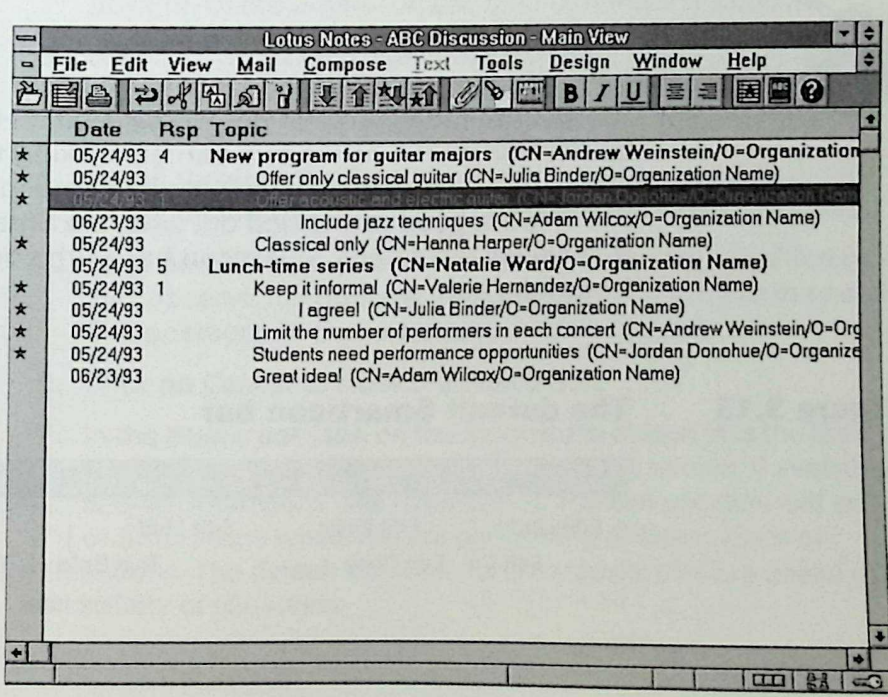


COMPOSING A RESPONSE TO A RESPONSE DOCUMENT

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.)

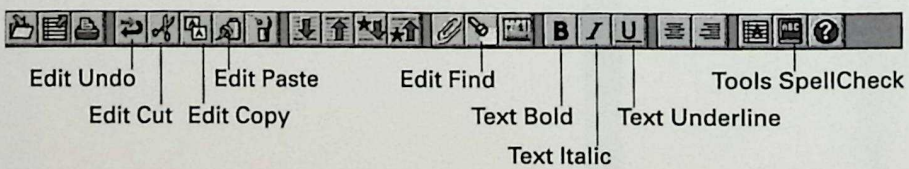
When you are editing a document, you can change information or change its appearance (this is called *formatting*). There are many techniques you can use to accomplish these things.



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.

How select a given List?

Tools | SmartIcons

Figure 3.14 **The SmartIcons dialog box**

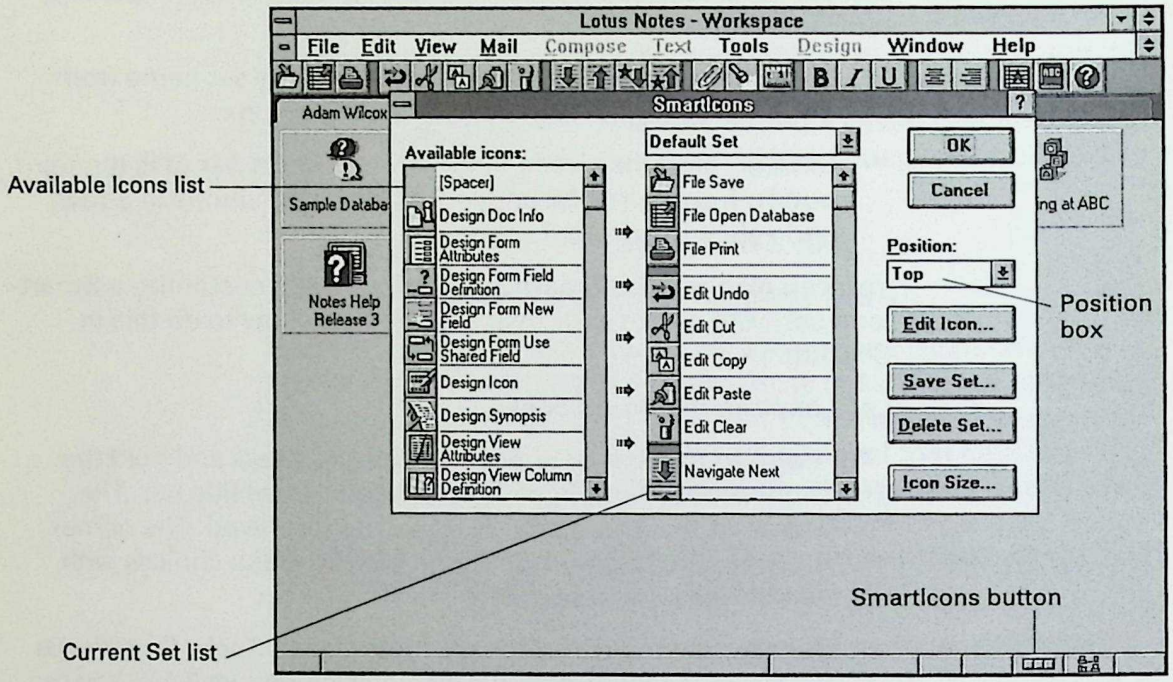
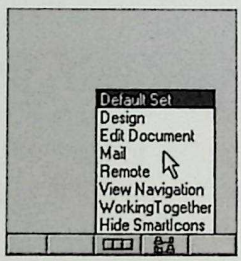


Figure 3.15 **Displaying a list of SmartIcon sets**





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**

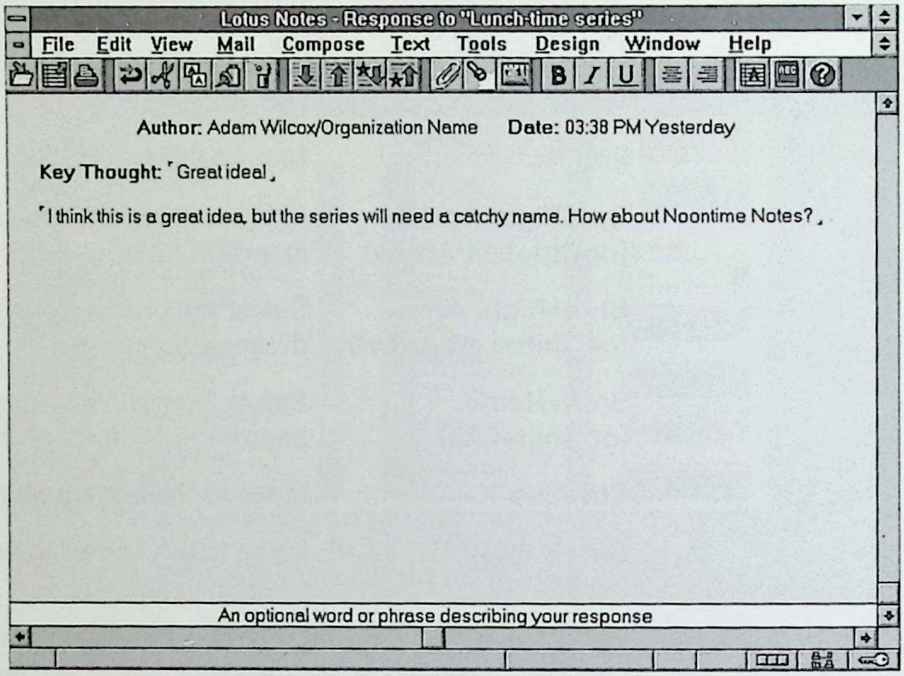
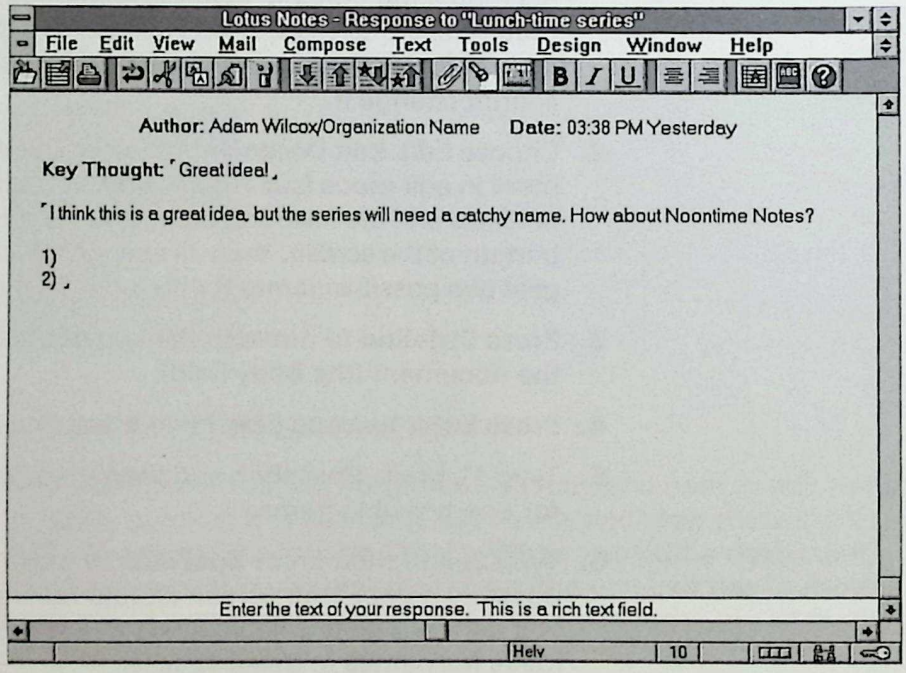


Figure 3.17 **The partially edited document**





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:

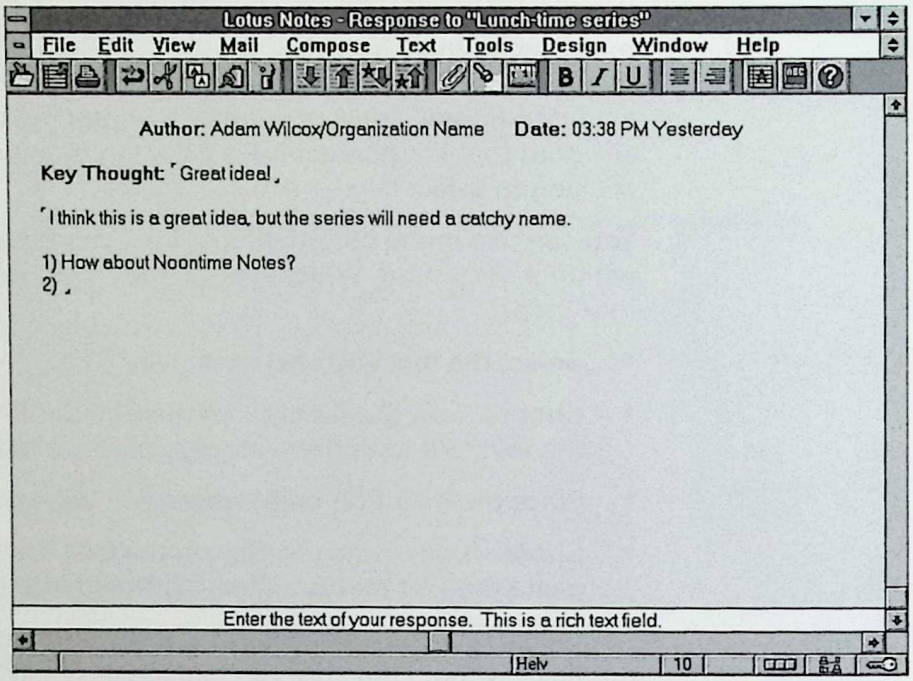
- Select the text you wish to move.
- Choose *Edit, Cut* (or click on the Edit Cut SmartIcon) to move the text to a temporary storage place called the *Clipboard.*
- Place the insertion point where you want the text to go.
- Choose *Edit, Paste* (or click on the Edit Paste SmartIcon) to paste the text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

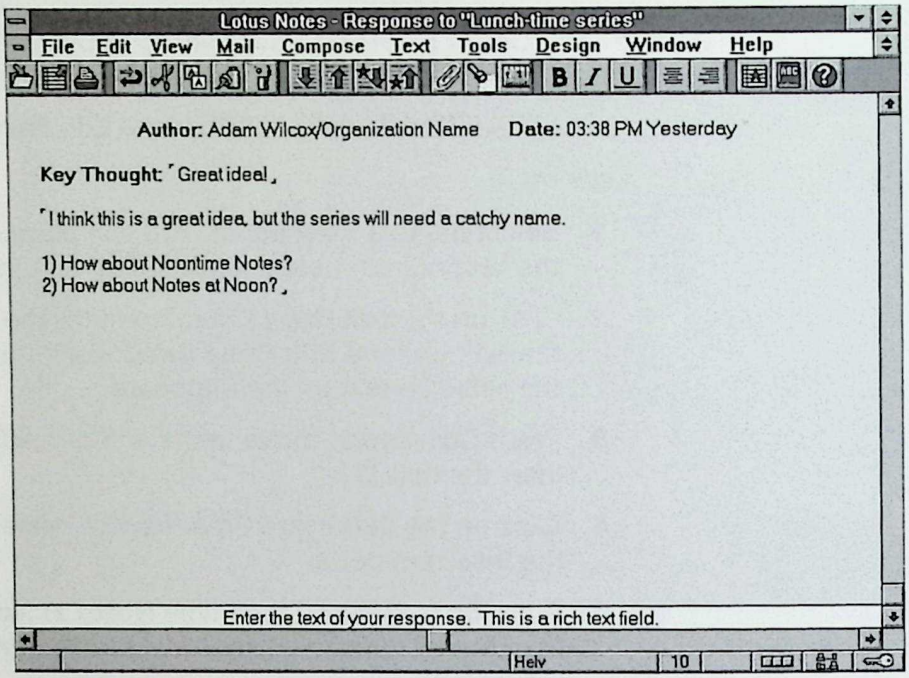


CHECKING SPELLING

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).

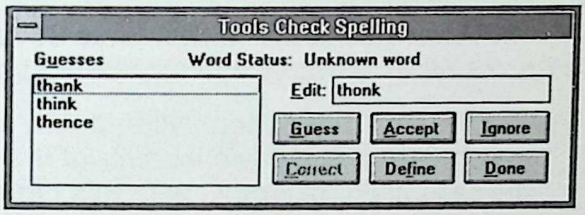
   Note: In the steps that follow, you will check the spelling of the words in your document. The steps assume that everything is spelled a particular way. If you have used alternate

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

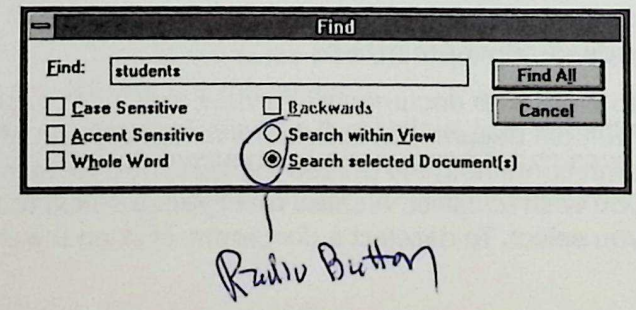
You can search for specific text either in a view or in the documents in a view by using the *Edit, Find* command. To do so,

- 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.

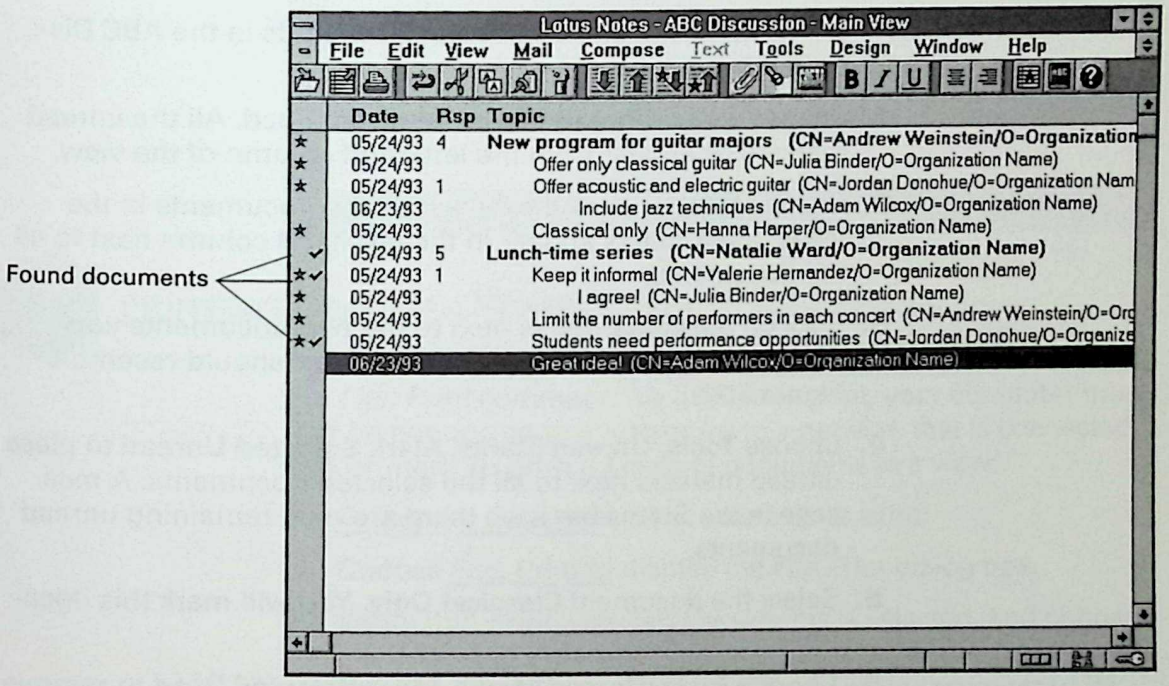
Figure 3.21 **Searching for the text *students***



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,

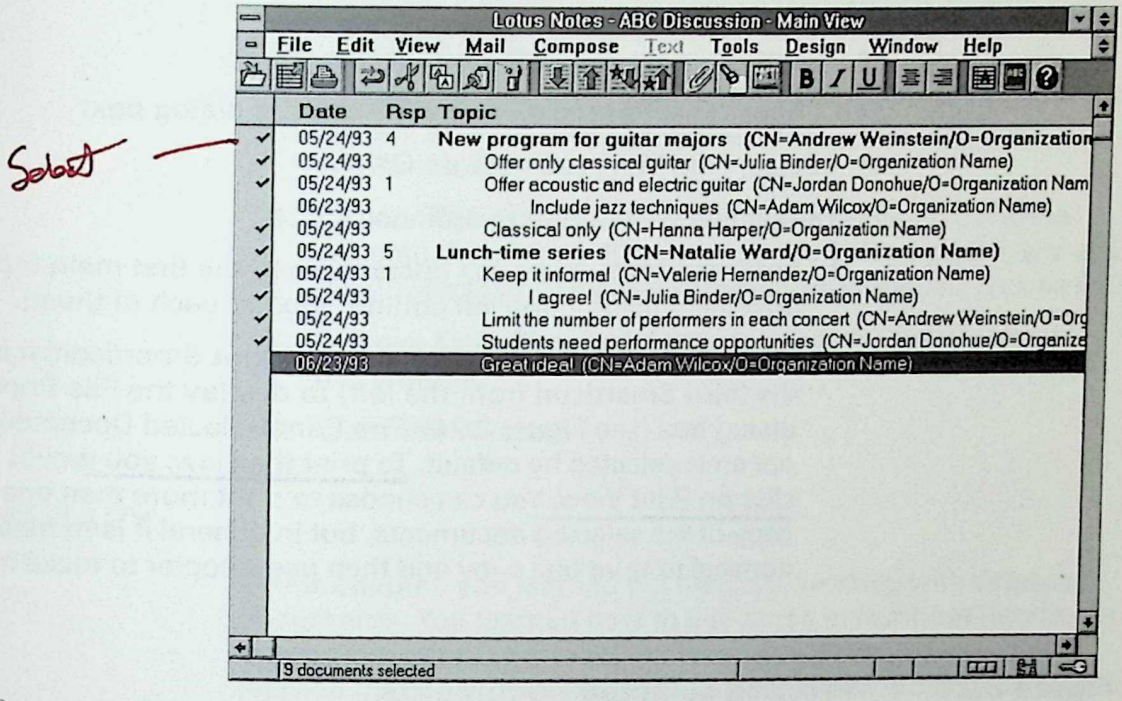
- Select the documents that you want to mark as read or unread (if you want to mark all the documents, you do not need to select any).
- Choose *Tools, Unread Marks* and then select one of the four options in the submenu that appears: *Mark Selected Read, Mark All Read, Mark Selected Unread,* or *Mark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

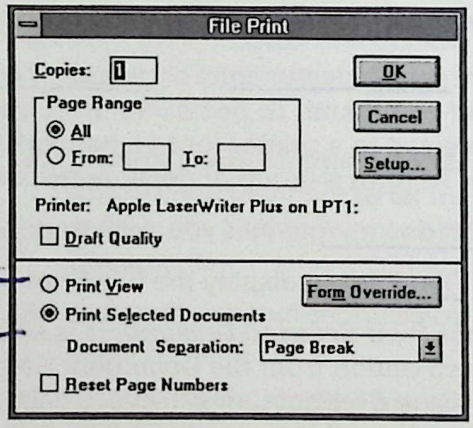
To print a view,

- 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 radiobutton 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.

WTS

ARTICLE DELIVERY

WTS Number: 352668

Order #1101415

Rush

Request Date:	11/21/2024 02:46pm
Requester:	Sylvia Hall-Ellis - San Jose State University
Delivery email:	**sylvia.hall-ellis@sjsu.edu**
Reference:	SamuelKL
Instructions:	**would like title page, verso, table of contents, and selected pages**
WTS staff contact:	**Karen**

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CHAPTER 5: MANAGING DATABASES

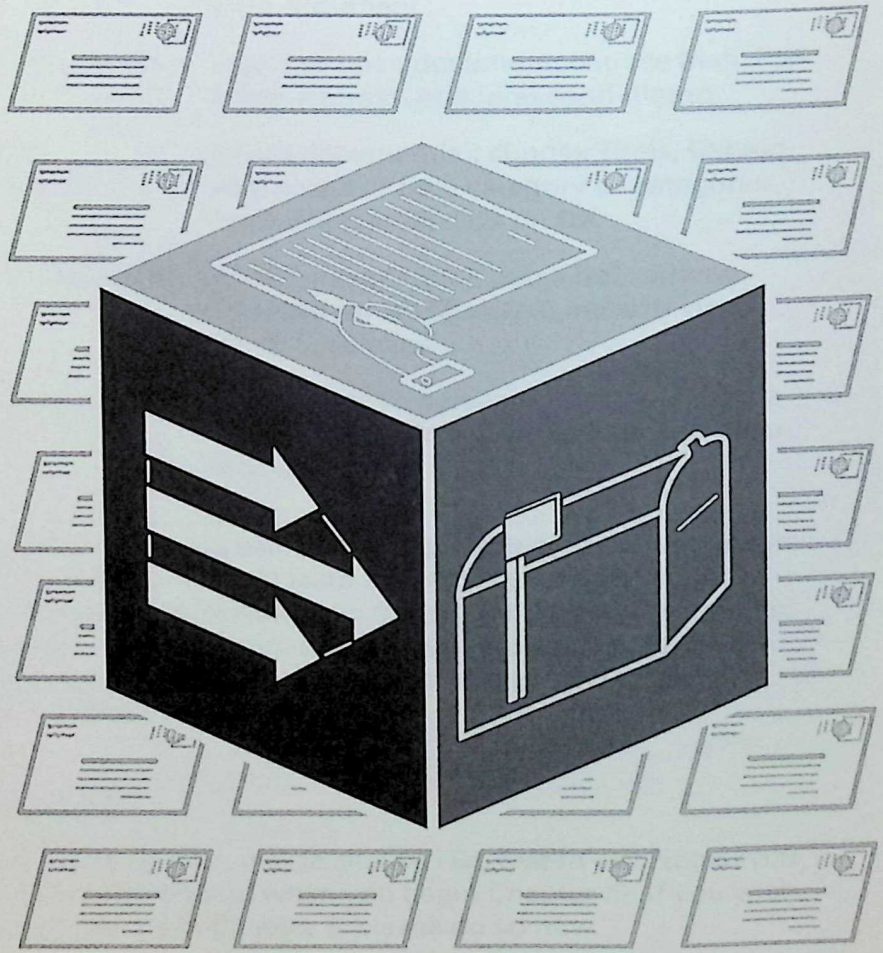
Getting Information about Databases

Notes Security

Copying Databases

More about Searching Databases

Indexing Databases



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Sometimes, you might want to know how many unread documents are in a database or where the database is stored. Or perhaps you will want to make a copy of a database or search through a database for documents that pertain to a particular customer. Notes provides many tools for getting information about and managing databases.

In this chapter, we'll learn how to display information about a database on its icon, how to scan for unread documents, and how to remove database icons from your workspace. We will discuss how access control aids in Notes security. We'll also get into a little more detail about managing databases. You will learn how to create a replica of a shared database on your hard drive so that you can work with a database even when you are not connected to a server. Finally, we'll talk about indexing and searching databases to find the documents you want.

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

- How to display database information on database icons
- How to scan databases for unread documents
- About database access control
- How to create a replica of a database
- How to use the Query Builder to search a database
- How to index a database so that it can be searched

GETTING INFORMATION ABOUT DATABASES

There are some pieces of database information that you cannot get by opening a database, or that you might rather get without opening it. For example, you cannot find out where a database is stored simply by opening it. And if you want to know how many unread documents are in a database, you'll probably want a method that is faster and more efficient than opening the database and counting the unread markers. Fortunately, you can handle both these situations by displaying the information on database icons. If you know there are unread documents you wish to read, you can read them without opening the databases in which they are stored by using the *Tools, Scan Unread* command.



DISPLAYING DATABASE INFORMATION

You can display the unread-document count, location, or file name for a database on its icon by using the View menu. To display the unread-document count,

- Choose *View, Show Unread*. A box with a number appears on every database icon in your workspace. This number might not be accurate, because documents could have been added to a database since the unread-document count was last refreshed.
- Choose *View, Refresh Unread* (or press F9) to update the unread count for databases on the current page. (You can update the unread counts for databases on all workspace pages by holding down the Shift key and pressing F9.)

Two other pieces of information you can display on a database icon are the name of the server where the database is stored, and the database's file name (the title of a database and its file name are different things; the file name must conform to standard file-naming conventions).

To display the name of the server on which a database is stored, choose *View, Show Server Names*. The database titles in the workspace will now include the names of the servers where the databases reside. For example, a database called Sales Tracking that is stored on a server called Shostakovich would display the text *Sales Tracking on Shostakovich* on the database icon. Databases that are stored on your hard drive will not show server names.

To display the file name for a database on its icon, hold down the Shift key while choosing *View, Show Server Names* (yes, this is not particularly intuitive). The file names will appear in blue at the bottom of the database icons.

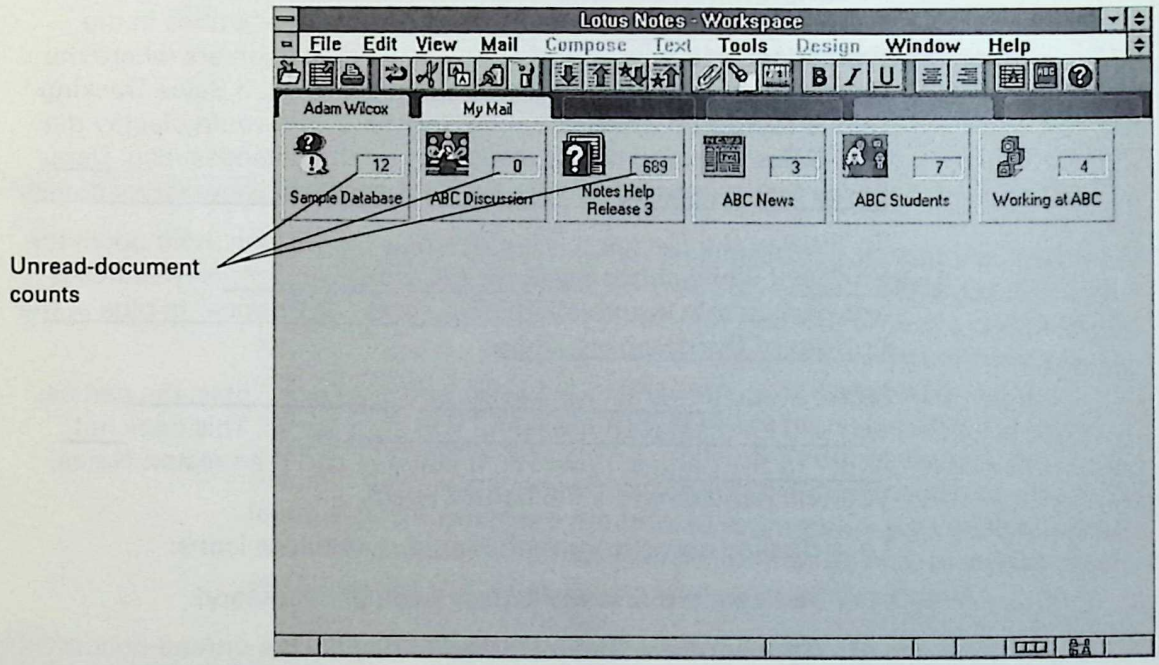
Note: If you show server names and then exit Notes, the names will still be displayed next time you start Notes. This does not apply to file names, however. If you exit and then restart Notes, you will need to show file names again.

Let's display some information on our database icons:

1. Activate the first workspace page (if necessary).
2. Choose **View, Show Unread** to display the unread-document count on each of the database icons (see Figure 5.1; you may see different icons and different unread counts). If you are asked to enter your password, do so and click on **OK**.
3. Activate the second workspace page. Notice that the unread count appears for the databases on this page as well. The View, Show Unread command affects all databases in the workspace. These numbers might not reflect the current unread count, because documents may have been added to the databases since the counts were last refreshed.
4. Keep your eyes on the Status bar, and choose **View, Refresh Unread** (if you are asked to enter your password, do so and click on **OK**). The name of each database on this page appears briefly in the Status bar. If any documents have been added to these databases since you last opened or refreshed them, the unread counts will change to reflect it. The Refresh Unread

command, unlike the Show Unread command, affects only databases on the current workspace page.

Figure 5.1 **Displaying the unread-document count**



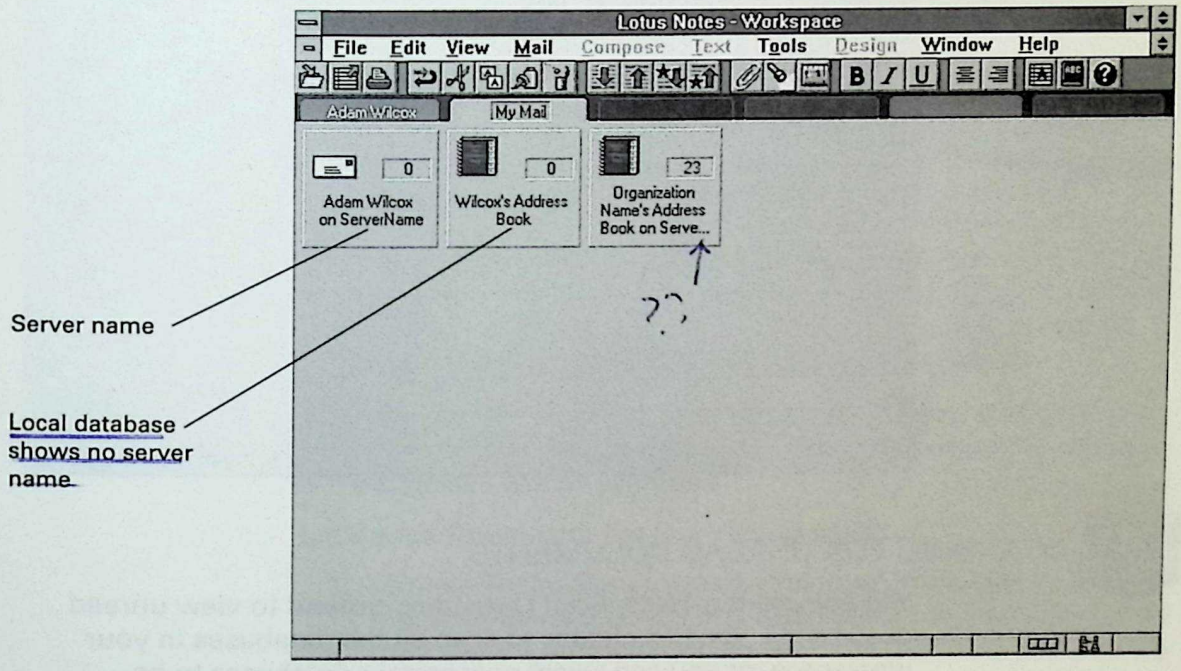
5. Activate the first workspace page and press **F9** to refresh the unread counts for the databases on this page. The F9 key will always issue the Refresh command that is appropriate for what you are doing (Refresh Fields when composing a document, Refresh View in a view, or Refresh Unread from the Workspace window).

6. Watch the Status bar again, but this time press **Shift+F9**. The name of every database in the workspace—regardless of the page it is on—appears briefly in the Status bar. This command refreshes the unread count for all databases in your workspace.

7. Activate the second workspace page, and then choose **View, Show Server Names** to display the names of servers on which the databases are stored (see Figure 5.2; you may see

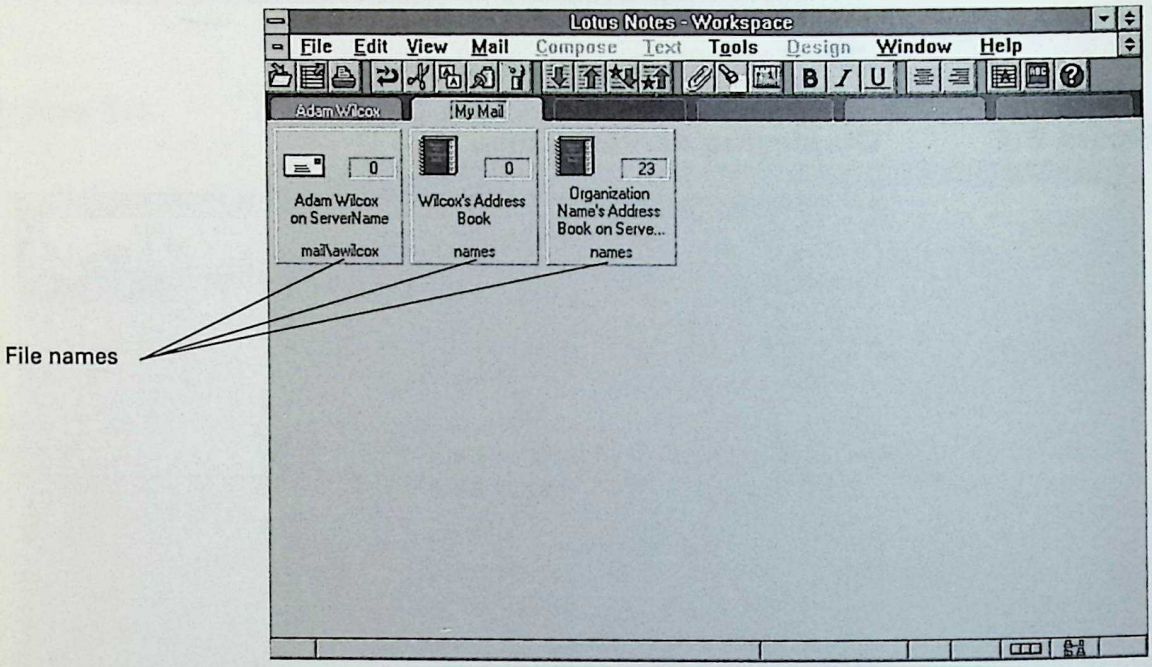
different icons and your server names will be different). Databases that are stored on your hard drive do not show any server name.

Figure 5.2 **Displaying server names**



8. Activate other workspace pages and observe the server names for the databases. When you are done, return to the second workspace page.
9. While holding down the **Shift** key, choose **View, Show Server Names** to display file names on the database icons (see Figure 5.3; you may see different icons and file names). A database's file name is different from its title.
10. Hold down **Shift** and choose **View, Show Server Names** to turn off the display of file names.

Figure 5.3 Displaying database file names





SCANNING FOR UNREAD DOCUMENTS

You can use the Tools, Scan Unread command to view unread documents. You can choose to scan all the databases in your workspace, or you can select only certain databases to be scanned. To scan for unread documents in databases you deem preferred, choose *Tools, Scan Unread, Preferred Databases* (or click on the Tools Scan Unread SmartIcon). (You can also scan unread documents in only the selected database(s) by choosing *Tools, Scan Unread, Selected Databases.*) The name of the first scanned database appears in the Scan Unread dialog box. When you are in this dialog box,

- Click on *Mark All Documents Read* to remove the unread markers from all the documents in the database. You might want to do this if there are many unread documents and you do not intend to read most of them.
- Click on Open to open the next unread document in the database (when you close the database, Notes returns you to the Scan Unread dialog box). If you choose this command, you

can then move through the other unread documents in the database by pressing the Tab key. When there are no more unread documents, Notes returns you to the Scan Unread dialog box.

- Click on Done to close the dialog box and return to the workspace.
- Click on Next to display the unread count for the next database to be scanned.
- Click on *Next Unread* to display the unread count for the next database to be scanned that *has* any unread documents. If there are no unread documents in any of the databases to be scanned, the dialog box will close.

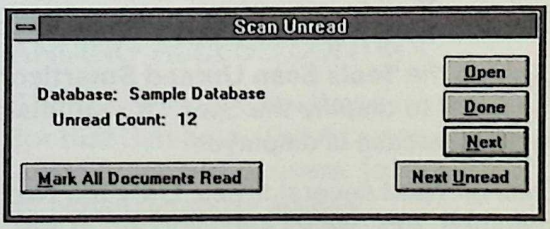
To determine which databases are scanned,

- Choose *Tools, Scan Unread, Choose Preferred* to display the Scan Unread Preferred Setup dialog box, which shows an alphabetical list of all databases in your workspace.
- To scan only certain databases, select the name of each you wish to scan in this dialog box. If none are selected, all the databases will be scanned.

Let's experiment with the Scan Unread feature:

1. Choose **Tools, Scan Unread, Preferred Databases** to display the Scan Unread dialog box (see Figure 5.4; your dialog box may show a different database).

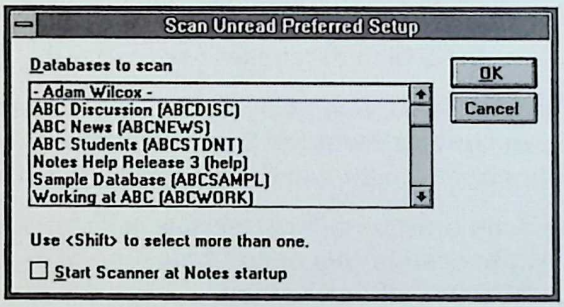
Figure 5.4 **Scanning for unread documents**



2. Click on **Next** a few times and examine the dialog box each time. Notes displays the name and unread count for each database in your workspace.

3. Click on **Done** to close the Scan Unread dialog box.
4. Choose **Tools, Scan Unread, Choose Preferred** to display the Scan Unread Preferred Setup dialog box (see Figure 5.5; you may see different databases in this, or, for that matter, any dialog box throughout this book). You use this dialog box to choose which databases are scanned when you issue the Tools, Scan Unread, Preferred Databases command. When none are selected, all databases will be scanned.

Figure 5.5 **The Scan Unread Preferred Setup dialog box**



5. Scroll down in the Databases To Scan list. All the databases (and their file names) in your workspace are shown. They are arranged alphabetically by workspace page.
6. In the Databases To Scan list, select **ABC News** and **Working at ABC** by clicking on each. (Although the dialog box says you must hold down Shift to select more than one item, this is not so.)
7. Click on **OK** to accept your selections and close the dialog box.
8. Click on the **Tools Scan Unread SmartIcon** (it is third from the right) to display the Scan Unread dialog box. The ABC News database is displayed.
9. Click on **Next** several times. Only the two databases you specified, ABC News and Working at ABC, are being scanned.
10. Click on **Next** to display ABC News (if necessary), and then click on **Mark All Documents Read**. The unread count changes to zero.

11. Click on **Next Unread** to display the unread count for the next preferred database that *has* unread document, Working at ABC.
12. Click on **Next Unread** again. Because this is the only preferred database that still has unread documents, its name still appears in the dialog box.
13. Click on **Open** to read the next unread document in the Working at ABC database.
14. Press **Tab** several times to view the unread documents in the database. When there are no more unread documents, Notes returns you to the Scan Unread dialog box. In this manner, you can read the unread documents in all your preferred databases. You will probably want to add only the databases you use most often to the preferred list. In many cases, this might include only your Mail database and a company news database.
15. Click on **Done** to close the dialog box.

NOTES SECURITY

One of the most important aspects of Notes database management is security. The two primary ways Notes provides this security are through passwords and database *access control*. You can examine the access control for most databases, and in some cases you can even change it. The combination of who you are (which is verified by your password and your ID file) and your *access level* to a database determines what you can do in that database.



UNDERSTANDING ACCESS CONTROL

The manager of a database creates an *Access Control List* (ACL) for that database. The ACL specifies access levels for various users or groups of users. Table 5.1 summarizes the seven levels of Notes database access.

Table 5.1 Notes Access Levels

Access Level	Database Rights
No Access	No rights in the database. Users with this access level cannot even add the database icon to their workspaces.
Depositor	Can compose new documents but cannot read existing ones.
Reader	Can read documents but cannot compose or edit them.
Author	Can read and compose documents, but can edit only documents he or she composed.
Editor	Can read, compose, or edit any document. Cannot modify forms, views, or ACL.
Designer	Can do everything an editor can do, but can also modify forms, views, and the database icon. The designer cannot modify the ACL, and cannot delete the database.
Manager	Can do anything to the database; the manager is the supreme Notes being.

Figure 5.6 depicts the "hallway of Notes access." Each user has an access level, which acts as a key to open the doors to all the access levels before his or her own. With the exception of Reader and Depositor—which are exclusive to each other—each Notes access level encompasses the rights of all the levels that come before it.

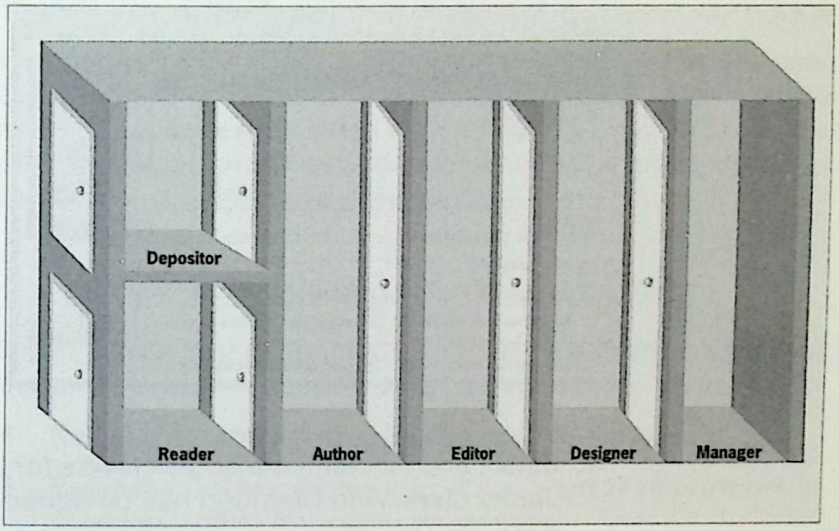


EXAMINING AN ACCESS CONTROL LIST

To examine the ACL for a database,

- Select or open the database.
- Choose *File, Database, Access Control* to display the Database Access Control List dialog box.
- Select the name of a user or group and observe the Access Level box (we will discuss changing access levels in Chapter 9).

Figure 5.6 **The "hallway of Notes access"**

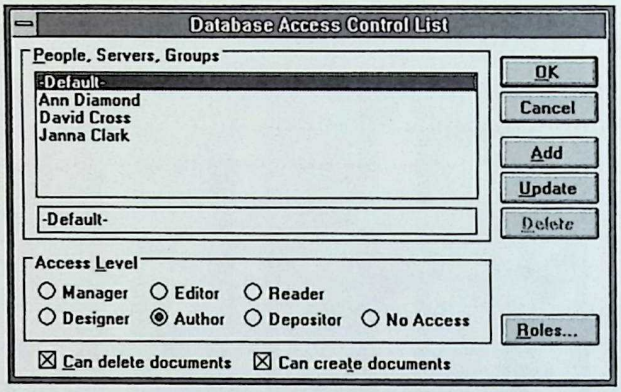


Every database has a user called -Default- whose access level applies to all users who are not specifically defined in the ACL. In a company-wide discussion database, the default access level would most likely be Author to allow all users to contribute to the discussion. In a personnel database, on the other hand, the default access level would be No Access to safeguard the sensitive information the database contains. You will always have Manager access to databases that are stored on your hard drive.

Let's examine the ACLs for some databases in your workspace:

1. Activate the first workspace page (if necessary) and select the **Sample Database** icon.
2. Choose **File, Database, Access Control** to display the Database Access Control List dialog box (see Figure 5.7). The name *-Default-* is selected in the People, Servers, Groups box, and the Author access level is selected. Because this is a discussion database, it is appropriate for any user to be able to compose and read documents.
3. In the People, Servers, Groups box, select **David Cross**. The access level for David Cross is Manager. Every database must have at least one user with Manager access.

Figure 5.7 **The ACL for the Sample Database**



4. Select and examine the access levels for **Ann Diamond** and **Janna Clark**. Ann Diamond has Designer-level access to this database, meaning she can alter forms and views, but cannot modify the ACL or delete the database. Most databases will have at least one person besides the manager with at least this level of access. Janna Clark's access level is Editor, meaning she can modify documents written by any user.
5. Click on **Cancel** close the dialog box.
6. Select the **Working at ABC** database icon and then choose **File, Database, Access Control.** The default access level in this database is Reader. Although any employee should be able to refer to these documents, the right to compose or modify documents in this database must be restricted to few.
7. Select and observe the access level for **Personnel Director** (Manager) and then click on **Cancel** to close the dialog box.
8. Select the **ABC Students** database icon and then choose **File, Database, Access Control.** The default access level in this database is No Access, because only certain users should be able to view students' documents.
9. Select and observe the access level for **Teachers.** This is a group that has been defined to include all teachers at the ABC School; they have Editor-level access so that they can modify students' documents.
10. Click on **Cancel** to close the dialog box.

PRACTICE YOUR SKILLS

Examine the ACLs for any other databases in your workspace.

Note: When a database is stored on your hard drive, you can do anything to the database, regardless of the ACL. This is true of the sample databases provided with this book. Their ACLs were created by the author as examples of what ACLs might look like in the shared databases you encounter.



REMOVING A DATABASE ICON FROM THE WORKSPACE

If you decide you no longer need to use a database, it's a simple matter to remove its icon from your workspace. To do so,

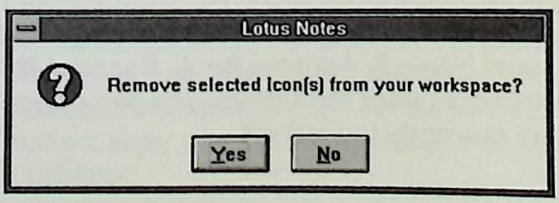
- Select the database icon(s) you wish to remove.
- Press the Del key. Notes asks if you want to remove the selected icon(s) from your workspace.
- Click on Yes.

When you remove a database icon from your workspace, you are not deleting the database itself. It's more like you're just boarding up the door. You can *delete* a database (which we'll discuss later in this chapter) only if you have Manager access to the database or if the database is stored on your hard drive.

Let's remove a database icon from your workspace:

1. Activate the first workspace page (if necessary) and select the **Sample Database** icon.
2. Press **Del**. Notes asks if you want to remove the selected icon(s) from your workspace (see Figure 5.8).

Figure 5.8 **Removing a database icon from your workspace**



3. Click on **Yes** to remove the selected icon from your workspace.
4. Choose **File, Open Database** to display the Open Database dialog box.
5. In the Server box, select **Local** and click on **Open** to display the databases that are available on your hard drive. Notice that Sample Database is still in this list; when you remove a database icon from your workspace, you are not deleting the database itself.
6. Click on **Done** to close the dialog box.



SECURING DATABASES

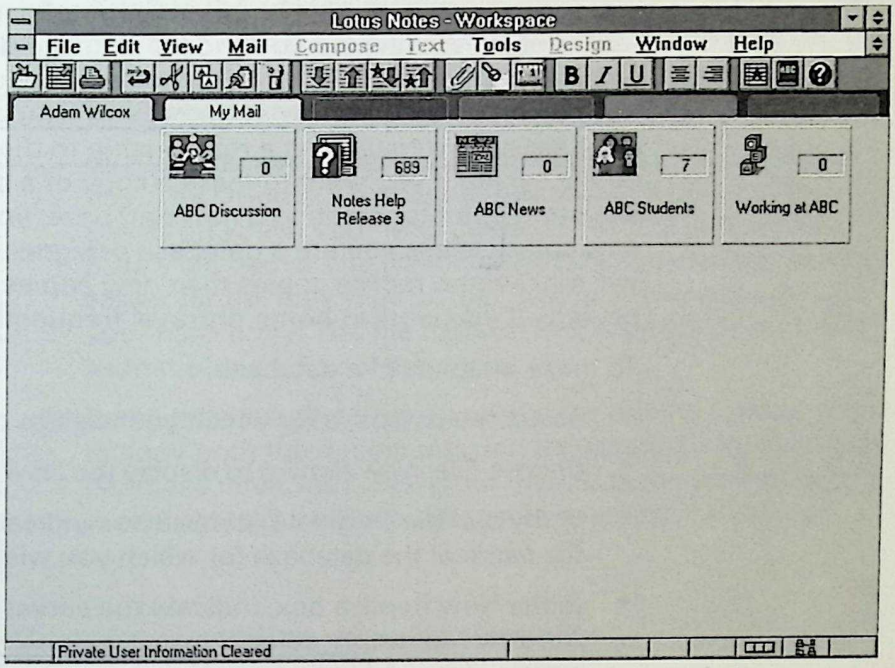
After you enter your password once in a Notes session, you will not have to enter it again to gain access to shared databases. This presents a security problem when you walk away from your computer without exiting Notes, because anyone could walk up and look at any database to which you have access.

To protect yourself against this problem, you can choose the *Tools, User Logoff* command (or press F5) before you walk away. After doing so, you will not be able to access any databases on the server (including your Mail database) without entering your password again. You will, however, still be able to access databases on your hard drive.

Let's try using this command:

1. Choose **Tools, User Logoff**. The Status bar indicates that your private user information has been cleared (see Figure 5.9). This means you will not be able to access databases on the server without entering your password again.
2. Choose **Mail, Open** to open your Mail database. Notes asks you to enter your password.
3. Click on **Cancel** to remain logged off the server.
4. Activate the **My Mail** workspace page and open your personal Name & Address Book. Because this database is stored on your hard drive, you can open it even though you are currently logged off.

Figure 5.9 **Clearing private user information**



Tip: If you are running Notes under Windows 3.1, you can use the Windows screen-saver feature to secure your entire workstation. This feature is available in the Windows Control Panel. Consult your Windows manual for more information.

5. Close your Name & Address Book database.

COPYING DATABASES

Most databases you work with are stored on servers to which you are connected. There are times, however, when you may want to copy databases from a server to the hard drive of your computer. For example, you can copy a database to the hard drive of a portable computer and then work on the database at home. Then, by a process called *replication*, you can synchronize your copy of the database with the original on the server. You might also want to make a copy of your Mail database on your hard drive to serve as a backup.



CREATING A REPLICA OF A DATABASE

You can make two kinds of copies of a database: a *new copy* or a *replica copy*. Which kind you choose to make depends on what you want to do with it. If (as in the example above) you want to work on a shared database at home, you would make a replica copy, because it maintains a relationship to the original database on the server. If you want to make a copy of a database to use as a starting point for creating a new database, you would make a new copy. Unless you are a database designer, chances are you will make more replica copies than new copies of databases, particularly if you work at home or travel frequently.

To make a replica of a database,

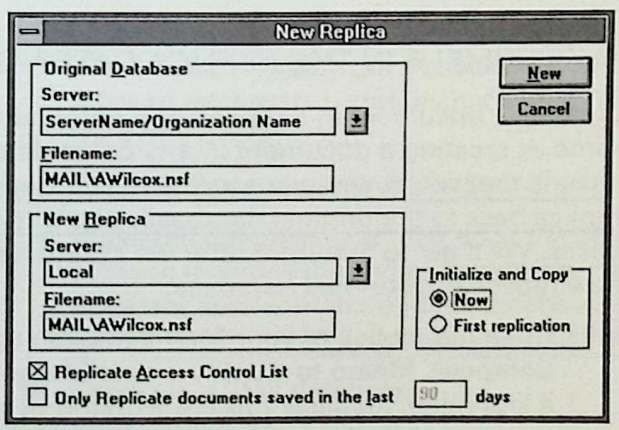
- Select the database for which you wish to create a replica.
- Choose *File, New Replica* to display the New Replica dialog box.
- Verify that the Original Database box indicates the server and file name of the database for which you wish to create a replica.
- In the New Replica box, indicate the server and file name for the new replica. By default, Notes will make the new replica on your hard drive (in your Notes directory) and will use the same file name as the original database. In most cases, this name and location should be fine. If you choose to change the file name, it can consist of up to eight characters with no spaces (Notes will automatically add the .NSF extension to the file name).

  Note: You should *never* copy databases to a server without first consulting your Notes administrator. Because servers are shared resources, the administrator must be aware of all changes that are made to them. This is a very important concept, and we'll be reminding you of it throughout the book.
- In the Initialize And Copy box, select *Now* if you want to copy both the structure and the documents of the original database. If you select *First Replication*, you will not be able to use the new database until you replicate it manually (which we'll discuss shortly).
- Click on *New* to create the replica. After a few seconds (or maybe minutes, if the database is very large), the new database icon appears on the active workspace page.

Let's create a replica of your Mail database:

1. Activate the second workspace page and select your Mail database icon. Your Mail database is stored on a server, but you can use it when you work at home or when you travel by creating a replica of it on your hard drive.
2. Choose **File, New Replica** to open the New Replica dialog box. The Original Database box shows the name of the server on which your Mail database resides and the database's file name. The New Replica box shows *Local* as the server for the new replica; this means it will be located on your hard drive. The file name Notes suggests is the same as that of the original database.
3. In the Initialize And Copy box, click on **Now** to instruct Notes to copy both the documents and the structure of the original database now. Your dialog box should resemble Figure 5.10, except that you will see different server and file names.

Figure 5.10 **Creating a replica of a database**



4. Click on **New** (if necessary, enter your password and click on **OK**). As Notes creates a replica, the Status bar shows messages about the status of the replica. When the process is finished, a new Mail database icon appears in the workspace (see Figure 5.11). The replica's icon does not show a server name, because it is stored on your hard drive.