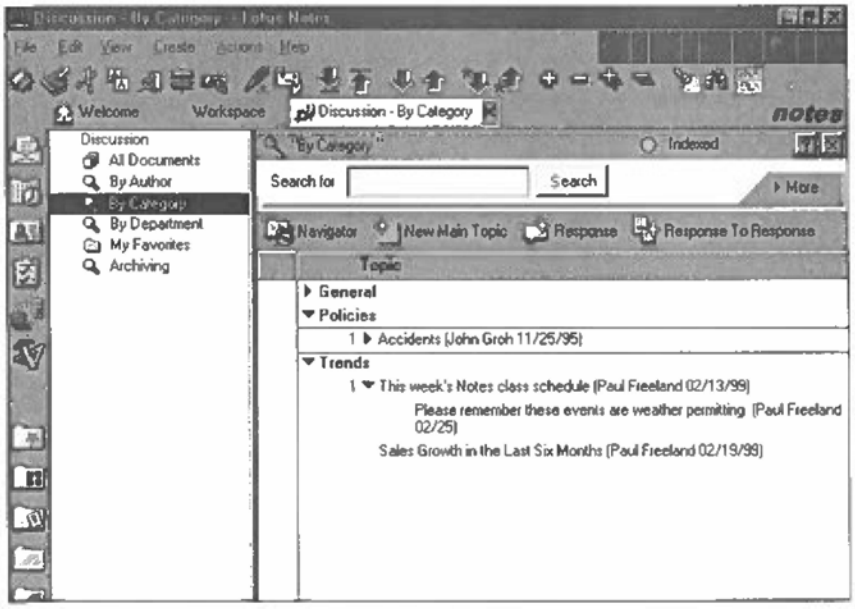


When you double-click a row containing a category, you *collapse* the category, which means that you temporarily hide all the documents in the category. Double-click again to redisplay the documents and then double-click on one of the documents to open it. In the figure, the General category is collapsed, Policies is partially expanded to show only main documents, and Trends is completely expanded to show main and response documents.

Some views have main documents with response documents indented in a hierarchy beneath them. If a hierarchical view is collapsed, the response *(children)* documents are hidden. When a view is fully expanded, all the responses, the responses to responses, and so forth (called *descendants*) are visible. Usually, an arrow appears next to documents that have children documents. If the arrow points to the right, the responses are hidden; if the arrow points down, the responses are visible. Clicking the document itself opens the document; clicking the arrow expands or collapses the descendants.

So, a categorized or hierarchical folder or view is like an accordion — you can fully open or fully close it, or you can partially open it, revealing some response documents and not others. In other words, you can open one or several categories. The following SmartIcons and keystrokes help you expand and collapse categories, document "families," folders, or views:



✦ To expand a single collapsed category or family, highlight it and click the Expand SmartIcon or double-click the category.



✦ To collapse a single expanded category or family, highlight it and click the Collapse SmartIcon or double-click the category.



✦ To expand a whole view or folder, click the Expand All SmartIcon or press the Shift + + (that's Shift and the plus sign).



✦ To collapse a whole view or folder, click the Collapse All SmartIcon or press the Shift + – (that's Shift and the minus sign).

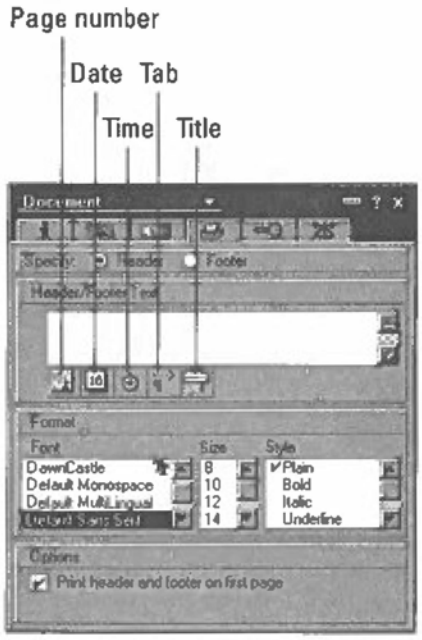
✦ To expand a single category that has subcategories or multiple levels of descendants, highlight it and press the asterisk (*) key. Use the minus key to collapse the whole category.

Headers and Footers

Headers and footers are bits of text that appear at the top (header) or bottom (footer) of every printed page. You type the header or footer once and then sit back, confident that it will be there when the printing is done.

To create a header for the current document, follow these steps:

1. Activate the Properties box for the current document.
2. Click the printer-tabbed page of the Properties box.



3. Click Header or Footer to determine where the text appears on the page.

4. Enter the text for the header or footer in the text box. To streamline the process of writing the text, Notes gives you these five icons to choose from, each representing a feature that often appears in headers or footers:

   - **Page Numbers:** Click the Page Number button to have a page number automatically inserted in the header or footer. You can even get fancy and type **Page** and then click the Page SmartIcon. The header or footer looks like this: Page &P. The &P turns into the proper page number when you print, so that you see "Page 5" on page 5.
   - **Date:** Click the Date button to insert the current date in a header or footer. Printing the date and time in a header or footer is handy if the reader needs to tell which is the most recent printout among several printed copies of the same document.
   - **Time:** Click the Time button, and the header or footer shows the current time (according to the computer's clock) each and every time you print your document. Notes prints the time in this format: 03:48:42PM.
   - **A Tab:** When you click the Tab button, Notes moves the next part of the header over to the right, just as if you pressed the Tab key when typing a document. Clicking Tab enables you to make more complete headers and footers with, for example, the date in the lower-left corner of the page, the time in the middle of the bottom of the page, and the Page number in the lower-right corner of the page.
   - **The Window Title:** When you click the last button, Notes puts the title of whatever document you're working on right in the header (or footer) for all to see.

5. Select the font, size, and style for the text.

6. If you want the header and/or footer to appear on the first page, be sure to check the Print Header and Footer on First Page box.

Nonstandard Characters

We are increasingly called upon to use words and symbols in our writing that come from other languages. Notes, recognizing that you may need to type some non-English characters, has a large

number of extra characters not available on your keyboard (or in stores). The LMBCS (Lotus Multi-Byte Character Set) includes all characters available in Notes.

The LMBCS includes characters available on the keyboard as well as nonkeyboard characters — characters unique to languages other than English and such characters as © for copyright or £ for pound sterling. To see the list of LMBCS characters and the way to create them, check the documentation or use the Help feature (use the index and choose LMBCS). Mac users choose Apple menu➪ Key Caps for a reference to nonkeyboard characters. The way to type one of these character sets depends on whether you use an IBM-style or a Macintosh keyboard. If you use Macintosh, you may not be able to see the character on-screen. You have to print the document to see the character.

As an example of the way to create a character, we provide the keystroke sequences used to type Ø:

* On the IBM-style keyboard, press Alt+F1, then O, and then / (the slash mark).
* On a Macintosh keyboard, press Option+Shift+O.

To find the Alt+F1 sequence (also called the *compose sequence*) for a particular character, look in Help or in the documentation. If you can't find the character you're after there, you need to use the LMBCS character code by following these steps:

1. Press Alt+F1 twice.
2. Press 0 (that's a zero).
3. Press - (a hyphen).
4. Enter the LMBCS number for the character (such as 157 for the Ø). If the LMBCS code has only two digits, 33 for example, use 033.

(This is almost as bad as dialing a long-distance number with your credit card, isn't it?)

After you create the character, you can copy and paste it if you need it again. Using the Copy➪Paste command is faster than using the LMBCS or composing key sequences.

Properties Boxes

Properties boxes are dialog boxes that you use to set the properties for whatever item you have selected on-screen. A Properties box exists for virtually any item you select on the screen — text, fields, views, documents, and even the whole database.

Each Properties box contains tabbed pages representing related properties for the selected item. Sometimes the title of the tabbed page is a word; sometimes it's a picture of the nature of the items on the page — for example, a key for the page on which you set properties related to security.

To call the Properties box to the screen, use any of the following methods:



- Click the Properties SmartIcon.
- Click the secondary mouse button (Windows) and choose Properties from the pop-up menu (in this case, Text Properties).
- Press Alt+Enter.
- Choose Edit from the menu and select the item from the drop-down list that names the item you want to change.

If you don't see in the Properties box the name of the item for which you want to set properties, click the down arrow to see a list of other items and then select the one whose properties you want to set.



If you plan to use the Properties box for several on-screen elements, dismissing it and calling it back every time may be a bit of a pain. If you want to shrink it to get most of it out of your way, double-click its title bar to reduce it to a fraction of its size. Then click and drag it off to the side. When you need the Properties box, double-click its title bar again to restore it.

Links to Documents, Views, and Databases

When you're creating or editing a document, or when you're writing an e-mail memo, you sometimes refer to other Notes information. Of course, you could write, "Open the XYZ.NSF database and then open the ABC view and scroll down to the 144th document and open it to see the year-to-date totals." Perhaps the information that you want readers to see is contained in a view, or perhaps you want them to see a whole database.

Instead of sending your readers off on a fishing expedition, you can link the appropriate information into the current document. Remember that you must paste the link into a rich-text field.

Here's how to link Notes data into a document:

1. Highlight or open the appropriate document and open the appropriate view or database. (If you want to create a database link, you can simply highlight the database on your desktop.)

2. Choose Edit⇨Copy as Link.
3. Choose Document Link, View Link, Database Link, or Anchor Link.
4. Open the document into which you want to place the link, and place your cursor in a rich-text field.
5. Choose Edit⇨Paste or click the Edit Paste SmartIcon.

Remember: Be sure that the database, document, or view is one to which all readers have access. (To be available, the database and documents must reside on the server, not on a local workstation, with no restrictions preventing potential readers from database and document access.) If you create a link to a memo in your own e-mail database, for example, you frustrate your readers because they don't have access to your e-mail database.

Margins

You may be satisfied with the margins supplied back at the factory, an inch all around, in which case you don't need to read this section. However, if you want to change the margins, follow these steps:

1. Activate the Text Properties box.
2. Click the Alignment tab.
3. Enter a value for the margin in the appropriate margin text box. You can set the following:
   - **Left Margin:** The default is 1 inch, if you're using imperial measurements, or 2.54 cm, if you're using metric measurements. (You can switch from one to the other choosing File⇨Tools⇨User Preferences, clicking International, and choosing Imperial or Metric.) Since the left edge of the page is always 0, the left margin size and setting are always identical. If you want a first line indention that differs from the default, switch to the Alignment-tabbed page and choose whatever first line option suits your fancy.
   - **Right Margin:** The right margin setting is the distance from the *left* edge of the page to the right edge of the paragraph. That's the left edge of the page. For a 2-inch right margin on a sheet of paper 8.5 inches wide, the right margin should be set at 6.5 inches. The default margin size is 1 inch, a right margin setting of 7.5 inches.



Notes doesn't show text on-screen the same way it shows text when printing, so you can't always see how the document will look on paper. To get some idea of where the page breaks are, use View⇨Show⇨Page Breaks or to see the document as it will look when it is printed, use File⇨Print⇨Preview.

New Documents

Your responsibility in using a database likely includes adding to it, and you do that by creating new documents. All the forms that you can use to create documents in the database appear in the Create pull-down menu.

In case the terms *form* and *document* are not familiar, think back to the dark ages when you used paper instead of Notes. Often, you would take a blank form from a pile and fill it out; an employment application is a good example. In Notes, the blank thing that you fill out is a form. Some databases have only one form; others may have many. A request database, for example, may have only one request form. A personnel database, on the other hand, may include one form to recommend new employees, one for a corporate suggestion box, and one for payroll requests. When you complete a Notes form and save it, it becomes a document in a database.

To create a document by using a form, follow these steps:

1. Choose Create⇨[*Name of form*].
2. Fill in the fields with data.
3. Save the form when you're done.

Remember: To create a response to a document, be sure the document you want to respond to is either open or highlighted in the view before you create the response.

Numbered Lists

Automatic numbering is a convenient way to write down steps or to enumerate items in a list. To number paragraphs that you're about to type, follow these steps:



1. Click the Text Number SmartIcon.
2. Type the desired text and press Enter to start a new numbered line.

To convert existing paragraphs to numbered paragraphs:

1. Highlight existing paragraphs that you want Notes to number.

2. Click the Text Number SmartIcon. Every time you press Enter, a new paragraph starts with the next number.

3. When you're done with numbered paragraphs, press Enter to start a new paragraph and then click the Text Number SmartIcon again to turn off the numbering. If you click the same SmartIcon in another part of the document, the numbering starts again at 1.

Page Breaks

Of course, like any other responsible program, Notes determines where a page break occurs if too much text is on the current page. But you can also determine where these breaks occur. To create a page break, choose Create⇨Page Break. A solid line appears across the screen.

Where the page break occurs depends on where the cursor is. If the cursor is at the beginning of a field, the page break occurs outside the field, and the whole field moves to a new page. If the cursor is anywhere in the field other than at the beginning, the page break occurs within the field.

The way to remove a page break depends on where it is.

- If the page break is outside the field, place the cursor at the beginning of the field and choose Create⇨Page Break.
- If the page break is inside the field, place the cursor just below the break and press Backspace or choose Create⇨Page Break.

Pagination

Pagination is a setting that determines what happens to paragraphs that are broken up by the sudden, menacing appearance of a dreaded page break. You have three options to choose from:

- **Page break before paragraph:** As the name implies, this option forces the currently selected paragraph to appear on the next page.
- **Keep paragraph on one page:** This option allows Notes to determine where the page break falls — either before or after the current paragraph.
- **Keep paragraph with next paragraph:** This setting causes the page break to fall before the first paragraph or after the second paragraph, which may result in some extra white space on a page.

Paragraph Alignment

You can set the alignment of a paragraph in two ways: by using a SmartIcon or by using the Alignment tab of the Properties box for text properties.

Here are the four alignment SmartIcons:



- Text Align Paragraph Center
- Text Align Paragraph Full
- Text Align Paragraph Left
- Text Align Paragraph Right

The Alignment tab of the Text Properties box has options for center, full, left, and right alignment. In addition, it has an option for no alignment (to use for text that should not wrap).



When you choose no alignment, text disappears off the screen to the right, and you need to do a great deal of scrolling. One good use for this setting is when you want to use the underline character to draw a line across a page to separate bits of data. Having the alignment set at None prevents the line from wrapping into two or three small line segments if someone shrinks the window considerably.

Paragraph Indents

You can use the SmartIcons or the Properties box for text properties to change a paragraph's indentation when in Edit mode. Remember that you will be indenting the whole paragraph and subsequent paragraphs you type. To indent several paragraphs, highlight them all before clicking any icons.



- To indent a paragraph, click the Text Indent SmartIcon. To reduce the amount of indent, click the Text Outdent SmartIcon. The text is indented or outdented one tab stop (1/2 inch) for every click of the SmartIcon (unless you changed the tabs).
- For more control over indenting the paragraph, activate the Text Properties box. Click the Alignment tab and set a unique indent for the first line. An icon represents each possible indent option: block, indent, and hanging indent.

Saving a Document

As with any other program, saving your work as you progress is a good idea. Whether you're designing a form, modifying a view, working on a new document, or editing an existing document, saving the document is the only way to ensure that you won't lose it if a power failure or other mishap suddenly strikes. To save your work, whether it's a view, form, or document, do one of the following:



- Click the File Save SmartIcon.
- Choose File⇨Save.
- Press Ctrl+S.

Selecting Text

Many times, after you type something, you later decide to go back and change it. Before you can change its appearance, however, you have to let Notes know what you want to change. The act of selecting the text you want to change is called, well, *selecting*. What you can do to the text comes later; right now we talk about just selecting it.

Three terms you may as well get straight right now are *I-beam, cursor,* and *insertion point:*

- The *I-beam* is the vertical line that moves around the screen as you move the mouse. Notes calls this line an I-beam because it looks like an I beam used in building construction — a vertical line with little horizontal lines at the top and bottom.
- *Cursor* and *insertion point* are two names for the same thing: the thick vertical line that blinks at the place where something you type appears.

Remember: The mouse pointer is always visible on-screen, often in the shape of an I-beam, but if you use the mouse to scroll up or down, the cursor may scroll off the screen. Don't fear. Move the cursor by pressing any cursor-movement key (such as an arrow key, Page Up, or Page Down) and type something. Or press the spacebar, and the screen changes to show you where the insertion point is.

The easiest way to select text is to click and drag across it with the mouse. The dark box around the text means that it's selected. This dark box is called *reverse video* (light letters on a dark background, rather than vice versa). Using the keyboard, you can select text by moving the cursor to the beginning or the end of the

text, holding down Shift, and pressing a directional arrow to move over the characters you want to select. Press the ← or → key to stretch the highlighter one character to the left or right. Press the ↓ or ↑ key to highlight to the same point in the next or previous line. Pressing Shift while using any cursor-movement key combination moves the cursor and highlights text on the way.

The following additional tips about selecting text are well worth remembering because they can save you a lot of time.

- Use Ctrl along with Shift and the cursor-movement keys to speed up the process of highlighting. Shift+Ctrl+ ← or → moves the highlight one word at a time. Shift+Ctrl+↓ or ↑ moves the highlight to the beginning or end of the next or previous line, respectively.
- Double-click a word to select it.



- If you want to select all the text in the current field, you're in luck — you can use the menu to choose Edit⇨Select All, click the Edit Select All SmartIcon, or just press Ctrl+A.
- If you want to select text in more than one field at a time while you're in edit mode, you're out of luck. Regardless of the method you choose to select text, you can select text in only one field at a time.
- When you use Edit⇨Select All in edit mode, you select everything in the current field. If you use it in read mode, you select the whole document. (In the latter case, the only thing you can do with selected text is copy it to the clipboard.)
- If you want to select two separate chunks of text, you're out of luck. You can select only one bit of text at a time.
- If you find that you selected the wrong text, simply select other text to correct the mistake.
- If you selected some text but meant to select more, hold down Shift and then click at the farthest end of the additional text or use a cursor-movement key combination. Notes adds to the selected text all text between the currently selected text and the place where you click.
- To select a big chunk of text, put the cursor at the beginning of the text you want to select and then use the mouse and scroll bars to scroll until you can see the other end of the text you want to select. Press Shift as you click at the other end of the text. Notes selects all the text in between.
- To select all text from the cursor to the beginning of the field, press Shift+Ctrl+Home. To select all text from the cursor to the end of the field, press Shift+Ctrl+End.

Spacing

Spacing is the distance between lines in a paragraph or between the paragraphs themselves. You find the spacing settings on the Alignment tab of the Text Properties box. You have three spacing settings and three choices for each.

The spacing settings are

- **Interline,** for the space between lines of the paragraph
- **Above,** for the space above a paragraph
- **Below,** for the space below the paragraph

The choices for the settings are

- **Single,** for no empty lines of separation
- **1½,** for a line and a half of empty space
- **Double,** for two empty lines

Spell Check

Use the spell checker to verify the spelling in any document before you close or print it. Here's how to spell check a document:



1. To check the spelling, click the Edit Check Spelling SmartIcon. The spell checker reads the whole document, including every field. When it finds a misspelled word, the spell checker highlights the word and opens a dialog box like the one in the following figure; the misspelled word appears in the Replace window.



2. Perform one of the following actions:
   - Edit the word right in the Replace window. When you do, the Replace button becomes available. Click it to replace the misspelled word with the correct spelling.

- Choose Add to add the word to the Notes dictionary, so that Notes never, ever highlights the word again.
- Choose Skip the word if you want to accept the misspelling this time, but you want Notes to continue to watch for it in the rest of the document.
- Choose Skip All if you want to ignore every occurrence of this word in this document.
- Choose Stop at the bottom if you're not prepared for the shock of seeing what you spelled *rong*.



If you just want to spell check a small section of a document, highlight all the text you want to spell check and then kick off the spell checker.



Use the Add button carefully, because adding a misspelling to the dictionary can be very embarrassing. Forevermore, Notes ignores that misspelling.

Styles

You don't have to go through all the keystrokes again and again to format paragraphs scattered around your document. Imagine that you wrote a report with lots of sections, and each section has its own title. You want the titles to be centered and bolded, to have one line of space after them, and to have a larger font with blue text. All you have to do is format one title, turn that format into a *style,* and then use that style for all the other titles, thus saving lots of time and getting you home for dinner. Applying styles also guarantees that you're consistent. After formatting 15 titles, you're bound to get bored and careless, and you may forget to add boldface along with all the other formats to a title. Using styles guarantees that the same characteristics get applied to every paragraph you select.

To create a style, follow these steps:

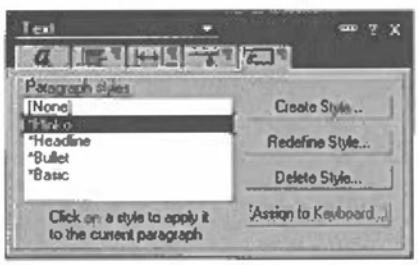
1. Write some text like a title, section head, or whole paragraph.
2. Apply all the formatting you want to associate with the text — for example, choose alignment, text coloring, bolding, spacing, and font.
3. Keep the cursor in the paragraph and activate the Text Properties box and then click on the Styles tab (the last page).
4. Click the Create Style button. The Create Paragraph Style dialog box appears.



5. Enter a name for your new style in the Style name text box.
6. (Optional) Click Include font in the style. If you leave the item unchecked, the style includes all attributes except the font.
7. (Optional) Click Make style available for all documents if you want to be able to use the style in any Notes document in any database, not just the current document.
8. (Optional) Click Assign style to the Style Cycle key [F11] — which means that when you highlight a paragraph and press F11, the paragraph changes to show each available style in succession.
9. Click OK to get out of the dialog box and finish with the current style.

After you create styles, you can apply them to the current paragraph (the one where the cursor is) or to all selected paragraphs. Press F11 to cycle through all the styles you've created and stop when you find the one you want. Or you can apply one of the styles by clicking on the Style box (immediately to the right of the Font Size box) in the status bar. Click a style name and Notes automatically applies that style to the paragraph where your cursor is or in which you've selected at least part of the text.

Remember: When you choose a style, you apply it to the whole paragraph, or to all selected paragraphs if you selected more than one. You can't apply a style to part of a paragraph. Remember also that a paragraph is everything between the previous and the next carriage return (line feed).



The Styles page of the Text Properties box contains three buttons below the Create Style button that enable you to make some changes to the style. Here they are:

- **Redefine Style:** If you decide that the attributes associated with a style aren't quite what you want, format a paragraph with the attributes you do want and then activate the Text Properties box. In the Paragraph styles list box, highlight the name of the style you want to redefine and then click the Redefine Style button. The style you choose includes the new attributes.
- **Delete Style:** No mystery here, highlight a style name in the Paragraph styles list box and click the Delete Style button. The style is toast.
- **Assign to Keyboard:** We mention previously that pressing F11 assigns certain styles one by one to the selected paragraph(s). To add a style to the F11 key, click the Assign to Keyboard button.

Tables

A *table* is a series of rows and columns of cells into which you can enter data. You have considerable control over such attributes as the size of the table and its appearance.

Building the table



Place the cursor at the place in a rich-text field in which you want to insert the table, and then choose Create⇨Table or click the Create Table SmartIcon. You can create four types of tables:

- **Standard:** All rows and columns are visible all the time.
- **Tabbed-Only:** One row is visible at a time, and each row is represented by a clickable tab.
- **Timed:** A new row appears alone every two seconds (yes, you can change the interval for your users who aren't speed readers).
- **Programmatic:** The table is based on a field in the document. This feature is beyond the scope of this book.

After you add a table to your document, whenever you put the cursor in your table, Notes adds a new menu command called, appropriately enough, Table. It appears right after Text and right before Window. You use this menu choice to do things such as change the table's properties or add, insert, or delete rows and columns.

By default, new tables are set to Fit to window, which means that the table size and column widths change, depending on the size of the window that you (or your readers) use to read your document. In addition to Fit to window, you have two menu choices:

- **Fixed** causes the table (and its columns) to be the same width, no matter how big or small you make the document window.
- **Same as window** means that the document displays with the table fitting exactly between the sides of the window.

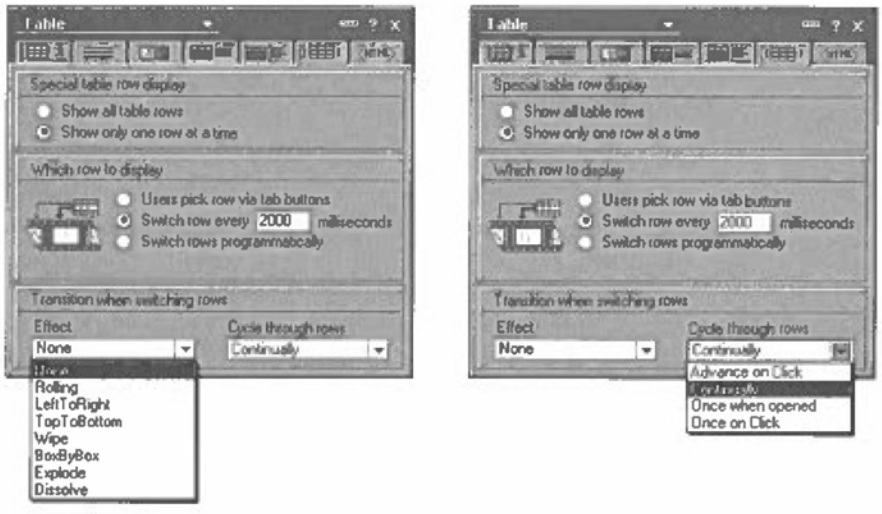
Entering data in tables

Put the cursor in a cell and start typing. When you're done with one cell, move to the cell to the right by pressing Tab, to the cell to the left by pressing Shift+Tab, to the cell below by pressing the ↓ key, or to the cell above by pressing the ↑ key. Of course, you can move to any cell in the table by using the mouse to click in the cell.

Changing the display of rows

The normal, run-of-the-mill table consists of rows and columns, with all the data visible at all times. However, in Notes you can display one row at a time, either letting users decide which one they want to see or displaying a new row every few seconds. Use the Table Rows tab in the Properties box.

As soon as you click on Show only one row at a time, the table changes to a single row and defaults to a "tabbed table," with a tab for each cell at the top above the single displayed row. Click a tab to display the corresponding single row.



If you click Show only one row at a time, the Which row to display box is visible. In it you can choose one of three options:

- **Users pick row via the tab buttons that correspond to each row.** This option gives the user control over which row to view and how long to view it.
- **Switch rows every *xx* milliseconds** conducts a sort of automatic slide show. You set the interval, measured in thousandths of a second, for the display of a row. After that interval, the next row appears automatically. Set the time so that the reader has time to read the row's contents. The default is 2000 milliseconds; that's 2 seconds.
- **Switch rows programmatically** is a choice we can't discuss here, because you need to tinker with the design of the form to make it work. Database designers don't allow their users to mess around with the inner workings of their databases. This option uses the contents of a field to determine which row is visible.

When you click on the tabbed-table choice, a new text box appears at the bottom of the Table Properties box that enables you to enter the text for the currently selected tab.

If you elect to switch rows automatically, you make two more choices in the Table Properties box under the heading Transition when switching rows:

- **Effect.** This option determines the way the background of selected cells appears when their row is displayed. We suggest that you choose each of the effects, open the document in read mode, and see how each row unfolds. One quick note: The only choice under Effect will be None unless you add an image (wallpaper) or color to the cells. Any other choice brings a reminder to the screen that you need to set an image or a color.
- **Cycle through rows.** This setting determines how the cycling of the rows occurs. It scrolls through data on-screen, similar to the way some data scrolls automatically on the Web. Continually is the default option, which means the rows cycle forever. To prevent the rows from cycling forever, use one of the other three options. Advance on click means that every time a user clicks the table a new row appears. Once when opened means that every time someone opens the document containing the table, the rows cycle once and then stop on the last row. Once on click enables the user to click the table, cycle automatically through all the rows, and then stop on the last row. (Remember that you can change the interval for display of the rows.)

Remember: You won't see the changing rows while you're in edit mode; you need to save the document and then open it in read mode to see the rows change.



Users won't know a table changes when they click unless you tell them with a bit of text near the table.

The last page of the Properties box concerns the use of HTML and JavaScript and is beyond the scope of this book.

Merging and splitting cells

To merge cells, highlight the cells you want to merge and then choose Table⇨Merge Cells from the menu. If you merge some cells and then want to split them back to the way they were, use Table⇨Split Cells. You can't split a single cell unless it is first merged, and you can't merge a single cell, period.

Putting a table in a table

Putting a table inside a table is sometimes called *nesting tables*. To add a table to a table, first click in the cell where you want to insert a table and choose Create⇨Table from the menu. Then make the usual decisions about the number of columns and rows and click OK. Enter data and impress your users with your table prowess.

Adding background colors

Use the Table/Cell Background tab of the Table Properties box to change the color of individual cells or of the whole table. Here are your choices:

- **Table color** enables you to color groups of cells — all cells, certain border cells, or alternate rows or columns. You need to pick two colors when you want to color border cells or alternate rows.
- **Cell color** enables you to color the selected cells with a solid color or with two colors fading into each other vertically or horizontally.
- **Cell image** enables you to add wallpaper to the cell or cells and then to use it once or repeatedly throughout the cells.

Changing cell borders

Cell borders are the lines that surround each cell. Click the Cell Borders tab in the Table Properties box to change the appearance of the borders. You can change the following:

- **Border style:** The three styles — solid, ridge, and groove — apply to all cells.
- **Border color:** All the colors apply to all cells.
- **Border thickness:** The thickness of the border can range from None to a thickness of 10. Consider the numbers to be just relative; they don't stand for inches or anything that you need to be concerned about. Change the individual borders of individual cells or of all selected cells.

Adding table borders

Table borders (not to be confused with cell borders) are the settings for the outside of the table. Change the settings on the Table Borders tab of the Table Properties box. The settings include, but are not limited to, the following:

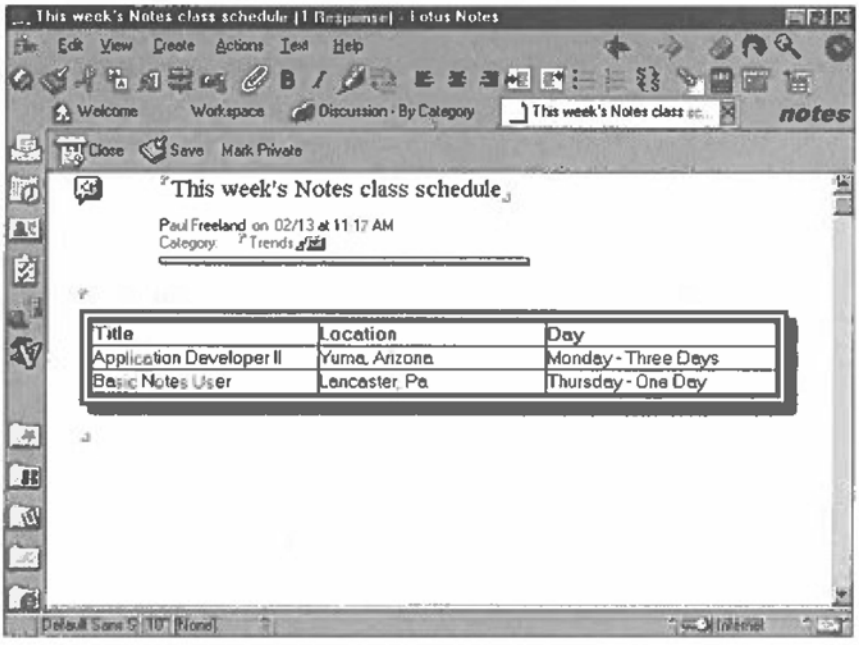
- **Border style:** Not too surprisingly, this option enables you to choose the type of border. Choose from more than eight (that means nine) options, including dotted, solid, double, and the ever-popular none. Just to the right is where you set the table border color.
- **Border effects:** This one is simple — it adds a drop shadow to the right and the bottom of the table, so that the table looks like it's floating a bit above the page. The wider you set the width, the higher it appears to float. Set it wide enough and your readers will have to get a ladder to see what's in the table. Note that you can set the width by typing in a number or by clicking on the little up and down arrows.
- **Width:** At the bottom of the Table Borders tab, you can set Inside, Outside, and Thickness. Changing the Inside number determines the distance from the table to the border; Outside determines the distance from the border to whatever stuff is above, below, to the right, or to the left of the table. Thickness determines the thickness of the border. For each of these settings, you can set each measurement separately by changing just Left, Right, Top, or Bottom. To save time, you can click the larger arrows to the right of the little table and change the whole border at once.

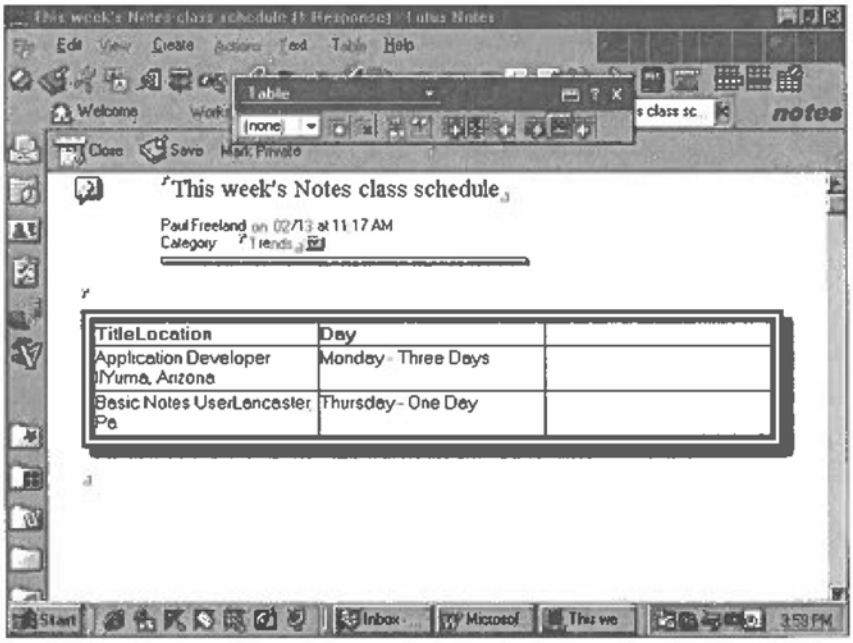
Setting table margins

Use the Table Margins tab of the Table Properties box to set how the table fits in with whatever surrounds it and how it fits into the page. Here's how:

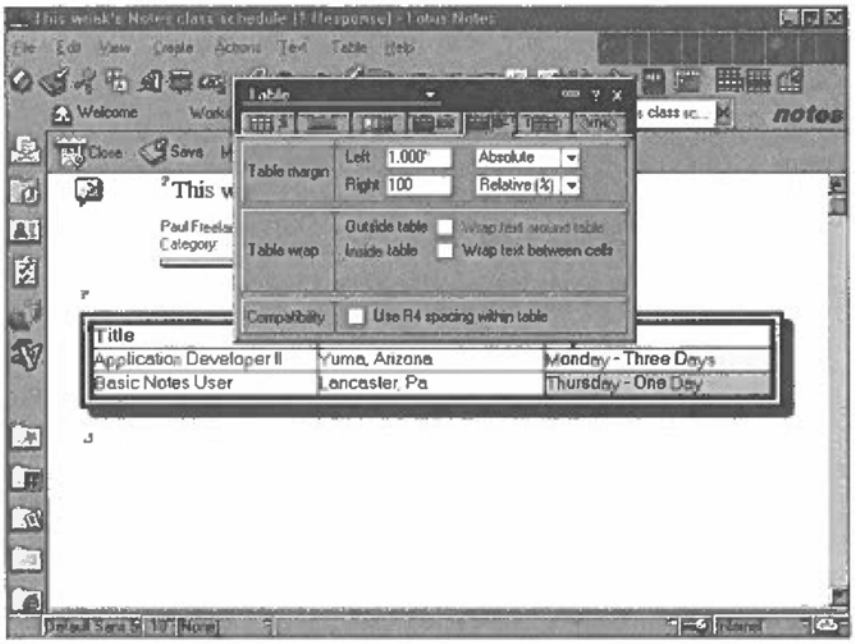
1. Set the table margins the same way you set them for any line of text, whether in a table or not.
2. Choose one of the text wrap settings:
   - **Outside Table — Wrap text around table** is available only if you set the table to Fixed Width on the first tabbed page of the Table Properties box. By checking the Wrap text around table box, you can type text beside the table. However, you can't just type and expect the text to start wrapping; you need to place the cursor beside the table to enter text there. The text wraps after you get even with the bottom of the table.
   - **Inside table — Wrap text between cells** has to do with what happens *inside* cells. Pay attention here or you may get hurt. When you select this setting, a new box appears in which you enter a number representing the maximum height you want the row to be. When you type enough stuff to cause the cell to reach that height, the new text spills into the cell to the right. Be careful, though; as soon as you click on this selection, all *existing* text in the cell to the right of the cell where you put your cursor moves into the current cell, so that the cell to the right is empty and ready to receive the extra text you may type. You may have a lot of arranging to do unless the cells to the right are already empty.

     In the two following figures, the first one has data before we select Wrap text between cells. The second shows what happens. Not a pretty sight.





- **Use R4 spacing within table** uses the slightly larger cell and spacing settings from Release 4 of Notes so that users who still use R4 can view the table without distortion.



Changing row height

All you have to do to change the height of a cell is type. If you have too much text to fit on one line in the cell or if you press Enter, the height of the cell increases to accommodate the additional text. The whole row becomes as tall as the cell with the most text in that row.

Changing column widths

The one setting you most frequently want to change is the width of different columns. To change column width, you have three options:

- **Use the ruler:** Put the cursor in the column whose width you want to change. Choose View⇨Ruler. The ruler contains square symbols for the left and right margins of the column (that's column, not cell) and symbols that look like houses indicating the text indents for the cell (that's cell, not column). Note that you set the width for the whole column in the ruler, but you can change the text indents for each cell in the column individually. The moral? Highlight all the cells in the column if you want a consistent text indent. Finally, grab that little square symbol on the right side of the column in the ruler to change the column's size.
- **Use the Table Properties box:** The more difficult way to set column width is to enter the dimension in the Width box of the Table Properties box. Express your desires in inches (or in centimeters by adding **cm** after the number). Most people find this method harder than using the ruler, but if you prefer to use the Properties box to enter a column's width manually, go right ahead. All that clicking and typing, you could break a nail.
- **Click the Autosize button in the Table Properties box:** The Autosize button tells Notes to make the column as wide as the widest cell entry in that column. If you also click the Fixed width box next to the Autosize button, no matter how much you resize the window, no matter how much you squeeeeze the table, the column you selected when you checked Fixed width stubbornly keeps its width.

Changing more than one cell at a time

To make changes to more than one cell, just click and drag from the first cell to the last cell you want to change. After you highlight a bunch of cells, you can make any kind of change you want to those cells; a new font, italics, or even a new cell border is only a menu choice away.

Deleting rows and columns



Place the cursor in the row that you want to delete. Click the Table Delete Selected Row(s) or Table Delete Special SmartIcon (if you want to delete more than one row or column), or choose Table⇨Delete Selected Row(s) or, perhaps, Table⇨Delete Selected Column(s). When you do, you get a warning that the action can't be undone — it's a one way street.



If you have the cursor in the wrong row or column, or if you chose to delete a row when you meant to delete a column, you could end up in big trouble! So *be careful*. Because an ounce of prevention is worth two in the bush, here's a piece of advice. Save the document first; then do your deleting. If you goof, you can then close the document (without saving it) and reopen it. Now try again, and please be more careful this time!

Inserting rows and columns



To add a new column or row, click the Table Insert Row or Table Insert Special SmartIcon, or choose Table⇨Insert Column or Table⇨Insert Row, depending on the circumstances.

If you want to insert a column, put your cursor in the column in which you want the new blank column to appear (the column containing your cursor gets pushed to the right). If you want to insert a row, put your cursor in the row in which you want the new row to appear (the row containing your cursor gets pushed down). In other words, when you insert a new column, it appears in the column in which you have the cursor, and all other columns move to the right to make room for the new one. When you insert a new row, all other rows in the table move *down* to make room. If you choose Append from the menu rather than Insert, the new column is added at the right end of the table, and the new row is added to the bottom. Use Table⇨Insert Special to insert or append multiple rows or columns.

Deleting a table altogether

On rare occasion, you may want to get rid of a whole table. Getting rid of a table once and for all is a little tricky. You *cannot* select all the cells and then just press Delete. In fact, if you do, you end up deleting all the table's contents, but the empty cells stay. Instead, you have to select the *entire table* by putting the cursor at the end of the line just before (and outside) the table and then pressing Shift+↓ (which highlights the whole table). Then, and only then, can you press Delete to get rid of the whole thing.

Tabs

Back at the factory, paragraphs automatically have their own tabs set at every half inch. This may be fine for you, in which case you don't have to set any tabs at all. But if you're not happy with the way the tabs are set, you can use the Pagination tab of the Text Properties box to set new ones.



The easiest way to create a tab is to right-click the ruler at the place where you want to add a tab.

In the Tabs box, choose Evenly spaced and pick a distance between tabs, such as .75 inch. Or you can choose Individually set and then type in the location of each tab. Just type the distance (measured from the left edge of the page) for all the tabs that you need. For that extra touch of variety, you may even enter some tabs in inches and others in centimeters. If you use inches, you don't have to type any symbol; if you want centimeters, just type **cm** after the number. You can't use yards, miles, quarts, or kilometers, though. Here are a some things to remember:

- You have four types of tabs to choose from: Left, Center, Right, and Decimal. The backwards *L* means the tab is a right tab. To change it to another type of tab, right-click the tab and choose the type. (You can also choose to delete the tab if you goofed.) Left tabs align the left end of all lines at the tab, right tabs align the right end of each line at the tab, center tabs center each line at the tab, and the decimal tab arranges a column of numbers so that the decimal points are lined up.
- The little example box shows you how to set the different tabs by putting the number before the letter; however, the letter comes first. It's "D4" for a decimal tab at the 4-inch mark.
- Put a semicolon, not a comma, between each separate tab setting. Notes complains if you use commas.
- Tabs only work in rich-text fields (RTF), which explains why you can't move to a new field from an RTF by pressing Tab. Instead, you move to the next tab stop.

The left margin looks like two houses joined at the peaks of their roofs (one is upside-down) near the left end of the ruler. Move the upside-down house to give the first line of the paragraph a different indent from the rest of the paragraph. Move the right-side-up house to set the indent for the rest of the paragraph. Click and drag the very bottom of the joined houses to move both together.

Part V

Notes on the Road

The fact that you're working away from the office doesn't mean that you have to be away from Notes. In this part, we discuss how to make Notes mobile — that is, how to set up your computer so that you can open your databases and read your e-mail while you're away from the office. Through the wonder of something called *replication*, you can be sure that you have all the latest and most up-to-date information from the office, whether you're in a hotel room, at home, or even 35,000 feet in the air!

In this part . . .

- **Working with location documents**
- **Configuring your modem**
- **Using selective and partial replication**
- **Working in Notes away from the office**



Connecting through Location Documents

Location documents tell Notes how you connect to your Domino server. You may have one location document that you use when you're at home, one you use when you're calling your server from a hotel room, and of course, one you use when you're at the office and connected directly to the network. Location documents are stored by Notes in your Personal Directory. Specifically, a location document tells Notes whether it should do the following:

- Connect to the server via the network or the modem
- Dial 9 (or some other prefix) to get an outside line
- Deliver your outgoing mail messages immediately or hold them until later (when you call the server)
- Use your telephone credit card when placing a call

In Notes, you have two ways to communicate with your Domino server by using your modem: Notes Direct Dialup and Network Dialup. The former means that your PC dials the Domino server directly — your PC's modem calls the Domino server's modem. The latter means that your PC calls a modem that's connected to your company's network, which the PC uses to connect to the Domino server.

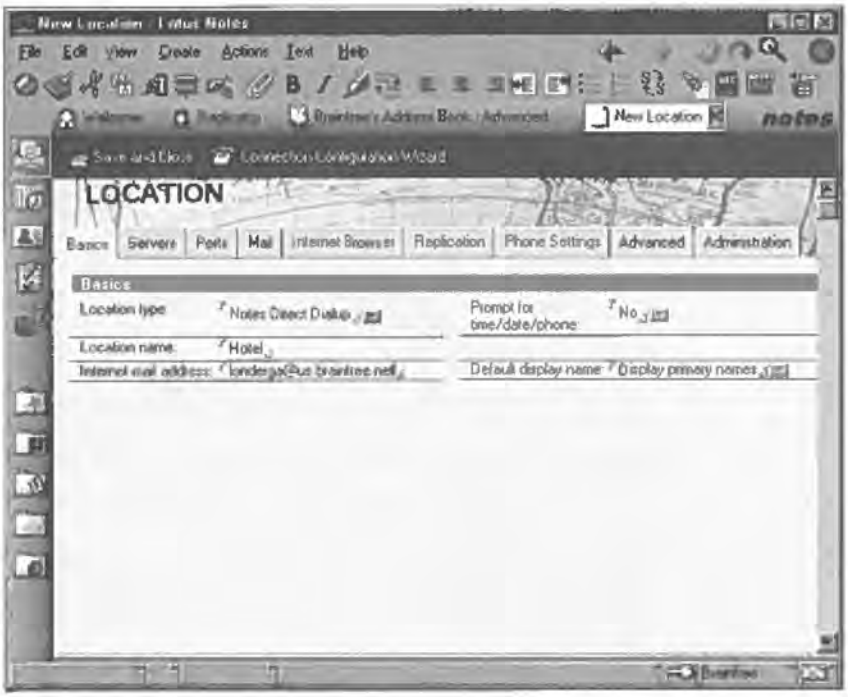
The good news is that you don't have to deal with which method you employ to connect — that's a job for your administrator to figure out. You just need to find out which one he or she chose.

Adding a new location document

Although Notes comes with five location documents (Home, Internet, Island, Office, and Travel), you may need to create your own. If you regularly stay at a couple of different hotels, you may create a new location document for each so that you don't have to constantly change your configuration.

To add a new location document to your Personal Directory, follow these steps:

1. Choose File⇨Mobile⇨Locations.
2. Click the Action bar's Add Location button or choose Create⇨Location, and then watch for the New Location form.



3. Fill in the fields that you want to enter information in. A location document has many fields, but you need only concern yourself with these fields:

   - **Location type:** This field determines whether your PC calls the Domino server directly or calls a modem that's connected to your company's network. In most cases, you choose either Notes Direct Dialup or Network Dialup.
   - **Location name:** This is the name you use to select this location document later, so make it meaningful.
   - **Internet mail address:** This is the name by which you receive e-mail via the Internet. If you're not sure, check with your administrator to determine what you should enter in this field.
   - **Prompt for time/date/phone:** This field is useful if you intend to use the same location document in many situations. If you choose Yes, Notes asks you, every time you switch to this location document, for the current date, time, and whether you need to dial 9 to get to an outside line.
   - **Home/mail server:** Make sure that this field, which is on the Server tab, contains the name of the server on which your e-mail is located.

- **Ports to use:** This field, which is on the Ports tab, is how Notes knows to connect to your server via the network or via modem. In most cases, you create modem-based location documents, so choose COM2, COM3, and so on.
- **Mail file location:** This field, which is on the Mail tab, tells Notes if this location document should use a copy of your e-mail database that's on the Domino server or a copy that's on your own system. In most cases, if you're creating a location document so that you can work away from the office, choose Local.
- **Mail file:** This field, which is also on the Mail tab, is the name of your e-mail file. It's usually mail\yourlastname.
- **Prefix for outside line:** On the Phone Settings tab, use this field to enter the number (if any) that your computer needs to dial to get an outside line.
- **International prefix:** If your computer needs to dial a special international number to make a call, enter it here (011, for example).
- **Area code at this location:** This field is important, so make sure that you enter the area code for the city that you expect to be in when you use this location document.
- **Country code at this location:** If you place calls from one country to another, be sure to enter the appropriate country code in this field.
- **Calling-card access number:** If you want Notes to save you a few dollars and use a telephone calling card, enter the number that you dial for your long-distance carrier here.
- **Calling-card number or extension suffix:** This is the number that you enter so that your long-distance carrier knows who to charge for the call.

4. Click the Connection Configuration Wizard button in the Action bar to create a Connection document that works with your new location document. What happens when you click the Connection Configuration Wizard button depends on what you enter in the Location type field. If you use Notes Direct Dialup, you are prompted for the Domino server's name, phone number, area code, and country code. If you chose Network Dialup, you're prompted for the connection that Notes should use. Check with your administrator before using the Connection Wizard — he or she can tell you exactly what you need to choose.
5. Click the Save and Close button in the Action bar.



You can use a comma in any of the fields to have Notes pause when dialing. For example, typing **9,** (the number 9, followed by a comma) in the Prefix for Outside line field tells Notes to dial a 9 when making a call and then briefly pause before dialing the server's phone number. Each comma that you enter makes Notes pause for about two seconds. You may want to add a comma if your phone system takes an extra second or so when you call outside.

Setting automatic replication

Replication is the fancy word that describes the process by which your computer connects to the Domino server to pick up any new mail that's waiting for you, to deliver any mail you've created, and to make sure that everything else in Notes is shipshape. You can replicate manually or automatically. When you replicate manually, you use the Replicator page, click the Start button, and Notes does its thing. Alternatively, you can set Notes up so that it replicates automatically — in other words, you can set up Notes so that it replicates on a regular schedule without you having to click that Start button.

By using a location document, you can set up a schedule by which Notes regularly calls your server — every hour, every three hours, or perhaps once a day.

Here's how to make a new schedule:

1. Choose File➪Mobile➪Locations.
2. Select the location document that you want to use for your schedule.
3. Click the Action bar's Edit Location button or choose Actions➪Edit Location.
4. Click the Replication tab on the location document.
5. Use the space bar to change the Schedule field's value to Enabled.
6. Use the Replicate daily between field to tell Notes when to start and stop the schedule. You can enter a range of times, such as 8:00 a.m.–10:00 p.m., or discreet times, such as 9:00 a.m.; 3:30 p.m.
7. Enter the frequency with which you want to call in the Repeat every field.
8. Use the Days of Week field to tell Notes which days to call.
9. When you finish entering a new location document, click the Save and Close button in the Action bar.

Every time that you start Notes, it checks your location documents to see whether you have set up an automatic replication/mail delivery schedule. If you have, Notes starts calling the server according to the instructions that you entered in the location document.

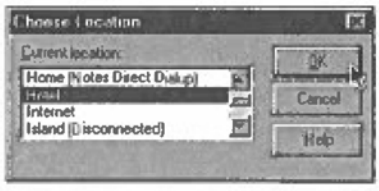
Keep these three things in mind:

- You don't *need* to set up a calling schedule, and most people don't.
- "Location document" does not describe this document very well. Setting up a schedule of calls is not just for replication; Notes also uses this schedule to send and receive your e-mail.
- You have to leave Notes "up and running" on your computer for it to follow your schedule. So if you set up a schedule of calls from a hotel room, leave your computer's power on and Notes running when you leave the room in the morning. Don't forget to leave the phone cord plugged into the modem, too.

Changing locations

Whenever you change your location — well, change your *computer's* location — you have to tell Notes where you (and it) are. The two ways to switch location are as follows:

- In the lower-right corner of the screen, click the location selector. From the small menu that pops up, choose the location document that you want to use.
- Choose File⇨Mobile⇨Choose Current Location and then select the location that you want to use from the Choose Location dialog box.



In either case, the location selector shows the name of the location document that you picked. After you switch locations, Notes knows how to connect to the server the next time you try to open a database or replicate.

Making Your Modem Work

Your *modem* is that fancy part of the computer that lets it talk to other computers over the telephone line. For reasons that no one can explain, every modem works a little bit differently, so (unfortunately) you have to do a little work to tell Notes what kind of modem you have and how fast it is.

Enabling your serial port

Your first step is to make sure that Notes knows that you do, in fact, have a modem!

To tell Notes that you have a modem, follow these steps:

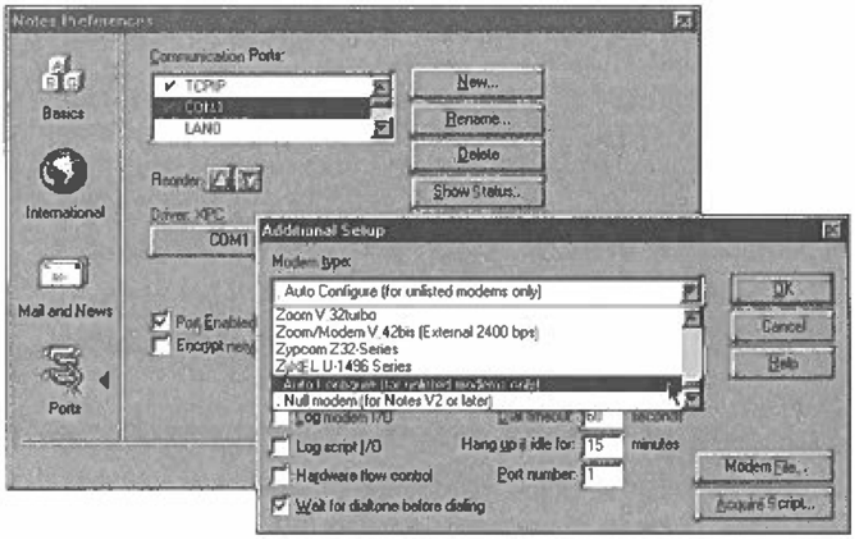
1. Choose File⇨Tools⇨User Preferences.
2. Click the Ports button. The Communication Ports list box presents you with a list of all the *ports* that your computer has. (A port is like a pipe for information; you have a pipe that connects you to the network, a pipe that connects you to your telephone, and so on.)
3. Select the port to which your modem is connected.
4. Click the Port Enabled button.

That's it! Now Notes knows that your modem is connected.

Configuring your modem

To tell Notes what kind of modem you have, follow these steps:

1. Choose File⇨Preferences⇨User Preferences.
2. Click the Ports button.
3. Select the port that your modem is connected to.
4. Click the XXX Options button (where XXX is the name of the port you selected).
5. Select your modem from the Modem type drop-down list. If your modem isn't listed, try one of the following (in order of preference):
   - Generic All-Speed Modem File (with instructions)
   - Auto Configure (for unlisted modems only)
6. Click OK twice.



Troubleshooting modem problems



Troubleshooting modem problems is easily one of the most confusing, least rewarding, and generally no-fun-at-all activities that you can imagine; we certainly can't do it justice in this small book. So leave it to the experts — if your modem doesn't work, don't hesitate to ask your local guru for help.

Saving Replication Time and Money

Replication can sometimes take a long time and lead to some big phone bills. So here are a few tips that can reduce your time online and save you a few buck$ in the process.

Partial replication

Depending on the speed of your modem, you may find that replication takes a long time. How long it takes depends on the number of databases that you replicate, when you last replicated them, and most importantly, the size of the documents that are waiting for you on the server.

One way of reducing the replication time is to use *partial replication* — in other words, to replicate only a portion of very large documents. That way, if someone has sent you e-mail with an especially large spreadsheet attached to it, you don't have to wait while your modem picks up the whole message. To replicate only part of the documents, follow these steps:

1. Click the Tab for the Replicator page on the workspace.
2. Click the Replication button for the database in question.
3. Select Receive summary and 40KB of rich text from the drop-down list.
4. Click OK.



You must manually set partial replication for each database that you want to partially replicate. If, for example, you want to partially replicate three of your four databases, you need to follow the preceding steps three times.

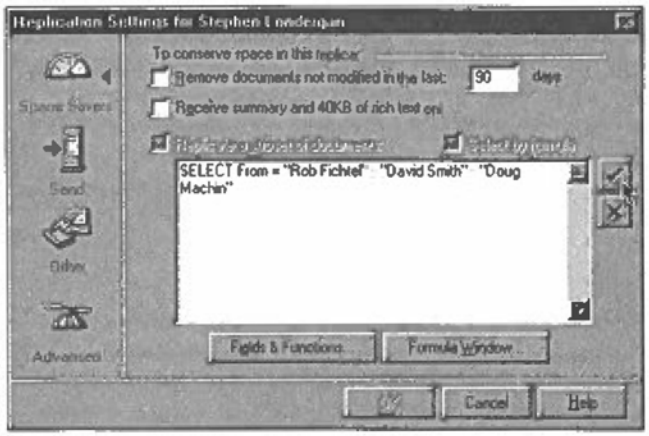
Remember: If you're reading a document that has been partially replicated, you can choose Actions⇨Retrieve Entire Document to retrieve the whole document. If you're not already connected, Notes makes a special call to the server to update the document and get the rest of it.

Selective replication

Selective replication is a way to replicate only documents that meet a criterion that you establish. This criterion may be only the documents from a certain person, only the documents created after a certain date, or some other detail that you think of. Selective replication is a great way to reduce the amount of time (and money) that you spend replicating with your company's server(s).

To set up selective replication for a database, follow these steps:

1. Open the database.
2. Choose File⇨Replication⇨Settings.
3. Click the Replicate a subset of documents check box.



4. Click the Select by formula check box.
5. Enter the formula in the list box.
6. Click the green check mark to save the formula and then click OK.

Clicking the buttons is easy, but writing your selection formula is another story. We can't predict exactly what your formula will look like, but we can say that the most common formulas look something like this:

```
SELECT From = "Debbie Little" : "Ursula Smith":
  "Jeff Schick"
```

You need to know the exact field names to write a selective replication formula — and that means either becoming a database design expert or asking someone for help!

Working in Notes Away from the Office

The good news is that using Notes when you're disconnected from the network is just like using Notes when you're connected, with two notable exceptions:

- Any e-mail messages that you create are held on your computer and aren't delivered until the next time you call your server.
- You must have copies of the databases (including your e-mail database) on your computer's hard drive.

Assuming that you have taken care of the second step and have copies of the databases on your computer, you can use Notes anywhere that you can take your computer: at home, in the car, in an airplane, or at the beach.



The key to working *remotely* is always to use the database icons that refer to the copies of the databases that are on your hard drive.

Sending e-mail from afar

You use your e-mail when you're way from the office the same way that you use it when you're at work. In fact, the following are the only two differences:

- Any e-mail messages that you create are held on your computer and don't get sent until the next time you call your server.
- The list of people you see when you choose Actions⇨Address while writing an e-mail message is only from your Personal Directory.

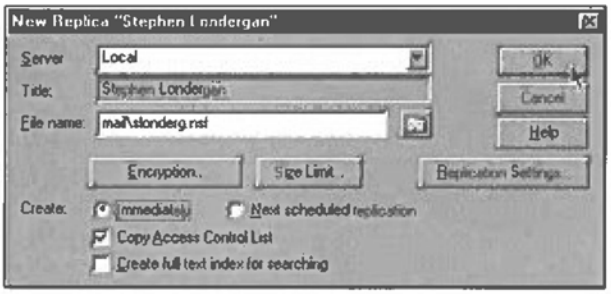


Outgoing messages are held in a special database, called (appropriately enough) Outgoing Mail. This database offers you a chance to second guess yourself, but only when you're working remotely. If you create and send a message and then decide that you don't want to send it after all (and you haven't called the server), you can open your Outgoing Mail database and delete the document. Cool!

Taking a database with you

You have to make a copy of any database that you want to be able to use when you're away from the office — including your e-mail database. To make a copy of a database, so that you can replicate it and take it on the road, follow these steps:

1. Open the database.
2. Choose File⇨Replication⇨New Replica.
3. Click the Immediately button.
4. Click OK.



When you click OK, Notes makes a copy of the database on your computer's hard drive.



Make the copy of the database that you want before you leave the office, while you're still connected to the local area network (LAN). That way, your first replication — where Notes has to do a lot of work — is nice and fast. You can replicate a database for the first time over your modem, but doing so takes much longer.



Notes neophytes often think that they need to copy *every* database that they use at the office and bring it with them. In addition to wasting a lot of disk space on your computer, this practice gives your modem much more work to do every time you replicate. The more experienced Notes user knows to exercise some restraint! The bottom line is that you need to copy only the databases that you *really* need.

When you create a copy of a database, you end up with two icons on the workspace: one for the copy of the database on the server and the other for the copy of the (same) database on your computer. Choose View⇨Stack Replica Icons to have Notes stack all the icons.

Using the Replicator page

The last tab on the workspace is the *Replicator page*. This is a special page that you use to tell your computer to call the server, deliver your e-mail, pick up any new e-mail, and synchronize the databases that you have on your computer with the databases on the server. Whenever you want to replicate, use these steps:

1. Click the Tab for the Replicator page.
2. Click the Start button.



You can continue working while Notes is replicating. You can switch to another workspace page to open a database or even switch to a different program.

When the phone call is finished, you can switch back to the Replicator page to see an account of exactly what happened. Notes tells you, for each database, exactly how many documents it sent and how many documents it received.





Don't be surprised if your Replicator page tells you that it received, for example, five documents in a particular database. When you open that database, you may find only three new documents. Replication takes care of new documents, deleted documents, and edited documents. In other words, if someone edited a document, the changes get replicated to you, and that counts as a replicated document on the Replicator page. So five documents may really be two edits plus three new documents.

Part VI

Text Searching Near and Far

Databases crowd your servers, documents pile up in each database, hundreds of millions of documents are tucked in dusty corners of the Internet — mountains of data are there for the reading. Notes offers several ways to find information, from quickly searching a single document to *full-text searching* (a slick way to let Notes do the digging) to letting Notes search the Net. Take our word for it, no matter how many speed-reading courses you take, Notes can find information faster than you could ever hope to.

In this part . . .

- **Building your own index**
- **Searching documents, views, databases, the Internet**
- **Using the Search bar**
- **Setting search conditions**
- **Setting search options**
- **Using Query by Form**



Boolean Searches

We tell you briefly about Boolean searches because the wrong choice can give you the wrong search results. Boolean refers to the use of *and* and *or*. Imagine that you're concerned with the first name *Kathryn* and the last name *Kemp*. Suppose your criteria specify that the Last Name field contains *Kemp* and the First Name field contains *Kathryn*. If you choose to connect the two conditions with *and*, the search results have to contain *Kemp* in the Last Name field. The second condition refines that first condition; it tells the search engine, "Now that you have all the Kemps, find documents in which the first name is Kathryn." What's left is all the Kemps named Kathryn.

What if you use *or* between the two conditions instead of *and?* First, as before, you get all the Kemps, but then the second criterion says, "Find all people whose first name is Kathryn." You're not refining anything, so your list is going to be a combination of everyone whose last name is Kemp and *everyone* whose first name is Kathryn. That could be a big list; lots of people have the first name Kathryn.

Domain and Worldwide Searches

A *domain search* looks beyond the content of your screen to other Notes databases, non-Notes files, and selected Web sites. Before you can perform a domain search, your administrator needs to set up the search. Until that's done, Domain Search mentioned in Step 2 in the following procedure will be grayed out, and you won't be able to do a domain search.

Here's how to perform a domain search:

1. Click the arrow to the right of the Search icon.
2. Choose Domain Search. (The title that your administrator created for the search may be something other than "Domain Search.")
3. Select Documents if you want to search the contents of databases; select Databases if you want to search only the titles of databases.
4. If you want to include non-Notes documents in your search, click More and select File System.
5. Type your query in the search box.

6. Select Terse or Detailed results and an option in Sorted by. Choosing either Terse or Detailed returns relevance (the number of times the search text appears in each document found), date last modified, and document title. Choosing Detailed also returns a summary of content and the URL (if available).
7. Click More.
8. Choose conditions and options to specify the search. These become part of your query, along with the text you type. You can also type operators into the query, such as *and*, *or*, and *not*.
9. Click Search.

To search the world (in other words, the Web), use the Search button to specify your favorite Internet search engine site and then enter your search criteria as you normally would to search around the virtual world. The search engine opens, conducts its search, and delivers the results of the search.



If you plan frequent worldwide searches from inside Notes, you may want to bookmark that favorite Internet search engine. Here's how:

1. Use Notes to activate the Internet search site.
2. Click and drag the task button (near the top of the Notes window) for the site to the More Bookmarks icon.
3. Keep holding down the left mouse button, and when the More Bookmarks folder opens, drop the task where you want it.

Full-Text Index

Before you try searching, you should understand full-text indexing. A search for text is much speedier and offers more options when you have a *full-text index*, a behind-the-scenes list of text and documents that the search uses to find documents containing the text you want. If you're a manager or designer of a database or if you have a copy of the database on your own computer, you can create your own index. How about indexing your e-mail database? That way, you can easily find all those old messages that have your customer's names in them or quickly put your hands on all the messages that are about a certain project. You don't absolutely have to create a database FTI (as the experts sometimes call a full-text index), but an FTI does make searching easier.

Planning your index

Before indexing every database in sight, you need to consider a few issues:

- **Access.** You can index a database only if the database is on your local computer (not on the server) or you have at least designer access. In the status bar, in the third section from the right, is a symbol indicating your level of access in the currently opened database. Click it, and if it says "You have designer . . ." or "You have manager access to this database," you're all set. For more information about database access, see Part IV.
- **Disk space.** Indexing a database takes up more disk space — maybe an additional 50 percent (or more) of the database's size. In other words, if your e-mail database takes up, say, 10MB of disk space, indexing could increase the size to 15MB. Predicting exactly how big the index is going to be is hard, because the size depends on the type of database you're indexing. For a database that contains a lot of pictures and a relatively small amount of text, the index won't be as big (percentage-wise) as it would be for a database that's almost all text. Of course, if the database you want to index is on a server, rather than on your own computer, you don't need to be as conscious of the disk-space requirements, because you're not going to use any of your hard-disk space — the index is stored with the Notes database on the server.



  Don't let your administrator read that last sentence, because administrators are *extremely* concerned about disk space on the server. That's their job.

- **Maintenance.** Like a beautiful lawn, an index requires maintenance. As users add documents to and remove documents from the database, someone has to update the index periodically so that it stays current. (Keep in mind that a new or recently edited document may not show up in the search results if the document was added or changed after the last index update.) And who's going to do the work to keep up the index? The answer depends on where the database is located.
- **On the server.** If the indexed database is on the server, maintaining the index is more your administrator's concern than yours. In fact, the index is automatically updated if the database is on the server. Your administrator controls the frequency with which Notes updates the index — whether the

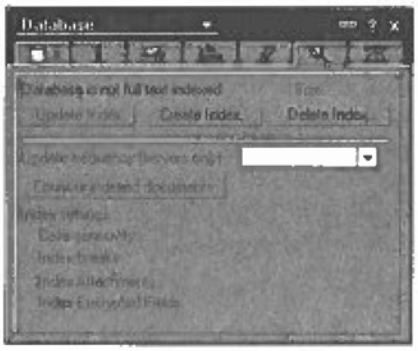
frequency is instantly, hourly, or daily. The more often the update, the slower the server runs, so you may have to do some negotiating (or resort to bribery) to get your administrator to agree to an index that updates the instant that the database changes.

- **On your hard disk.** If the indexed database is on your computer's hard disk, *you* have to be responsible for keeping it up-to-date. This maintenance may not sound like much, but it takes time — how much time depends on how many documents users have added to and removed from the database since you last updated the index.
- **Operating system.** If you use a Macintosh, you can't index a database that's on your own computer. Mac users can create indexes for databases that are on the server, and Mac users can certainly use the indexes for the databases on the servers. They just can't create an index for a local database.

Building your index 101



To create a new full-text index for a database that's on your local hard disk, call up the Database Properties box by clicking the Properties SmartIcon and then clicking the Full Text tab. If the database has never been indexed, you see `Database is not full text indexed` displayed in the Properties box. The Create Index button is right there for the clicking.



Before you create the index, you have to make several choices in the Create Full-Text Index dialog box. Your decisions can really affect the size of the FTI (that's a TLA, *three letter abbreviation*, for full-text index) and how long the indexing process takes. Here's what the options in the Properties box mean:



- **Index attached files:** Notes actually reads all the files attached to each document and includes their contents in the full-text index. Wanna guess what happens to the size of the index?
- **Index encrypted fields:** Notes reads and includes the contents of encrypted fields in the index. If the search finds a document with the search text in an encrypted field, Notes includes that document in the results — even though you may not be able to read the document. See Part IV for information about encryption.
- **Index sentence and paragraph breaks:** This option makes it possible to find words in a document when they're in the same paragraph or sentence as other words in a search. If you search for "travel" near "policy," you find only documents in which the two words are close to one another, excluding documents that simply contain the two words scattered throughout. This feature tells Notes to remember not only the word, but also where it occurs. Space hog!



- **Make case sensitive:** This option really increases the size of the index on disk, but if distinguishing between *Sue, sue,* and *SUE* is really important, by all means check it.
- **Update index:** This option determines how often the index is updated. Because the indexing process does take valuable server resources — in other words, it slows the server down — you should choose to index as infrequently as possible.

Creating an index takes a while because Notes has to index every document in the database the first time. The good news is that updating the index after that doesn't take as long, because Notes only has to update the index to reflect users' changes (new,

deleted, and edited documents) since the index's last update. After you create the index, the Index tab of the Database Properties box changes to show the current status of the index.



You can get an idea of how long the indexing process will take, or at least how necessary it is, by clicking the Count Unindexed Documents button on the Full Text tab of the Database Properties box. You may decide not to bother updating the index if it's not too out-of-date. On the other hand, you may decide to go ahead with the update because it won't take very long for just one document. It's your call.

When you're ready to update the index, just click the Update Index button on the Full Text page of the Database dialog box. If you decide that you don't need a database index after all, click the Delete Index button. Why would you want to do that? Perhaps because you're running out of disk space or you simply never do a search for text and therefore don't need the index. These reasons aside, an index is a handy thing to have around.

Full-Text Search



When you use the Search icon in the Navigation bar, you can search anything from a Notes document to the world. Where you look, what you look for, how you want the search results displayed, and what specific search conditions you want to use are all contained somewhere in that Search icon. The choices you can make are determined by where you plan to look and whether the database you're searching has a full-text index.



We didn't get into word and paragraph breaks when talking about setting search criteria because that gets a bit complicated. A search formula to take advantage of sentence and paragraph breaks looks like this:

```
("gold" sentence "silver") paragraph "diamonds"
```

Here, you look for the words *gold* and *silver* in the same sentence and in the same paragraph as the word *diamonds*. In this formula, the words *sentence* and *paragraph* aren't text that the search looks for; they're actually part of a search formula.

Searching through all the documents in the view

In this section, we talk about the whole document, not just the text displayed in a view containing the documents you want to rifle through. In a view, you may see just the documents' title and author's name, but of course there is much more information in the document you may need to search.

The Search icon allows a *full-text search,* which is a way for you to find all the occurrences of a word (or a couple of words) very, very quickly. You can search a huge database in no time at all. Most searches don't take more than two or three *seconds.* And when you ask Notes to search for a word, Notes finds *all* the documents for you, no matter where (or how many times) the documents contain the word. Notes calls this full-text search not because it finds full text (no such thing exists), but because full-text search is more powerful — it enables you to find words near each other or in the same sentence or paragraph, and it allows you to locate variations of the search text.

Playing hide and seek with the Search bar

To do a full-text search, you need to call up the *Search bar* to enter the criteria for your search. To display the search bar, click the Search icon in the Navigator bar, or choose View⇨Search Bar from the menu.



Remember: When you perform a search, Notes searches only the documents in the current open view. So you have to be careful to choose the right view before you start your search. If the open view shows only documents from the first half of the year, your search doesn't look through the documents from the second half of the year.

Bellying up to the Search bar

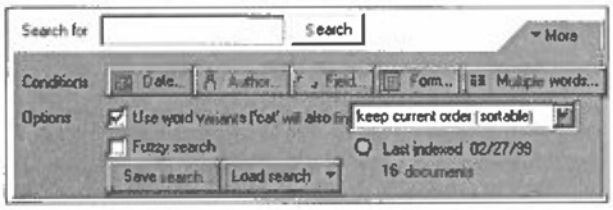
The Search bar contains several important parts. On the left, the blank box is where you type the text that you want to search for. Here are the types of things you can enter:

- **A single word:** For example, type **gold** to find all documents that contain the word *gold.*
- **A phrase in quotes:** For example, type **"gold and silver"** to find documents that contain the phrase *gold and silver.*
- **Words connected by *and*, without quotes:** For example, type **gold and silver** to find documents that contain both the word *gold* and the word *silver.*
- **Words connected by *or*, without quotes:** For example, type **gold or silver** to find documents that contain either the word *gold* or the word *silver* — maybe both, but at least one of the two.

If you're satisfied simply to find documents containing the text you enter — and most of the time you want to keep the search simple — enter the text, click Search, and wait for the proper documents to appear.

Getting into conditions

Suppose you search for a word and find 150 documents. Great — you still have too much to read. If you can somehow refine your search, you can narrow the number of search results. For example, you can narrow the search to documents created by a single author. Just click the More button in the Search bar and then click the Author button and enter the author's name in the Search Builder dialog box that appears. Note that the dialog box contains a drop-down list displaying the word *Contains*. Clicking the down arrow enables you to choose *Does not contain* in case you want to exclude documents by a certain author.





When you click the various buttons and specify certain conditions, each condition appears in the Search window. You can find documents with multiple conditions; for example, you can search for documents written by a certain author, not written by another author, and containing specified text. In the Search bar, each condition is represented by a *condition token,* a gray box containing the specific condition. To see the condition, or to modify it, double-click its token. To delete the condition, highlight its token and press Delete.

But wait, there's more, much more. In fact, there's too much to cram into this part. So we suggest you spend a few minutes improving your search skills by clicking the buttons in the Search bar to see all the options available to you. Here's a quick list of available search conditions:

- **Date:** When you select By Date, a dialog box appears so that you can enter a date and tell Notes to find the documents that are newer or older than that date. You can also find documents created between two dates, documents not created between two dates, documents created in the last specified number of days, and so on.

- **Author:** When you choose By Author, a new dialog box appears so that you can enter the name of the author whose documents you want to see or don't want to see.
- **Field:** When you click By Field, a dialog box appears so that you can enter the name of a field and the data you want that field to contain, or not to contain, in the documents you find. One of the items in the Condition drop-down list is By Form. By Form enables you to do a Query by Form, which we explain in the following section.
- **Form:** This condition enables you to look for documents created in a single form. If the view you're searching through has many types of main documents and responses, you may only want documents created with a specific form.
- **Multiple words:** You can also refine your search by looking for several words. Use this option when you want to look for more than just a couple of words or phrases. Instead of entering in the text box words or phrases that you want to find, as we describe in the previous section, click Multiple Words and enter one word or phrase in the numbered boxes in the Search Builder dialog box. Choosing Any is like, in our previous example, using the word *or* between *gold* and *silver* in the text box; the resulting search finds all documents that contain any of those words. Choosing All is like, in our previous example, using the word *and* between *gold* and *silver* in the text box; the resulting search finds the documents that contain all the words in the list.



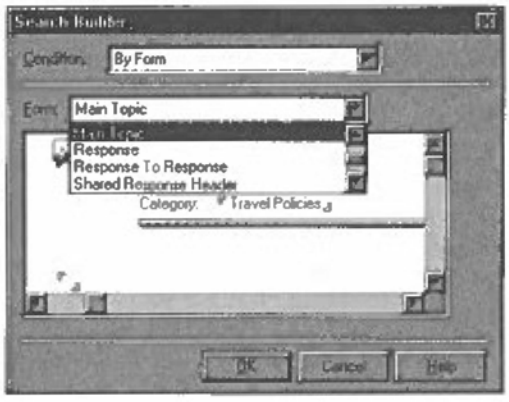
Querying by form

A way to make your life easier is to do a *Query by Form,* which allows you to call up an empty document and enter into the fields the text you want to find in those fields. The search finds the text you specify only when it appears in that field. This method narrows and refines your query substantially.

Imagine that you want to search through a personnel database for someone's name, but that person is the author of many documents in that database. Complicating the problem is the fact that the documents in the view are of many different types (composed with different forms). You aren't interested in documents the person wrote, only in documents in which the person's name is mentioned, and you only want one type of document. You can use Query by Form to tell Notes to be sure that the name occurs in the Body field of a particular form.

Here's how you make a Query by Form:

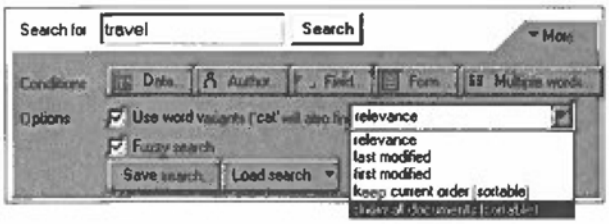
1. Click More in the Search bar.
2. Click the Field button.
3. In the dialog box that appears, click the down arrow at the end of the Condition text box and choose By Form.
4. Click the down arrow to the right of Form to see the list of forms.
5. Pick the form you want to use, and Notes gives you an empty version of the form.



6. Place the cursor in the field in which you want to find the word or phrase and type the text you want Notes to find in that field. Tired of picking and clicking? Sorry, one more.
7. Click OK to close the dialog box and then click the Search button in the Search bar to find the documents.

Querying with Fuzzy Search and the Variants

Sounds like a 1960s band, doesn't it? Actually, it's two search options. In the Search bar, below the search condition buttons, are additional search options you may want to exercise before you send the search engine purring off into the database on a scavenger hunt. You see the options on your screen if you click the More button.



When you have a full-text-indexed database, the following options are available to you:

- **Use word variants:** This option tells Notes that you want to look for not only the base word you typed, but also the base word with any possible prefixes or suffixes. For example, searching for *sneeze* also finds *sneezed* and *sneezing*. Bless you.
- **Fuzzy search:** This option tells Notes to use not only the word you typed, but similar phrases and corrected spellings if you misspelled your criterion. For instance, searching for *known problems* returns *known serious problems* and searching for *travvel* finds *travel*.
- **Sorting the results:** You can choose to sort the search results by choosing one of the items from the drop-down list to the right of the Use Word Variants check box:
  - **Relevance:** This choice means that you want to see the search results listed in descending order by the number of times your search criteria appear in each document, with the ones containing the largest number of examples of your criteria at the top. The marker column to the left of the list of documents contains a bar with the darkest part of the bar in the marker column next to the documents with the largest number of occurrences of the search text.

- **Last Modified** and **First Modified:** Choosing either of these options asks Notes to list the documents in order according to age — from earliest- to latest-composed, or vice versa.
- **Keep current order (sortable):** This choice keeps the documents in the order that they were in the view; they aren't sorted by relevance or age. Only the search results appear in the view, and they appear with checkmarks.
- **Show all documents (sortable):** Choosing this option shows all the documents in the view but puts a checkmark next to the documents that satisfy the search results.

Saving a search

If you plan to execute the same search again and again, save yourself a lot of keystrokes by saving and reusing the search criteria you worked so hard to create. Saving a search is simple; just click Save Search and give the new search a name in the dialog box that appears, and then click OK. Check Shared search to allow other users of the database to use the search you save. To re-use the search, click Load Search, click on the name of the search from the drop-down list, and then click the Search button. You can also click and drag the task button for the search to the Bookmark bar so that you can use the same search in the future.

On your mark, get set, search!

After you set your conditions and choose your options, you may as well go ahead and start the search itself. That's the easy part — just click the Search button. Even though Notes is fast, you may have to wait a little while. If you have a lot of documents in the view, finding them is going to take a couple of minutes. Of course, if the database has only three small documents, the search doesn't take any time at all. The point? The amount of time a search takes depends on three factors:

- The size of the documents in the database
- The number of documents in the database
- The complexity of the search conditions you set

Seek and ye shall find

When the search finally finishes, Notes changes the view to show the search results the way you specified for Notes to display the search results. If the database is full-text-indexed, Notes lists the documents that match your criteria in order of their relevance — in other words, in order from those with the most occurrences of

your criteria to those with the fewest occurrences. The vertical bar, called the *marker bar,* at the left-hand side of the view represents the relative frequency of your criteria in each document. The darker the bar, the more occurrences in that particular document.

Remember: You can choose to sort documents in other ways than by relevance. Just be sure you make the decision before the search.

You open a document uncovered by a search the same way that you open any other document: Double-click it or select it with your mouse and press Enter. Notes then shows you the document and highlights the text that you wanted to find. As you read a document retrieved by a full-text search, you can jump quickly to the next occurrence of the search text by pressing Ctrl++ (that's the Control key and the plus sign). You use Ctrl+– (Control and the minus sign) to jump quickly to the preceding occurrence of the word.

Resetting the stage

After you read the documents that interest you, click the Reset button to clear the search and return all documents to the view.



If you want to conduct another search, you don't need to click Reset first; instead, just type in a new bunch of text, set your conditions, and then click Search. Typing a new search word makes Notes forget all about the old search and returns only documents that satisfy the new set of criteria. You really only need to use the Reset button when you're completely done searching.

Home Page Search Buttons

Below the task center is yet another way to search. Click the down arrow in the text box next to Search, and then select Notes Database Catalog or an Internet search option. Enter some search text in the text box to the right and then click the Search button.

Keyword Fields

Some fields in your documents enable you to do a kind of search. The fields contain lists from which you may choose one or more items, rather than typing them in. You can find just what you're looking for in a keyword field without having to scroll up and down in a long list. Just zero in on an item by typing its first letter.

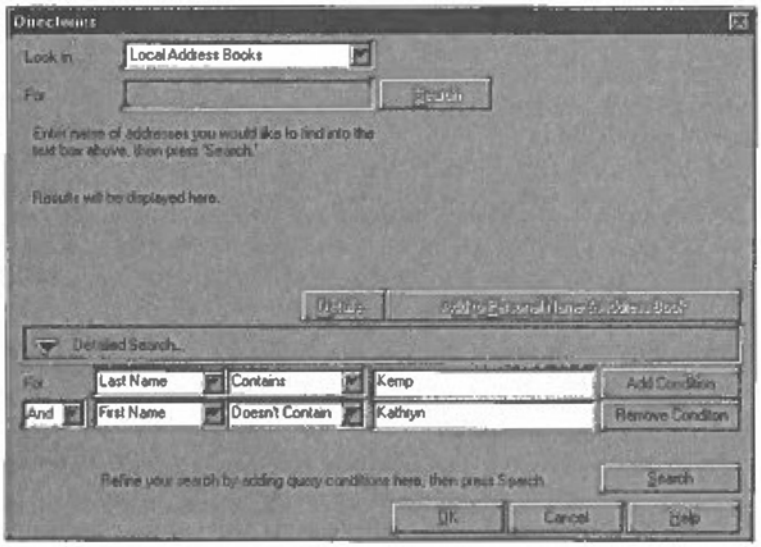
For example, in the name, To, cc, and bcc fields in the memos in your e-mail database, you can start to type the name of the person you want to find, and Notes anticipates what you're typing and finishes the name for you. If Notes gets it wrong, just keep typing the name, and after you type enough of the name to distinguish your choice from similar names, Notes finishes the name for you.

People Searches

Notes can even find a person for you, without making you open a bunch of databases such as the registry. To find someone, follow these steps:

1. Click the down arrow next to the Search icon in the Universal Navigator.
2. From the drop-down list, choose Find People.
3. In the Directories dialog box that appears, choose where to Look in.
4. Enter some helpful text in the Starts With box (a few distinguishing characters will do), and click Search. The results of your search appear in the Search dialog box.

Highlight a line in the results if you want to see Details and click the Details button. The page in the appropriate registry opens so that you can see more about the person. Click Add to Personal Name & Address Book if you want to use the name to address memos in the future.



Screen Contents

Frequently, you may simply want to find some text in the document you're reading. If you're busy with a mammoth document that trails off the bottom of your screen and well into the desk below, reading the whole document to find a small section of text is a waste of time. Instead, you can quickly and easily tell Notes to find a word or a phrase.



1. Use Edit⇨Find/Replace or click the Edit Find/Replace SmartIcon.
2. Enter the text you want in the little dialog box that appears.
3. Click Find Next.

Notes takes you to the highlighted text. To find the next occurrence of the word, simply press Enter, though you can also click Find Next if you're particularly fond of using the mouse. After you find the specific occurrence of the text you want, click Close or press Escape to clear the Find dialog box off the screen.

You can also easily find a document in a sorted, but not categorized, view — just type the first few characters of the item you're looking for. Just start typing, that's all; no dialog box or menu item is necessary. A small dialog box appears showing you what you typed — in case you forgot. You don't need to type the whole word you're looking for; just type enough characters to distinguish what you're looking for from other similar words and then press Enter. Notes jumps to the first document that contains whatever text you typed. To continue your search, leave the current document highlighted and repeat the same procedure again to find the next document containing the text.



You can tell if a view is sorted — the documents in the view are in some sort of order. If it's categorized, the documents are clustered under headings.

Here are three small things to remember as you search the contents of an on-screen view (not a document on-screen):

- Using Edit⇨Find/Replace finds text in the view, but not inside of the documents.
- You can use the menu or the SmartIcons, but you can't use Ctrl+F.
- Searching a view finds the word in the view even if the word isn't the first word in the title of the document. So if you're looking for the word *directions*, using Edit⇨Find/Replace finds a document listed in the view as "Follow these directions to install Notes," even though *directions* is not the first word in the title.

Part VII

Notes and Other Programs

Today, a program can't be a hermit. A program is less useful if it keeps its data to itself, preventing the data from being used by other programs, or if it doesn't allow data from other programs to be used in its environment. In this part, we examine several different ways to exchange data between Notes and other programs.

The way that you bring data into Notes or send Notes data out into the world depends on several things: the form that the data takes outside Notes, what non-Notes program you use, what platform you use (Windows 95 or 98, Windows NT, OS/2, or Macintosh), and what you plan to do with the data after it arrives at its destination. This part gives you some pointers about when to use each technique for data sharing.

In this part . . .

- **Attaching files to a document**
- **Cutting (or copying) and pasting**
- **Importing and exporting data**
- **Linking and embedding**



Attachments

Sometimes when you send a memo or create a document, you want to include a computer file along with it. The purpose is simply to give the recipient the file, not to include its contents in the document or to make it possible to edit the file. The file can be of any type — a Word Pro or MS Word document, a batch file, or an executable (.EXE) file — any type of file except Macintosh folders, PC directories, or databases stored on a server.

It probably comes as no surprise that a large attachment creates a large document and increases the size of your database. The attachment goes where the document goes, just like a disk that you include in an envelope with a letter.

Creating attachments

To attach a file to a document, follow these steps:

1. Place the cursor in a rich-text field (the body of a memo, for example) in Edit mode.



2. Click the File Attach SmartIcon or choose File⇨Attach. (If Attach is grayed, then the field is not a rich-text field.) The Create Attachment(s) dialog box appears. This is where you choose the file or files to attach.

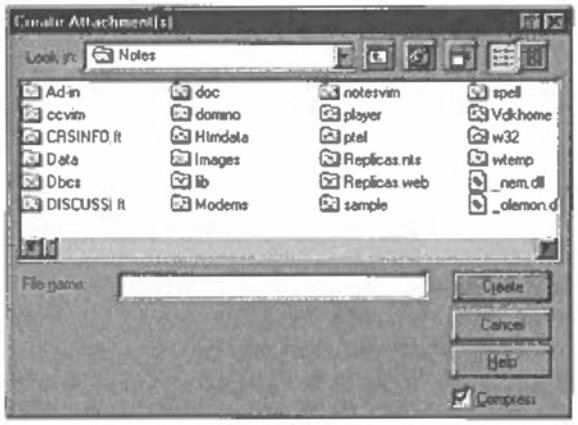
3. If the file that you want is in another drive or directory, select the correct drive or directory in the Look in box of the Create Attachment(s) dialog box.

4. Highlight the proper filename in the list of files and press Enter or click Create. To attach more than one file at the same time (if they are all in the same directory), highlight the first file and hold down Ctrl while you select the other files that you want to attach. To select several consecutive files, highlight the first file and Shift+Click the last file. All files between the first file and the last are highlighted.



To narrow your search to only one type of file, type the extension for that type of file in the text box next to File name in the Create Attachments dialog box.

By default, the Compress box is checked. The file is compressed as it's attached so that it takes up less disk space and takes less time to send. The only reason not to compress files is that the attachment process takes a little longer if the files are being compressed. Attachments are automatically decompressed when the recipient detaches them.



Each file that you attach is represented separately by a small icon. If Notes can figure out which program the file was created in, the icon is the logo of that program; otherwise, the icon looks like a piece of paper with the corner folded over.

Using attachments

When you double-click an attachment, the Properties box appears so that you can choose what you want to do with the attachment. You have the following three choices:

- **View:** Depending on the type of file, you can elect to see its contents. Seeing is not always possible, of course — a program file has nothing you can see, but a spreadsheet file created in Lotus 1-2-3 does. The attachment viewer often lets you see the contents of an attachment even if you don't have 1-2-3 software on your computer. Remember that you can only *see* it; you can't edit it.

- **Launch:** Again, depending on the type of file and depending on whether you have the appropriate software on your computer, Launch starts the program in which the file was created and opens the file. In this case, not only can you look at the file, you can edit it and save it.

  When you launch a file, the parent program often opens the file with a strange filename. If you want to save the file, use the Save As choice on the File menu, so that you have some control over the name and where the file is saved.

- **Detach:** This term is a slight misnomer. Choosing Detach doesn't actually remove the file from the original document but just enables you to save a copy to whatever disk or drive you choose. If you want to remove the attachment from the document to save disk space, you have to delete the attachment just as you would delete any text (highlight it and press Delete).

Cutting or Copying and Pasting

If you know how to cut or copy and then paste in other programs, you are ahead of the game: The process in Notes is the same. Of course, cutting or copying and then pasting is a way to get data from one Notes document into another. The process is also a way to get data from a document in one program into a Notes document.

The following fascinating facts apply to copying or cutting and then pasting:

- You aren't limited to pasting into a rich-text field. Any type of field is acceptable, as long as the data matches the field type. In other words, you can't paste a picture into a text field or your name into a date field.
- If you paste into a non-rich-text field, you lose the formatting (such as boldface) of the data that you're pasting.

To paste something into a Notes document, use these steps:

1. Switch to the program and the file that contains the data you want to paste into a Notes document.
2. Highlight the data or text that you want to paste.
3. Copy or cut the data, depending on whether you want to leave the data in the original document (copy) or remove it (cut).
4. Switch to Notes.
5. In Edit mode, place the cursor where you want the data to appear.



6. Click the Paste icon or choose Edit⇨Paste.
7. If necessary, and if the cursor is in a rich-text field, format the text to suit your taste.

Data Exports

Exporting refers to taking data from Notes and turning that data into a file in a new format. For example, exporting Notes data to MS Word turns the data into a Word file. Exporting is a useful technique when you need to give some Notes data to a person who doesn't have Notes.

You may have a program on your computer that doesn't use the clipboard. So, a second reason to use File⇨Export is when you can't transfer the Notes document to another program via the clipboard.

To convert a Notes document into another format, follow these steps:

1. Find and open the Notes document that you want to export.
2. Choose File⇨Export.
3. In the dialog box that appears, use the Save in drop-down list to choose the drive and directory to which the exported file is to be saved.
4. In the Save as type drop-down list, choose the kind of file that you want the file to be. The choices are as follows:
   - Ami Pro
   - ASCII Text
   - CGM Image
   - Microsoft Word RTF
   - TIFF 5.0 Image
   - Word for Windows 6.0
   - WordPerfect 5.1, 6.0, and 6.1
5. Click Export.

File Imports

Importing refers to taking a file from its native format and turning it into data in Notes. For example, importing Lotus 1-2-3 data makes the original file an integral part of a Notes document.

You import a file when other means of bringing in data fail you (for example, if the other program doesn't allow the use of the clipboard, and attaching the file doesn't allow people to see the data when they read the document). Importing converts a file from another program's format into the Notes document that you're composing and sends the data right into the rich-text field in which you're typing. You must import the file if you have the file but not the application that created the file.

To import a file into a Notes document, use these steps:

1. Place the cursor in the area of the rich-text field in which you want the data to appear.
2. Choose File⇨Import.
3. In the dialog box that appears, use the Look in box to choose the drive and directory where the file is stored or enter the filename in the File Name box.