entire name might not fit on the workspace page tab.)

Figure 1.8 **The workspace with two labeled pages**





EXITING NOTES

You should always exit Notes before turning off your computer. To exit Notes, choose File, Exit. It is not necessary to close any Notes windows that might be open before you exit.

SUMMARY

In this chapter, you learned that Notes belongs to a relatively new kind of software called groupware. You learned that Notes allows you to share information with your fellow employees in the form of documents that are stored in a central location called a Notes server. You also learned that Notes comprises two kinds of software, server and workstation, and that it runs on a local area network, or LAN. We also discussed some ways Notes can be used, and some of the advantages of using Notes over traditional ways of doing business.

We then took a quick tour of the Notes environment, beginning with a review of mouse skills. You learned how to start Notes and how to use the window elements of the Notes workspace. Finally, you learned how to work with database icons and how to label workspace pages.

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

Desired Result	**How to Do It**
Start Notes	Double-click on **Lotus Notes** icon
Display application Control Menu	Click on **Control Menu** box
Minimize window	Click on **minimize** button
Restore minimized icon	Double-click on icon
Activate workspace page	Click on tab for page
Select database icon	Click on it

Desired Result	How to Do It
Select multiple database icons	Press and hold **Shift** key and click on each icon you wish to select
Move database icon	Drag to desired location
Arrange database icons	Choose **View, Arrange Icons**
Label workspace page	Double-click on tab, type name for page in Name box, click on desired color, click on **OK**

In the next chapter, we will explore some examples of Notes databases. You'll learn how to open databases and how to understand documents and views. You'll also learn about the Notes help system.

IF YOU'RE STOPPING HERE

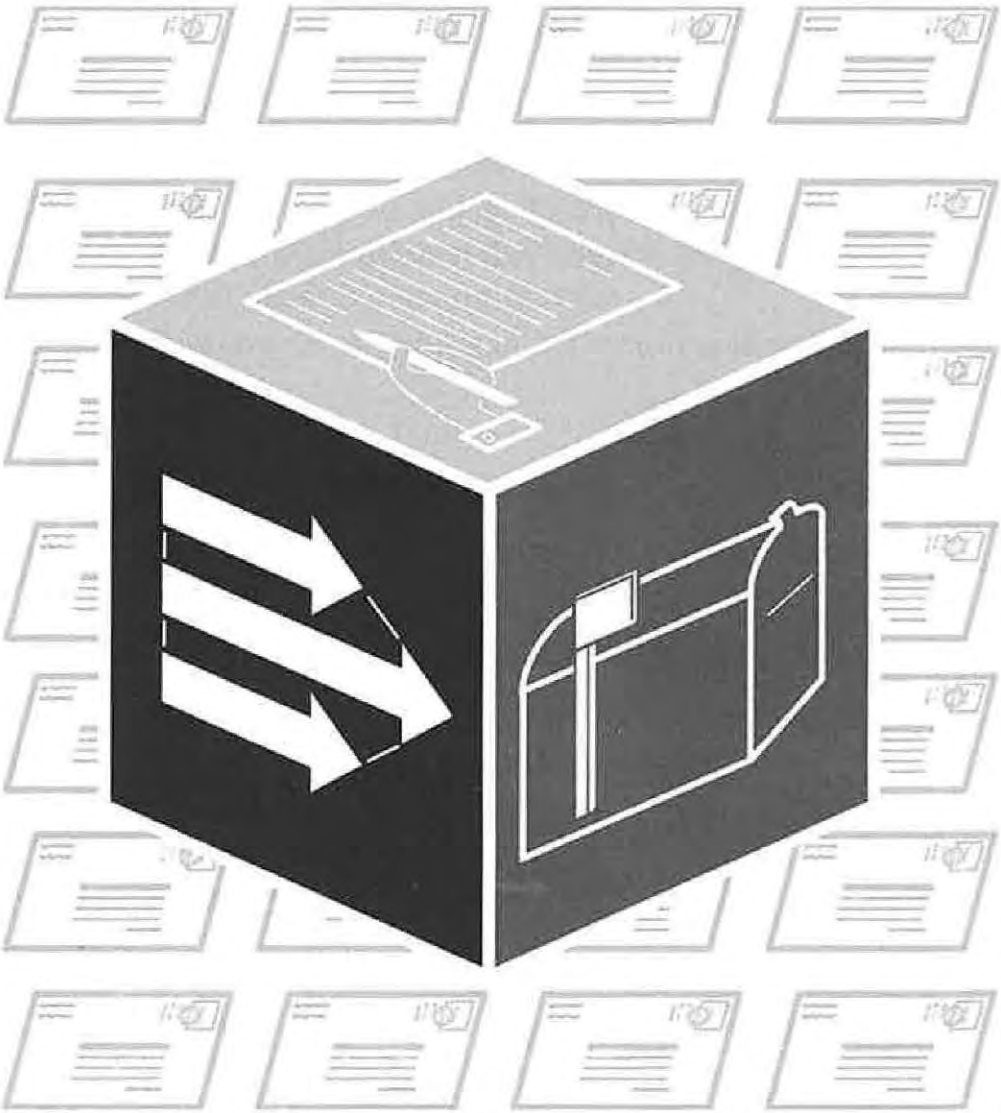
If you wish to stop here, please choose **File, Exit** to exit Notes (you will need to restart Notes when you begin Chapter 2). If you wish to proceed directly to Chapter 2, please do so now.

CHAPTER 2: INTRODUCTION TO NOTES DATABASES

Exploring a Sample Database

Examining Different Types of Notes Applications

Getting Help



All the information you work with in Notes is contained in databases. A Notes database is a collection of related information that is stored in the form of documents. Most databases are stored on a central server so that many people can have access to them, but databases can also be stored locally on your hard drive. In this chapter, we'll take a look at the basics of Notes databases. You'll learn how to examine the contents of databases through views and how to browse through the documents within databases. You will also learn about the Notes on-line help system.

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

- How to open a database and examine its views and documents
- About different kinds of Notes applications
- How to use the Notes help system

EXPLORING A SAMPLE DATABASE

There are many kinds of databases in Notes, and their appearances can vary drastically. There are a few things, however, that most Notes databases have in common. First, they are all made up of documents; second, you access these documents through *views.*

Documents can look very different in different databases. All views, however, are similar in that they contain rows and columns of information. Each row in a view represents a single document in the database, and each column represents a particular combination of data taken from those documents. All this will become much clearer in a few moments, when we take a look at a sample Notes database.



OPENING A DATABASE

Databases are stored either on a central server or on your hard drive. To view and work with a database, you must first add the database's icon to your workspace. A database icon is like a doorway through which you can enter a database. To add a database icon to your workspace,

- Activate the workspace page where you want the database icon to appear.
- Choose *File, Open Database* to display the Open Database dialog box.
- Select the drive or server where the database you want to add is located and click on *Open.*

  Note: Because this is a self-study book, all the databases you will use are stored on your hard drive, with the exception of your Mail database. In general, the databases you will use at work will be stored on a server. Most database concepts apply in either case. The main difference is that you will not be asked to provide a password to access databases on your

hard drive. When you attempt to access databases that are stored on a server, you will be asked to provide your password.

- Select the name of the database that you want to add.
- Click on Open to add the database icon to your workspace, open the database, and exit the dialog box.

To open a database from your workspace, all you need to do is double-click on its icon. If this is a database that is stored on a server, you may be asked to enter your password. If so, type your password and click on OK.

The first time you open a database, a window containing a document called About *Database Name* usually appears (*Database Name* here stands for the actual name of the database). This document is composed by the person who created the database (the database's *designer*), and its purpose is to provide an overview of the database. You can close the About *Database Name* document—or any other Notes window—by either double-clicking the right mouse button or pressing the Esc key.

You can have many windows open in Notes at a time. In fact, when you first open a database, there are actually two windows open: the About *Database Name* document window and one view of the database (you might even consider the Notes workspace to be a third open window). The Window menu allows you to manage multiple windows within Notes. Table 2.1 summarizes some Window menu commands that you may find useful.

Table 2.1 Notes Window Menu Commands

Command	Effect
Tile	Arranges all the open windows to use as much space as possible. This command is useful when you need to see the contents of several windows at a time.
Cascade	Stacks all the open windows like a hand of cards so that you can see their title bars.
Minimize All	Reduces all open windows to as small a size as possible.

Table 2.1 **Notes Window Menu Commands (Continued)**

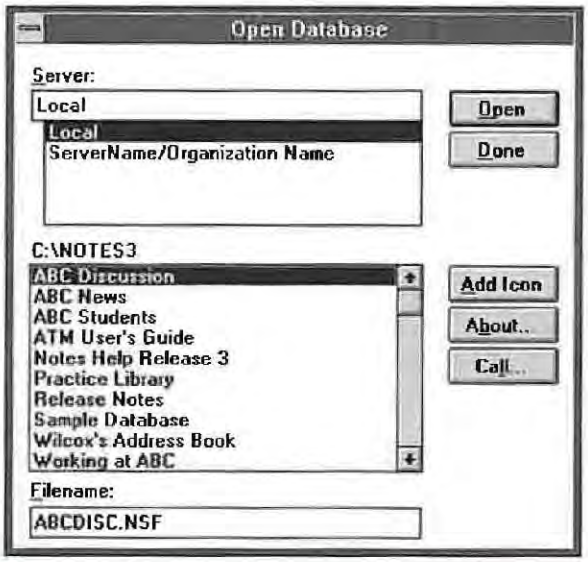
Command	Effect
Maximize All	Stacks all open windows so that only the active window is visible.

The bottom of the Window menu lists the names of all the open windows, and you can use this list to activate different windows.

In this book, the sample databases all refer to a fictional music school called the ABC School. Let's open a sample Notes database and take a look at its About *Database Name* document:

1. Make sure that the first workspace page is active, and then choose **File, Open Database** to display the Open Database dialog box. The Server box displays the names of any servers to which your workstation is attached, as well as the word *Local*, which refers to databases that are stored on your hard drive.
2. Select (click on) **Local** and click on **Open** to display the names of databases that are stored in the Notes directory of your hard drive (see Figure 2.1; the name of the directory you see above the list of databases might be different from what you see in the figure).

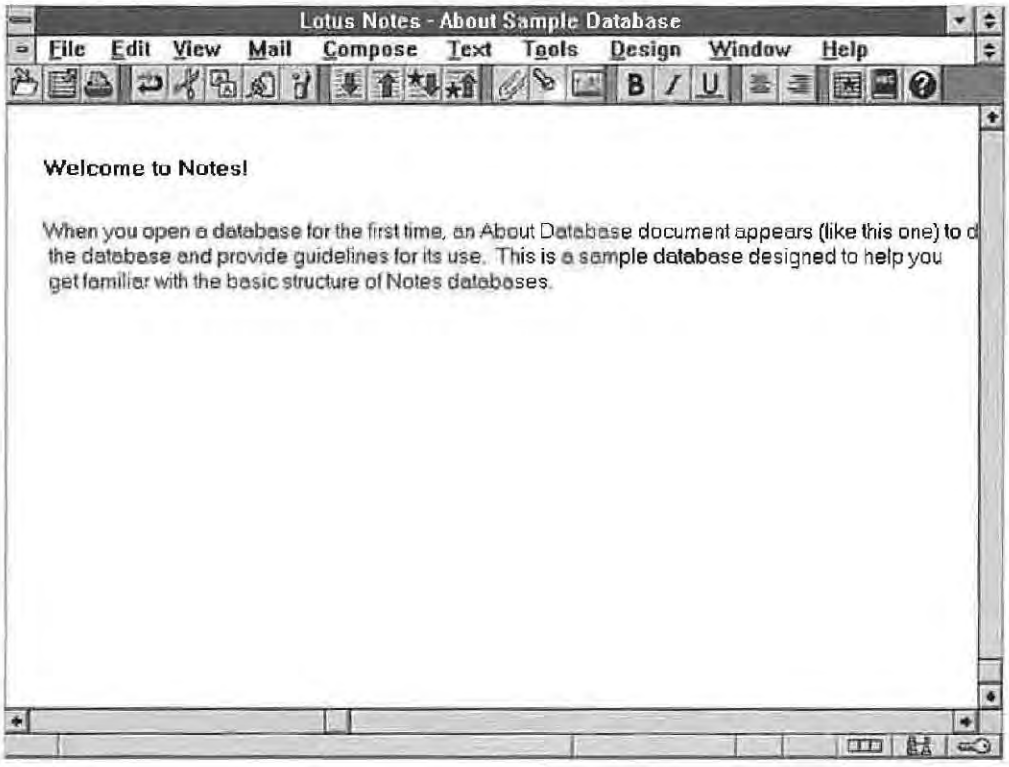
Figure 2.1 **The Open Database dialog box**



3. Select **Sample Database** and click on **Open** to add the database icon to your workspace, close the dialog box, and open the database.

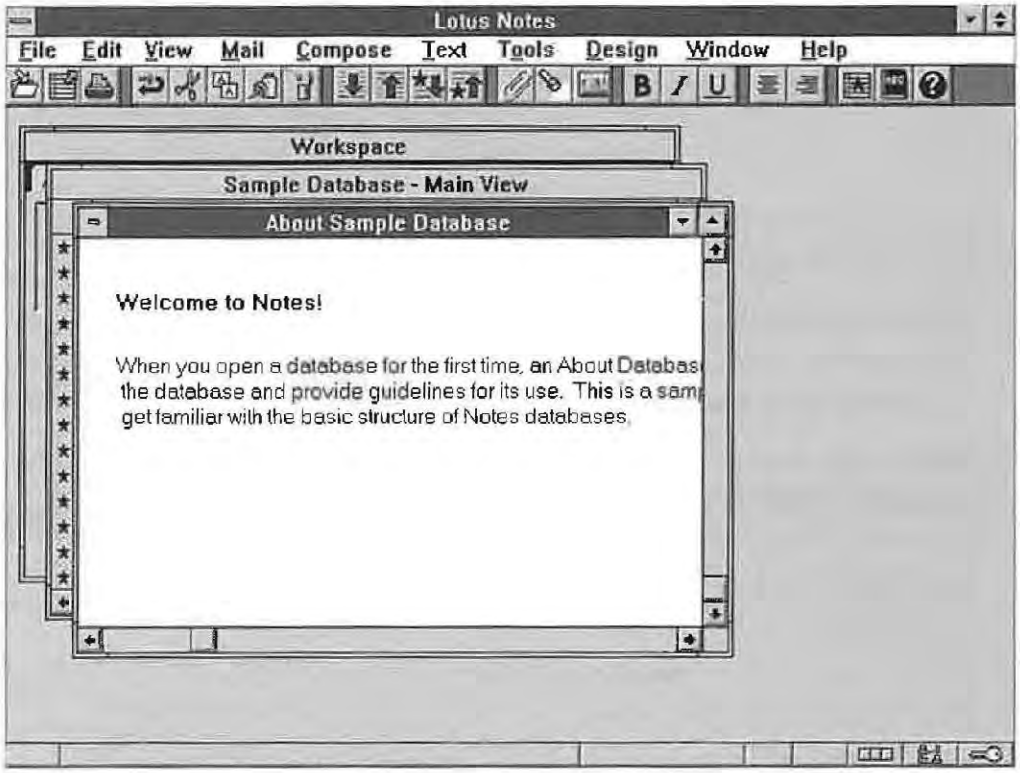
4. Examine the About Sample Database document that appears on your screen (see Figure 2.2). The first time you open a database, you will usually see a document like this one. This particular document doesn't tell you much about this database; many About *Database Name* documents go into much greater detail than this one, as you will see later in this book.

Figure 2.2 **An About *Database Name* document**



5. Choose **Window, Cascade** to stack all the open windows so that you can see their Title bars. Right now, there are three windows open: Workspace, Sample Database - Main View, and About Sample Database (see Figure 2.3).

Figure 2.3 **Cascaded Notes windows**



6. Choose **Window, Maximize All** to stack the open windows so that only the active window (About Sample Database) is visible.
7. Point anywhere inside the About Sample Database document, and then double-click the right mouse button to close it. You can now see the Sample Database - Main View window, which we'll discuss in just a minute. You can also close the active window by pressing Esc, or by double-clicking on the window's Control Menu box.



UNDERSTANDING A HIERARCHICAL VIEW

Although each Notes database is designed to meet the needs of a particular workgroup, all databases share a similar underlying structure. The basic component for entering and sharing information in any database is a document. In a broad sense, there are only two types of documents: *main topic* and *response*.

Databases are organized in views to make it easier to find documents and to examine the relationships between them. As we mentioned at the beginning of this chapter, a view is a list of some or all of the documents in a database, with each row in the view corresponding to a single database document. Each column in a view represents some combination of data that is taken from the documents.

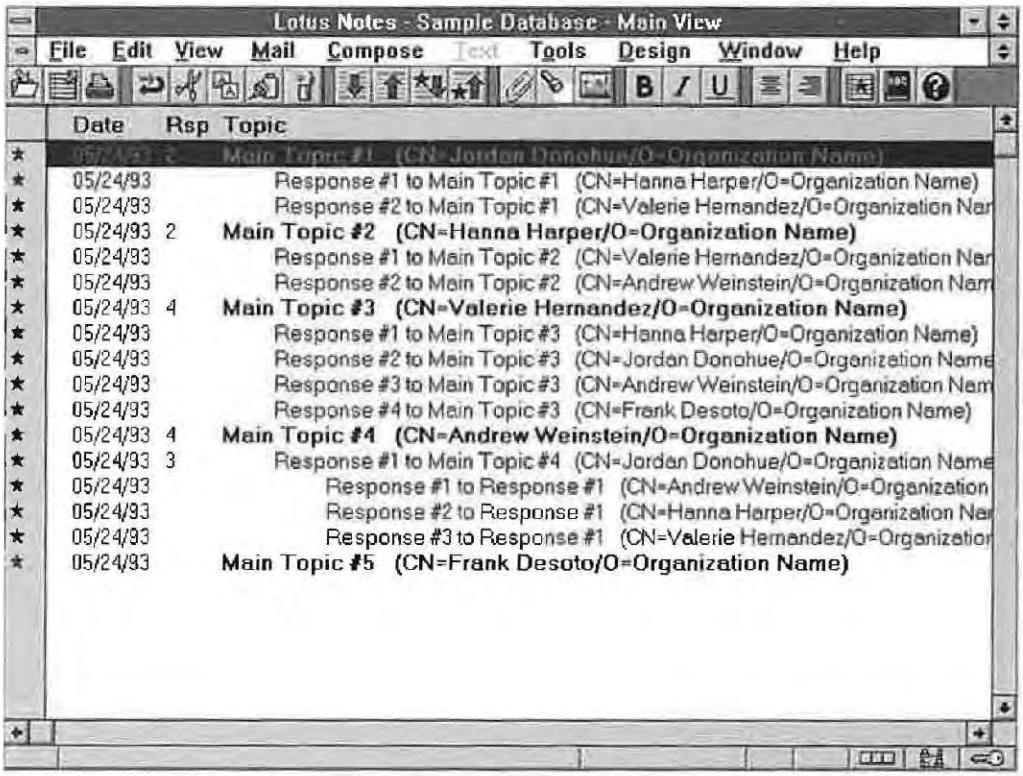
Every database has at least one view and may have many. The view you see the first time you open a database—often called Main View—is the default view, and usually displays all database documents in a way that is appropriate to the kind of information in the database. In many cases, a view that displays both main-topic and response documents will be a *hierarchical view*. In such a view, response documents appear indented underneath the main-topic documents with which they are associated.

The View menu lists all the views in a database at the bottom of the menu (it also contains commands that you can use to control the view, which we'll get to later in this chapter). The Compose menu allows you to create new documents in the database (we'll discuss composing documents in Chapter 3).

Let's take a look at the Main View of the Sample Database:

1. Examine the way information is arranged in the view (see Figure 2.4). Each row represents a document. There are three columns representing particular kinds of information taken from the documents: Date, Rsp, and Topic.
2. Examine the Topic column in the view. This column shows the subject of each document, as well as its author and the name of the author's company (in this case, the generic "Organization Name"). Main-topic documents appear at the far left in the column, and response documents appear indented below the documents with which they are associated. Notice that there are both responses to main-topic documents and responses to response documents.
3. Choose **View** to display the View menu. The bottom section of the menu lists the views in this database: By Author, By Department, and Main View.

Figure 2.4 **The Main View of the Sample Database**



4. Choose **Compose** to display the Compose menu, which provides commands for composing documents. You can compose two documents in this database, Main Topic and Response.

   Note: In this case, the names of the two documents that can be composed—Main Topic and Response—correspond to the two types of Notes documents, main topic and response. This will be true some of the time, but is not necessarily going to be the case in every database. The names of the documents you see in the Compose menu are arbitrary, and are determined by the database designer.

5. Click on **Compose** to close the Compose menu.



BROWSING THROUGH DATABASE DOCUMENTS

The asterisks in the far-left column of a view are *unread markers.* Not surprisingly, these indicate documents that you have not yet read. (Actually, unread markers can be any character, but the

asterisk is most commonly used.) Notes offers an incredible variety of ways to browse through the documents in a database. The general procedure to look at a particular database document is as follows:

- Open the database.
- Select the document you wish to see and press Enter (or double-click on the document).

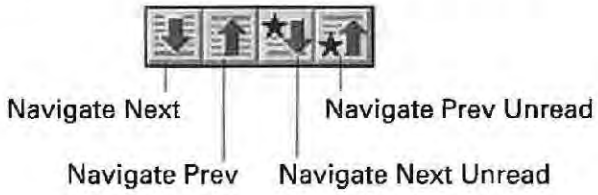
While you are reading a document, there are a number of techniques you can use to see other documents that are listed in the current view. Table 2.2 summarizes some of these techniques.

Table 2.2 Techniques for Viewing Documents

To View This Document	Press
Next document listed in the current view	Enter
Next unread document	Tab
Next document on same level of hierarchy	Plus sign (+) on numeric keypad
Previous document	Backspace

You can also click on the SmartIcons shown in Figure 2.5 to view different documents. To find out what a particular SmartIcon is used for, you can point to it and click the right mouse button. The name of the SmartIcon will appear in the application's Title bar.

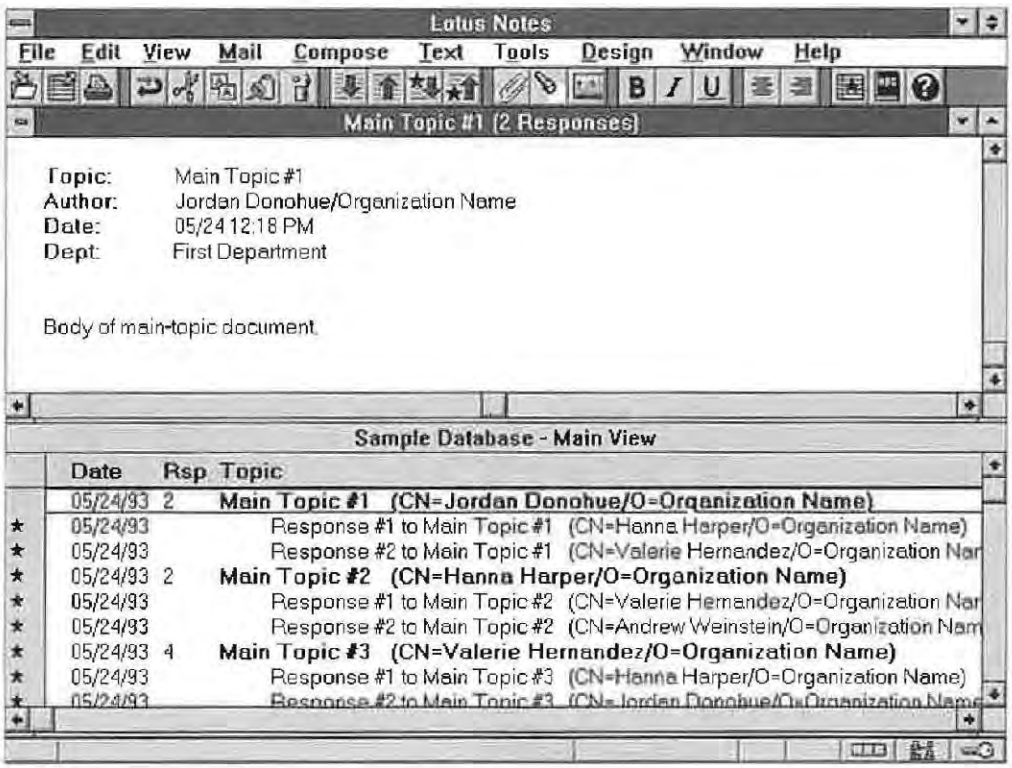
Figure 2.5 Document-navigation SmartIcons



Let's browse through some of the documents in the Sample Database:

1. Make sure that the first document in the view is selected (click on it if necessary) and press **Enter** to open it.
2. Choose **Window, Tile** to arrange the Main View and Main Topic #1 windows so that you can see the contents of both (see Figure 2.6). You can see the contents of the Main Topic #1 document in the upper window, and the Main View in the lower window. Notice that there is an outline around the Main Topic #1 document in the Main View window. Note, too, how some of the information in the Main Topic #1 document is listed in the Main View.

Figure 2.6 **Tiling a view and a document**



3. Press **Enter** to close the current document and read the next document listed in the view. This is a response document that is associated with Main Topic #1. Notice that the unread marker (*) no longer appears to the left of Main Topic #1 in

the Main View. This indicates that the document has now been read. Notice also that the outline in the Main View is now around Response #1 to Main Topic #1, the active document.

4. Point to any SmartIcon, press and hold down the *right* mouse button, and observe the application's Title bar. The name of the SmartIcon appears. You can use this method to identify the various SmartIcons.
5. Click on the **Navigate Next** SmartIcon (it is the downward-pointing arrow without an asterisk; if necessary, refer to Figure 2.5 once again) to read the next document listed in the view (Response #2 to Main Topic #1). Using this SmartIcon is equivalent to pressing Enter.
6. Press **Backspace** to read the previous document listed in the view (Response #1 to Main Topic #1). You can also use the Navigate Prev SmartIcon for this purpose.
7. Press **Tab** to read the next unread document listed in the view (Main Topic #2). You can also use the Navigate Next Unread SmartIcon for this purpose.
8. On the numeric keypad, press the **plus sign** (+) to read the Main Topic #3 document. Because a main-topic document was active, pressing the plus sign moved you to the next main-topic document.
9. Point to the document window and double-click the right mouse button to close it (you can also press Esc).
10. Maximize the Sample Database - Main View window.

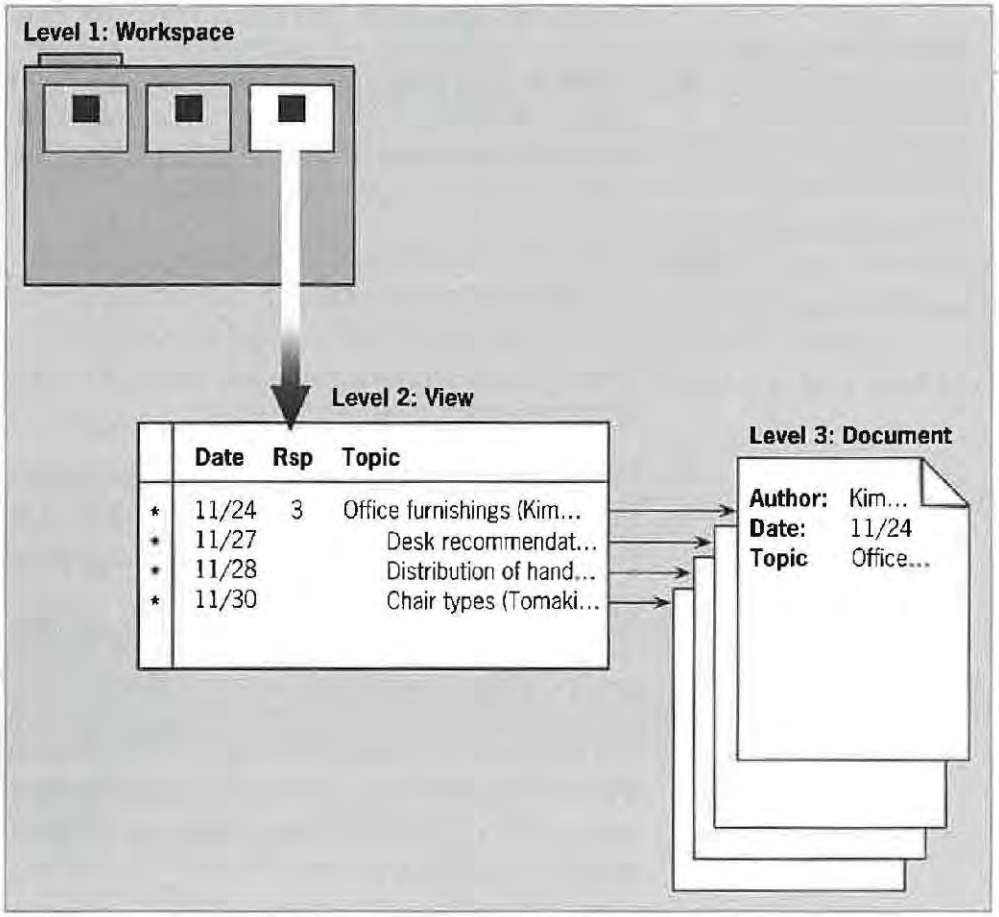
You might think of Notes as having three levels: the workspace, views, and documents. Figure 2.7 summarizes the relationship between these three levels in Notes.



COLLAPSING AND EXPANDING A VIEW

A database can contain many different views, and any given view might or might not be *categorized*. In a categorized view, documents are grouped together by the information that they contain. Document information can be categorized in different ways in different views. Category names are case-sensitive—that is, "Draft Documents" would be a different category than "draft documents."

Figure 2.7 **The structure of a database**



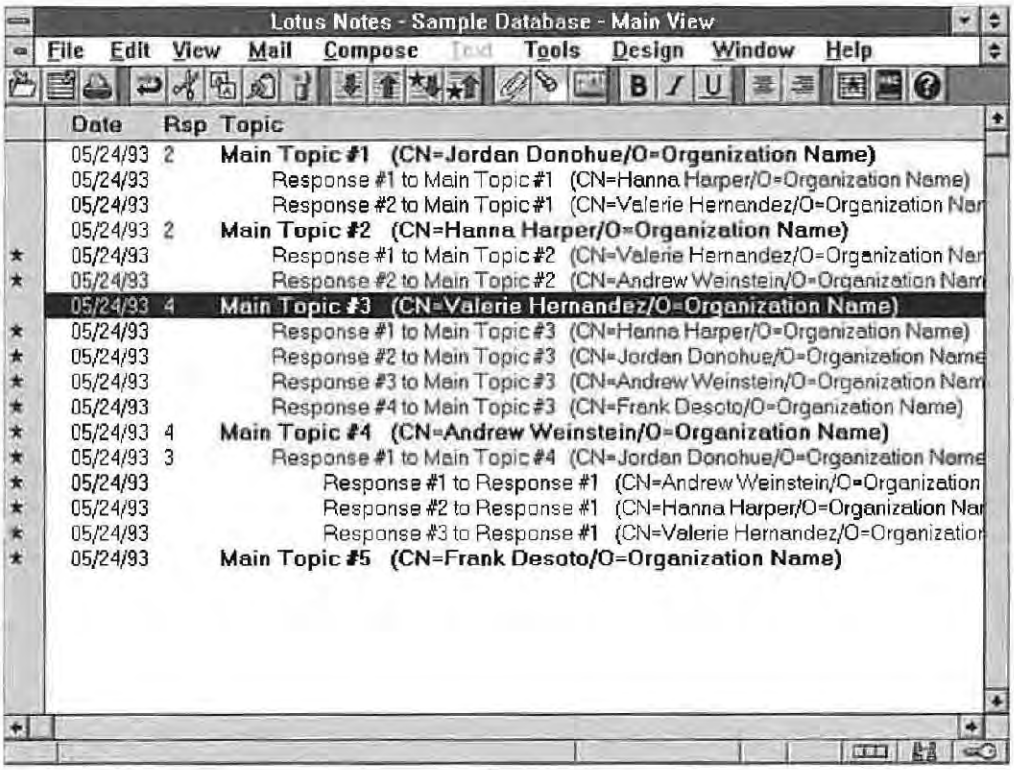
When you are working with a categorized and/or hierarchical view, you can expand or collapse the view either by categories or by levels of response. Here are some techniques you can use to expand or collapse a view:

- Choose *View, Collapse All* to view only main-topic documents or categories.
- Choose *View, Expand All* to view all documents.
- Choose *View, Collapse* (or press the minus sign (–) on the numeric keypad) to collapse a selected category or topic.
- Choose *View, Expand* (or press the plus sign (+) on the numeric keypad) to expand a selected category or one level of the responses below a selected document. You can expand all levels of response to a selected document by pressing the asterisk (*) on the numeric keypad.

Let's experiment with collapsing and expanding a view:

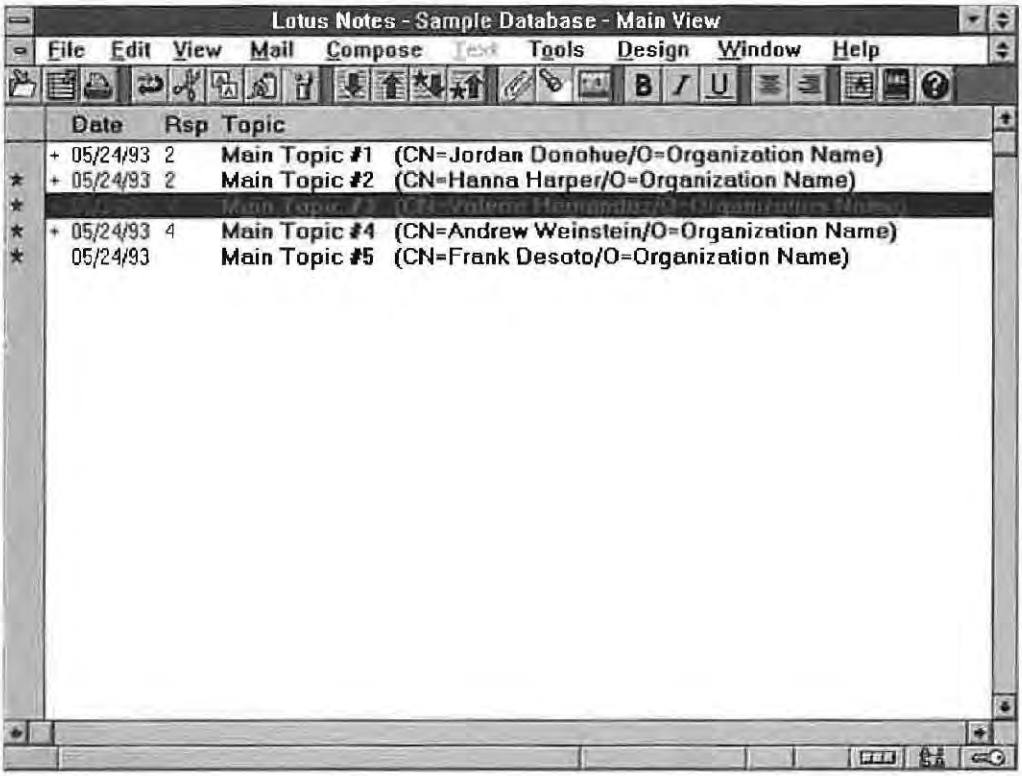
1. Examine the Sample Database - Main View window (see Figure 2.8). Right now, you can see all the documents in the view.

Figure 2.8 **The fully expanded Main View**



2. Choose **View, Collapse All** to display only main-topic documents (see Figure 2.9). All the response documents are collapsed underneath the main-topic documents with which they are associated. A plus sign appears to the left of each document that has responses hidden underneath it. There is no plus sign next to Main Topic #5 because there are no response documents hidden beneath it.
3. Choose **View, Expand All** to again display all the documents in the view.
4. Select **Main Topic #4**, and then choose **View, Collapse** (*not* Collapse All) to hide the response documents for Main Topic #4. Both Response #1 to Main Topic #4 and the responses to that document are hidden.

Figure 2.9 **A collapsed view**



5. Choose **View, Expand** to show the response documents for Main Topic #4. Notice that the Expand command displays only one level of responses to the selected document.
6. Select **Response #1 to Main Topic #4**, and then choose **View, Expand** to view the responses to this response document.



USING DIFFERENT VIEWS OF A DATABASE

As we mentioned earlier, a database can have many different views. Different views can display different information, can be arranged in different ways, and can even display different documents. To change to a different view of a database, you choose View and the name of the view to which you wish to change (the views are listed at the bottom of the menu).

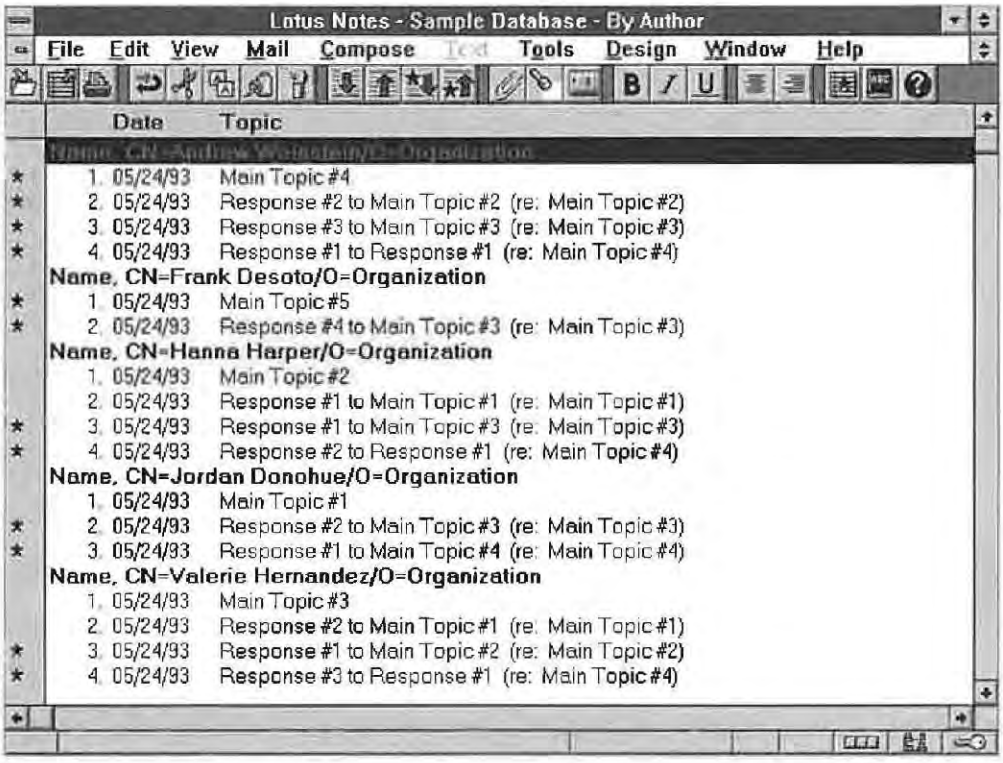
In the upcoming steps, you will see two examples of views that are categorized. In such a view, database documents are grouped by the information that they contain. For example, all the documents by a particular author might be categorized together, or

there might be a category listing documents that pertain to a particular department.

This will be clearer when we look at some examples, so let's do that:

1. Choose **View, By Author** to select a view of the database that lists documents by author (see Figure 2.10). This is a categorized view, and each author's name is a category. Notice that the categories (author names) appear in a different color and in the leftmost column of the view. Related main-topic and response documents are indented underneath the categories with which they are associated. This view is not, however, a hierarchical view. Because documents are grouped by author, response documents do not appear below main-topic documents with which they are associated. A response hierarchy in this view would make no sense.

Figure 2.10 **The categorized view By Author**



Note: Like almost everything in Notes, the structure of a categorized view is in the hands of the database designer. The

examples in these steps show the most common structure, but the databases you see at work may differ.

2. Choose **View, By Department** to change to a view with one category for each unique department. Documents that are not categorized (do not contain any department information) appear under the heading *(Not Categorized).*
3. Choose **View, Collapse All** to collapse the view so that only categories are visible. Categories are not documents, but rather are headings under which documents are listed.
4. Double-click on **Second Department** to display the documents that are associated with that category. Double-clicking on a category name will expand a collapsed category (or collapse an expanded one).
5. Double-click on **Main Topic #3** to open the document. As in views that are not categorized, double-clicking on a document name will open the document.
6. Close the document (double-click the right mouse button or press **Esc**).

PRACTICE YOUR SKILLS

1. Display the response documents for Main Topic #3.
2. Display all the documents in the By Department view.
3. Return to the Main View of the database.

The appearance of different views can vary drastically. There are, however, two general types of views: categorized and non-categorized. Figure 2.11 summarizes these two types of views.

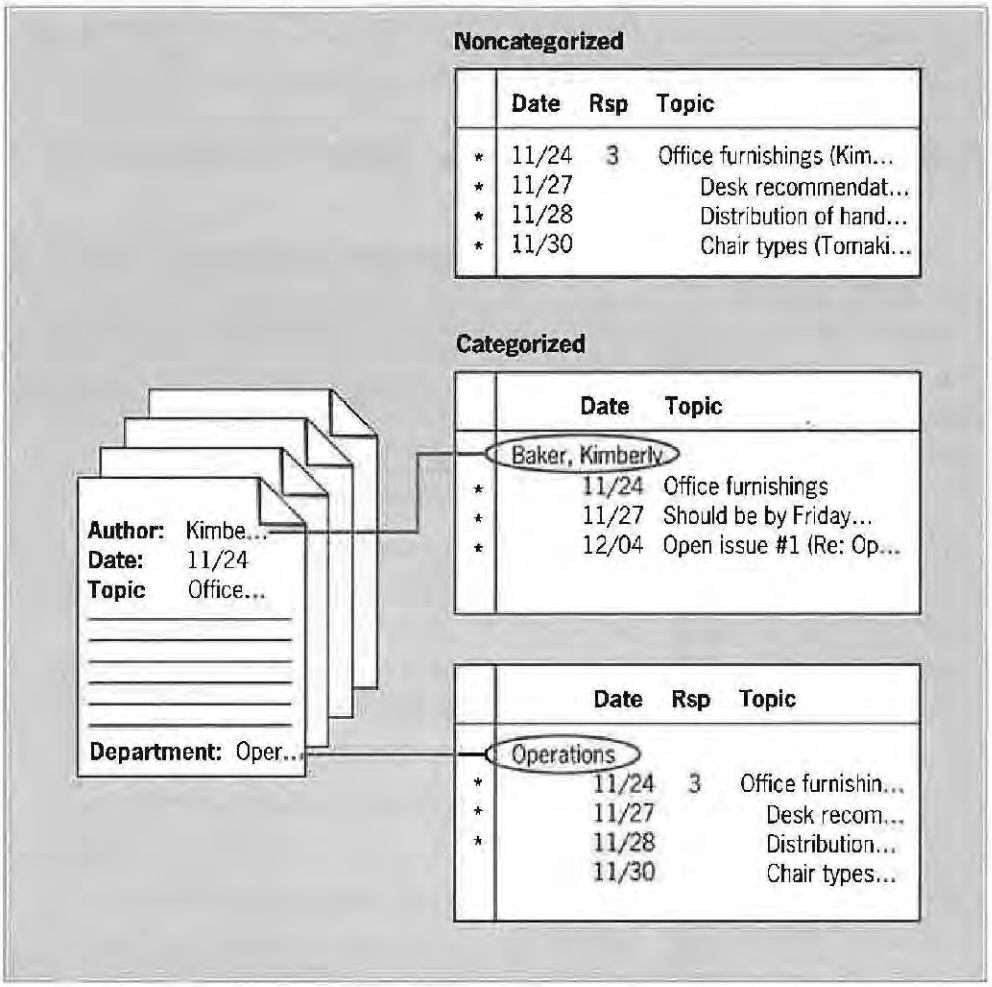


RESTRICTING A VIEW

You can also use the View menu to restrict the current view to display only certain types of documents. For example,

- Choose *View, Show Only Unread* to restrict a view to display only unread documents.
- Choose *View, Show Only Categories* to show categories only. If you choose this option in a view that is not categorized, you will not see anything in the view.

Figure 2.11 **Types of views**



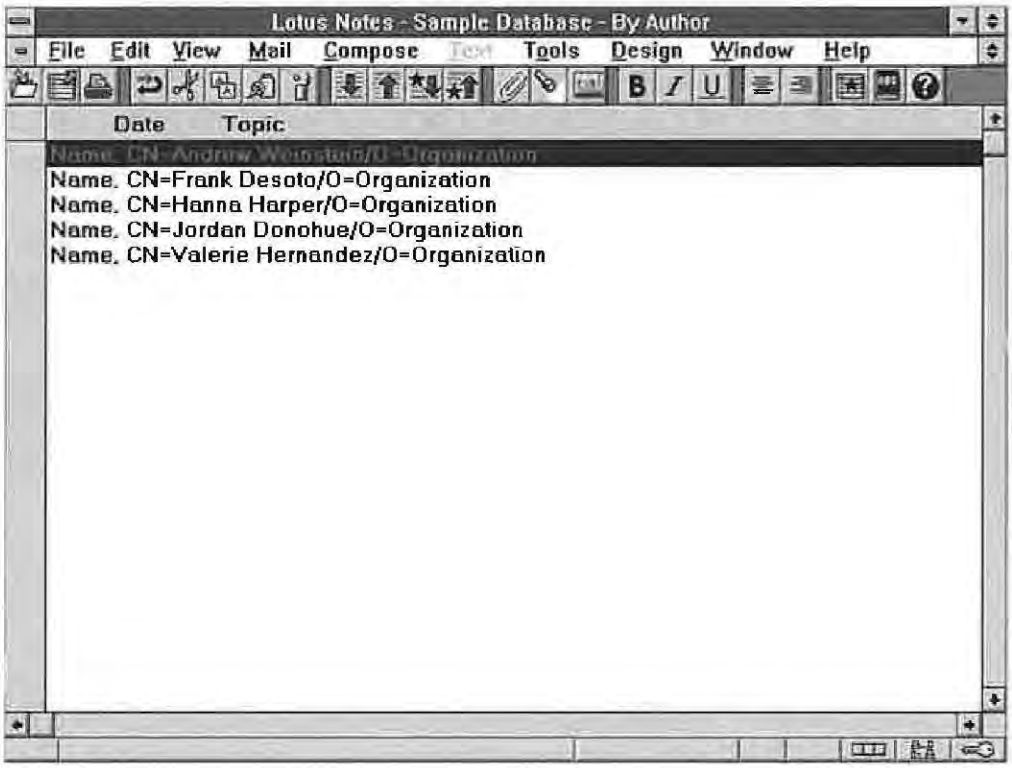
View-restriction commands are *toggles*; that is, to turn a restriction off, you would choose the same command again. Only one restriction can be in effect at a time, and the active restriction is indicated by a check mark in the View menu.

Let's try using some view restrictions:

1. Choose **View, By Department** to select the categorized view By Department.
2. Choose **View, Show Only Categories** to display only the categories in the current view. At first glance, it might seem that the Show Only Categories command is the same as the Collapse All command. When you are showing only categories, however, there are no plus signs next to the categories, meaning they cannot be expanded.

3. Change to the **By Author** view. Only the author names appear in the view because the Show Only Categories restriction is still in effect (see Figure 2.12).

Figure 2.12 **By Author view with the Show Only Categories restriction**



4. Choose **View, Show Only Categories** to remove the restriction from the view and again display all the documents. To remove a view restriction, simply choose the command again.
5. Change to the **Main View**, and then choose **View, Show Only Unread** to display only the unread documents in the view.
6. Choose **View, Show Only Categories**. Because this is not a categorized view, nothing is displayed when you choose this restriction.
7. Choose **View** to display the View menu. Notice that there is a check mark next to the Show Only Categories command, indicating that it is in effect. The Show Only Unread command

is no longer in effect because only one view restriction can be active at a time.

8. Change to the **By Author** view. You see only categories in this view because the Show Only Categories restriction remains in effect.



CLOSING A DATABASE

You close a database by closing all its open windows. When you open a database for the first time, you will see the default view selected by the designer of the database. The next time you open a database, you will see the view you were using when you last closed the database. Any view restrictions you were using, however, will no longer be in effect.

Another difference between the first time you open a database and subsequent times is that the About *Database Name* document is displayed only the first time. If you want to see the About *Database Name* document again, you can choose Help, About *Database Name*, with *Database Name* representing the name of the particular database.

Let's close the database and then open it again to see how it behaves:

1. Point anywhere inside the view and double-click the right mouse button to close the database.
2. Double-click on the **Sample Database** icon to open the database. Notice that the current view is By Author and not Main View (which was the default view when you first opened the database). This is because By Author was the view you were using when you closed the database. The Show Only Categories restriction, however, is not in effect; view restrictions are not retained when you close and reopen a database. Also notice that the About Sample Database document did not appear; this document appears automatically only the first time you open a database.
3. Choose **Help, About Sample Database** to display the About *Database Name* document.
4. Close the About *Database Name* document, and then close the database.

EXAMINING DIFFERENT TYPES OF NOTES APPLICATIONS

A Notes database, or a group Notes databases that work together for a particular purpose, is often called a Notes application. Notes applications are created and customized by a database designer to suit a particular purpose. Although Notes applications can come in an almost infinite variety of shapes and sizes, they generally fall within the following four categories:

- Discussion applications
- Broadcast applications
- Reference applications
- Tracking applications

In the next few sections of this chapter, we will look at examples of each of these four types of applications. To learn to use a Notes database, you should become familiar with the documents that are available and the various ways to view them. You can use the Compose menu to see what documents are available in a database, and the View menu to examine its views.



ADDING SEVERAL DATABASES TO THE WORKSPACE

You can use the File, Open Database command to add several database icons to your workspace at one time. To do so,

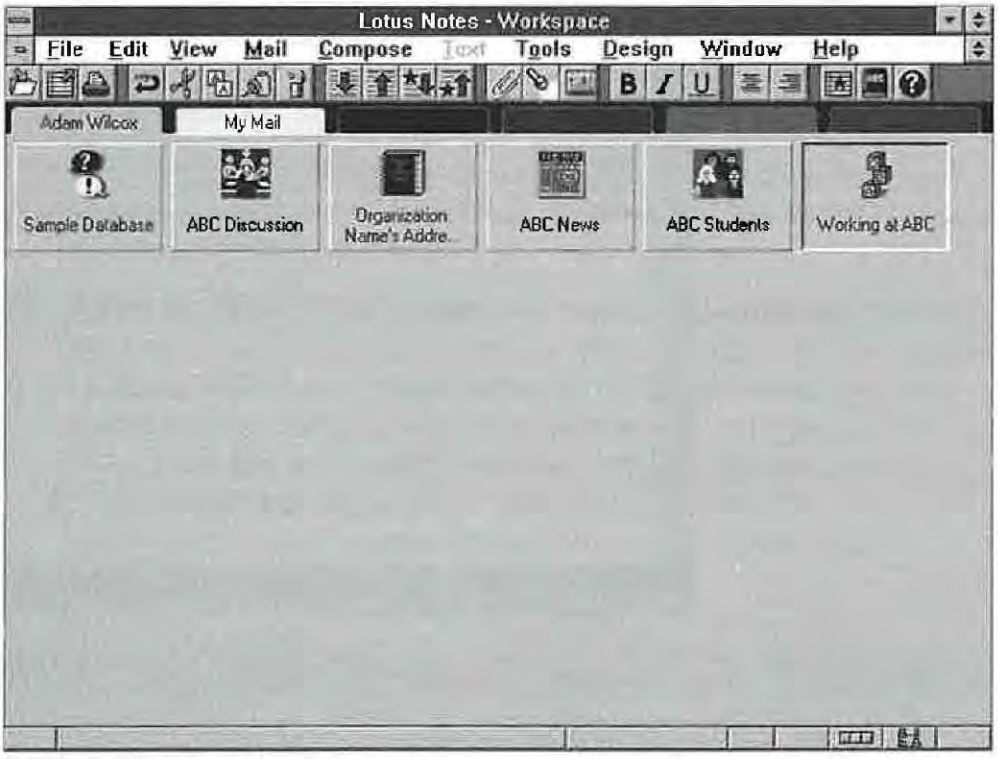
- Choose File, Open Database to display the Open Database dialog box.
- Select the drive or server that contains the databases you wish to add and click on Open.
- For each database icon you want to add, select the database name and click on Add Icon.
- When you are finished, click on *Done* to close the dialog box and return to the workspace.

Let's add several database icons to your workspace:

1. Choose **File, Open Database** to display the Open Database dialog box.

2. In the Server box, select **Local** and then click on **Open** to display the names of databases that are stored on your hard drive.
3. Select **ABC Discussion** and then click on **Add Icon** to add the icon for the selected database to your workspace. You remain in the Open Database dialog box.
4. Select **ABC News** and then click on **Add Icon** to add the icon for the selected database to your workspace.
5. Select **ABC Students** and then click on **Add Icon** to add the icon for the selected database to your workspace. (Is this tune getting familiar?)
6. Select **Working At ABC** and then click on **Add Icon** to (surprise!) add the icon for the selected database to your workspace.
7. Click on **Done** to close the dialog box. Your workspace should resemble Figure 2.13, although you may have additional database icons in your workspace, and the icons may be arranged differently.

Figure 2.13 **The new database icons added to the workspace**



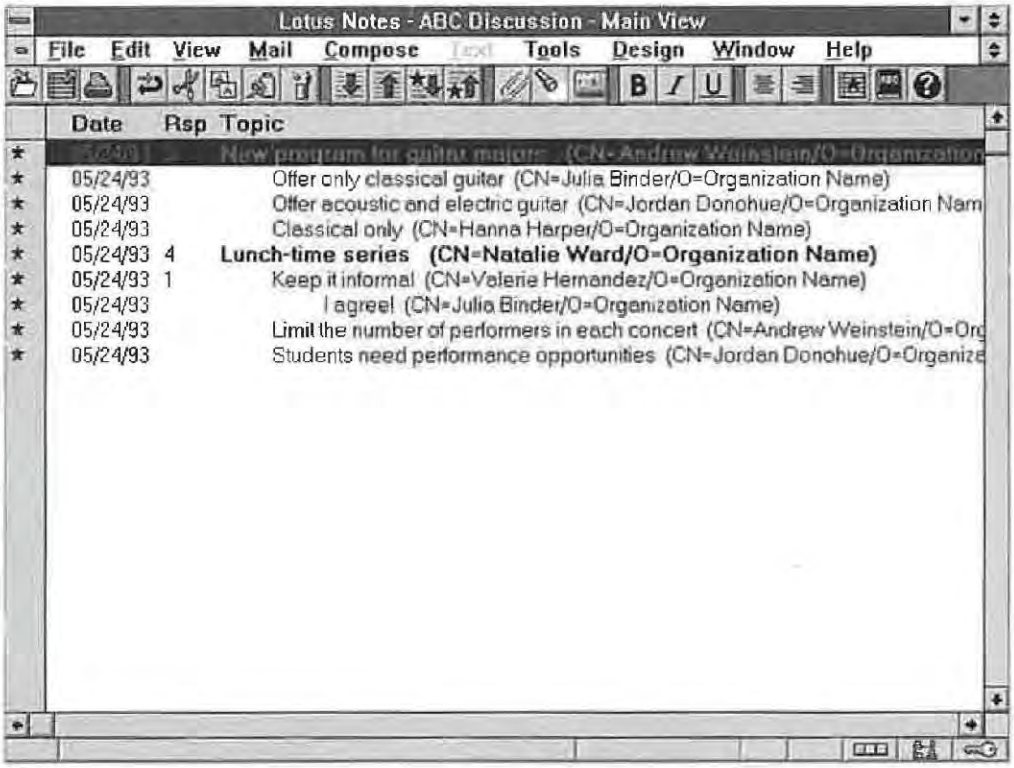


EXAMINING A DISCUSSION APPLICATION

Discussion applications provide a forum in which users can exchange information on topics of common interest. You might use this type of database for brainstorming, feedback, or gathering opinions. Let's look at an example of this type of database:

1. Double-click on the **ABC Discussion** icon to open that database and examine the About ABC Discussion document. This is an example of a Notes discussion application.
2. Close the About ABC Discussion document and examine the default view of the database (see Figure 2.14). This database allows ABC School's students and faculty to exchange opinions on a variety of topics. There are currently two main-topic documents in this database, and each has several responses.

Figure 2.14 **The Main View of the ABC Discussion database**



3. Choose **Compose** to display the Compose menu. You can compose two documents in this database: Main Topic, for starting discussion topics; and Response, for responding to those topics.
4. Choose **View** to display the View menu. There are three views of the documents in this database: By Author view, By General Topic view, or Main View. The word *By* at the beginning of a view's name usually indicates that the view is categorized by the information in the view name.

PRACTICE YOUR SKILLS

1. Observe the database in the By General Topic view.
2. Observe the database in the By Author view.
3. Change to the Main View, and then close the database.

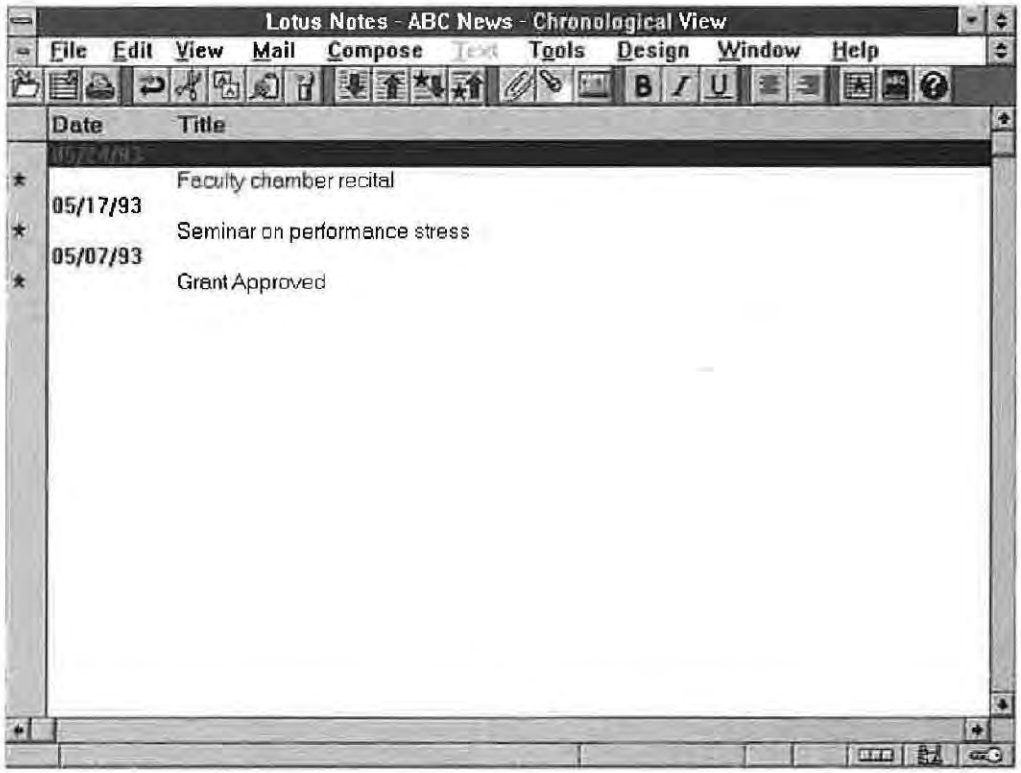


EXAMINING A BROADCAST APPLICATION

Broadcast applications provide information to a variety of people. You might use this type of database for a company newsletter, to track industry current events, or to house meeting minutes and agendas. Let's take a look at ABC News, our mythical music school's electronic newsletter, which is a good example of a broadcast application:

1. Open the **ABC News** database (double-click on its icon) and examine the About ABC News document. This is an example of a broadcast application.
2. Close the About ABC News document and observe the default view of the database (see Figure 2.15). This database is designed to be the equivalent of a college newsletter. Its default view, called Chronological View, is categorized by date, with the most recent documents at the top. In this database, main-topic documents take the form of news items and appear under the heading *Title*. There do not appear to be any response documents.

Figure 2.15 **The default view of the ABC News database**



3. Choose **Compose** to observe the documents that can be created in this database. You can create only one document in this database, News Item, which is a main-topic document. In some Notes applications, the designer may decide that response documents are not necessary or appropriate.
4. Choose **View** and examine the views that are available in the database. Besides the default view (Chronological View), there is also a view called By Keyword. You will see many databases in Notes that have views that are categorized by information called *keywords*. We will discuss this more as we move through the book.

PRACTICE YOUR SKILLS

1. Observe the database in the By Keyword view.
2. Return to the Chronological View, and then close the database.

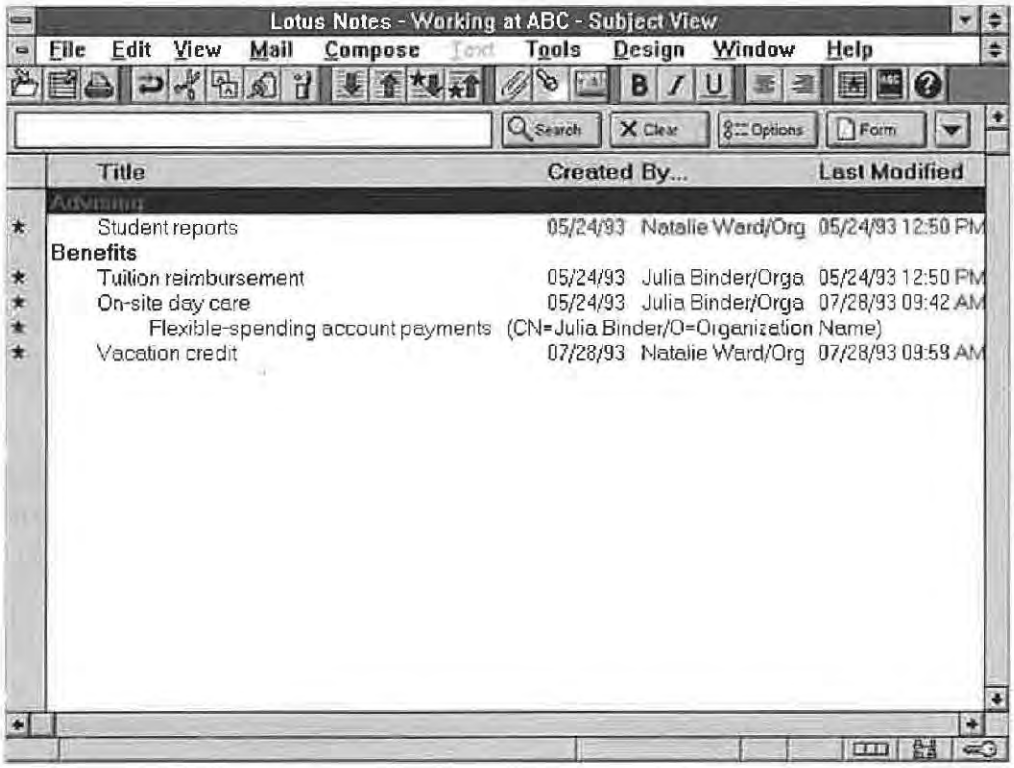


EXAMINING A REFERENCE APPLICATION

Reference applications, like broadcast applications, provide information, but are less time-sensitive. You might use this type of database to store libraries of forms and templates, software codes, or policies and procedures. The Working At ABC database is a reference application used to house employment policies for good old ABC School. Let's take a look at it:

1. Open the **Working At ABC** database and examine the About Working At ABC document. This is an example of a Notes reference application.
2. Close the About Working At ABC document and observe the default view, Subject View (see Figure 2.16). The default view is categorized and there appear to be both main-topic and response documents. The main-topic documents represent a policy, and the response documents represent updates to these policies.

Figure 2.16 **The Subject View of the Working At ABC database**



Notice also that there is an area between the SmartIcon bar and the view that contains several buttons. This is called the Search bar, and you can use it to find documents that contain particular text. We will discuss searching briefly in Chapter 3, and then in detail in Chapter 5.

3. Observe the documents that can be composed in the database (click on **Compose**). There are two documents available: Policy Procedure, a main-topic document; and Update, a response document.
4. Observe the views that are available in this database (click on **View**). There is only one view in this database, the default view called Subject View.
5. Click on **View** to close the View menu, and then scroll to the right in the view (click on the scroll arrow on the far-right side of the scroll bar at the bottom of the view). There is more information in this view than will fit in a single maximized window.
6. Scroll all the way to the left side of the view (use the scroll bar), and then close the database.

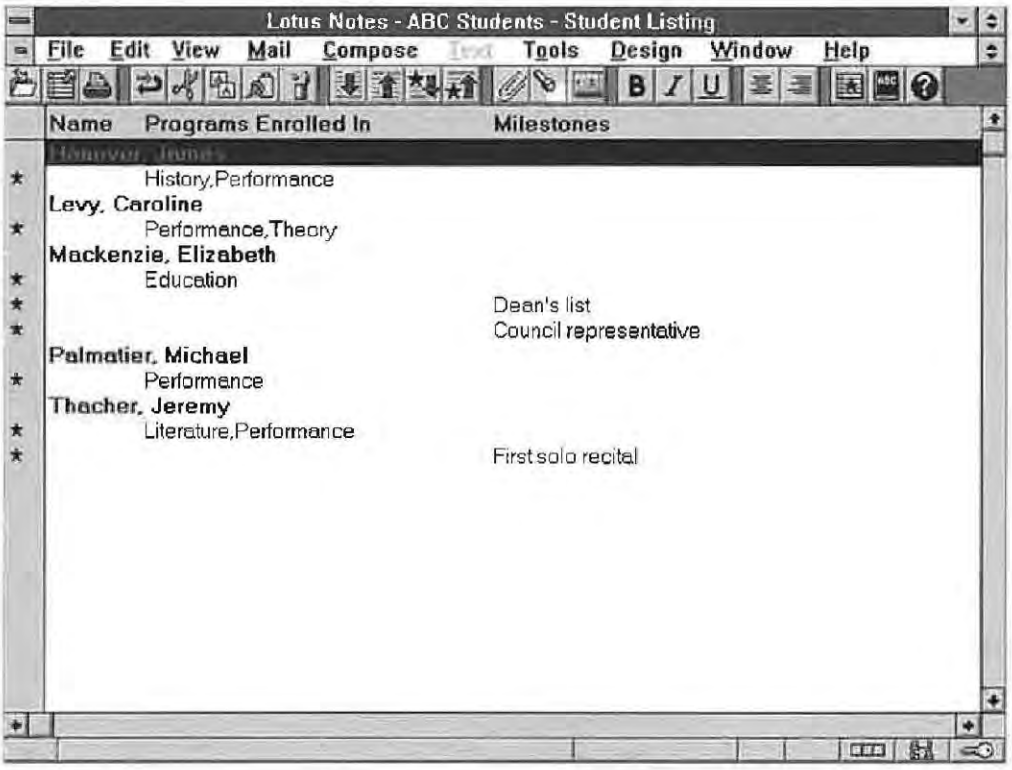


EXAMINING A TRACKING APPLICATION

A tracking application allows many users to contribute to an ongoing collection of information to profile or monitor some aspect of the group environment. You might use this type of database to track sales accounts, client histories, service requests, or project development. Our friends at the ABC School have a tracking application they use to keep tabs on their students. Let's check it out!

1. Open the **ABC Students** database and examine the About ABC Students document.
2. Close the **About Students** document and observe the default view of the database, Student Listing (see Figure 2.17). Documents in this view are categorized by student. Each student has one main-topic document representing his or her student profile, and some have response documents that represent milestones in their records.
3. Observe the documents that can be composed in this database. There are two: Student Profile, a main-topic document; and Milestone, a response document.

Figure 2.17 **The Student Listing view of the ABC Students database**



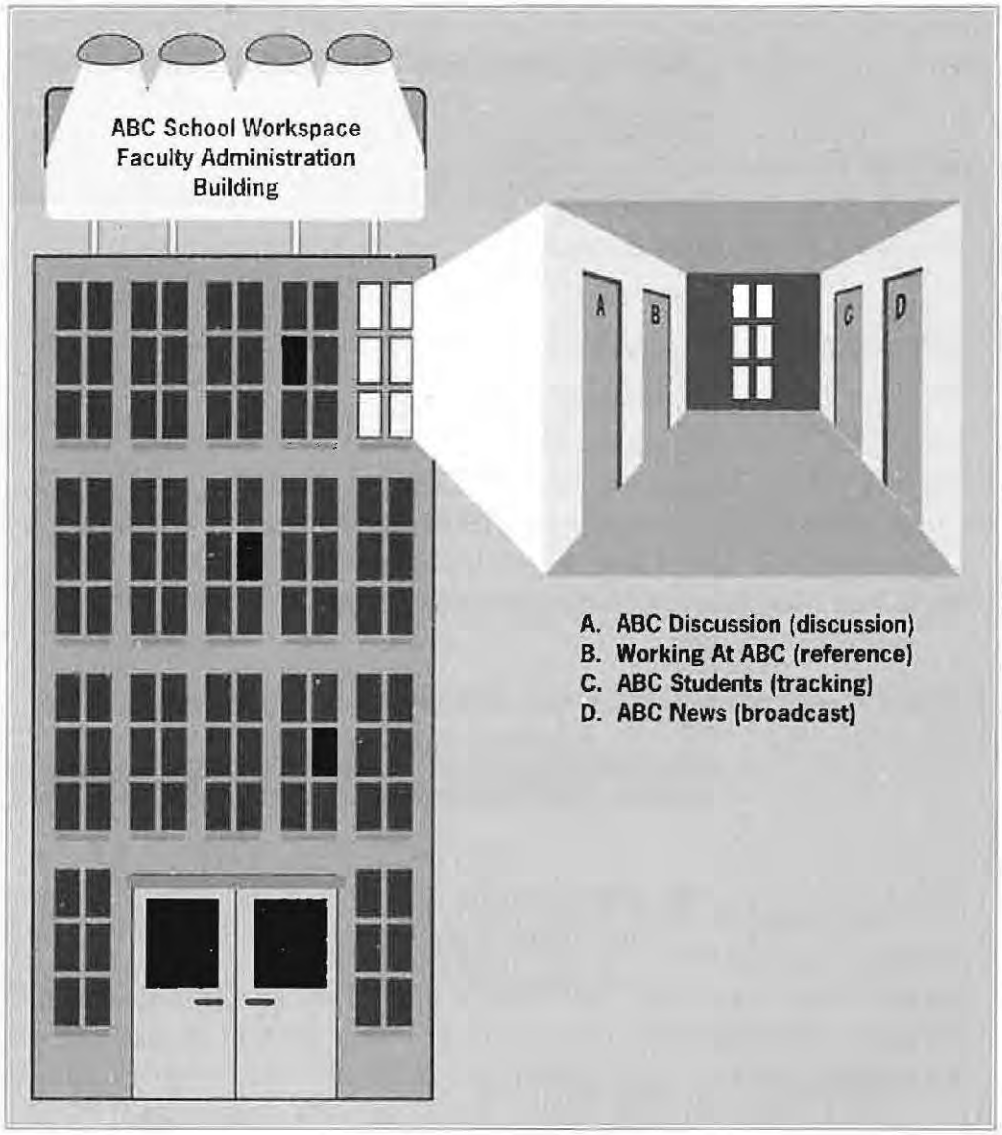
4. Observe the views that are available in the database. There are three views available: Student Listing, By Degree, and Advisor Listing.

PRACTICE YOUR SKILLS

1. Observe the database in the **By Degree** view.
2. Observe the database in the **Advisor Listing** view.
3. Return to the **Student Listing** view, and then close the database.

Because each database is built to meet the needs of a specific workgroup, adding a database to your workspace is like joining a new workgroup. You might think of your workspace as an office building (see Figure 2.18). Each workspace page represents one of the building's floors, and each database icon represents a door to a room within which a group of people is working on a particular project.

Figure 2.18 **A Notes workspace is like an office building.**



Behind some of the doors, you hear loud conversations as many people are brainstorming to hatch strategies or are airing their views. These would be doors to discussion applications. Other rooms are like libraries, with people working individually, studying reference materials, or making additions to the library's contents; these rooms would represent reference applications. Other rooms are like lounges, with people scanning bulletin boards that contain information about time lines, sales goals, and so on; such a room would be like a tracking application. And finally, there would be the broadcast application rooms, where people are reading the news or discussing current events.

GETTING HELP

Notes provides an on-line help system that you can use to get help on various Notes topics. The help system lives in a database called Notes Help Release 3, and you can access it in many ways.



EXAMINING THE HELP MENU

You can use the Help menu to get into the Notes help system in a number of ways. Some of the commands in the menu show you different listings of help topics, while others give you help on a specific Notes topic. Some of the Help command you may find useful are

- *Current Task,* which gives you help on whatever you are doing at the time (this is called *context-sensitive help*)
- *Table Of Contents,* which gives you a list of help topics as they are organized in the Help database
- *Keyboard,* which gives you help on Notes keyboard commands
- *Messages,* which gives you a list of help topics that have to do with the various messages you may receive while working in Notes
- *Index,* which gives you an alphabetical list of help topics

Note: If you are in a database or have a database icon selected in the workspace, two other commands will appear in the Help menu. The About *Database Name* command, as we've seen, displays a document that gives information about the current database. The Using *Database Name* command displays a document containing information about how to use the current database.

You can also use the Help, About Notes command to display information about the current version of Notes. Let's take a quick look at the Notes Help menu:

1. Click in a blank area of the workspace to deselect all the database icons.
2. Choose **Help** to display the Help menu, which you can use to get different kinds of help.
3. Choose **About Notes** to display a message with information about the current version of Notes. The people at Lotus built

some cute animation into this message, so you might want to look at it for a moment or two. (For an added show, try clicking on the *o* in *Lotus*.)

4. Point to the message and click the left mouse button to close it.



NAVIGATING IN THE HELP SYSTEM

Any of the commands we were just talking about can get you into the Notes help system. Perhaps the most useful of these commands is Help, Current Task, which gives you context-sensitive help. You can also issue this command at any time by pressing the F1 key.

Note: To use Notes help, the Notes Help Release 3 database must be available to you. This database can be installed on the hard drive of your workstation, on a server, or on both. If the database is not installed on your hard drive and you are not connected to a server where it is installed, you will not be able to use the help system.

There are a number of ways to move around in the help system. In many documents, you will see small, dog-eared rectangles next to some of the text. These are called *DocLinks*, and by double-clicking on them you can move to a related help document. In many documents, you will also see a row of buttons at the top of the screen. Table 2.3 summarizes the Notes help navigation buttons.

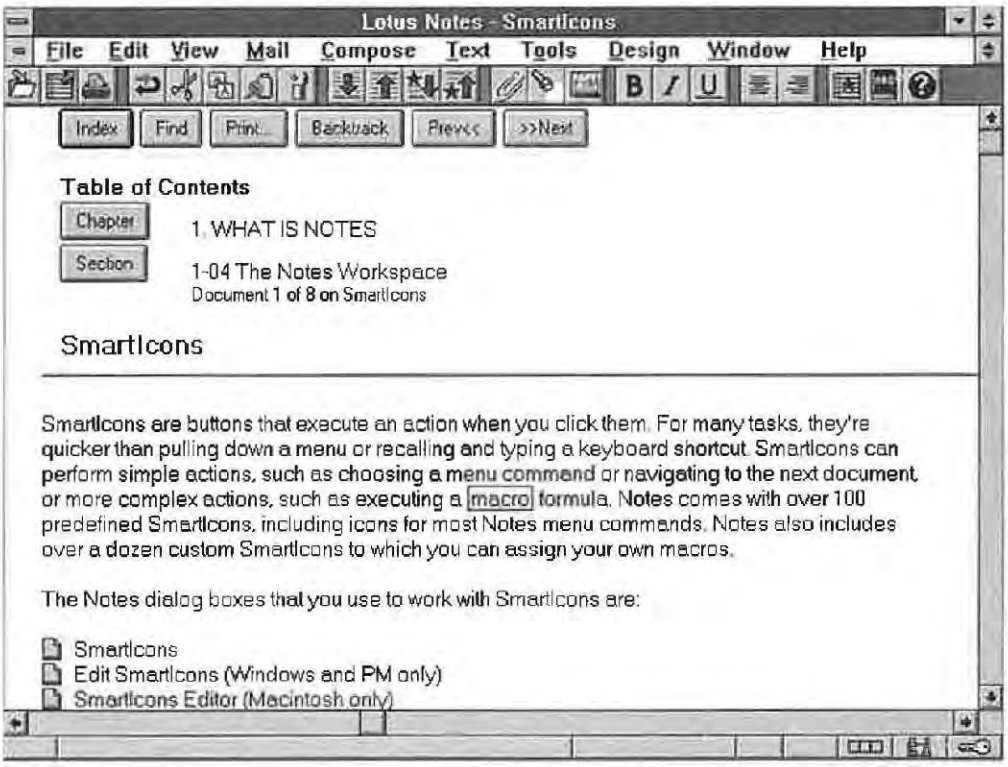
Table 2.3 Notes Help Navigation Buttons

Button	What It's Used For
Index	To go to the Notes Help Index
Find	To display a dialog box that you can use to find help documents containing text you specify
Print	To print the current help document
Backtrack	To display the last help document that you read
Next	To display the next document in the Help database
Prev	To display the previous document in the Help database

Let's explore the Notes help system:

1. Choose **Help, Current Task** to display a help document pertaining to the Notes workspace. (If Notes asks you to enter your password, do so and then click on **OK.**)
2. Point to the DocLink (the small, gray, dog-eared rectangle) after the word *SmartIcon* near the top of the document, and double-click to display a help document about SmartIcons (see Figure 2.19). There are several navigation buttons at the top of the document.

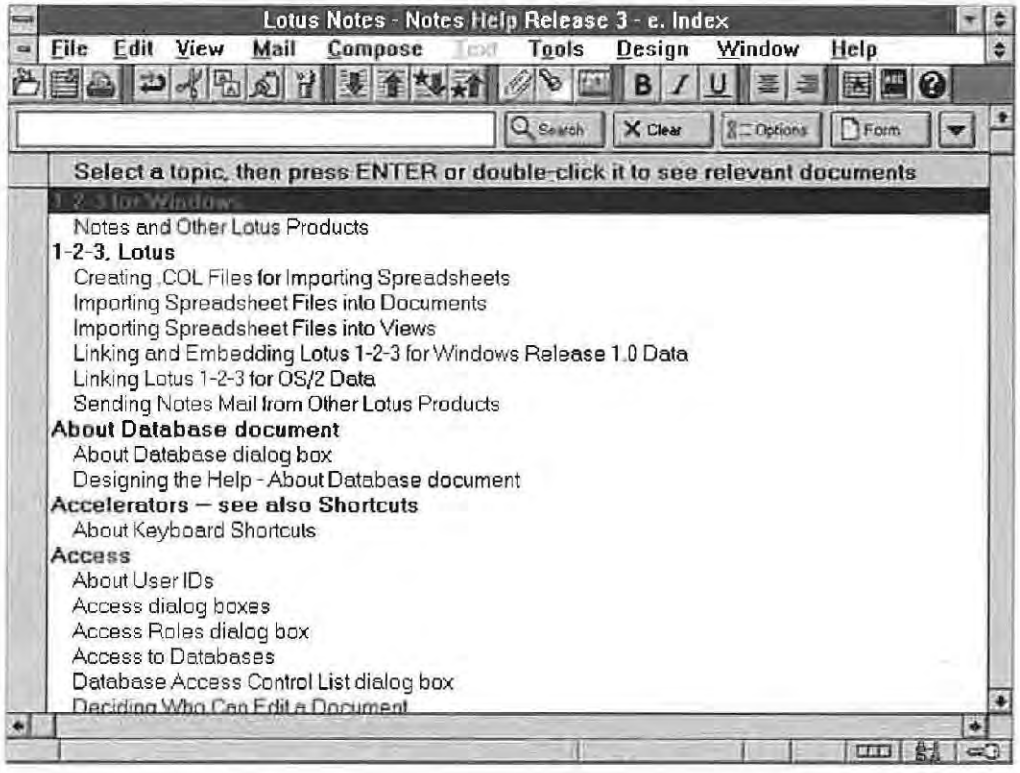
Figure 2.19 **A Notes Help document**



3. Scroll down in the document until you get to the heading *Customizing SmartIcons*, and then double-click on the **DocLink** after the text *In the SmartIcons dialog box* to display another help document.
4. Click on **Backtrack** to close the current document and display the last one that you read.

5. Close the remaining two help documents (double-click the right mouse button or press **Esc** for each of them). When you move through the help system, each of the documents you open remains open to allow you to move back through them if you wish. When you close the last help document, notice that a new database icon, Notes Help Release 3, has been added to the workspace.
6. Choose **Help, Index** to view the main index for the help system. Index is a categorized view of the Help database documents.
7. Choose **View, Expand All** to expand all the Index categories (see Figure 2.20).

Figure 2.20 **The Notes Help Index**



8. Under the Accelerators category, double-click on **About Keyboard Shortcuts** to view that document.

9. Double-click on the **DocLink** to the left of the text *Document reading keys* to display a help document containing the keyboard shortcuts for moving around in documents and views.
10. Close all help documents to return to the Notes workspace.



EXAMINING THE NOTES HELP DATABASE

The Notes help system is based on a database that is much like any other Notes database. You can open it by double-clicking on its icon, and you can observe different views by using the View menu. Let's take a look at this database:

1. Open the **Notes Help Release 3** database and observe the About Notes Help Release 3 document.
2. Close the About Notes Help Release 3 document and then examine the view of the database. The current view is Index, because you were using this view when you were last in the help system.
3. Press the letter **G** to move to Index categories that begin with the letter *G*, and then double-click on **Glossary** to expand that category. Remember, double-clicking on a document opens it, but double-clicking on a category simply expands the category.
4. Under the Glossary category, double-click on **Notes Terms** to display that help document.
5. Click on **Index** to return to Index view, and then double-click on the category **Menus** to expand it. The Menus category contains documents that explain the various Notes menus.
6. Change to the **Messages** view of the Help database. This view contains an alphabetical list of messages that you may see while you are working in Notes. The associated help documents explain the messages in greater detail. You can also get help on a currently displayed message by pressing F1.
7. Close the Notes Help Release 3 database.

SUMMARY

In this chapter, you learned the basics of Notes databases. You learned how to open a database and browse through its documents,

how to understand and switch among views, and how to close a database. We also discussed different types of Notes applications and examined an example of each. Finally, you learned how to use the Notes help system.

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

Desired Result	**How to Do It**
Add database to workspace	Choose **File, Open Database**; select drive or server and click on **Open**; select database; click on **Add Icon**
Open database	Double-click on database icon (you may be asked to enter your password)
Stack windows with Title bars visible	Choose **Window, Cascade**
Arrange windows so all can be seen	Choose **Window, Tile**
Stack windows so only top can be seen	Choose **Window, Maximize All**
Make all windows as small as possible	Choose **Window, Minimize All**
Close window	Double-click right mouse button or press **Esc**
Close database	Close all open database windows
Examine documents you can compose in database	Display **Compose** menu
Examine available views in database	Display **View** menu
Read document	Select document in view and press **Enter**, or double-click on document in view

Desired Result	How to Do It
Read next document	Press **Enter** or click on **Navigate Next** SmartIcon
Read previous document	Press **Backspace** or click on Navigate Prev SmartIcon
Read next unread document	Press **Tab** or click on **Navigate Next Unread** SmartIcon
Expand all categories or topics	Choose **View, Expand All**
Expand selected category or topic	Choose **View, Expand**
Collapse all categories or topics	Choose **View, Collapse All**
Collapse selected category or topic	Choose **View, Collapse**
Use different view of database	Choose **View** and select name of desired view
Show only unread documents in view	Choose **View, Show Only Unread**
Show only categories in view	Choose **View, Show Only Categories**
Get context-sensitive help	Choose **Help, Current Task** or press **F1**
View Help Index	Choose **Help, Index** or open Help database and select **Index** view
Move to related help document	Double-click on **DocLink**
Return to last read help document	Click on **Backtrack** or close current document

In the next chapter, you will learn how to compose documents. You will learn about the different types of information you can enter, and how to create both main-topic and response documents.

You will also learn how to use Notes editing tools—including SmartIcons—to change the appearance of Notes documents, and how to manage documents after you create them.

IF YOU'RE STOPPING HERE

If you wish to stop here, please choose **File, Exit** to exit Notes (you will need to restart Notes when you begin Chapter 3). If you wish to proceed directly to Chapter 3, please do so now.

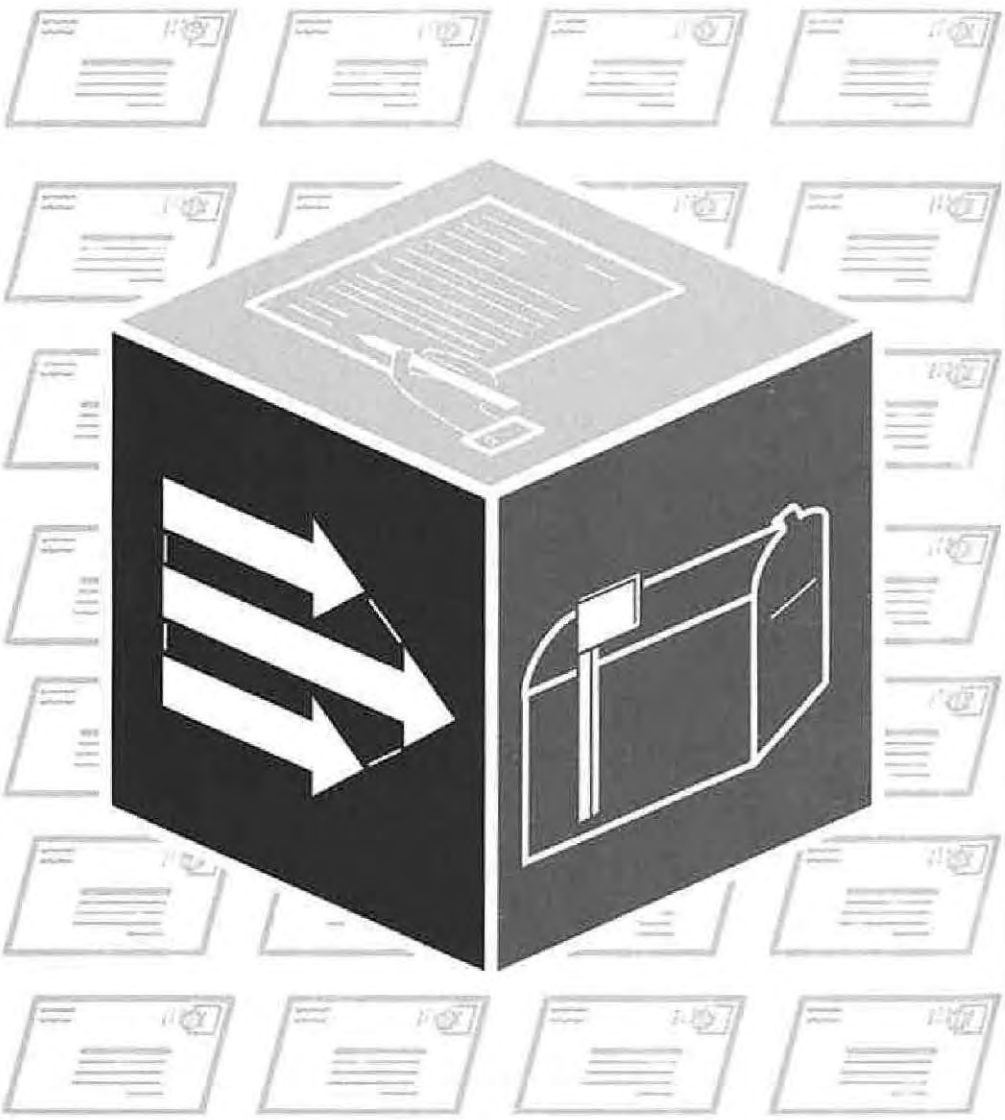
CHAPTER 3: WORKING WITH DATABASE DOCUMENTS

Composing a Document

Composing Response Documents

Editing Documents

Managing Documents



Documents, which are the building blocks of Notes data bases, can look very different in different databases. There are, however, some things that all documents have in common. In this chapter, you will learn how to create documents by using forms. We will discuss the various types of fields, the building blocks of documents. You will also learn how to edit documents, as well as how to manage them after you create them.

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

- How to compose main-topic and response documents
- How to enter information in fields
- How to edit documents
- How to search through and print documents
- How to mark documents as read or unread

COMPOSING A DOCUMENT

So far, we've been telling a little white lie about the Compose menu. We've been saying that the menu lists *documents* that can be created in a database. The truth is, the Compose menu actually contains a list of *forms* from which you create documents. A form is a blank version of a document, and you turn it into an actual document by filling in its blanks and then saving it in a database. Forms are part of a database's design and are created by the database designer.

Each blank area in a form is called a *field* and can contain a particular kind of data. A field can be one of two main types:

- In *editable fields*, you can enter or change information. The subject line or the body of a document are examples of this kind of field.
- *Computed fields* supply information automatically. In most cases, you cannot change the information in a computed field. The name of the author of a document and the date a document was composed are examples of information that might be contained in this type of field. A computed field might also combine information from two or more other fields.

Beyond these two broad types, fields are also categorized by the type of data that they can contain. The data type of field not only determines what data the field can contain, but also how you can enter that data. The field data types you will encounter most often are

- Text
- Rich text
- Number

- Time/date
- Author name
- Keyword

We will discuss each data type in detail later in this chapter.



COMPOSING A NEW DOCUMENT

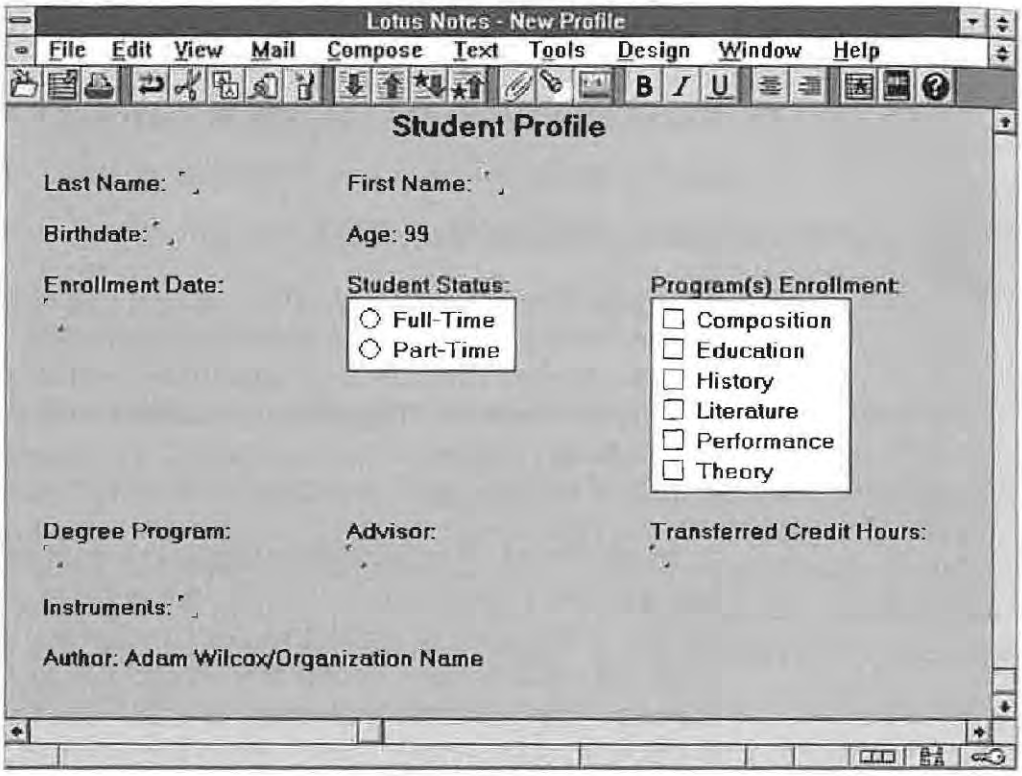
To compose a document, you choose the appropriate form name from the Compose menu. A form then appears on the screen. It may include text, graphics, and blank areas enclosed in corner brackets. These blank areas—and some other areas that we will discuss—are the fields. You complete the form by filling in the fields.

In most forms, the database designer has provided helpful hints, called *Field Help*, to help you fill in the form. When the *insertion point*—a flashing vertical line—is in a particular field, its Field Help text will appear above the Status bar at the bottom of the screen. The first time you wish to use Field Help, you must turn it on by choosing *View, Show Field Help*. After you turn Field Help on once, it will stay on until you turn it off, even if you exit and restart Notes.

Let's begin to compose a new document in the ABC Students database:

1. Select the **ABC Students** database icon (click on it). To compose a document in a database, it is not necessary to open the database; selecting its icon is good enough.
2. Choose **Compose, Student Profile** and observe the form that appears on the screen (see Figure 3.1). Fields are located in various parts of the form, labeled with descriptive text. Some of the fields are blank areas enclosed by corner brackets, others are lists of options. The Author field displays your name (and your company's name); this is an example of a computed field. The insertion point is located in the first editable field, which is labeled *Last Name*.
3. Choose **View, Show Field Help** to display text about the current field above the Status bar at the bottom of the screen. Field Help tells you that this field is a *required field* (you will not be able to save this document without filling in all the required fields) and that you should enter the student's last name.

Figure 3.1 **The blank Student Profile form**





ENTERING DATA IN A TEXT FIELD

A *text field* accepts any character from the keyboard and can hold up to 15 kilobytes of text (or 15,000 characters—plenty for most purposes). Text fields do have certain limitations, which we will discuss when we introduce the rich-text data type later in this chapter.

You enter information in a text field by placing the insertion point within the corner brackets and typing. You can place the insertion point in any field by clicking there with the mouse pointer. In most cases, you can also move between fields by pressing Tab.

If you make a mistake while entering information in a field, you can make corrections in a number of ways.

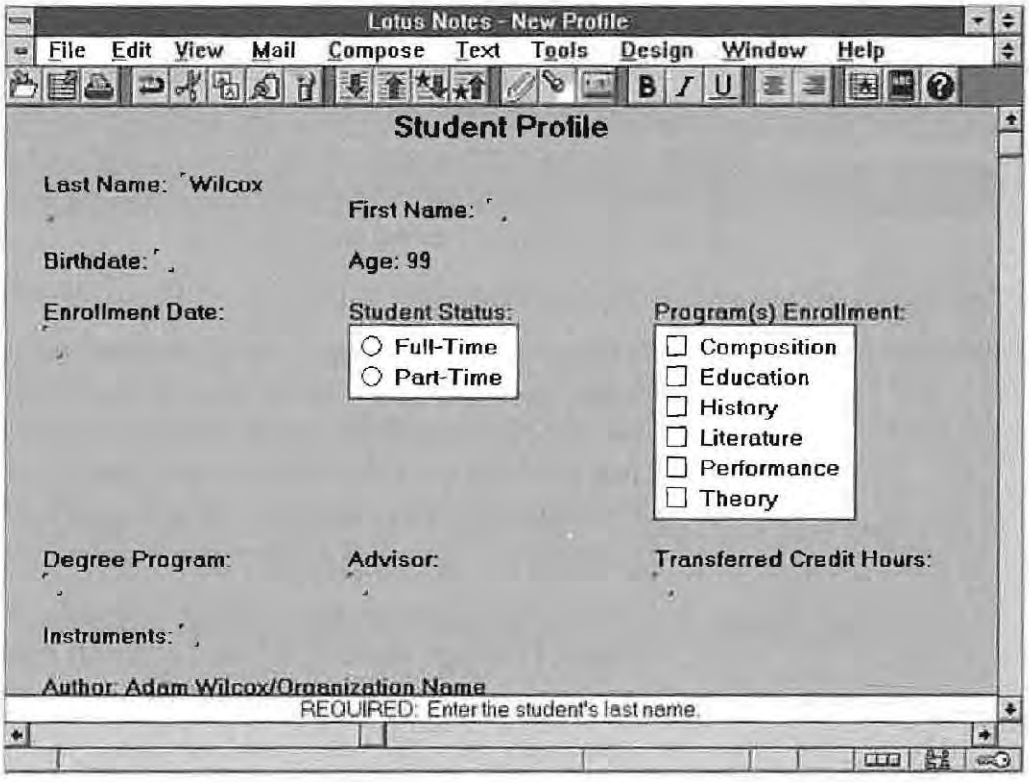
- Press Backspace to delete the character before (to the left of) the insertion point.
- Press Ctrl+Backspace to delete the word before the insertion point.

- To delete a large area of text, drag over it with the mouse and then press Del.

Let's enter some information in a couple of text fields:

1. Make sure the insertion point is within the corner brackets next to the text *Last Name*, and then type your last name. As you type, the characters appear in the field.
2. Press **Enter** to attempt to move to the next field. Unfortunately, the Enter key does different things in different types of fields. In a text field, pressing Enter creates a new line in the field (see Figure 3.2).

Figure 3.2 **Creating a new line in a text field**



3. Press **Backspace** to delete the new line you just inserted, and then press **Tab** to move to the next field (it is labeled *First Name*).
4. Type **Milo**, even though this is probably not your first name. We're doing this because we need a word to delete.

5. While holding down the **Ctrl** key, press **Backspace** to delete the word *Milo*.
6. Type your first name and then press **Tab** to move to the Birthdate field.



ENTERING DATA IN A TIME/DATE FIELD

As in a text field, you enter data in a time/date field by typing. Dates should be entered in either *MM/DD/YY* or *MM-DD-YY* format, depending on how your Notes server is set up. Times should be entered in *HH:MM:SS* format, and you can also include the text *AM* or *PM* after a time.

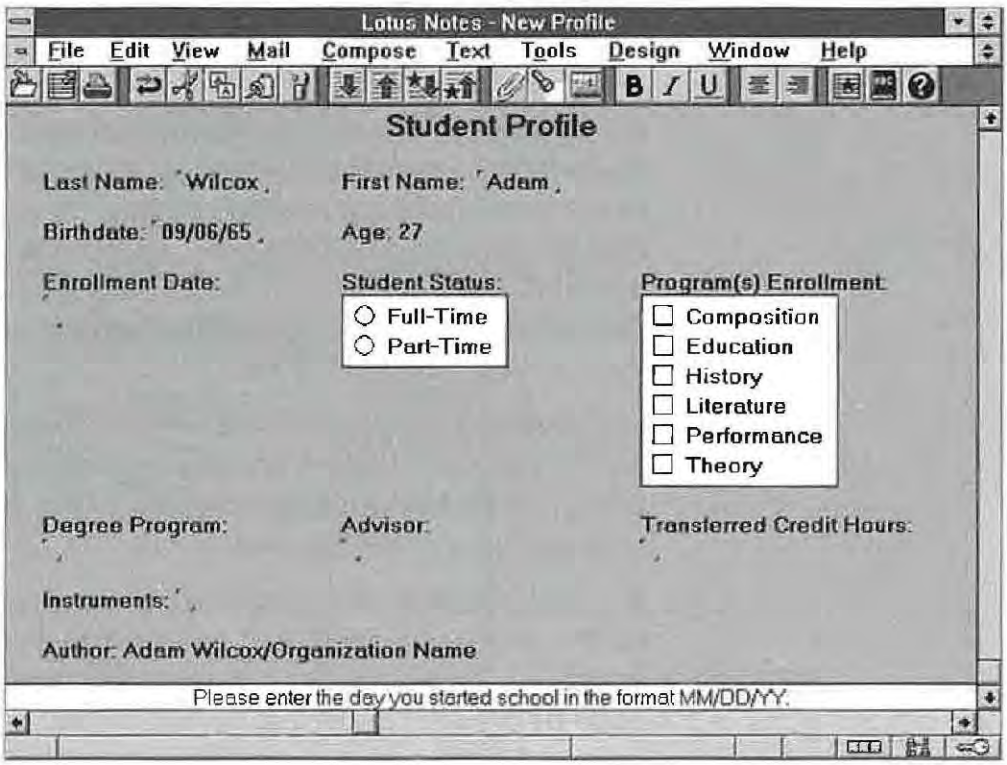
Note: A nice feature of time/date fields is that you can also use the words *today* and *yesterday* as shortcuts for entering today's or yesterday's date.

While you are composing a document, you can use the *View, Refresh Fields* command to calculate fields based on the information you have entered so far. This is useful for two reasons: first, it calculates any calculated fields; and second, it verifies that the data you have entered are valid.

Let's enter some date information in our Student Profile:

1. In the Birthdate field, type your date of birth in *MM/DD/YY* format (for example, if your birthday is September 6, 1965, you would type 09/06/65). Notice that the Field Help above the Status bar tells you the format for entering dates. Also notice that the Age field says you are 99 years old. This is because it is a calculated field, but it has not yet been calculated.
2. Press **Tab** to move to the next editable field, Enrollment Date. The Age field still has not been calculated.
3. Choose **View** and observe the Refresh Fields command. You can use this command to calculate the fields on a form while you compose a document. Notice that the F9 key is a shortcut for issuing this command.
4. Choose **Refresh Fields** to calculate the fields based on the information you have entered so far. The computed Age field should now display your correct age (see Figure 3.3).

Figure 3.3 **Refreshing a calculated field**



Note: If your server is set up to accept dates in *MM-DD-YY* format, then you may get an error message in the Age field when you refresh the fields. If this happens, select the information in the Birthdate field and reenter it in *MM-DD-YY* format.

5. In the Enrollment Date field, type **today**. You can use the word *today* as a shortcut for entering today's date.
6. Press **Tab** to move to the Student Status field.



SELECTING OPTIONS IN A KEYWORD FIELD

A *keyword field* provides a list of choices from which you can choose one or more keywords, depending on the type of keyword field. For example, in the ABC Students database, the Student Profile Form contains a keyword field called Student Status that allows you to choose between the keywords *Full-Time*

and *Part-Time*. A database designer can define three types of keyword fields:

- In a *standard keyword field*, there is a list of choices defined by the database designer, but you do not see them on the form. When you press Enter in this type of field, you will see a list of keywords from which to choose. You can also cycle through the choices (without pressing Enter) by pressing the Spacebar. In some fields of this type, you can also make choices by pressing the first letter of the keyword you wish to choose. Depending on the design of the field, it may or may not allow you to type new keywords.
- In a *check-box keyword field*, all the keywords are displayed on the form with check boxes next to them. You can select one or more keywords by clicking in the appropriate boxes. To deselect a keyword, simply click on its box again.
- In a *radio-button keyword field*, the keywords are displayed on the form with radio buttons next to them. You select a keyword by clicking on its corresponding radio button. The difference between this kind of keyword field and a check-box keyword field is that the radio buttons allow you to choose only one keyword from the list.

If there is an underline flashing below an option in either a radio-button or check-box keyword field, you can also select that option by pressing Enter.

Let's explore the three types of keyword fields in our Student Profile form:

1. Make sure that there is a flashing underline below the Full-Time option in the Student Status field, and then press **Enter**. The radio button next to the Full-Time option is now on, indicating that this option is selected.
2. Click on the radio button for the **Part-Time** option. Notice that when you select a different option in a radio-button keyword field, any other selected option is turned off.
3. In the Program(s) Enrollment field, click in the check box for the **Composition** option. An *X* appears in the check box.
4. Click in the **Theory** check box. Notice that both *Composition* and *Theory* are now selected.
5. Click in the **Theory** check box again to deselect the option.

6. Press **Tab** to move to the Degree Program field. Field Help tells you to press Enter to see a list of choices for this standard keyword field.
7. Press **Enter** to display the Select Keywords dialog box (see Figure 3.4).

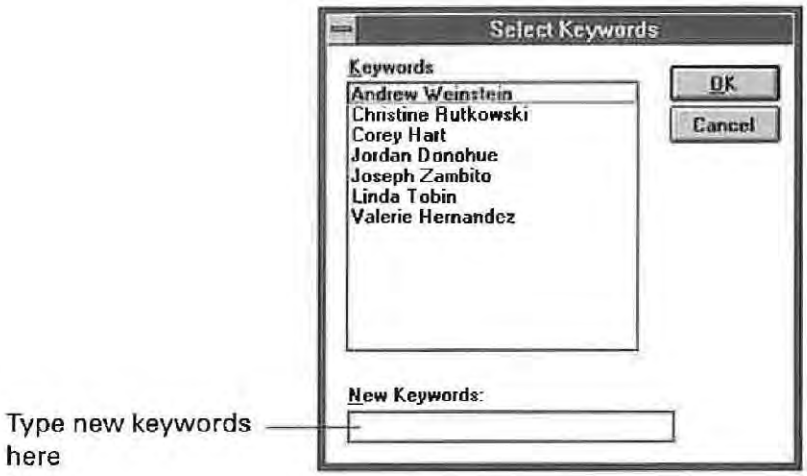
Figure 3.4 **The Select Keywords dialog box**



8. In the Keywords list, select **Bachelor of Music** and then click on **OK**. The selected keyword appears in the Degree Program field.
9. Move to the Advisor field and press **Spacebar** several times to display the available keywords one at a time.
10. Press **Del** to delete the selected keyword, and then press **a** to display a keyword beginning with the letter *a*. The name *Andrew Weinstein* appears. If you are familiar with the keyword list, this is a good way to select keywords. If more than one keyword begins with a given letter, Notes inserts the keyword that first appears in the alphabetical order (if you press the same letter again, Notes inserts the next keyword that begins with that letter).
11. Type **e**. Notes beeps at you because there are no keywords that begin with the letter *e*, and because you cannot type a new keyword directly into a keyword field.

12. Press **Enter** to open the Select Keywords dialog box. Notice that this dialog box, unlike the last one you saw, has a New Keywords box at the bottom of it (see Figure 3.5). This means that the database designer decided to allow users to create new keywords in this field.

Figure 3.5 **A keyword field in which you can enter new keywords**



13. In the New Keywords box, type **Aziz Ibrahim** and then press **Enter**. The new keyword appears on the form.

    Note: When you type new keywords in the Select Keywords dialog box, they are not added to the permanent keywords list.

14. Press **Tab** to move to the Transferred Credit Hours field.



ENTERING DATA IN A NUMBER FIELD

A *number field* accepts any data that can be used in calculations. You enter information in a number field by typing. Let's try it:

1. In the Transferred Credit Hours field, type **18 hours**. You have entered both a number and some text in this number field. We'll soon see whether this is kosher.
2. Press **Tab** to move to the Instruments field.



ENTERING DATA IN A RICH-TEXT FIELD

A *rich-text field* is a more versatile version of a text field. In a regular text field, you can apply formats (such as bold, italic, and so on) only to the field as a whole. A rich-text field allows you to format characters, words, and paragraphs individually. This type of field can also be much larger than a regular text field, accommodating up to 21,509 paragraphs of text.

As in a text field, you enter information in a rich-text field by typing. The Tab key, however, works differently in a rich-text field than it does in any other type of field. Pressing Tab in this type of field moves the insertion point to the next *tab stop* within the field (if you have worked with word processing software, this concept will be familiar to you; if not, you will learn about it in greater detail in Chapter 6). To move from a rich-text field to the next field on a form, you can use either the mouse or the arrow keys.

Let's enter some information in a rich-text field:

1. In the Instruments field, type **violin, piano, and flute** (or any combination of instruments that moves your soul).
2. Press **Tab** to attempt to move to the next editable field. The insertion point moves to the next tab stop in the Instruments field instead. You can use the mouse to move to another field.
3. Attempt to click in the Author field. You cannot change the data in this field because it is computed.
4. Compare your screen to Figure 3.6. Although some of your data will differ slightly, you should make sure that all the same fields have some information in them.

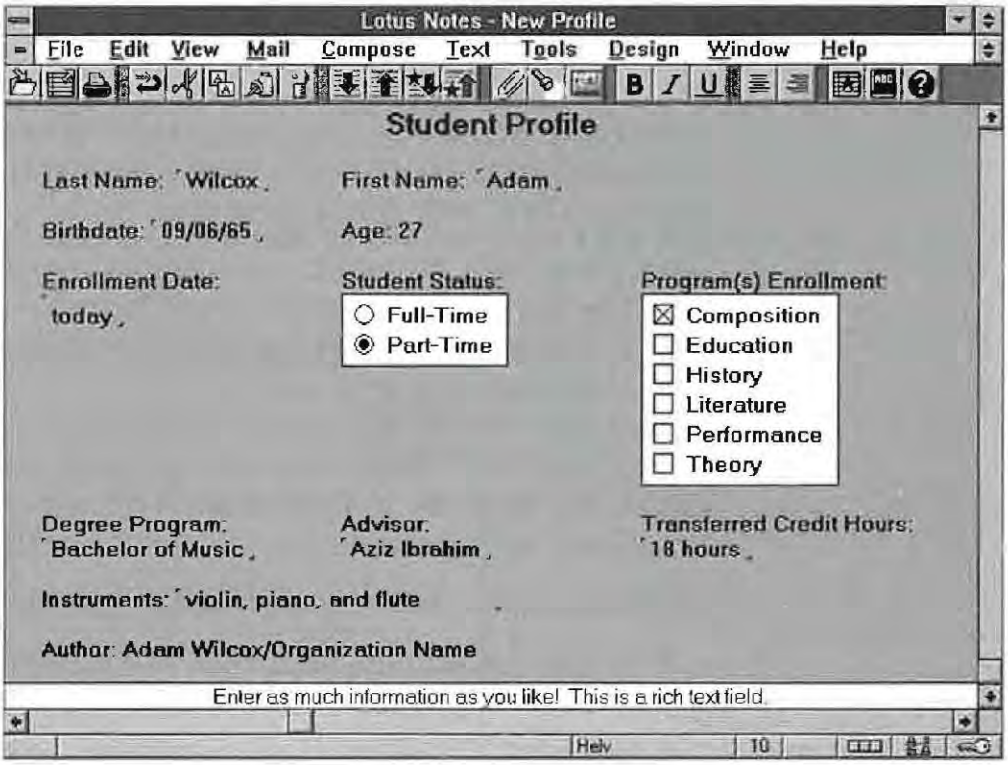


SAVING AND CLOSING A DOCUMENT

After you enter all the necessary information in a form, you must then add it to the database. You do this by saving the document, at which point it becomes part of the database. Unlike electronic mail, you do not *send* a document somewhere—you simply save it. There are two primary ways to save a document:

- Choose *File, Save* (or click on the File Save SmartIcon; it is the first SmartIcon on the left in the default set). This method saves the document but also leaves it open; it is a good choice if you want to save a document while continuing to work on it.

Figure 3.6 **The author's completed Student Profile**



- Close the document (double-click the right mouse button or press Esc). When you close a document that you are either composing or editing, a dialog box appears, asking if you want to save the document. Click on Yes to close and save the document, click on No to close the document without saving it, or click on Cancel to return to the document without saving it.

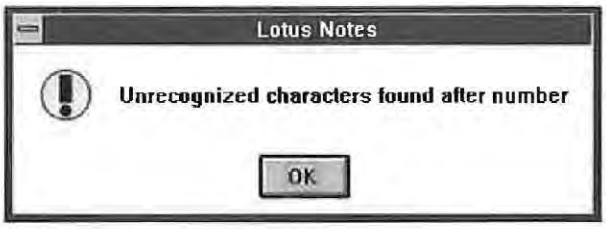
Sometimes, when you are looking at a view, you may not see all the documents that should be displayed. This often happens with *shared databases* (databases that are stored on a server) when someone saves a document to the database while you are in one of its views. You can update a view that you are looking at by choosing View, Refresh View (or by pressing F9).

Note: Because all the databases with which you work in this book are private (stored on your hard drive), this issue will not come up in the book. When using Notes at work or school, however, you will want to use the Refresh command (the F9 key) often. You should experiment with this command on your own—don't worry, it can't do any harm.

Let's save our Student Profile:

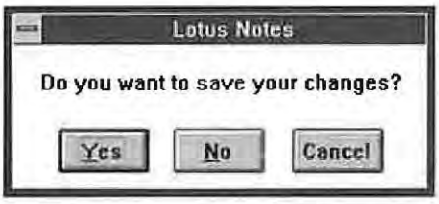
1. Click on the **File Save** SmartIcon (it is the first SmartIcon on the left) to save the current document. Notes displays an error message having to do with the number field (see Figure 3.7).

Figure 3.7 **A Notes error message**



2. Click on **OK** to clear the error message from the screen.
3. In the Transferred Credit Hours field, select (drag over) the text **hours**, and then press **Del** to delete it.
4. Press **F9** to refresh the fields and verify that your input is acceptable. No error message appears this time. Notice also that the text *today* in the Enrollment Date field has been converted to the current date.
5. Close the document by either double-clicking the right mouse button or pressing **Esc**. A message asks if you want to save this new document (see Figure 3.8).

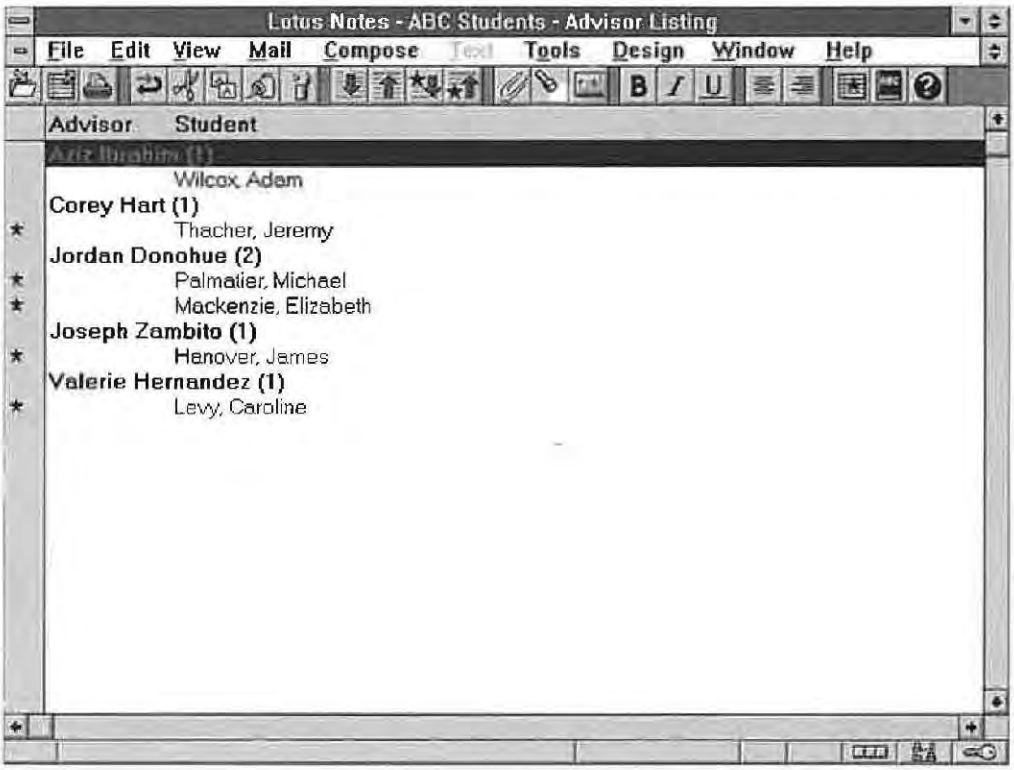
Figure 3.8 **Closing and saving a document**



6. Click on **Yes** to save and close the document.

7. Open the **ABC Students** database and change to the Student Listing view (if necessary). Your Student Profile document appears in the view.
8. Change to the Advisor Listing view. There is a new category in the view for the new advisor (Aziz Ibrahim), and your Student Profile is listed in this category (see Figure 3.9).
9. Change back to the Student Listing view and close the database.

Figure 3.9 **The new Student Profile in the Advisor listing**



COMPOSING RESPONSE DOCUMENTS

Not all databases have forms for composing response documents. In the ABC News database, for example, there is only one form, the main-topic News Item form. In some databases you can respond only to main-topic documents; that is, if you try to respond to a response document, the database will treat your response as if it were associated with the original main topic (the ABC Students database works this way). In still other databases, you can respond to any document (as with the ABC Discussion database).



COMPOSING A RESPONSE TO A MAIN-TOPIC DOCUMENT

You can compose a response to a document either from within the document itself or from within a view. To do so,

- Either open the document to which you wish to respond or select it in a view.
- Choose the appropriate response form from the Compose menu.
- Fill in the fields and save the document.

Let's compose a response to a main-topic document in the ABC Discussion database:

1. Open the **ABC Discussion** database and verify that you are in the Main View.
2. Open the main-topic document **Lunch-time series**. You will compose a response to this document. You can also compose a response to a document without opening it by selecting it in a view.
3. Choose **Compose, Response** and observe the response form (see Figure 3.10). There are two computed fields, Author and Date, which have been filled in automatically. There are two editable fields: one is labeled *Key Thought,* and the other has no label. Often, a rich-text field that is meant to contain the bulk of the text in a document will have no label. Such a field is usually called the body field.
4. In the Key Thought field, type **Great idea!** and then press **Tab** to move to the unlabeled body field.
5. In the body field, type **I think this is a great idea, but the series will need a catchy name. How about Noontime Notes?**
6. Close the response document (press **Esc**) and click on **Yes** to save it.
7. Close the main-topic document and observe the placement of your response document in the view (see Figure 3.11).

   Note: If this were a shared database, you could press F9 at this point to refresh the view and see any documents that your coworkers had added since you opened the view.

Figure 3.10 **A response form**

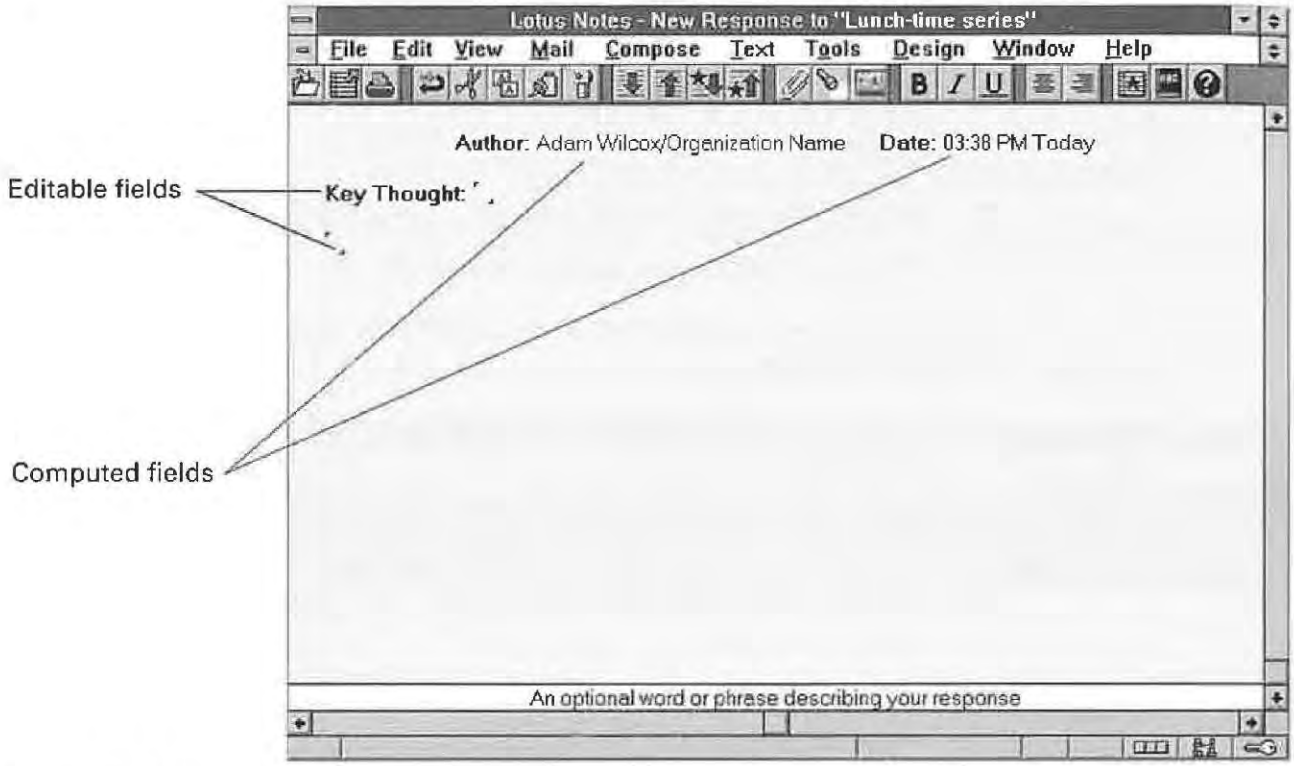
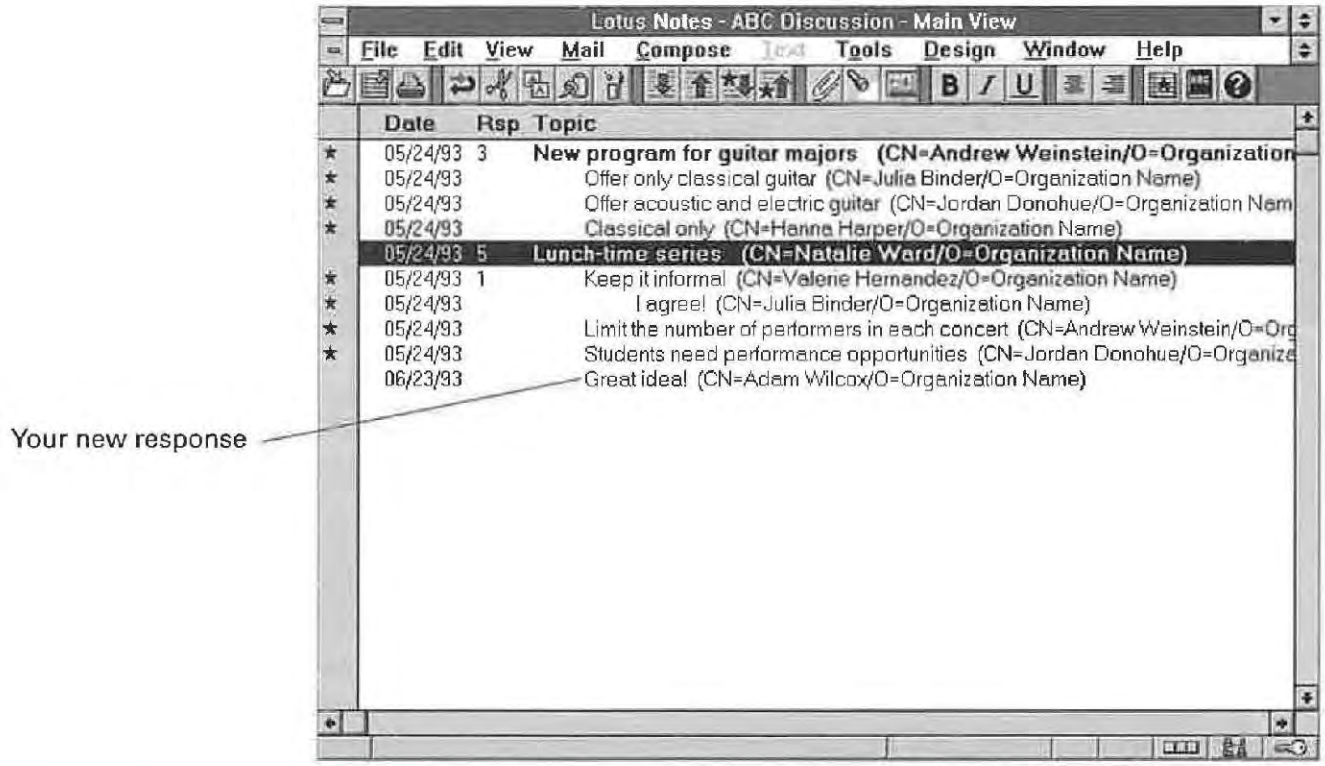


Figure 3.11 **The new response document displayed in the view**



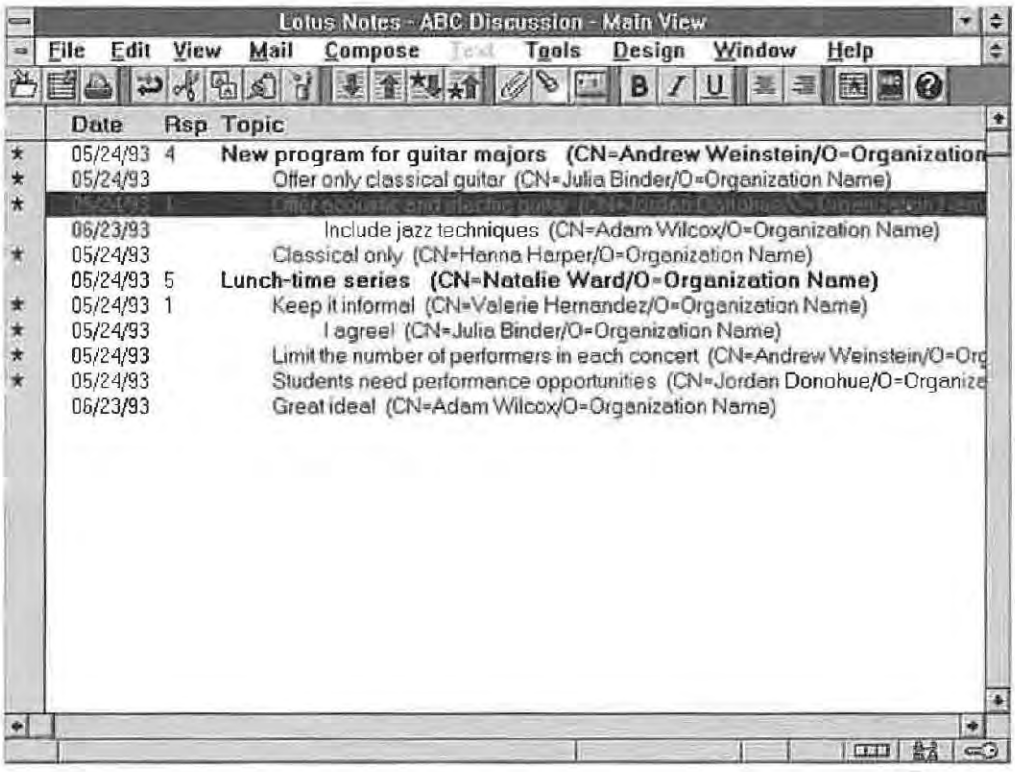


COMPOSING A RESPONSE TO A RESPONSE DOCUMENT

You compose a response to a response document the same way that you compose a response to a main-topic document. In a database that allows responses to response documents, you can have up to 31 levels of responses in a hierarchical view. Let's respond to a response document:

1. Select the response document **Offer acoustic and electric guitar** (it is indented below the first main-topic document).
2. Choose **Compose, Response** to display the response form. In the Key Thought field, type **Include jazz techniques**.
3. Press **Tab** to move to the body field and type **Let's include study of jazz techniques on both acoustic and electric guitar.**
4. Close and save the document, and then observe its placement in the view (see Figure 3.12). The new response document is indented under the response document you selected. Now, close the database.

Figure 3.12 **The view with the new response to a response document**



EDITING DOCUMENTS

When you first compose a document, you do so in *edit mode*. This means that you can change the information in any of the editable fields. You can tell that a document is in edit mode when you can see corner brackets in it. When you open a saved document, it is not in edit mode, and therefore cannot be changed. To place a saved document in edit mode,

- Open the document or select it in a view.
- Choose *Edit, Edit Document* (or press Ctrl+E).

Note: To be able to edit a saved document, you must have the appropriate *access level*. In any database in Notes, the manager of the database decides what actions to allow various users to perform. Each user is assigned an access level that controls this. Generally, you do not have the access level necessary to edit other users' documents, but you almost always have the access level required to edit your own. (We'll discuss access levels again in Chapter 5, and then in detail in Chapter 9.)

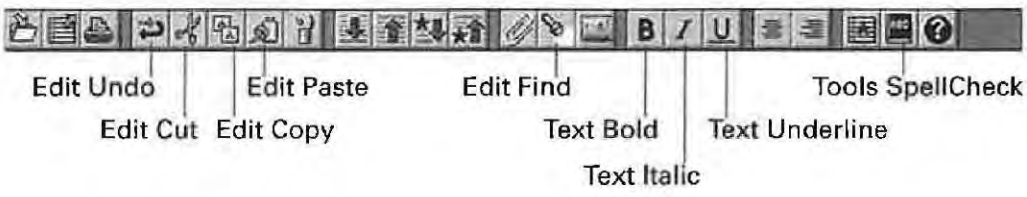
When you are editing a document, you can change information or change its appearance (this is called *formatting*). There are many techniques you can use to accomplish these things.



USING SMARTICONS

You can use the SmartIcon bar to accomplish many editing tasks quickly and easily. As we saw earlier, clicking the right mouse button on a SmartIcon will display its name in the Notes title bar. This is a good way to find out what the SmartIcons do. Figure 3.13 shows the default SmartIcon bar, with some of the SmartIcons labeled.

Figure 3.13 The default SmartIcon bar



Notes comes with seven defined sets of SmartIcons that you can use for various purposes. You can change to a different set in a couple of ways:

- Choose Tools, SmartIcons and then select a set name from the drop-down list at the top of the dialog box.
- Click on the SmartIcons button in the Status bar (it is the third button from the right, and looks like three buttons in a row) and select the desired set name.

You can also use the SmartIcons dialog box to customize a SmartIcon set or to create your own set. We'll see how to do this in Chapter 11.

Let's explore the SmartIcons:

1. Point to the first SmartIcon on the left, press and hold the right mouse button, and observe the Notes title bar. The name of the SmartIcon, *File Save*, is displayed. The names of SmartIcons often correspond to the menu choices with which they are associated.
2. Release the mouse button and then choose **Tools, SmartIcons** to display the SmartIcons dialog box (see Figure 3.14). You can use this dialog box to change SmartIcons sets, to change the position of the SmartIcon bar, or to customize SmartIcons.
3. Scroll down in the Default Set of SmartIcons (the list on the right). The list shows each SmartIcon and its name in the order in which it appears in the SmartIcon bar.
4. Scroll through the Available Icons list. There are 120 SmartIcons, including one for each command in the Notes menu.
5. Click on the drop-down arrow to the right of the Position box and observe the options. You can place SmartIcons in one of five positions in the workspace.
6. Click on **Cancel** to close the dialog box.
7. In the Status bar, click on the SmartIcons button (it is the third button from the right) to display a list of the names of available sets of SmartIcons (see Figure 3.15). You can use different sets of SmartIcons when you are performing different kinds of actions. The default set contains SmartIcons that are useful in a variety of situations.

Figure 3.14 **The SmartIcons dialog box**

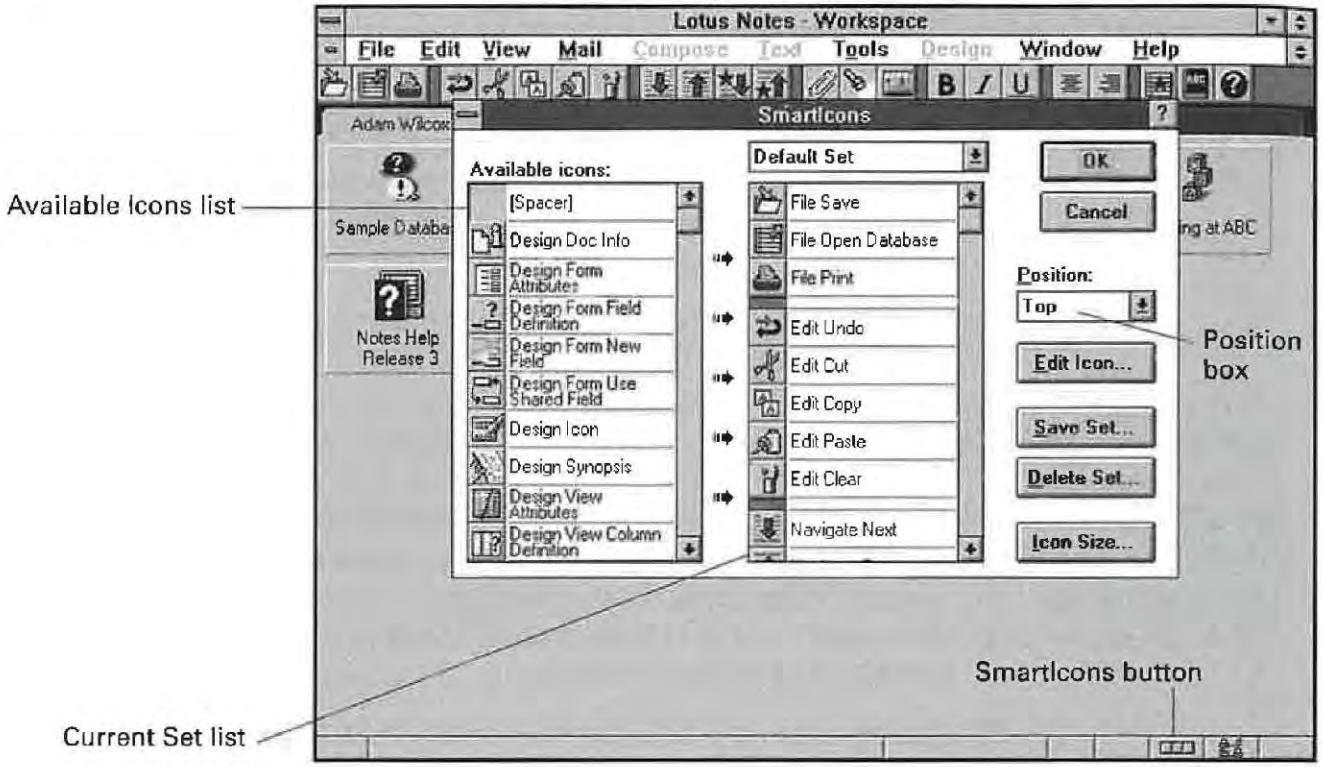
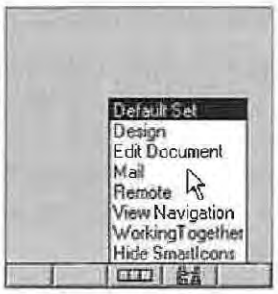


Figure 3.15 **Displaying a list of SmartIcon sets**





OPENING A DOCUMENT IN EDIT MODE

As we mentioned earlier, you place a saved document in edit mode by either opening it or selecting it in a view and then choosing Edit, Edit Document (or pressing Ctrl+E). When you edit a document, there are several keyboard techniques that you can use to move around in it and select text. Table 3.1 summarizes some of these.

Table 3.1 **Notes Keyboard Editing Techniques**

Press	To
Home	Move to the beginning of the current line
End	Move to the end of the current line
Ctrl+Right Arrow (or Ctrl+Left Arrow)	Move one word to the right (or left) of the insertion point
Shift+Right Arrow (or Shift+Left Arrow)	Select the character to the right (or left) of the insertion point
Shift+Home (or Shift+End)	Select from the insertion point to the beginning (or end) of the current line
Ctrl+End	Move to the last editable field in a document
Ctrl+Home	Move to the first editable field in a document

Let's edit one of the documents you created earlier in this chapter:

1. Open the database **ABC Discussion**, and then open your response document **Great idea!**. There are no corner brackets indicating editable fields, and there is no insertion point. Also notice that there is no Field Help at the bottom of the screen. When you open a document, you can read it but you cannot change it.
2. Choose **Edit, Edit Document** (or press **Ctrl+E**) to place the document in edit mode (see Figure 3.16). You can now see corner brackets and the insertion point, and Field Help appears at the bottom of the screen. You will change this document to suggest two possible names for the noontime performance series.
3. Press **Ctrl+End** to move to the end of the last editable field in the document (the body field).
4. Press **Enter** twice to insert two blank lines.
5. Type **1)**, press **Spacebar**, and then press **Enter** to make room for one possible name.
6. Type **2)** and then press **Spacebar** to make room for another possible name. Your screen should resemble Figure 3.17. We will use new editing techniques in a few moments to put our ideas for names in these spaces.

Figure 3.16 **Placing a document in edit mode**

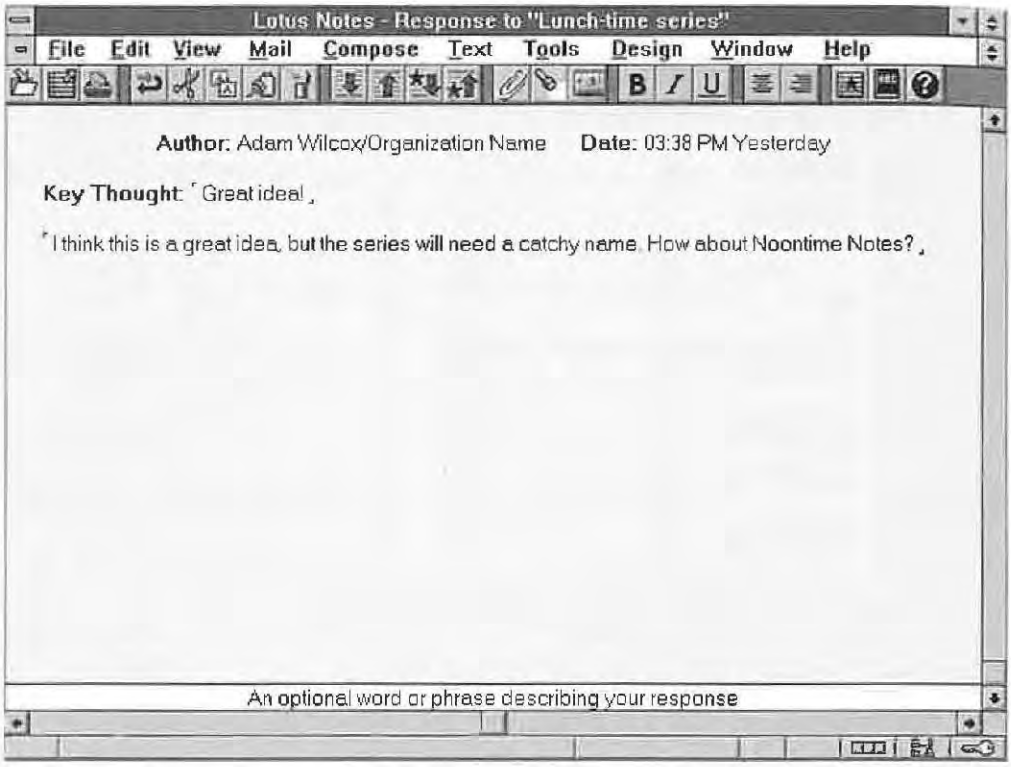
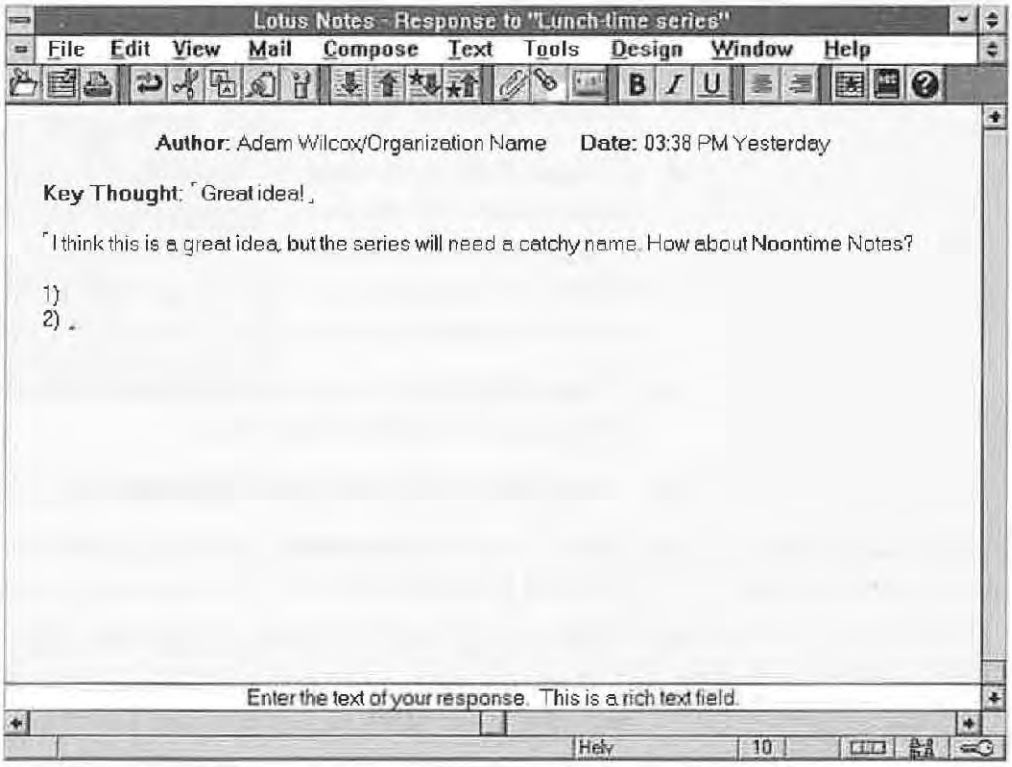


Figure 3.17 **The partially edited document**





MOVING TEXT IN A DOCUMENT

If you have used a Windows word processing program, then many techniques for selecting and editing text in Notes will be familiar to you. You can use the mouse to select text you wish to act upon (move, copy, or format) by dragging over it. A selection shortcut that is often useful is pointing to a word and double-clicking to select it.

You can use menu commands or the SmartIcon bar to move text within a document. Whichever method you use, the process has four steps:

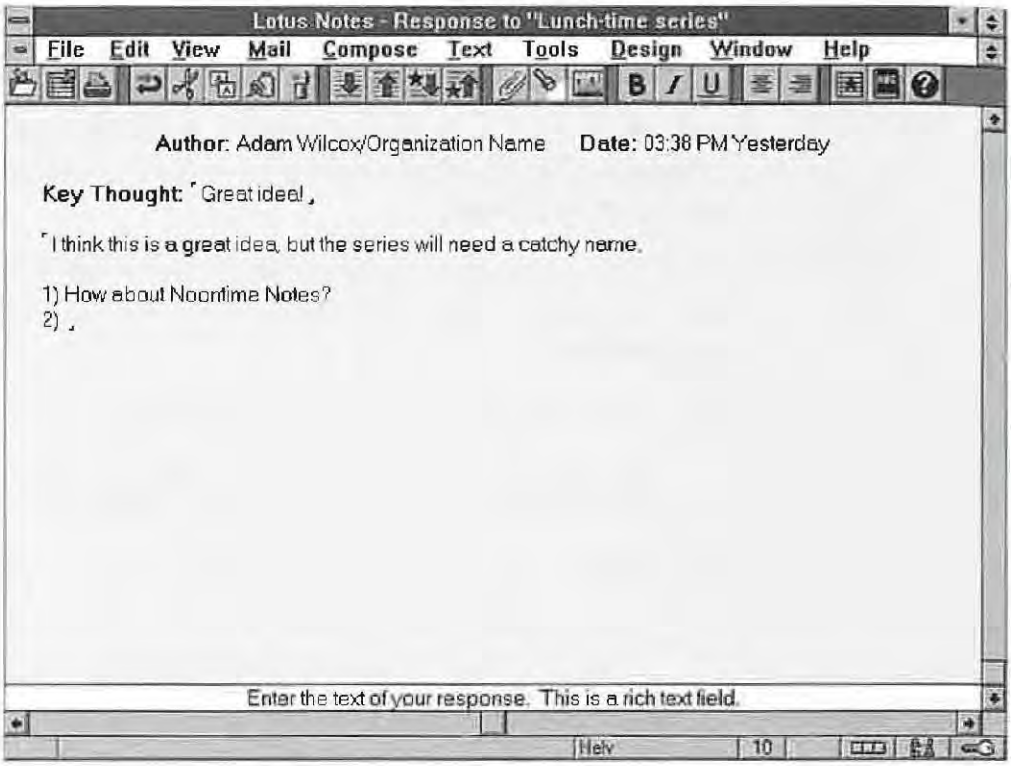
- Select the text you wish to move.
- Choose *Edit, Cut* (or click on the Edit Cut SmartIcon) to move the text to a temporary storage place called the *Clipboard.*
- Place the insertion point where you want the text to go.
- Choose *Edit, Paste* (or click on the Edit Paste SmartIcon) to paste the text that is on the Clipboard into the document.

Sometimes, you may perform an action accidentally, or it might not have worked the way you expected. When this happens, you can use the *Edit, Undo* command or the Edit Undo SmartIcon to undo your last action (you can refer to Figure 3.13 to find this SmartIcon).

Let's move some text in our document:

1. In the body field, point to the word **Notes** and double-click to select it. This is a useful way to select a single word. Tip: If you continue to hold the mouse button down on the second click, you can drag to the left or right to select the text word by word instead of character by character.
2. Drag over the text **How about Noontime Notes?** to select it. You will move this text down to become the first numbered item. The first step in moving text is always to select it.
3. Click on the **Edit Cut** SmartIcon (it looks like a pair of scissors) to remove the selected text from the document and place it on the Clipboard.
4. Click to place the insertion point after the text *1)* and then click on the **Edit Paste** SmartIcon (it looks like a bottle of rubber cement). Your document should resemble Figure 3.18.

Figure 3.18 **Moving text within a document**



5. Click on the **Edit Paste** SmartIcon again and observe the results. Another copy of the text is placed at the insertion point. When you cut text (or copy it) to the Clipboard, it remains there until you cut (or copy) something else. This allows you to paste as many copies of something as you like.
6. Click on the **Edit Undo** SmartIcon (it is the fourth SmartIcon from the left) to remove the second copy of the text from the document. The Undo command undoes only the most recent action that you performed; in this case, the second Paste command.



COPYING TEXT IN A DOCUMENT

The process of copying text is just like that for moving text, except that the original text is not removed from the document. Copying is also a four-step process:

- Select the text.

- Choose *Edit, Copy* (or click on the Edit Copy SmartIcon) to place a copy of the selected text on the Clipboard.
- Place the insertion point where you wish to put a copy of the text.
- Choose Edit, Paste (or click on the Edit Paste SmartIcon).

Let's try it:

1. Select the text **How about**. You will place a copy this text in the second numbered space in the document.
2. Click on the **Edit Copy** SmartIcon (it is the double *A* between the Edit Cut and Edit Paste SmartIcons) to place a copy of the selected text on the Clipboard.
3. Press **Ctrl+End** to move to the end of the field—located just after the text *2).*
4. Click on the **Edit Paste** SmartIcon to paste the copied text at the insertion point.
5. Press **Spacebar** and then type **Notes at Noon?** to complete the second numbered item. Your document should resemble Figure 3.19.

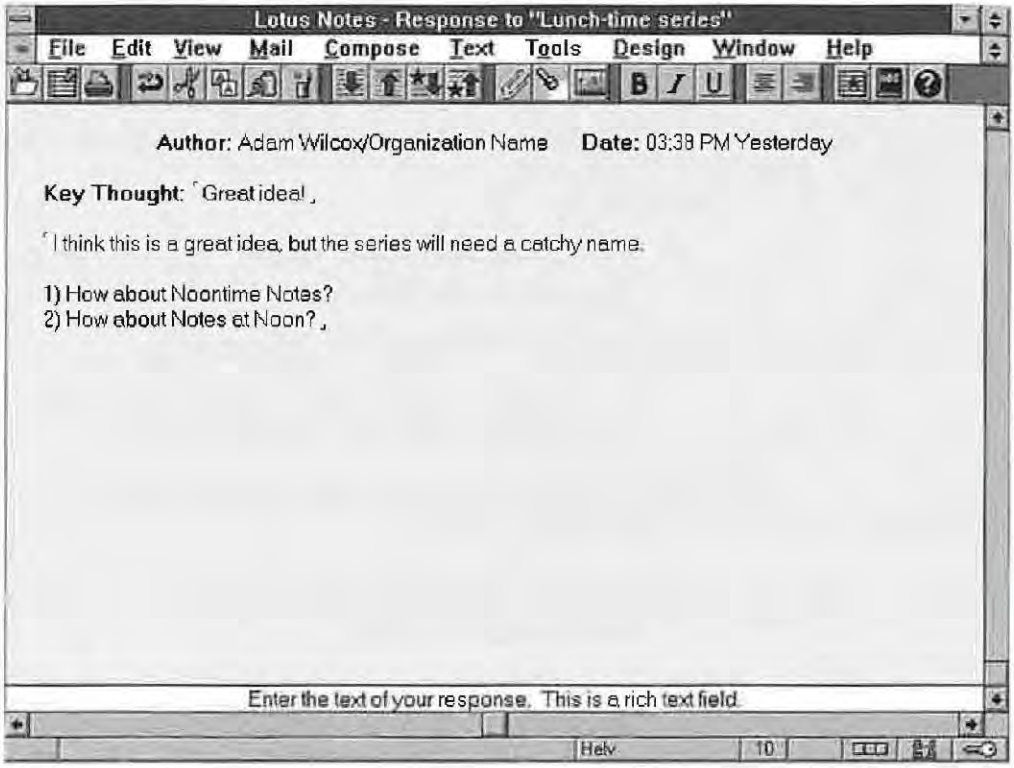


CHECKING SPELLING

You can check the spelling of either selected words or entire documents while you edit a document. To do so, follow these steps:

- To check the spelling of a single word or a group of words, select the word or words; to check the spelling of all the words in a document, place the insertion point within any field but do not select any text.
- Choose *Tools, Spell Check* (or click on the Tools SpellCheck SmartIcon).
- The Tools Check Spelling dialog box gives you one or more options for each unrecognized word Notes encounters:
  - Click on *Guess* to display a list of alternative words.
  - Select a word in the Guesses list and click on *Correct* to replace the unrecognized word.

Figure 3.19 **Copying text within a document**



- Click on *Accept* to accept all occurrences of the word in the document. This is useful, for example, when Notes does not recognize a name that you have used several times in a document.
- Click on *Ignore* to accept only this occurrence of the word. If Notes encounters the same word later in the document, the word will be checked again.
- Click on *Define* to add the word to a dictionary.
- Click on *Done* to close the dialog box.

Let's add a little more text to our document and then check our spelling:

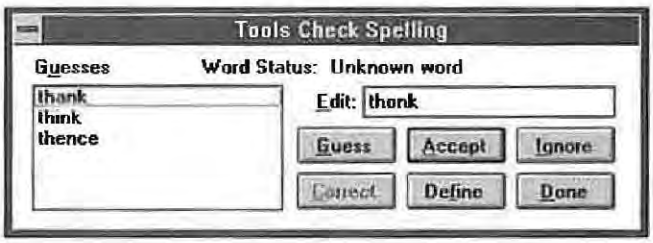
1. Press **Enter** twice and then type **What do you thonk?** (yes, we want it misspelled).

   Note: In the steps that follow, you will check the spelling of the words in your document. The steps assume that everything is spelled a particular way. If you have used alternate

spellings along the way, then your exact steps may differ from those below.

2. Click on the **Tools SpellCheck** SmartIcon (it is the second SmartIcon from the right) to open the Tools Check Spelling dialog box. The spell check has found *thonk* because it is not a word.
3. Click on **Guess** to display a list of alternatives to *thonk* (see Figure 3.20). The Guesses list suggests three possible spellings.

Figure 3.20 **Using the Tools Check Spelling dialog box**



4. In the Guesses list, select **think** and then click on **Correct** to replace *thonk* with the correct word, *think*. Notes displays a message, telling you the check is complete.
5. Click on **OK** to accept the message and close the dialog box.
6. Close the document and save changes to it when you are prompted to do so.

MANAGING DOCUMENTS

There are many ways you can work with documents in a database. One useful feature is the ability to find documents that contain a particular item of text. Notes has search features that allow you to do this. You can mark documents in a view as read or unread in a number of ways. You can also print Notes documents individually or in groups.

To work with documents in a view, you must select them. To select multiple documents, click in the far-left column of the view (the column containing the unread markers) next to each document that you wish to select. A check mark appears next to each document you select. To deselect a document, click on the check mark again.



SEARCHING THROUGH DOCUMENTS AND VIEWS

You can search for specific text either in a view or in the documents in a view by using the *Edit, Find* command. To do so,

- Select the documents within which you wish to search.
- Choose Edit, Find (or click on the Edit Find SmartIcon) to display the Find dialog box.
- Type the text for which you wish to search.
- Select any desired options:
  - The *Case Sensitive* option finds only the exact combination of upper- and lowercase letters that you type.
  - The *Accent Sensitive* option finds documents containing any special accented characters that you type.
  - The *Whole Word* option will find only occurrences that match each and every character of the text you specify for the search. For example, with this option selected, a search for the text *rat* would find only the word *rat*—and not *rats, ratchet, Surat,* and so on.
- Click on *Find All.* All the documents that contain the specified text are marked as selected in the view.

Let's search for some text in the documents in the Main View of the ABC Discussion database:

1. Click on the **Edit Find** SmartIcon (it looks like a flashlight) to display the Find dialog box.
2. In the Find box, type **students** (see Figure 3.21). You will search for documents that contain this text.

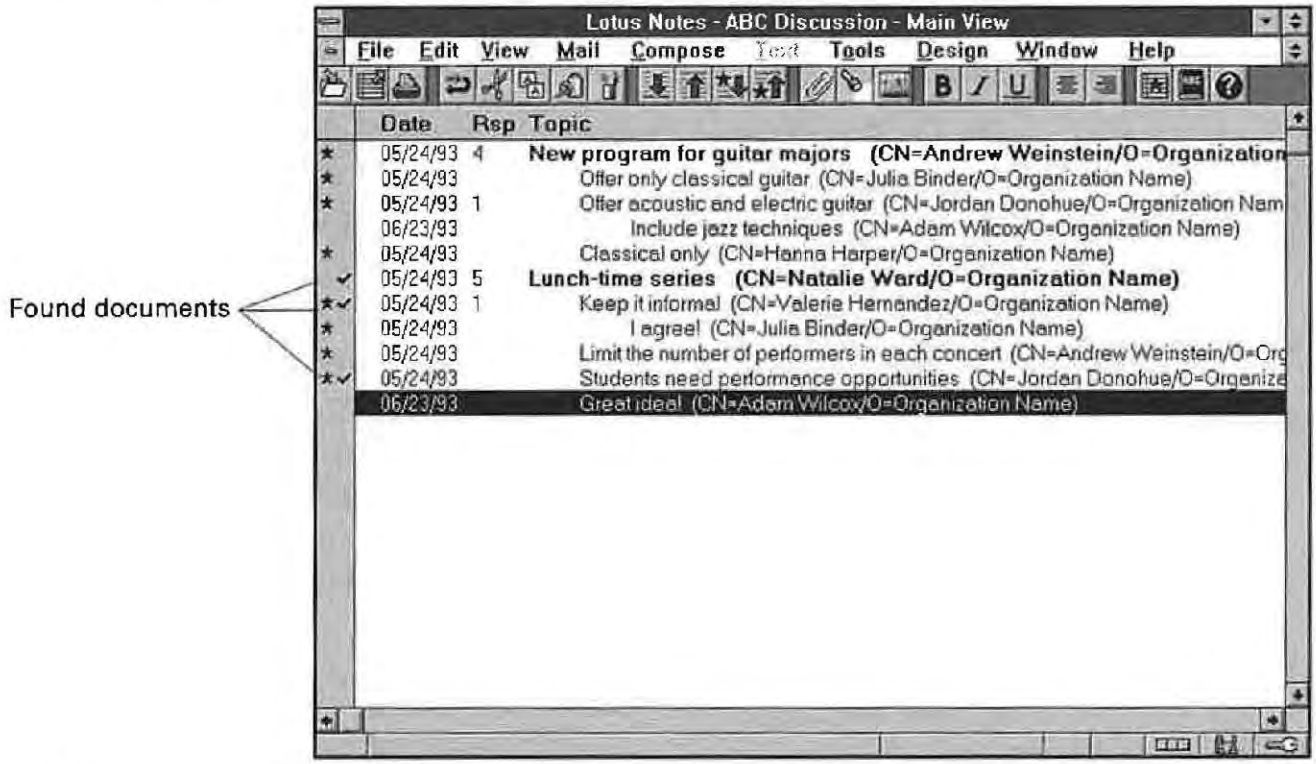
Figure 3.21 **Searching for the text *students***



3. Verify that **Search Selected Document(s)** is selected. The other radio-button option, Search Within View, will search only the text that is displayed in the view. There are currently no documents selected in the view; when you do not select specific documents, all the documents in the view will be searched.

4. Click on **Find All** to find the documents that contain the specified text. Check marks in the left-hand column of the view indicate that three documents contain the text *students* (see Figure 3.22).

Figure 3.22 **The found documents selected in the view**





MARKING DOCUMENTS AS READ OR UNREAD

Sometimes you might want to mark documents as read or unread. Say, for example, you add a new discussion database to your workspace and it has 1,000 documents in it. Chances are you will not read all 1,000 documents, but rather will join new discussions as

they arise. Notes has features to allow you to mark all the documents as read or unread. To do so,

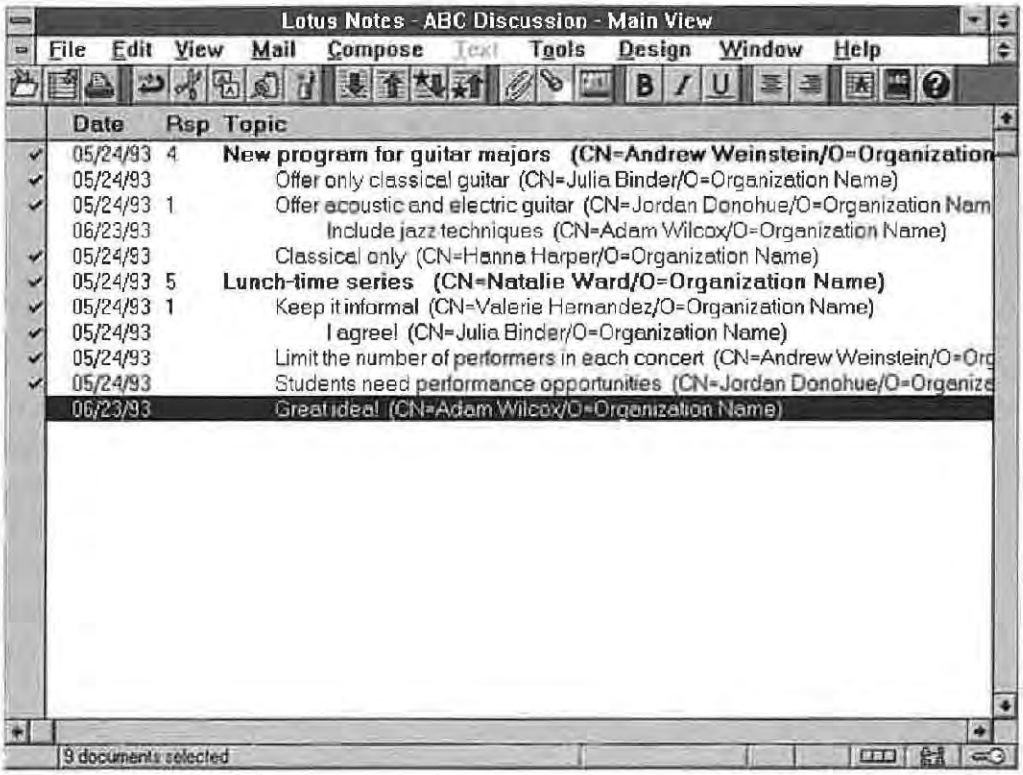
- Select the documents that you want to mark as read or unread (if you want to mark all the documents, you do not need to select any).
- Choose *Tools, Unread Marks* and then select one of the four options in the submenu that appears: *Mark Selected Read, Mark All Read, Mark Selected Unread,* or *Mark All Unread.* The names of the commands are self-explanatory.

There are also menu commands that you can use to select or deselect all the documents in a view. Choose *Edit, Select All* to mark all the documents in a view as selected; choose *Edit, Deselect All* to deselect all the documents in a view.

Let's experiment with some of these commands in the ABC Discussion database:

1. Choose **Tools, Unread Marks, Mark All Read.** All the unread markers disappear from the left-hand column of the view.
2. Choose **Edit, Select All** to select all the documents in the view. Check marks appear in the left-hand column next to all the documents.
3. Click on the check marks next to the two documents you composed to deselect them. Your screen should resemble Figure 3.23.
4. Choose **Tools, Unread Marks, Mark Selected Unread** to place unread markers next to all the selected documents. A message in the Status bar says there are nine remaining unread documents.
5. Select the document **Classical Only.** You will mark this document as read.
6. Choose **Tools, Unread Marks, Mark Selected Read** to remove the unread marker from the selected document.
7. Choose **Tools, Unread Marks, Mark All Read** to remove the unread markers from all the documents once again.

Figure 3.23 **Selecting documents in a view**





PRINTING DOCUMENTS AND VIEWS

You can print views, documents, or groups of documents by using the *File, Print* command. To be able to print, your computer must first be connected to a printer (or to a network that is connected to a printer). To print a group of documents in a view:

- Select the documents that you wish to print.
- Choose File, Print to display the File Print dialog box.
- Verify that *Print Selected Documents* is selected, and choose the desired option from the Document Separation drop-down list. The *Page Break* option will cause each document to be printed on a separate page; *Extra Line* will cause the documents to be printed continuously, separated by a line; and *No Separation* will cause the documents to be printed continuously with no visible separation.

  Note: If you select the Page Break option, then you can also select the Reset Page Numbers option. This option causes headers, footers, and pagination to be reset at the beginning of each document.

- Click on OK to print the document.

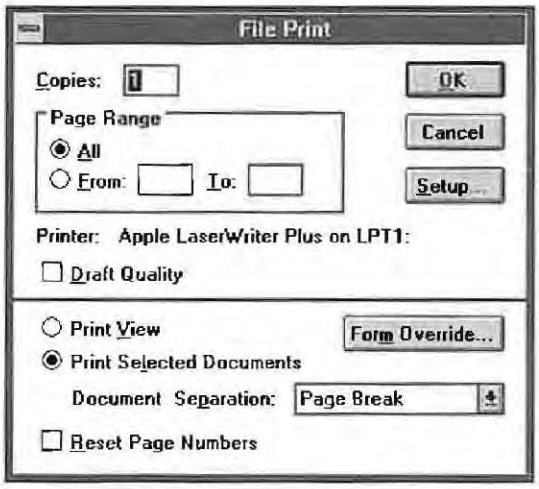
To print a view,

- Open the view you wish to print.
- Choose File, Print to display the File Print dialog box.
- Select Print View and click on OK.

Let's examine some printing options:

1. Select the three response documents to the first main-topic document (click in the left column next to each of them).
2. Choose **File, Print** (or click on the **File Print** SmartIcon; it is the third SmartIcon from the left) to display the File Print dialog box (see Figure 3.24). The Print Selected Documents option is selected by default. To print the view, you would click on Print View. You can choose to print more than one copy of the selected documents, but in general it is more economical to print one copy and then use a copier to make more.

Figure 3.24 **Printing selected documents**



3. Click on the drop-down arrow next to the Document Separation box, and choose **Extra Line**. Unless you have a specific reason to print each document on a separate page, you should choose either the Extra Line or No Separation option to conserve paper when you print.

Note: While we're on the subject of conservation, one of the main advantages of Notes is that it eliminates the need for redundant paper copies of documents. Sometimes it *is* necessary to print documents, but you should give it some thought before you do so. Remember, Notes documents are always at your "electronic fingertips" in the databases where they reside.

4. Click on **Cancel** to close the dialog box without printing the selected documents. (If you are connected to a printer, and you would like to print these documents, go ahead and click on **OK**.)
5. Choose **Edit, Deselect All** to deselect the three selected documents.
6. Close the database.

SUMMARY

In this chapter, you learned the basics of working with database documents. You learned how to use forms to compose new documents, including how to fill in the various kinds of fields. You learned that you must place a document in edit mode to change it, and that you can use several standard editing techniques when you do so. Finally, you learned a few ways to manage documents, including searching through them for specific text, marking them as read or unread, and printing.

Here is a summary of some of the techniques you learned in this chapter:

Desired Result	**How to Do It**
Compose new document	Select or open database, choose desired form from Compose menu, fill in fields, save document
Turn Field Help on or off	Choose **View, Show Field Help**
Enter information in text, number, date, or rich-text field	Click in field and type
Move to next editable field in form	Press **Tab**

Desired Result	How to Do It
Delete previous character	Press **Backspace**
Delete previous word	Press **Ctrl+Backspace**
Enter today's (yesterday's) date in time/date field	Type **today** (or **yesterday**)
Refresh fields	Choose **View, Refresh Fields** or press **F9**
Select options in checkbox keyword field	Click on check box next to each desired option
Select option in radio-button keyword field	Click on radio button next to desired option
Select option in standard keyword field	Press **Enter**, select option, and click on **OK** (or cycle through options using **Spacebar**, or press first letter of desired option)
Save document	Choose **File, Save** or click on **File Save** SmartIcon
Close and save document	Press **Esc** (or double-click right mouse button) and click on **Yes**
Refresh view	Choose **View, Refresh View** (or press **F9** while in view)
Compose response document	Open or select document to which you wish to respond and choose appropriate response form from Compose menu
Place document in edit mode	Choose **Edit, Edit Document** (or press **Ctrl+E**)
Change SmartIcon set	Click on **SmartIcon** button in Status bar and choose desired set
Move to end of last editable field in document	Press **Ctrl+End**

Desired Result	How to Do It
Select word	Double-click on it
Move text	Select text; choose **Edit, Cut** (or click on **Edit Cut** SmartIcon); place insertion point where you want text to go; choose **Edit, Paste** (or click on **Edit Paste** SmartIcon)
Copy text	Select text; choose **Edit, Copy** (or click on **Edit Copy** SmartIcon); place insertion point where you want text to go; choose **Edit, Paste** (or click on **Edit Paste** SmartIcon)
Undo last action	Choose **Edit, Undo** or click on **Edit Undo** SmartIcon
Check spelling of document	Place insertion point in any field (do not select any text); choose **Tools, Spell Check**; and correct or ignore unrecognized words as desired
Select multiple documents in view	Click in left-hand column next to each document you wish to select
Search for documents containing specific text	Select documents to be searched; choose **Edit, Find** (or click on **Edit Find** SmartIcon); type text to search for; click on **Find All**
Mark documents as read or unread	Select documents; choose **Tools, Unread Marks**; choose desired command from submenu
Select (deselect) all documents in view	Choose **Edit, Select All** (or **Deselect All**)
Print selected documents	Choose **File, Print**; choose one Separation option; click on **OK**

In the next chapter, you will learn how to use Notes Mail. We'll take a look at your Mail database and learn how to compose memo documents. You will also learn about several mail features,

including using Name & Address Books, attaching files, and forwarding memos.

IF YOU'RE STOPPING HERE

If you wish to stop here, please choose **File, Exit** to exit Notes (you will need to restart Notes when you begin Chapter 4). If you wish to proceed directly to Chapter 4, please do so now.

CHAPTER 4: USING NOTES MAIL

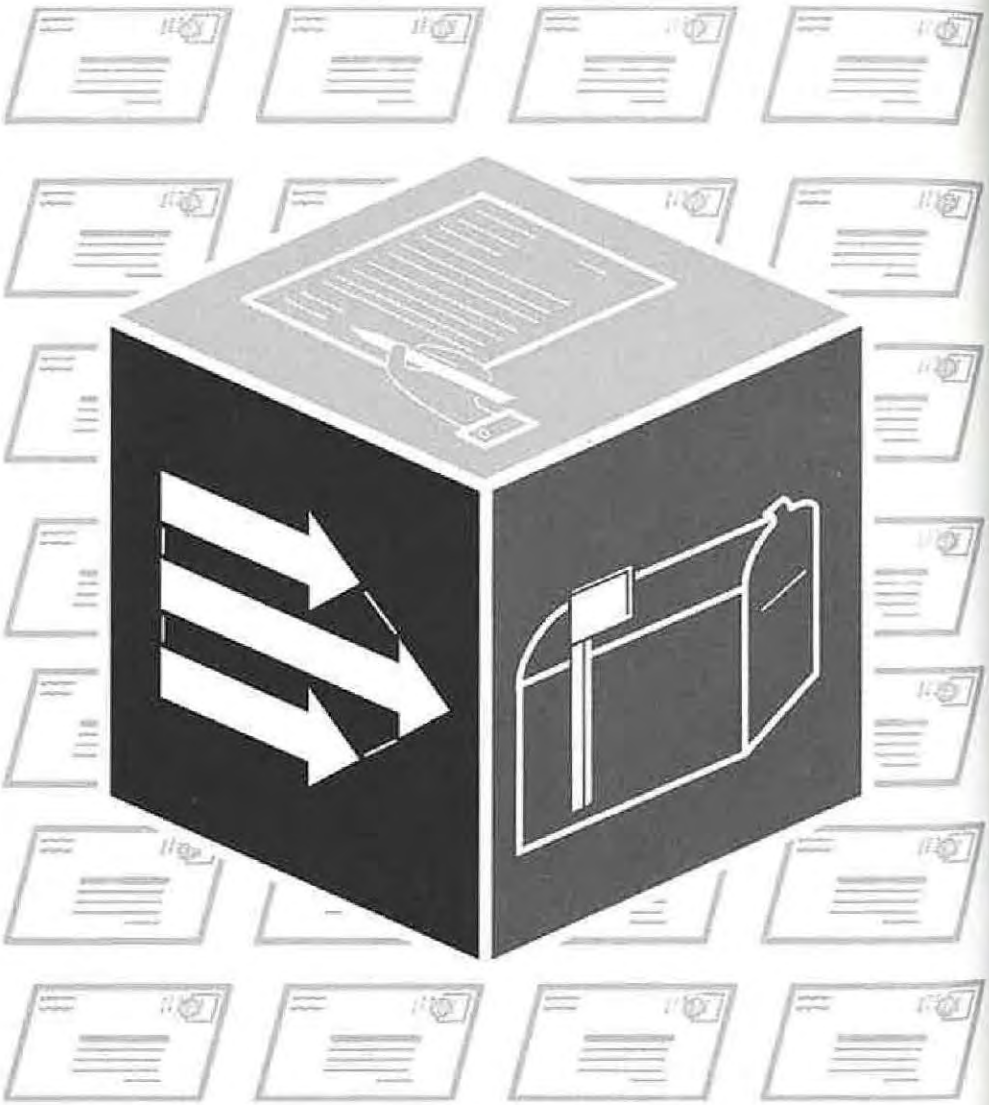
Introduction to Notes Mail

Composing and Sending Memos

About Other Mail Features

Managing Your Mail

Creating Mail Groups



Notes Mail is a special Notes application that allows you to perform many of the traditional functions of electronic mail. In this chapter, you will learn how Notes Mail works and some of the ways in which you can use it. In addition to learning how to send, reply to, and forward messages, you will learn some of the more specialized features of Notes Mail, including how to use Name & Address Books and attach files. We will also use the Mail database to discuss categorizing and deleting documents.

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

- How to open your Mail database
- How to compose and send a memo document
- How to use a Name & Address Book to address a memo
- How to attach a file to and detach a file from a memo
- How to reply to or forward a memo
- How to categorize, delete, and undelete documents
- How to compose a Mail Group document in your personal Name & Address Book

INTRODUCTION TO NOTES MAIL

Most Notes databases allow many users to create and read documents. Notes Mail is a special application in which each user has a database in which others can save documents. Other users cannot, however, read documents in any database besides their own. *Sending* documents to each others' Mail databases provides an excellent way for members of a workgroup to communicate with each other.

The server where your Mail database resides is called your *Mail Server.* It is likely that many other users' Mail databases will be stored on the same server as yours is. A directory of Notes users is kept in a special database called the *public Name & Address Book.* Because Notes users can be on separate servers on a network, a copy of the public Name & Address Book resides on each server to allow users to send mail between servers. A *Domain* is a group of Notes servers that all use copies of the same public Name & Address Book.

In addition to the public Name & Address Book, each user also has a personal Name & Address Book stored on his or her own workstation. You can use this address book to compose *groups* of users to whom you often send mail. You can then send mail to all the members of the group by using just one address instead of many. We will discuss how to do this toward the end of this chapter.



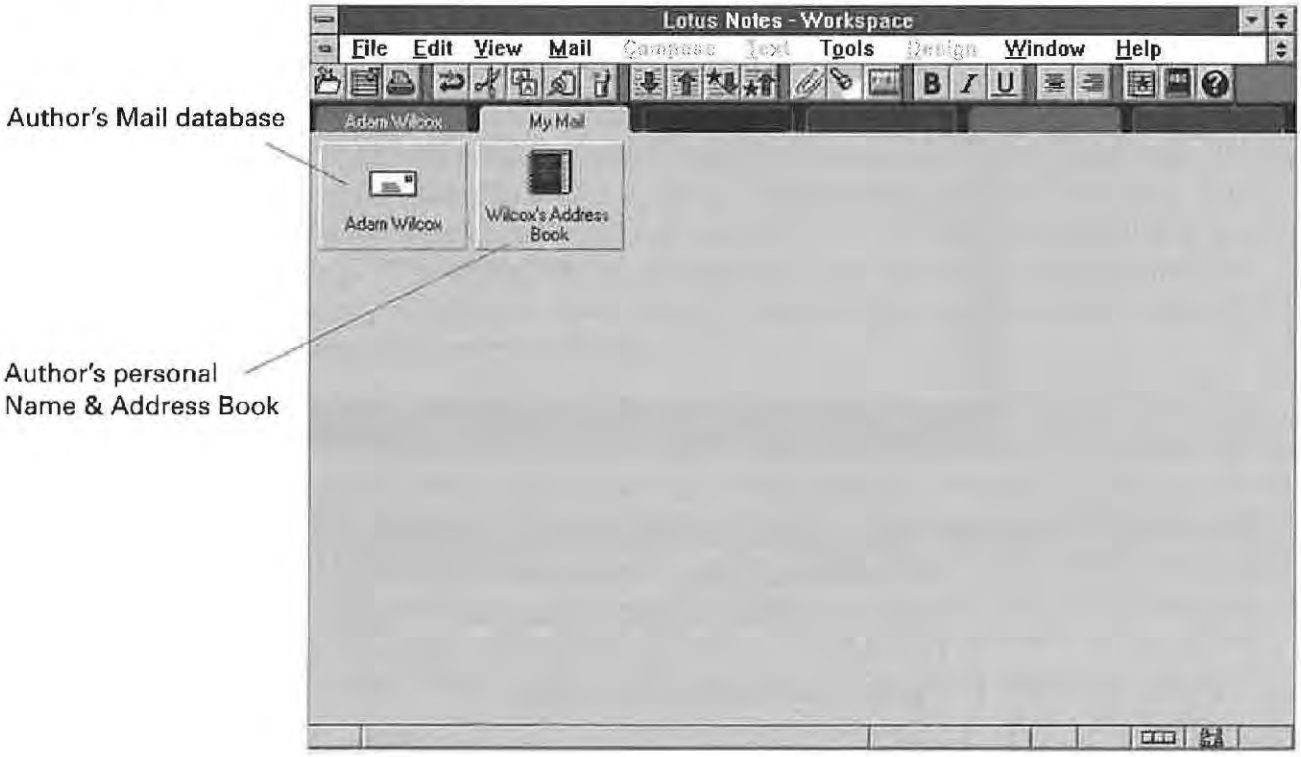
EXAMINING YOUR MAIL DATABASE

You can open your Mail database, like any other database, by double-clicking its icon. Unlike other databases, however, you can also open your Mail database by using the menu. The entire Mail menu is devoted to Notes Mail, which allows you to use Mail features from anywhere in the Notes workspace (even when you are in a view of another database). You read Mail documents the same way you read documents in any other database.

Let's open your Mail database and explore its structure:

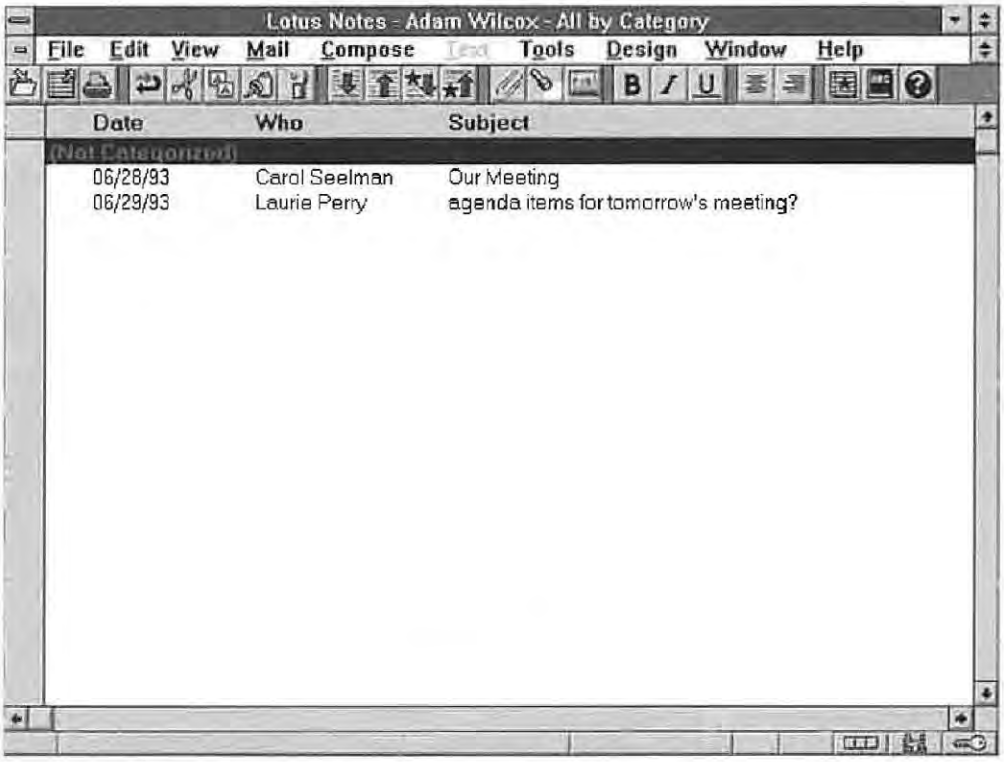
1. Activate the second workspace page and identify your Mail database and personal Name & Address Book (see Figure 4.1). Your Mail database icon, by default, shows a picture of an envelope and your user name. Your personal Name & Address Book also has your name on it.

Figure 4.1 Mail databases



2. Double-click on your Mail database icon to open it (if you are asked to enter your password, please do so and then click on **OK**). The default view of your mail database, called All By Category, has three columns: Date, Who, and Subject. Figure 4.2 shows the default view of the author's Mail database; the structure of yours will be the same, although you will see different documents (or you may see no documents at all). This is a categorized view.

Figure 4.2 **The default view of the author's Mail database**



3. If you have any documents in the view, double-click on one of them to open it. You open Mail documents the same way you open documents in any other database. (If you do not yet have any documents in this database, don't worry; we're going to create some soon.)

4. Close the document (if one is open) and then close the database.

5. Choose **Mail, Open**. This is another way to open the Mail database. This method is useful when you wish to open your mail from a workspace page that does not contain your Mail database, or even when you are in a view of a different database.

PRACTICE YOUR SKILLS

1. Examine the forms that are available in your Mail database (look in the Compose menu).
2. Change to some of the different views in the Mail database and examine them.
3. Change back to the All By Category view.

COMPOSING AND SENDING MEMOS

As in other databases, you compose memo documents in the Mail database by choosing a form from the Compose menu. If you are composing a new memo (as opposed to replying to or forwarding a memo), you will usually use the Memo form.

When you prepare a letter in the world of paper mail, you write it, place the address of the recipient and your return address on the envelope, place the letter in the envelope, seal it, stamp it, and send it on its way. The procedure for sending Notes mail is similar. With Notes Mail, you still need to address and compose a memo, but you don't need an envelope, and the return address is included automatically.

When you use electronic mail of any kind, it is important to bear in mind some of the ways in which it is different from other forms of communication. As is the case when you speak on the telephone, the person on the other end of the mail message does not have the benefit of your body language and facial expressions to help interpret your meaning. This may not sound like a big deal, but in fact it provides fertile ground for a misunderstanding. Here are some things to think about when composing electronic mail:

- It is difficult to convey irony in electronic mail. If you're trying to be funny, give the recipient some clear signal that this is your intention. One common trick is to include the electronic happy face :-) (you read this sideways).

- Strong emotions of any kind work poorly in electronic mail. Negative emotions in particular can be intensified by the flat nature of the medium. Praise usually can travel unscathed and works well, but criticism is better delivered in person. If you are writing a message that has an emotional content, a good general rule to follow is to write it and then wait a day or two before deciding whether to send it. You will often find that distance allows you to better understand how someone else might interpret what you have written.
- Think long and hard before emphasizing a word by using capital letters or including vulgarities that you might use in conversation. Capital letters are the electronic equivalent of shouting, and things that might be considered normal in conversation can be much more shocking in print.

Another thing you should keep in mind is that Notes Mail is not really private. It's not as if Big Brother is watching you, but there is always someone (namely the Notes Administrator) who can—but by code of ethics should not—read what is in your Mail database. For this reason, you should be careful when writing things you do not want anyone else to see. The Electronic Privacy Act of 1986 prevents unauthorized people from reading your mail, but this act has been interpreted in different ways in different cases. You might want to review your company's policy concerning this issue.



COMPOSING A MEMO DOCUMENT

To compose a memo document, you choose Compose, Memo and then complete the desired fields in the memo form. These fields include

- The *To* field, in which you specify the user(s) to whom you wish to send the memo. If you know the exact name (case is not important) of the user to whom you wish to send the memo, you can simply type it (use commas to separate the names of multiple users). Notes also provides access to the Name & Address Books while you compose Mail documents; we will discuss this feature later in the chapter.
- The *cc* field, in which you specify the names of users who are to receive "carbon copies" of the memo.

- The *bcc* field, in which you specify the names of users who are to receive "blind" carbon copies of the memo. Users listed in the To field will not know if or to whom blind carbon copies have been sent.
- The *From* and *Date* fields, which are computed fields that indicate the author of the document and its creation date and time.
- The *Subject* field, a text field that you use to give a brief description of the memo. The information in this field will appear in most views of the recipient's Mail database, so you should try to make this information as useful and accurate as possible.
- The *body* field, which is the unlabeled field below the Subject field. This is a rich-text field in which you compose the body of your message.

There are also four additional fields below the body field that have to do with delivery options. We will get to these shortly. For now, let's begin to compose a memo document:

1. Choose **Compose, Memo** and examine the Memo form (see Figure 4.3). In addition to several editable fields, the form also contains two computed fields (From and Date) as well as two buttons. The insertion point is in the To field, where you enter the names of users to whom you wish to send a memo.
2. You will send this memo to yourself. Type your Notes user name and then press **Tab** to move to the cc field.
3. Observe the cc and bcc fields. You can use these fields to specify users who should receive copies of the memo.
4. Click in the **Subject** field and type **A reminder** to indicate the subject of the memo. This field is important because the information it contains will appear in the default view of the recipient's Mail database. You do not need to worry about the From and Date fields, because they are computed for you.
5. Press **Tab** to move to the unlabeled body field and type **Stop at the benefits office to enroll in a flexible-spending account.** This is a rich-text field, which means you could include a good portion of *War and Peace* if you so chose. Your document should resemble Figure 4.4, except that you will see your own user name instead of the author's.

Figure 4.3 **A blank Memo form**

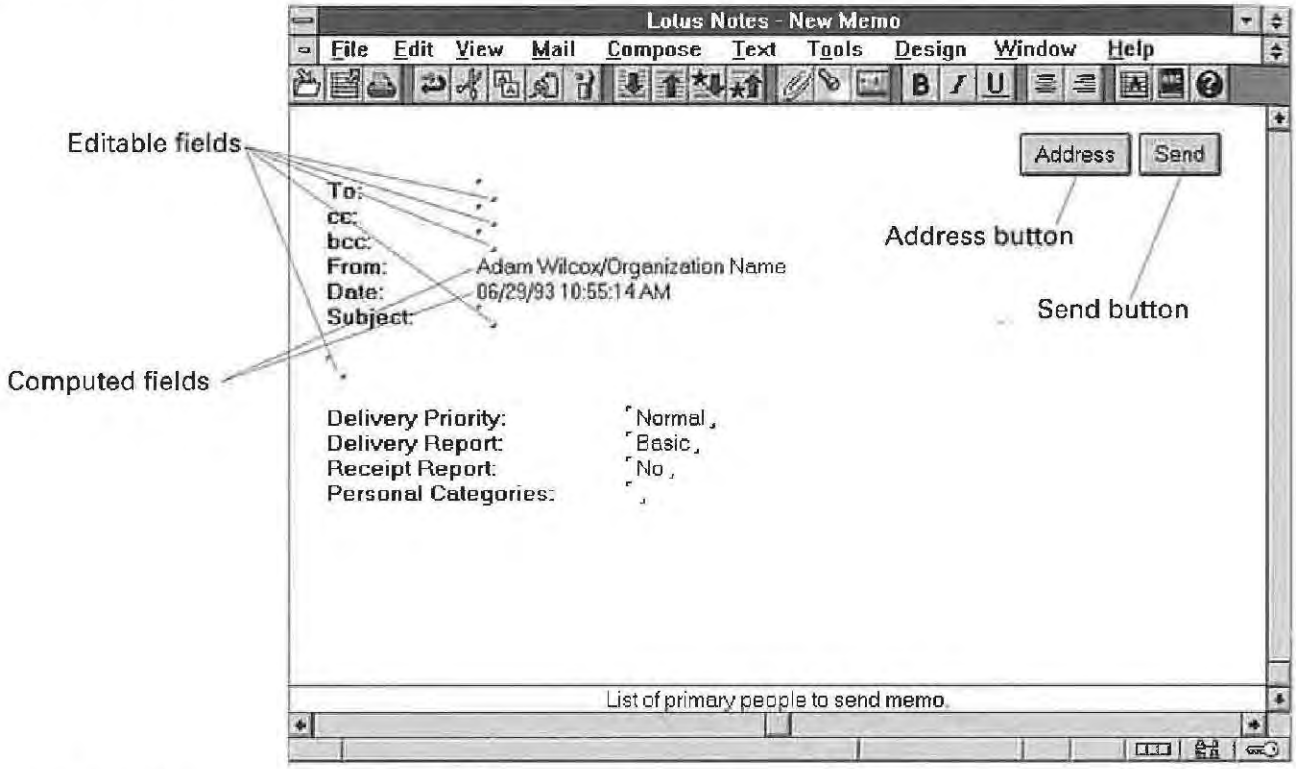
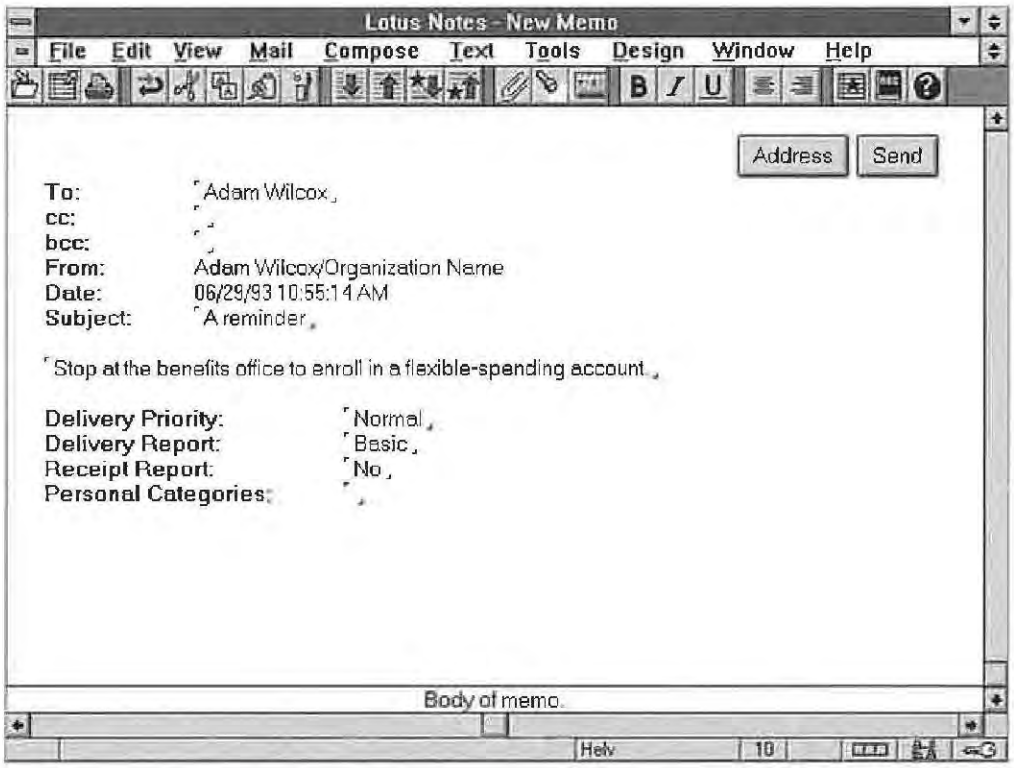


Figure 4.4 **The partially completed memo**





SPECIFYING MAIL-DELIVERY OPTIONS

In addition to the fields mentioned above, the Memo form contains four fields below the body field. The first three are standard keyword fields that you can use to specify mail-delivery options.

- The *Delivery Priority* field determines the urgency of a message that will be sent to a different server. The *Normal* option should suffice for most purposes.
- The *Delivery Report* field determines whether you receive confirmation that your memo was delivered to the recipient's Mail database.
- The *Receipt Report* field determines whether you receive confirmation that your memo was opened.

The final field on the Memo form, *Personal Categories,* has to do with categorizing documents that you save in your own Mail database. We will discuss categorizing documents later in this chapter. For now, let's examine the delivery options for the memo we are composing:

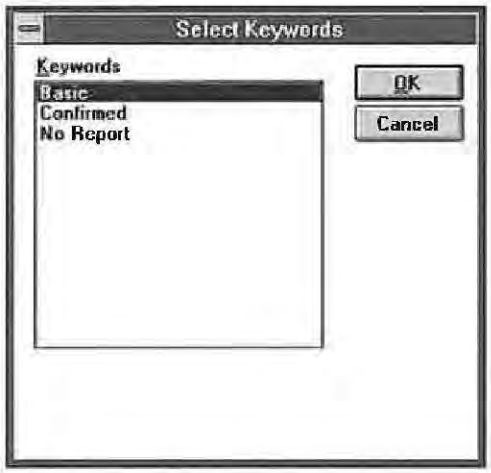
1. Click in the **Delivery Priority** field and observe Field Help. Normal priority is sufficient in most cases.

   Note: If you are sending mail to a different server, then you might want to consider the other two priority options. Sending information over phone lines can be expensive, and you can save your company money by having Notes wait until night to send such memos (to do this, select Low priority). If the memo is time-sensitive, you can choose High priority to send it as soon as possible.

2. Press **Spacebar** to cycle through the three Delivery Priority options, and then press **n** to specify Normal priority.
3. Press **Tab** to move to the Delivery Report field, and press **Enter** to see a list of keywords for the field (see Figure 4.5). There are three delivery report options: Basic, Confirmed, and No Report. The Basic option will notify you only if Notes cannot deliver your memo.
4. In the Keywords list, select **Basic** and click on **OK**.
5. Press **Tab** to move to the Receipt Report field and press **Spacebar** several times. Yes and No are the only receipt report options. Receiving a receipt report doesn't necessarily mean

that your memo was read, but it does tell you that it was opened. This information can be quite useful for those pesky times when someone says, "I never got that memo."

Figure 4.5 **The keyword list for the Delivery Report field**



6. Type **n** to indicate that you do not need a receipt report (after all, you are only sending this memo to yourself), and then press **Tab** to move to the Personal Categories field (we will discuss categories later in the chapter). Compare your memo to Figure 4.6, and change any fields that do not match.



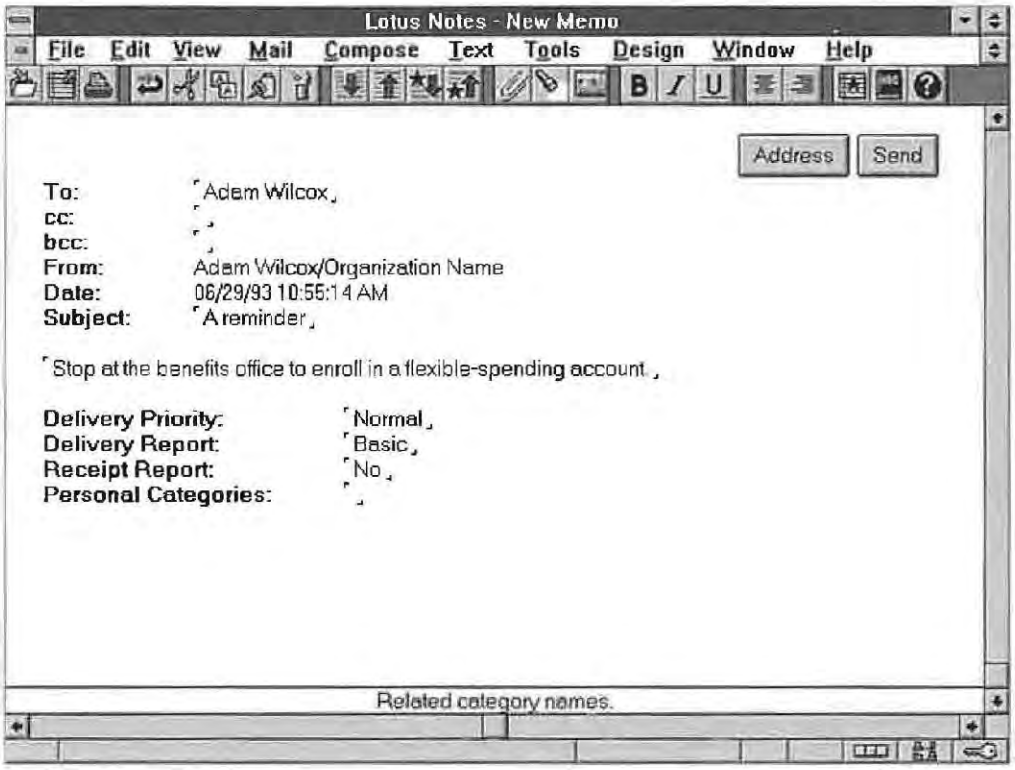
SENDING A MEMO DOCUMENT

After you compose a memo, you must decide what to do with it. In general, you have three choices: You can send the memo to the users listed in the To field, save the memo in your own Mail database, or both send and save it. There are many different ways you can accomplish these things.

To send a Mail document,

- Click on the Send button in the upper-right corner of the document (or choose *Mail, Send*) to display the Mail Send dialog box.
- Click on Send to send the document to the users listed in the To field. Depending on the method you use, Notes may ask if you want to save a copy of the document in your Mail database.

Figure 4.6 **The complete memo document**



To save a Mail document, click on the File Save SmartIcon or choose File, Save. You can also send or save a Mail document—or even do both in a single step—by closing it. To do so,

- Close the document (double-click the right mouse button or press Esc). When you attempt to close a Mail document, Notes displays a Document Save dialog box, asking if you want to mail or save the document.
- Check Mail if you wish to mail the document, Save if you wish to save it, or both if you wish to do both.
- Click on Yes to accept your choices, close the dialog box, and close the document; click on No if you do not wish to mail or save the document; or click on Cancel if you decide that you do not want to close the document at all.

As we mentioned earlier, many Mail features are available through the Mail menu even when you are not in your Mail database. One useful feature is the ability to view unread Mail documents at any time by choosing *Mail, Scan Unread*. When you do so, an unread Mail document (if you have one) will appear on the screen. You can

then press Enter to view any other unread Mail documents. When there are no more, Notes returns you to whatever you were doing.

Let's send our memo to ourselves:

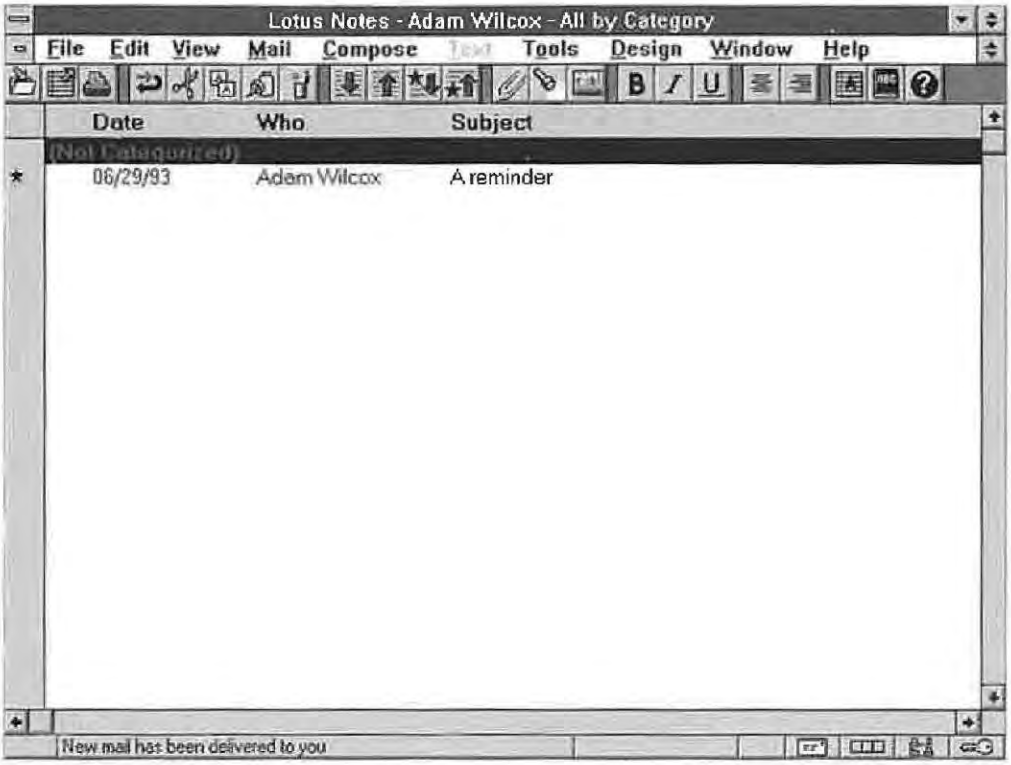
1. Click on the **Send** button in the upper-right corner of the document. The Mail Send dialog box appears, giving you the option of *signing* or *encrypting* the document (see Figure 4.7). Signing a document adds your electronic signature to it by adding information found only in your User ID, assuring the recipient that you are the author; encrypting a document encodes it so that only the intended recipient can read it.

Figure 4.7 **The Mail Send dialog box**



2. Click on **Send** to send the document to the user listed in the To field, namely you. Notes asks if you want to save this document. Because you are sending this document to your own Mail database, there is no point in saving another copy of it there.
3. Click on **No** to indicate that you do not want to save the document. You have just seen one of several methods for sending Mail documents; you will see more as we move through the chapter.
4. Press **F9** to refresh the view and see the new document you just sent yourself (see Figure 4.8). If you do not see the document, wait a minute and press F9 again. You shouldn't have to do this more than once or twice.
5. Close the database and then choose **Mail, Scan Unread**. The unread Mail document appears on the screen.
6. Press **Enter** to view any other unread Mail documents that you may have. When you have read the last unread document, Notes returns you to the workspace.

Figure 4.8 **Sending yourself Mail**



ABOUT OTHER MAIL FEATURES

There are many ways you can use Notes Mail besides simply composing and sending memos. You can copy and paste information from other databases into a memo, and you can also attach other files to Notes memos. Another useful feature of Notes Mail is the ability to use Name & Address Books to find and insert names of users and groups.



USING A NAME & ADDRESS BOOK TO ADDRESS A MEMO

You can access both public and personal Name & Address Books to find user or group names. This is especially useful when you either do not know the exact spelling of a name or are sending a memo to many users. To use a Name & Address Book while composing a memo,

- Click on the Address button in the upper-right corner of the memo document. The Mail Address dialog box opens.

- Use the drop-down list in the upper-left corner to select the field in which you wish to insert the name(s) (you can choose To, cc, bcc, or Current Field).
- Use the second drop-down list to select the Name & Address Book that you wish to use (your public and personal Name & Address Books should be listed).
- Either type the first letter of the name for which you are looking, or scroll through the list to find it.
- Select the name that you wish to use and click on Add to insert it in the selected field. (To create a list of several names, repeat these last three steps as many times as necessary.)
- Press Esc (or double-click on the Control-Menu box) to close the Mail Address dialog box.

Let's use the Name & Address Books to address a memo document:

Note: In the task that follows, you will need to know the name of another user in your Notes system. It might be a good idea at this point to find a "Notes buddy" who can help you with a task or two from time to time as you work through this book. You won't be asking much of this person, but some of the tasks do require another user.

1. Open your Mail database and then choose **Compose, Memo** to display a blank memo form.
2. Click on the **Address** button to open the Mail Address dialog box (see Figure 4.9). The first drop-down list allows you to select a field in which to insert names; the second drop-down list allows you to switch between Name & Address Books. The Name list shows the names of any users or groups in the current Name & Address Book.

   Note: By default, your public Name & Address Book should be active. If your personal Name & Address Book is active (its name will include your user name), you should select the public Name & Address Book from the drop-down list in the window.
3. Click in the box to the left of the Add button and type the first letter of your Notes buddy's last name. The Name list scrolls to show names that begin with that letter (see Figure 4.10).
4. Select your buddy's user name and click on **Add**. The selected name appears in the To field of the memo.