A Beginner’s Guide to Lotus Notes
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So, what’s this book about?

Funny you should ask. I was just about to tell you. This book shows you how to complete common Lotus Notes® tasks without making you read a lot of tedious details. Once you’ve learned the basics of a task, you’ll be able to learn more about it as you use it.

Why would I want to read this book?

Who knows? Maybe you have nothing better to do. Maybe you like to learn new things. Maybe your boss gave you Notes™ and said you’d better learn it fast or you’ll be in trouble. Or maybe you just like to have fun.

How does the book work?

The book shows you the steps involved in basic Notes tasks. You follow our mascot, Sherman, as he walks you through each task. The tasks are short and easy to complete. They do not contain a lot of boring details. This is good if you don’t like to be bored. If you like to be bored, read a different book about computers.

Do you really expect me to follow Sherman?

Yes. Say hello to Sherman.

Sherman will guide you through each task. If you have any questions along the way, feel free to ask Sherman. (But first be sure that your office door is closed so that people won’t think you’re crazy for talking to a shoe in a book.)
What is Notes anyway?

People have been asking that question since the beginning of time (or at least since Notes first came onto the market). It has been hard for people to define Notes because you can use it to do so many things. For example, you can:

- Send and receive electronic mail messages.
- Read about the latest industry news or find information about a particular subject.
- Track inventory and automatically create new orders when supplies are low.
- Plan and track progress on complicated projects.
- Collaborate on a project with people who are in different locations. You can work together to plan your work, create reports and databases, and discuss changes you want to make without leaving your office, even if each person is in a different country.
- Automatically route company forms to the people who need to see them and approve them. For example, you can create a purchase order and have Notes route it automatically to your manager and then to the Purchasing Department and then to the supplier. This can all take place without you leaving your office or trying to find your manager (who is probably out having a three-martini lunch anyway).
- Discuss and share information that is important in doing your job. This can significantly decrease the number of meetings you'll have to attend. (Of course, this means you'll have to catch up on your sleep somewhere else.)
Keep track of your schedule and your "To Do" list.

Take your computer with you and access Notes information from wherever you are.

Access the Internet.

Do all of this and more. The uses of Notes are limited only by people's imaginations. It truly changes the way that people work.

That's nice. So, what is Notes?

See, I told you it's hard to define. Basically, Notes gives you a way to find and share information, to make many tasks easier to accomplish, and to work easily with other people. These people can be at your company or outside your company. They can be in your country or outside your country. They can be anyplace in the world. (So far, we haven't figured out a way to communicate with people on other planets, but stay tuned.)
Getting the hard part out of the way first:
Some important Notes concepts

This chapter describes the basic building blocks of Notes. Unlike subsequent chapters, this chapter doesn’t tell you how to do anything. It just explains things that you should know before using Notes. (Actually, this is probably the most boring chapter in the book, but it’s important to read anyway.)

Great. So tell me something already.

Anxious, aren’t you? Okay...

Notes stores information in **databases**. Each database contains information about a particular subject, such as “Company Policies” or “Product Information.” The person who creates the database decides on the type of information that the database will contain. Databases can even contain reports for you to complete, such as attendance reports or expense reports.

A database usually contains many **documents**. Each of these documents is about a particular topic. In a Company Policies database, for example, there may be a topic about parking, one about sick days, and one about donating to charity through the company. Some databases only let you read information, while others let you create documents of your own.

You create a document by filling in information on a **form** that the database contains. The form has spaces for you to fill in. These spaces are called **fields**. Some forms also have buttons for you to click to perform particular actions.

Sound easy so far? Great. Let me recap this stuff anyway. To add information to a database, you fill in a form and store your completed document in the database. Anyone who has adequate access to the database can read the information that you wrote and can create additional documents. To read what someone else has written, you just look at the documents in the database.
Sounds easy, but what if there are hundreds of documents?

Often, a database contains so many documents, it can be difficult to find the information you want. Notes solves this problem by letting you create many different ways to view and store the documents. A view is a way for Notes to display documents in a database. A view often shows documents in a particular order and sometimes shows only a portion of the documents in the database. In a database that a company uses to store employee information, for example, there would be a document about each employee. This database could contain the following views:

- A view that shows all employees listed in alphabetical order by last name
- A view that shows all employees by first name
- A view that shows all employees by the department they work in
- A view that shows employees who have a parking space in the company parking garage
- A view that shows employees who have been at the company less than a year

Notice that the first three views include documents for all employees, but the last two views include only some of the documents.

You also can create folders in a database. Folders let you categorize documents to make them easier to find. In the Employee Information database, for example, you could create a folder to store the documents you use frequently, such as those of your boss, department members, and friends. When you open the folder, you would see only those documents you placed in the folder.

You can place the same document in more than one folder, just as documents can appear in more than one view. The difference between a folder and a view is that you can place any document you want in a folder, but a view has a formula that determines which documents it displays.

When people create databases, they usually include some folders and views to make the databases easy to use.
What will I see when I start Notes?

When you first start Notes, the program displays the Notes workspace. It looks something like this:

The table below describes the items that are labeled in the picture.

<table>
<thead>
<tr>
<th>Item</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Menu</td>
<td>Lets you choose Notes commands. (The commands on the menu sometimes change depending on what you are doing.)</td>
</tr>
<tr>
<td>SmartIcons®</td>
<td>Let you choose Notes commands by just clicking an icon. (The SmartIcons that Notes displays sometimes change depending on what you are doing.)</td>
</tr>
<tr>
<td>Workspace tabs</td>
<td>Let you change to different workspace pages to see the database icons on those pages.</td>
</tr>
<tr>
<td>Database icons</td>
<td>Let you open Notes databases.</td>
</tr>
<tr>
<td>Workspace page</td>
<td>Lets you store database icons.</td>
</tr>
<tr>
<td>Status bar</td>
<td>Lets you change some settings, open your mail database, and see some current information about Notes.</td>
</tr>
</tbody>
</table>
But it looks different when I open a database

When you open a database, Notes might look like this:

The table below describes the items that are labeled in the picture.

<table>
<thead>
<tr>
<th>Item</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action bar</td>
<td>Contains buttons you can click to quickly perform some common tasks. The buttons on the action bar sometimes change depending on what you are doing. Some databases may not have an action bar at all.</td>
</tr>
<tr>
<td>Navigation pane</td>
<td>Lets you open different folders and views.</td>
</tr>
<tr>
<td>View pane</td>
<td>Lets you select and open documents.</td>
</tr>
<tr>
<td>Preview pane</td>
<td>Lets you read the document that is highlighted in the view pane without opening the document.</td>
</tr>
</tbody>
</table>

So, that’s it. If any of that seems hard to understand, don’t worry about it. As you use the product, things will become clearer. And you can always look back here for a refresher.
Hold on tight...here we go!
Getting started with Notes

Like most computer programs, getting started with Notes can be an exhilarating experience — or a daunting one. There are all those new icons staring you in the face, menu commands beckoning to you, and strange words and drawings scattered around the screen. Luckily, the pictures and words in Notes are often self-explanatory. And if you’ve used other Lotus programs, you’re already familiar with many of them.

This chapter gets you started using Notes but doesn’t have you do very much — at least not yet. It shows you the basics, like how to start the program and use a few of the features. Starting Notes is pretty simple, but I tell you how to do it anyway. I also tell you a couple of ways to get Help while you’re using Notes. In addition, I tell you what to do if you make a mistake while using Notes. (This feature is primarily for other people, not for you.) Then I tell you how to use those icons you will see near the top of the Notes screen. Finally, I explain how to stop Notes. (I could’ve waited until the end of the book to tell you how to stop Notes, but if you decided to stop reading the book before the end, you’d have to leave Notes running forever.)

To recap,

This chapter tells you how to do the following:

- Start Notes
- Have Notes guide you to information about a task you want to accomplish
- Guide yourself to information about a task you want to accomplish
- Undo your mistakes
- Use SmartIcons to accomplish tasks faster
- Stop Notes
Starting Notes

How will this help me?

For this topic, that seems like a silly question, doesn’t it? But that’s the format we’re using in this book, so here goes: Starting Notes lets you use all of its wonderful features — all those things I convinced you were terrific in the first chapter. (Gee, I hope that clears things up for you.)

As you may have noticed, sometimes what appears in the section ”How will this help me?” will be pretty obvious. But sometimes, it will be pretty illuminating, maybe even important. So, it’s a good idea to browse through the section for each task, just to be sure you don’t miss anything. The good thing is, the section is always short.
If you're using Microsoft® Windows® Release 3.1, OS/2®, or a Macintosh®, look at your operating system’s desktop for the program icon for Lotus Notes.

If you're using Windows 95, find Lotus Notes on the Start menu and click it.

If you're using UNIX®, type this at the system prompt:
```
/opt/lotus/bin/notes
```

If you're using Windows Release 3.1, OS/2, or a Macintosh, double-click the icon for Lotus Notes.

If you're using Windows 95 or UNIX, skip this step.

When Notes starts, you see the Notes workspace. Initially, this usually includes icons for three databases: your mail database, your Personal Address Book, and the Public Address Book.
Getting help:  
Asking Notes to guide you to a Help topic

How will this help me?
While you're working with Notes, you may occasionally need assistance. You can use the Notes Help system to explain things to you and show you what to do.

There are two ways to find information in Notes Help: you can have Notes guide you to the topic you want, or you can search for the topic yourself. If you don't know a lot about Notes, it is probably better to have Notes guide you to the correct topic. That's what this procedure discusses. The next procedure shows you how to find a Help topic yourself.
1. Press F1, or choose Help and then choose Guide Me from the Notes menu. Notes displays a screen that asks, "What do you want to do?"

2. Click the question that best describes the task you want to do. Notes displays either a Help topic or a screen that asks you more specific questions. Click the appropriate questions until Notes displays a Help topic.

3. When you want to close Help, choose File and then choose Close from the Notes menu.

YOU SHOULD KNOW
If Notes displays a Help topic instead of a screen that says "What do you want to do?" you can skip Step 2.

YOU SHOULD KNOW
If Notes displays a Help topic instead of a screen that says "What do you want to do?" you can skip Step 2.
Getting help:
Locating a Help topic on your own

How will this help me?
When you locate a Help topic on your own, you get to choose from all the Help topics that come with Notes. This may lead you to information you might not know was there otherwise.
1. Choose **Help**, and then choose **Help Topics** from the Notes menu. Notes displays the Help index.

2. Scroll to the index entry you want. To do this faster, type the first few letters of the entry. When you start typing, Notes displays the "Quick Search" dialog box. After you're done typing, click **OK**. Notes highlights the first entry that begins with the letters you typed.

3. Click the triangle beside the index entry you want. This expands the entry to show you all the Help topics related to that entry.

**YOU SHOULD KNOW**

If the topic you want has another triangle beside it, click that triangle, too.
4 Double-click the topic you want to read.

YOU SHOULD KNOW
If a topic contains green, underlined text, you can click the text to see a related topic.

5 When you want to close Help, choose File and then choose Close from the Notes menu twice, or press ESC as many times as it takes to close Help.
Undoing mistakes

How will this help me?
Don't you wish there was a way to undo some of the things you do? We all make mistakes. (At least, everyone that I know does.) Well, Notes can't help you with the mistakes you make in your life, but it can help you with mistakes you make in Notes itself. For most things you do in Notes, you can tell Notes to undo them. But you have to tell Notes before you do anything else. Notes only undoes the last thing you did.
1. Make a mistake, or do something else you want to undo. (You really don’t have to do this on purpose. But when you do make a mistake, keep this procedure in mind.)

2. Choose **Edit** and then choose **Undo** from the Notes menu. (Notice that the Undo command in this picture actually says "Undo Typing" because the last thing I did was type some text.)


**YOU SHOULD KNOW**

If Notes can’t undo your last action, the Undo command will be gray.
Using SmartIcons to accomplish tasks faster

How will this help me?

SmartIcons are one of the shortcuts in Notes that will save you time and a lot of mouse clicks. You can use SmartIcons to perform multiple actions with a single mouse click. For example, SmartIcons can execute menu commands that might otherwise require several mouse clicks.

Notes displays the SmartIcons at the top of the workspace, although you can move them. The SmartIcons that Notes displays change depending on what you’re doing, so you always have access to the SmartIcons you need.
To find out what one of these icons does, hold the mouse pointer over it. Notes displays a balloon that tells what the icon does. (If you’re using a Macintosh, you must have Balloon Help turned on for this feature to work.)

After finding the icon you want to use, click it. Notes performs the action you want.
Stopping Notes

How will this help me?
This is one of those topics where this section probably isn't necessary. But I always try to think of something that makes sense in this spot. For example, you might want to stop Notes if you need to make memory available for other programs. In addition, you should stop Notes prior to turning off your computer.
If you’ve made changes that you want to save in any open documents, close and save those documents. (When you close a document that you’ve changed, Notes asks if you want to save it.)

2. Choose **File** and then choose **Exit Notes** from the Notes menu.
Fooling around in the workspace

The workspace is where everything starts in Notes. It is where you place icons that represent the databases you use. To open these databases, you simply double-click these icons. Because the workspace stores only icons for databases you select (and the three database icons Notes installs by default), your workspace is customized to your own needs.

You can further customize your workspace by organizing databases into logical groups and placing each group on a different page in the workspace. Notes gives you six pages to start with, but you can add more pages if you need them. (If you want to find out how to add workspace pages, look in the Appendix. That’s the section at the back of the book that we added to make the book fatter.) Each workspace page has a tab at the top that you can use to name that page. (There’s also a special page named “Replicator” whose name you can’t change and whose function is beyond the scope of this book.)

This chapter tells you how to do the following:

- Name and change the color of workspace tabs
- Rearrange database icons on a workspace page
- Move database icons to other workspace pages
- Display information about a database on the database icon
Naming and changing the color of workspace tabs

How will this help me?

Notes lets you place database icons on different pages in the workspace. This lets you organize the icons so that each page contains icons that have something in common.

Each workspace page has a tab at the top that you click to see the contents of that page. You can name the tabs to describe the type of database icons that are on each page. This helps you find the database icons you are looking for. You can also change the color of each tab to further differentiate between the workspace pages.
1. Double-click the workspace tab that you want to name. Notes displays an "InfoBox" that lets you change the name and color of the tab.

2. In the "Workspace page name" box, type the name you want on the tab.

3. Click the down arrow at the right of the "Tab color" box. Notes displays the colors available for the tab.
4 Click the color you want to use for the tab.

5 Click the "X" in the upper right corner of the InfoBox to close it.
   If you're using a Macintosh, click the button in the upper left corner of the InfoBox to close it.
   If you're using OS/2, double-click the button in the upper left corner of the InfoBox to close it.
Rearranging database icons on a workspace page

How will this help me?
You can move icons on a workspace page to organize them in a way that makes sense to you and makes them easy to find. For example, you may want to put the icons that you use the most at the top of the page. Or you may want to put icons that are related to each other in the same row. You can place icons anywhere on the workspace page.
1 Click the icon you want to move, and drag it to the new location. The mouse pointer becomes a hand, and Notes displays the outline of the icon as you drag it.

2 When you reach the new location, release the mouse button. Notes moves the icon to the new location.
Moving database icons to other workspace pages

How will this help me?
You can move database icons to different workspace pages to organize your workspace and make the icons easier to find. It's a good idea to place icons for related databases on the same page. For example, you may want to keep the icons for your mail database and your Personal Address Book on the same page because they are both personal databases. But you may want to move the icon for the Public Address Book to a page on which you store company-wide databases.
1. Click the icon you want to move, and drag it to the tab of the new workspace page.

2. When Notes displays a rectangle around the name of the workspace page you want, release the mouse button. Notes moves the icon to the new page.

YOU SHOULD KNOW
To see the icon on the new workspace page, you can click the tab for that page.
Displaying database information on database icons

How will this help me?
Each database icon always displays the title of the database it represents. You can also make database icons display the number of unread messages in a database and the name of the server that contains the database. This saves you time because you don’t have to open a database to know if there are new documents that you haven’t read. It also tells you if a database is on your own computer or a different computer.
To display the number of unread messages on the database icons, choose View and then choose Show Unread from the Notes menu.

By default, Notes displays server names on database icons. To turn this off (or to turn it back on after turning it off), choose View and then choose Show Server Names from the Notes menu.
Using mail without paying for postage

Notes lets you send mail to people electronically. You don’t need envelopes or stamps or paper or pencils. Best of all, you never have to go out in the rain to send your mail!

Writing a message in Notes is like writing a regular letter, except the Notes message will reach its destination faster. In addition, you can create fancier looking messages in Notes because you can change the style and color of any portion of the text. Your message can include tables and graphics and information from other computer programs. It can even include entire computer files. And you can send the same message to many people simultaneously — without buying more stamps.

Notes stores your messages in your own personal mail database. When you receive a message, Notes places it in the Inbox folder in your mail database. After you read the message, you can save it, delete it, forward it to someone else, or send a reply.

You can exchange messages with people who are on the same local area network (LAN) or wide area network (WAN). If you’re not connected to a network, such as when you’re at home or at a hotel, you can read and send your mail using a modem and a telephone.

This chapter tells you how to do the following:

- Read messages that you receive
- Create a message and send it
- Reply to a message that you receive
- Forward a message to other people
- Delete messages that you no longer need
- Save messages that you receive
- Look at messages in different folders and views
- Sort messages to help you find the ones you want
Reading your mail

How will this help me?
The best thing about receiving a mail message is reading it, especially if it contains good news. In order to read Notes messages, you must first open your mail database. While your mail database is open, you can also create new messages, sort existing messages, reply to messages, and move messages into folders to make them easier to find.
Open your mail database by double-clicking its database icon in the Notes workspace. The icon has your name on it, as well as a picture of an envelope.

2 Double-click the title of the message you want to read.

3 To close the message you are reading, choose File and then choose Close from the Notes menu, or press ESC. (Press ESC again if you want to close your mail database.)
Creating a mail message

How will this help me?
To communicate with other people through Notes mail, you create and send messages. You can send a message to anyone who is connected to your Notes network. Often, you can send messages to people outside your network, as well. You can format your messages to make them more attractive and easier to read. You can also do all that other neat stuff I told you about in the introduction to this chapter.
1. If your mail database is open, choose **Create**, and then choose **Memo** from the Notes menu. If your mail database isn't open, choose **Create**, then **Mail**, and then **Memo**.

2. In the **To** line, type the name of the person to whom you want to send the message. To send it to more than one person, type additional names separated by commas. As you type, Notes may display the names of people on your Notes network. If Notes suggests a name you want, press ENTER to accept it. Otherwise, keep typing the name you want.

**YOU SHOULD KNOW**
The messages you create may have a different picture at the top than the messages in this chapter. This won’t affect the way things work.

**YOU SHOULD KNOW**
To choose names from a list of the people on your Notes network, you can click the **Address** button.
3 Click in the Subject line, and type a brief description of the topic of your message. The subject tells recipients of the message what the message is about before they open it to read it.

4 Click in the brackets below the Subject line, and type the body of your message. You can make it as long or as short as you want.

5 When you're ready to send the message, click the Send button.
Replying to a message you receive

How will this help me?
After reading a message that a person sent to you, you may want to respond to that message. Instead of creating a new message from scratch, you can create a reply that already includes the address of the person who sent the original message and the subject of the message. You can even include the person's original message in your reply. You only need to type the text of your reply and send it.
1. While reading a message, click the **Reply** button.

2. Type your message. If you want additional people to receive the message, enter their addresses on the To, cc, and bcc lines.

3. When you’re ready to send the message, click the **Send** button.

**YOU SHOULD KNOW**
You can include the original message in your reply. To do so, click **Reply With History** instead of **Reply**.

**YOU SHOULD KNOW**
To send your reply to all the people who received the original message, you can click **Reply To All**.
Forwarding a message to other people

How will this help me?
After reading a message that a person sent to you, you may want other people to read the same message. Instead of creating a new message from scratch, you can forward the message to other people. You can also add your own comments to the message.
1 While reading a message or while highlighting a message title in the view pane, click the **Forward** button.

2 Address the message the same as you would address any new message.

3 If you want to add your own comment to the message, add it above the message you are forwarding.
When you're ready to send the message, click the **Send** button.
Deleting messages

How will this help me?
Deleting messages that you no longer need makes it easier to find the messages that you do need. It also saves disk space on the Notes server that contains your mail database.

There are two parts to deleting messages. First you tell Notes which messages you want to delete. Notes places a mark beside these messages. Then you tell Notes to actually delete the marked messages.
1 While reading a message, click the **Delete** button. Notes marks the message for deletion and displays the next message.

---

**YOU CAN ALSO...**

...mark a message for deletion in the view pane. To do so, click the message title, and then click **Delete**.

---

2 When you want to delete the messages you marked, choose **Actions** and then choose **Empty Trash** from the Notes menu.

---

**YOU SHOULD KNOW**

Notes displays a trash can beside each message that's marked for deletion. To see all marked messages, you can look in the Trash folder, as described in the task after next.
Saving mail you receive

**How will this help me?**

Saving your mail lets you read it again later. You can save your mail simply by leaving it in the Inbox folder, which is where Notes places it when you first receive it. However, the number of messages may get so large, it would be difficult to find specific messages. Therefore, it is a good idea to move them to other folders. You can create as many folders as you want.
While reading a message, click the **Move To Folder** button.

1. If Notes displays the name of the folder you want, click the name. Then skip to Step 5.
   If Notes doesn’t display the name of the folder you want, click the **Create New Folder** button.

2. Type a folder name, and then click **OK**.
4. Click the name of the new folder you just created.

5. Click "Move" or click "Add."
   "Move" moves the message to the new folder and removes it from the original folder. "Add" places the message in the new folder and also leaves it in the original folder.

YOU CAN ALSO...
...add a message to a folder from the view pane. To do so, click the message title and drag it to the folder you want.

YOU SHOULD KNOW
You can view the messages in a folder by clicking the folder name in the navigator pane.
Seeing messages in different folders and views

How will this help me?
The mail database contains several folders and views that let you look at your mail messages in different ways. The group of messages that you see in a folder or view depends on the purpose of the folder or view. This helps you find the messages you want.
1. Open your mail database.

2. Click the folder or view you want to see. Notes displays the messages from that folder or view in the view pane.
The table below describes the folders and views in the mail database.

<table>
<thead>
<tr>
<th>Folder or view</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbox</td>
<td>Automatically stores all messages that you receive.</td>
</tr>
<tr>
<td>Drafts</td>
<td>Automatically stores all messages that you save without sending. You can later edit and send these messages.</td>
</tr>
<tr>
<td>Sent</td>
<td>Automatically stores all messages that you save when you send them.</td>
</tr>
<tr>
<td>All Documents</td>
<td>Shows all messages that are currently in your mail database.</td>
</tr>
<tr>
<td>Calendar</td>
<td>Shows your personal calendar and the meetings, appointments, reminders, events, anniversaries, and tasks you put on your calendar.</td>
</tr>
<tr>
<td>To Do</td>
<td>Shows the status of all tasks that you’ve created and all tasks that people have assigned to you. Also shows messages that ask for a reply on or before a specific date.</td>
</tr>
<tr>
<td>Meetings</td>
<td>Shows a list of all the meetings, appointments, reminders, events, and anniversaries that are on your calendar.</td>
</tr>
<tr>
<td>Trash</td>
<td>Stores messages that you’ve marked for deletion (or placed directly into this folder). You can delete these messages or decide to save them.</td>
</tr>
<tr>
<td>Discussion Threads</td>
<td>Shows messages grouped with their replies. This lets you view an entire conversation.</td>
</tr>
<tr>
<td>Archiving</td>
<td>Lets you remove messages from your mail database and archive them in a different database. Also, lets you view the messages you’ve archived.</td>
</tr>
</tbody>
</table>
How will this help me?

Sorting messages can make it easier to find a particular message you are looking for. By default, Notes sorts your messages by date in ascending order. Notes also lets you sort messages by date in descending order or alphabetically by the names of the people who sent the messages to you (or to whom you sent the messages). If you know who sent the message or the approximate date on which you received it, this will help you find the message.

Notice that the Who and the Date column names have little triangles next to them. This tells you that you can click those column names to sort the document titles. When you do this, the triangle in that column changes color. When you click the column name again, Notes returns the document titles to their original order and returns the triangle to its original color.
1. Open a mail folder or view, such as the Inbox or the All Documents view.

2. To sort the messages by name in ascending order, click "Who" at the top of the name column.

3. To sort the messages by date in descending order, click "Date" at the top of the date column.

You should know:
When you sort a column, the triangle beside the column name changes to a different color.
To return the messages to their original order, click the name of the sorted column again.
Data, data everywhere:
Getting information from Notes databases

If your company has multiple Notes servers, they probably contain more databases than you’ll ever need to use. This is good. There may be databases about company policies, industry news, company products, sales information, marketing information, special projects, forms you have to submit to the personnel department, and almost any type of information you can think of. I’ve even heard a rumor that someone used Notes to create a database to track sightings of Elvis, although I can’t confirm or deny this. (My lips are sealed.)

So, how do you tap into all of this information? Well, first you find out what databases are available in your company. Then you open the databases you want and read whatever information interests you. Most databases let you look at information in more than one way, which helps you to find what you are looking for. Many databases let you add information. Others let you accomplish specific tasks, such as submitting expense reports or attendance reports for approval.

This chapter tells you how to do the following:

- Add database icons to your workspace
- Open and close databases
- Read documents in databases
- See documents in different folders and views
- Forward a document in a mail message
- Remove database icons from your workspace
Adding a database icon to your workspace

How will this help me?

Adding a database icon to your workspace makes it easy to open the database in the future — you simply double-click the database icon. In addition, you can place database icons on any page in your workspace, so you can find them easily.
1. Click the tab of the workspace page where you want to put the database icon.

2. Choose File, and then choose Database, and then choose Open from the Notes menu.

3. Click the down arrow at the right of the Server box. Then click the name of the server that contains the database, or click "Other" to see more server names. If the server name isn't listed, type it in the box and then press ENTER. If the database is on your own computer, skip this step because Notes chooses "Local" as the default.
4. In the Database box, click the title of the database you want.

5. Click the Add Icon button. (If you want to add another database, follow steps 4 and 5 again.)

6. Click the Done button.
Opening and closing a database

How will this help me?

After you open a database, you can read the documents in it. You may also be able to add new documents and edit existing documents, depending on your level of access to the database. You can leave the database open while you work in other databases. In fact, you can have as many as nine Notes windows open at the same time.
1. Click the tab of the workspace page that contains the icon for the database you want to open.

2. Double-click the icon for the database you want to open. The database opens and displays a list of folders and documents that are in the database.

3. When you want to close the database, display the list of document titles. To do this, choose Window and then choose the database title from the Notes menu. (On the menu, the database title includes the name of the folder or view you are using.)

YOU SHOULD KNOW
Closing a database does not close open documents from that database. You close open documents separately.
Choose **File** and then choose **Close** from the Notes menu, or press ESC.
Reading documents in a database

How will this help me?
You read documents to learn about information you want to know. If a
document you want to read is not located in the current folder or view, you
can open a different folder or view and look for the document there.

Notes gives you two methods to read a document. You can open the
document first, or you can view the document in the preview pane.

This procedure tells you how to read a document by opening it first. The
next procedure tells you how to read a document in the preview pane.
1. Open the database you want by double-clicking its database icon.

2. Double-click the title of the document you want to read.

3. When you want to close the document you are reading, choose **File** and then choose **Close** from the Notes menu, or press ESC.

**YOU SHOULD KNOW**
An unread document usually has a star to its left in the view pane, and its title may be a different color.

**YOU SHOULD KNOW**
To close the document you are reading and open the next document in the database, you can press ENTER.
(Optional) To read documents in other folders or views, click a folder or view in the navigation pane. Then double-click the document you want to read.
Reading documents without even opening them

How will this help me?
You may want to browse quickly through the documents in a database, but opening each document could take a lot of time. Instead, you can view each document in a special pane called the preview pane. The preview pane is located at the bottom of your screen.

When you view a document in the preview pane, you can treat the document as though it were open. You can scroll through the entire document, click buttons, and even edit the document, if you have the correct access to do so.
1. If the preview pane is not open, choose View and then choose Document Preview from the Notes menu. The preview pane opens, and displays the document whose title is highlighted in the view pane.

2. To see a different document in the preview pane, click the document title in the view pane.

YOU SHOULD KNOW
To close the preview pane, you can choose View and then Document Preview again.
Seeing the documents in different folders and views

How will this help me?

Databases can contain many folders and many views. The group of documents that you see in a folder or view depends on the purpose of the folder or view. This helps you find documents that interest you.
1. Open the database you want to view.

2. Click the folder or view you want to see. Notes displays the documents from that folder or view in the view pane.
Forwarding a document in a mail message

How will this help me?
While you’re reading a document in a database, you may want to share the information you’re reading with someone else. One way to do this is to forward the document to the person. In most databases, you can do this by creating a mail message that includes the document.
While reading a document, choose Actions and then choose Forward from the Notes menu. (Notes creates a mail message that includes the document you are reading.)

1. Address the message the same as you would address any new mail message.

2. If you want to add your own comment to the message, add it above the document you are forwarding.
When you are ready to send the message, click the **Send** button.
Removing a database icon from your workspace

How will this help me?

You can remove a database icon from your workspace to make your workspace easier to manage. This is a good idea if you no longer use the database. The fewer database icons you have in your workspace, the easier it is to find the databases you want to use.
1. Click the database icon you want to remove.

YOU CAN ALSO...
...remove multiple icons by holding down the SHIFT key while you click the icons.

2. Choose **Edit** and then choose **Clear** from the Notes menu, or press **DEL**.

3. When Notes asks if you're sure you want to remove the icon(s), click **Yes**.
Using those strange things that you see in documents

You may notice some strange-looking things scattered around in the documents you read. There may be little pictures lurking between words or sentences. There may be a little triangle pointing at a line of text. There may be a green rectangle surrounding one or more words. There may be pictures with file names under them. In other words, the documents may look like someone decorated them.

I’m sure you’ve already guessed — these aren’t just decorations. All of these things tell you there is additional information available to you. For example, a picture with a file name under it usually represents a file that is attached to the document you are reading. You can view the file or even copy it to your hard drive. A triangle pointing at a line of text tells you that somebody wrote a lot of words but didn’t want to take up a lot of space, so they collapsed what they wrote into one line. You can expand that section of the document to see everything the person wrote. A little picture may indicate a link to a different Notes document or database. You can use the link to easily see the other document or database. And a green rectangle surrounding some words may indicate that you can view an explanation of the enclosed text or that you can double-click the text to perform a particular action.

This chapter tells you how to do the following:

- View a file that is attached to a document
- View a document that is linked to another document
- Open and close a collapsible section
- Use buttons and hotspots
Viewing a file that is attached to a document

How will this help me?
You may receive a mail message or read a document that has a file attached to it. For example, someone creating a message about the budget might attach a spreadsheet file that shows the actual budget. Notes displays an icon in the document to represent the attached file. You can view many types of files without leaving Notes.
1. Double-click the attachment icon. Notes displays an InfoBox.

2. To view the attachment, click the View button.

3. To return to the Notes document, choose File and then choose Close from the Notes menu, or press ESC.

YOU CAN ALSO...
...copy the attached file to your hard disk by double-clicking Detach instead of View in Step 2. Notes then asks you for a name for the file.
Viewing a document that is linked to another document

How will this help me?

You might receive a mail message or read a document that has another document linked to it. For example, a document in one database might refer to information in another database. Rather than repeat the information from the second database, the document might include a link to the other document. You can view the document in the other database by clicking the link icon.
1. Click the link icon.

2. Read the linked document.

3. To return to the original Notes document, choose File and then choose Close from the Notes menu, or press ESC.

YOU SHOULD KNOW
People can also use "hotspots" to link documents. Using hotspots is discussed later in this chapter.
Opening and closing collapsible sections

How will this help me?

Some databases may contain documents in which the author has created sections of information that are collapsible and expandable. In such documents, you can collapse a section to take up less space on the screen. This lets you view more of the topics in a document at once. When you want to see the information in a collapsed document, you can expand it. This lets you see the details about a topic.
To expand a collapsed section, click the triangle at the left of the section title.

YOU SHOULD KNOW
In most cases, you can also click the top line of a section to expand and collapse it.

To collapse an expanded section, click the triangle at the left of the section title. (Yes, you're right -- this is the same thing you did to expand the section.)
Using buttons and hotspots

How will this help me?

The author of a document may include a button or a hotspot in the document. A button is programmed to perform a certain action when you click it. For example, it could send a message to someone as a response to a questionnaire. A hotspot is text that is usually surrounded by a green rectangle and is also programmed to do something when you click it or double-click it. For example, a hotspot can display text to explain a concept associated with the word or phrase that is surrounded by the rectangle. A hotspot can also link to another document or database, similar to the links discussed earlier in this chapter. In addition, a hotspot can perform an action, just like a button.

To use a button, you just click it. To use a hotspot, you should first find out what type of hotspot it is. This procedure tells you how to do that.
While reading a document, if you see a hotspot (text surrounded by a green rectangle), click the hotspot and continue to hold down the mouse button.

1. Follow the directions in this table.

<table>
<thead>
<tr>
<th>If this happens when you click a hotspot</th>
<th>It means</th>
<th>Do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes displays explanatory text.</td>
<td>This is an informational hotspot.</td>
<td>Read the text and then release the mouse button.</td>
</tr>
<tr>
<td>Notes displays a destination, such as the name of a database.</td>
<td>The hotspot is linked to another document or database.</td>
<td>Release the mouse button. Then click the hotspot to view the linked document or database.</td>
</tr>
<tr>
<td>Notes displays nothing.</td>
<td>The hotspot initiates an action, like a button does.</td>
<td>Release the mouse button. Then click the hotspot to initiate the action.</td>
</tr>
</tbody>
</table>

YOU SHOULD KNOW
Hotspots don’t display text when you’re editing a document.
Putting in your own two cents:
Adding information to a database

So, enough of reading other people’s information. Now it’s your turn.

You can add information of your own to many databases. Depending on the way the database was designed and the access rights the developer gave you, you may be able to create responses to existing documents or create completely new topics of your own. In some instances, you can edit what someone else has written, but in most cases, you can edit only what you have written yourself.

The procedures in this chapter use a standard Notes discussion database as an example. Although the databases at your company may look somewhat different, you can still use these general procedures when you want to add information to a database.

This chapter tells you how to do the following:

- Create a document in a database
- Respond to an existing document
- Edit an existing document
- Check your spelling in a document
Creating a document in a database

How will this help me?

After reading information in a database, you may decide to add some information of your own. To add information to a database, you create a document.

This procedure tells you how to create a document in a standard Notes discussion database. Although the design of databases at your company may vary, you can still use this procedure to create a document in most databases.
After opening a database, choose Create from the Notes menu, and then choose the type of document you want to create. For example, if you want to create a new topic in a standard discussion database, choose Create and then choose Main Topic.

You should know: These documents may have different names in different databases. This could change the names you choose from the Create menu.

Type the subject of the document, and add any other information you want in the document.

To save the document in the database, choose File and then choose Save from the Notes menu.
To close the document, choose File and then choose Close from the Notes menu, or press ESC.
Responding to an existing document

**How will this help me?**

In a discussion database, you can create responses to documents that you read. This lets you state your opinion about a topic, add more information about the topic, or ask questions about what someone else said.
1. After opening the database, click the document you want to respond to.

2. Choose **Create** from the Notes menu, and then choose either **Response** or **Response to Response**, depending on whether you are responding to a main topic or to someone else's response.

3. Type the subject of the document and any other information you want in the document.
To save the document in the database, choose **File** and then choose **Save** from the Notes menu.

To close the document, choose **File** and then choose **Close** from the Notes menu, or press ESC.
Editing an existing document

How will this help me?

After you’ve added a document to a database, you may decide to make changes to it. You can do this by editing the document. This is helpful if you find out new information or if previous information has changed. In most databases, you can edit a document that you created yourself, but you usually can’t edit documents that other people created.
1. Open the database, and click the document you want to edit.

2. To open the document so you can edit it, choose **Actions** and then choose **Edit Document** from the Notes menu.

3. Make the changes you want. Then save the document by choosing **File** and then choosing **Save** from the Notes menu.
To close the document, choose **File** and then choose **Close** from the Notes menu, or press ESC.
Checking your spelling

How will this help me?
While you’re creating a document, you may not want to stop to correct spelling mistakes. It’s often easier and faster to continue typing and then check your spelling when you’re done writing. In addition, if you’re a normal human being (and who isn’t?), you probably make spelling mistakes that you don’t notice. You can tell Notes to check your spelling and to suggest alternative spellings for words it thinks are misspelled.
While you’re creating or editing a document, choose **Edit** and then choose **Check Spelling** from the Notes menu.

If any text in the document is highlighted when you start checking spelling, Notes checks only that text. Otherwise, Notes checks the entire document.

If Notes highlights a word that is misspelled, correct the spelling in the Replace box or click on the correct spelling if it appears in the Guess box. (If Notes highlights a word that is not misspelled, click the **Skip** button.)

If Notes highlights a word that is not defined, click the **Define** button to add the word to its dictionary and will never again think it’s misspelled.
3 If you corrected a word in Step 2, click the Replace button. This tells Notes to fix the misspelled word in the document.

4 Repeat Steps 2 and 3 until Notes informs you that the spell check is complete. Then click OK.
Making your documents look great

One paragraph after another of plain text can be tedious to read. Without variety in your documents, readers may lose interest quickly. In this age of instant information and dazzling special effects, people sometimes have very short attention spans. So what can you do to hold people’s attention?

Well, if you’re still reading this book, perhaps a lot of pictures and silly jokes help. But there’s even more you can do. You can change the font or style of some text to emphasize it or give it a special meaning. You can change the color or size of text to make it stand out more. You can change the alignment or spacing of certain paragraphs. You can add titles to sections of documents and add numbered or bulleted lists of items. In other words, you can do anything you want to make your documents look and feel more interesting and make them easier to read.

This chapter tells you how to do the following:

- Change the font, size, color, and style of text
- Indent a paragraph
- Change the spacing between paragraphs
- Create a numbered list
- Create a bulleted list
Changing the font of text

How will this help me?

Changing the font of the text in a document can give the document a different look and feel. Some fonts give your document a more formal look than others and some fonts are easier to read than others.

In addition, you can change the font of some of the text to make it stand out from the rest of the document or to differentiate a particular type of information from other information. For example, you might use a different font for information that is particularly important. When you change the font of some text, you may want to change the size of that text as well.
1 While creating or editing a document, highlight the text you want to change.

2 Click the font list on the status bar. Notes displays a list of the fonts you can use.

3 Click the name of the font you want to use.
Changing the size of text

How will this help me?

You can change the size of text to make it easier to read. You can also change the size of a particular piece of text to differentiate it from other text in a document. For example, if you are typing a footnote, you might want to use a smaller size.
1 While creating or editing a document, highlight the text you want to change.

2 Click the size list on the status bar. Notes displays a list of the point sizes you can use.

3 Click the size you want to use.
Changing the color of text

How will this help me?

You can change the color of text to make a document more visually appealing and to make the text stand out from the rest of the document. For example, you may want to make titles a different color to more clearly define the sections of the document. Also, when you make comments in a document that someone else wrote, it’s helpful if you write your comments in a different color to differentiate them from the text in the original document.

Although color is useful when people view a document on the screen, remember that many people don’t have color printers. If you’re creating a document for printing, you may want to use another method of differentiating special text.
1 While creating or editing a document, highlight the text you want to change.

2 Choose **Text** and then choose **Color** from the Notes menu. Then choose the color you want to use.

---

If you choose **Other**, Notes displays an InfoBox that lets you choose from a wider variety of colors. (Using the InfoBox is discussed in the procedure after next.)
Changing the style of text

How will this help me?
You can change the style of text in a document to make that text stand out from the rest of the document. For example, text that is bold or italic or underlined draws your attention. This can also be useful if you want to define words in a document. The first time you use a term, you might want to use a different style.
1 While creating or editing a document, highlight the text you want to change.

2 Choose Text from the Notes menu and then choose the style you want: Italic, Bold, or Underline.
Changing the font, size, color, and style of text all at once

How will this help me?
Notes contains "InfoBoxes" that let you make multiple changes without using the Notes menus. If you want to change several text attributes in a document, it may be faster to use an InfoBox than to repeatedly use the Notes menus.
1. While creating or editing a document, highlight the text you want to change.

2. Choose **Text** and then choose **Text Properties** from the Notes menu. Notes displays an InfoBox. (If the box blocks the text you want to see, move the mouse pointer to the word "Properties," and drag the box out of the way.)

3. If you want to change the font of the text, click a different font in the Font box.
4. If you want to change the size of the text, click a different size in the Size box.

5. If you want to change the color of the text, click the down arrow in the "Text color" box, and then click the color you want.

6. If you want to change the style of the text (for example, make it bold or italic), click as many styles as you want in the Styles box.

YOU SHOULD KNOW
You can click a style again to turn it off.
7 If you want to change the attributes of a different piece of text, highlight that text and then repeat Steps 3-6.

8 After completing your changes, you can close the InfoBox by clicking the "X" in the top right corner of the InfoBox.

If you're using a Macintosh, click the button in the upper left corner of the InfoBox to close it.

If you're using OS/2, double-click the button in the upper left corner of the InfoBox to close it.
Indenting a paragraph

How will this help me?
Indenting a paragraph can make it stand out from the rest of the document. Indenting also makes a paragraph look like a subtopic or an explanation of the text that precedes it.

This procedure tells you a quick way to indent a paragraph a preset amount. (You can also use the Text Properties InfoBox, which was discussed in the preceding procedure, to indent a paragraph any amount you want.)
While creating or editing a document, click the paragraph you want to indent. (You can click anywhere in the paragraph.)

Choose **Text** and then choose **Indent** from the Notes menu, or press F8.

(Optional) Repeat Step 2 until you have indented the paragraph as much as you want.

**YOU SHOULD KNOW**
If you indent a paragraph too much, you can choose **Text** and then choose **Outdent** from the Notes menu.
Changing the space between paragraphs

How will this help me?
Including space between paragraphs can make a document look less crowded and easier to read.

This procedure tells you a quick way to change the spacing between paragraphs.
To change the spacing between two paragraphs while creating or editing a document, click in the top paragraph of the two paragraphs. (You can click anywhere in the paragraph.)

Choose **Text** and then choose **Spacing** from the Notes menu. Then choose the spacing you want to use. Notes places the number of spaces you choose below the paragraph you clicked.

If you choose **Other**, Notes displays an InfoBox from which you can make other spacing changes.
Creating a numbered list

How will this help me?

Notes lets you quickly create a numbered list. Numbering the items in a list makes the list easier to read and makes the information in the list easier to understand. In addition, because the numbers stand out from the text, it makes the list more visually appealing. Numbering lets you list items sequentially or in their order of importance.

Memo
To: Notes Users
From: Sherman
Subject: Numbered lists

To create a numbered list, do the following:

1. Choose Text, then Numbers.
2. Type the first item.
3. Press ENTER.
4. Type the next item.
1. Place the cursor at the location in the document where you want the list to begin.

2. Choose **Text** and then choose **Numbers** from the Notes menu.

3. Type the text for the first item in the list.
4. Press ENTER to create the next item, and then type the text for that item. Follow this step for each item in the list.

5. (Optional) To add more text to the document after you complete the list, press ENTER to create an additional line. Then choose Text and then choose Numbers from the Notes menu to stop the numbering.
Creating a bulleted list

How will this help me?
You may want to emphasize the items in a list without numbering them. Instead, you can put a bullet beside each item. As with numbering, bulleting the items in a list makes the list easier to read and understand, and makes the list more visually appealing.
1 Place the cursor at the location in the document where you want the list to begin.

2 Choose **Text** and then choose **Bullets** from the Notes menu.

3 Type the text for the first item in the list.
4. Press ENTER to create the next item, and then type the text for that item. Follow this step for each item in the list.

5. (Optional) To add more text to the document after you complete the list, press ENTER to create an additional line. Then choose Text and then choose Bullets from the Notes menu to stop the bulleting.

Some good features about SuperPro:

- Their sales have increased by 25% per year since 1992.

You can also...

...add bullets to paragraphs you've already typed. To do so, highlight the paragraphs and then choose Text and then Bullets from the Notes menu.
Adding information from other sources to your documents

There is information all over the place these days. Some of it is in Notes databases and some of it is elsewhere. While creating a document, you may want to refer to this other information. If the information is in another Notes document, you can let the reader view the other document while still reading your document. If the information is in a computer file, you can attach the file to your document so that readers can view it or copy it to their hard disks. If the information is in a picture, you can copy the picture into your document so that readers can see it. You can also copy pictures just to make your documents more pleasant to look at and read, even if the pictures don't add new information to the document.

This chapter tells you how to do the following:

- Attach a file to a document
- Create links to other Notes documents
- Add a picture to a document
Including a file in a document

How will this help me?

You can "attach" one or more files to a document so that people reading the document can view the files or copy them to their own computers. This lets you share information from other computer programs and lets people use the information in the files in any way they want.

When you attach a file to a document, Notes displays an icon in the document to represent the attached file. To use the file, the reader double-clicks this icon.
1. While creating or editing a document, place the cursor where you want Notes to display the icon that will represent the file attachment.

2. Choose File, and then choose Attach from the Notes menu.

3. If the file you want is not on the drive that Notes displays in the Create Attachment(s) dialog box, choose a different drive.
4 If Notes has not highlighted the directory (or folder) that contains the file you want, choose a different directory (or folder).

5 Click the name of the file you want.

6 Click the Create button. If you are using a Macintosh, click the Open button instead of the Create button, and then click the Done button.
Creating links to other documents

How will this help me?

When you create a document, you may want to refer to information in another document. It would be helpful if the reader could actually see this information while reading your document.

You can accomplish this by creating a link that displays the other document. When you do this, Notes places an icon in the document you are creating to represent the linked document. Readers can double-click the icon to see the linked document. When readers are done reading the linked document, they can return to your original document by pressing ESC.

In this procedure, you display the Notes workspace, open the database you want to link to, and create a link. Then you return to the document you are creating and paste the link into the document.
While creating a document, choose **Window** and then choose **Workspace** from the Notes menu.

1. Double-click the icon of the database that contains the document you want to link to. This opens the database.

2. Click the title of the document you want to link to.
Choose **Edit** and then choose **Copy As Link** and then choose **Document Link** from the Notes menu.

4

From the Notes menu, choose **Window** and then choose the title of the document you are creating. Notes returns you to that document.

5

You should know
If the document has no title yet, Notes lists it as "New.........", such as "New Memo," or "New Topic" or "New Response."

6

Place the cursor where you want Notes to display the link icon. Then choose **Edit** and then choose **Paste** from the Notes menu.
Adding a picture to a document

How will this help me?
Pictures often explain things better than words. In addition, pictures can make your documents more visually appealing and more enjoyable to read. This procedure tells you how to copy a picture from another document or program and paste it into the document you are creating.
While creating a document, open the file or document that contains the picture you want to copy. (The file can be in another program.)

Highlight the picture you want to copy.

Choose **Edit** and then choose **Copy** from the menu of the program you are using.
4 Return to the document you are creating, and place the cursor where you want the picture to appear.

5 Choose **Edit** and then choose **Paste** from the Notes menu.
Organizing documents and viewing them in different ways

Have you ever tried to count the jelly beans in a large jar? It can be difficult. It can also be difficult to find a particular size and color of jelly bean when there are so many of them. But if those jelly beans were divided into smaller groups, it would be easier for you to find the beans you want. And if you could automatically view those jelly beans in any way that you want, it would be even easier. For example, you could group them by color, by size, by manufacturer, by sugar content, or by any combination of these factors.

Well, Notes won’t help you sort jelly beans, but it will help you look at documents in different ways. When there are a lot of documents in a database, it can be difficult to find the information you want. Notes makes this easier by letting you view information in different ways and store documents in as many folders as you want.

This chapter tells you how to do the following:

- Create a new folder
- Move documents between folders
- Sort documents in a folder or view
- Update a view to show new documents
- Size panes
Creating a new folder

How will this help me?

Folders help you organize and categorize the documents in a database. You can create as many folders as you want. In a database about fish, for example, you might have folders for fresh water fish, salt water fish, tropical fish, edible fish, and poisonous fish. If a document falls into more than one category, you can place it into more than one folder.
1 Choose **Create** and then choose **Folder** from the Notes menu.

2 Type a name for the folder.

3 (Optional) If you want to place the new folder inside of an existing folder (create a "subfolder"), click the existing folder in the box that says "Select a location for the new folder."
Click OK.
Moving documents between folders

How will this help me?
You may decide that a document you've placed in a folder really belongs in a different folder. Or you may decide that a document should be in more than one folder. You can add a document to as many folders as you want. This lets you see the document when you open any of the folders that contain it.

Although you can add a document to more than one folder, Notes keeps only one copy of the document in the database. If you want to remove a document from a folder, but not delete it from the database, choose Actions and then choose Remove From Folder from the Notes menu. Be careful that you don't accidentally delete a document from the database when you only want to remove it from a folder.
1. Open the folder or view that contains the document you want to move or add to another folder.

2. Click the document you want to move or add to another folder.

3. Choose Actions and then choose Move To Folder from the Notes menu.

YOU SHOULD KNOW
You can move documents out of folders only; you can't move documents out of views.

Actions
- Add Selected Topic To Interest Profile
- Edit Interest Profile
- Mark/Unmark Document As Expired

Categorize
- Edit Document
- Forward
- Forward as Bookmark

Move to Folder...
4. Click the folder to which you want to move or add the document.

5. Click the Move button to move the document, or click the Add button to add the document to the new folder. (In our example, Move isn’t available because the original document is in a view.)

YOU CAN ALSO...
...move a document to a folder by dragging its title from the view pane to the folder in the navigation pane. To add the document instead of move it, press and hold CTRL before you drag it.
Sorting documents in a folder or view

How will this help me?
In many Notes databases, you can sort documents with a single mouse click. If a database contains a sort column, you can click the title of that column to sort the document titles in the current folder or view. A sort column has one or two triangles to the right of the column title (as shown at the bottom of this page). Sorting the documents in a folder or view makes it easier to find the documents you want and lets you view documents in a different order.

In the picture below, the Date column on the left has two triangles, indicating that you can sort documents by date in both ascending and descending order. The Date column on the right has only a downward-pointing triangle, indicating that you can sort documents by date in descending order only.
To sort a database that has a sort column, click the title of the column. The triangle beside the column title turns to a different color, indicating the column is sorted.

**YOU SHOULD KNOW**

If the colored triangle is pointing downward, the column is sorted in descending order; upward indicates ascending order.

If the column has two triangles, click the column title again to sort the titles in the opposite order from Step 1. The second triangle changes color, and the first triangle returns to its original color.

To return the documents to their original order, click the column title again. The colored triangle returns to its original color.
Refreshing a view to show new documents

How will this help me?
While you are looking at the information in a database, people can create new documents in that database. Refreshing a view shows any new documents that were added since you started to look at the database.
The view pane must be active. If you're not sure if the view pane is active, click any document in the pane.

1. The view pane must be active. If you're not sure if the view pane is active, click any document in the pane.

2. Choose View and then choose Refresh from the Notes menu, or press F9.
Sizing panes

How will this help me?

Changing the size of panes lets you determine how much of the contents of each pane to view at one time. When you have several panes open, this helps you see more information in a particular pane.

You can close a pane by making it so small that it no longer appears on the screen. You may want to close a pane if it interferes with viewing the contents of another pane. In addition, you may want to close the preview pane to speed up scrolling through document titles. Even when you’ve closed a pane, you can still resize the pane to open it again.
1. To size the navigation pane, place the mouse pointer over the right border of the pane until the shape of the mouse pointer turns into two arrows, as in the picture. Then drag the border to the left or right.

2. To size the view pane, place the mouse pointer over the left border of the pane until the shape of the mouse pointer turns into two arrows, as in the picture. Then drag the border to the left or right. (Did you notice that this is actually the same border as in the previous step? Pretty sneaky, huh?)

3. To size the preview pane, place the mouse pointer over the top border of the pane and drag the border up or down.
Searching for specific words or phrases in documents

Okay, imagine you have another large jar of jelly beans with only three red jelly beans in the jar. You suddenly have an intense craving for red jelly beans, but you don’t see any. How will you find them? Well, if no one is looking, you can stick your hands in the jar and poke around until the red beans appear. But wouldn’t it be nice if you had something that would automatically make the red beans jump to the top of the jar?

Well, as you’ve already learned, Notes can’t help you find jelly beans, but it can help you find specific words in the documents in a database. It can also help you replace those words with different words. (Now, if we can get it to replace the green jelly beans with red ones.)

This chapter tells you how to do the following:

- Find words or phrases in a document
- Find and replace words or phrases in a document
- Find all documents that contain a specific word or phrase
- Find document titles that contain a specific word or phrase
Finding a word or phrase in a document

How will this help me?

There are several reasons that you might want to look for a particular word or phrase in a document. For example, you might want to see what the document says about a particular subject, and you know that the section about that subject contains a particular word. Or you might want to edit the part of a document that contains that word.

When you tell Notes to find a word or phrase, Notes starts searching from the point in the document where the cursor is currently located. If you want to search from the beginning of the document, place the cursor at the beginning of the document.
While reading or creating a document, choose **Edit** and then choose **Find/Replace** from the Notes menu.

**YOU SHOULD KNOW**
If you are creating a document, Notes starts searching from the point in the document where the cursor is located.

1. In the Find box, type the text you want to find. Then click the **Find Next** button. Notes highlights the first occurrence of the text.

2. If you want to find another occurrence of the text, click the **Find Next** button again. When you’re done looking for the text, click the **Done** button.
Finding and replacing a word or phrase in a document

How will this help me?

After writing a document, you might decide that you don’t like the sound of a word or a phrase. You may have used that word or phrase several times in the document and may want to add variety to the document.

You can tell Notes to find a word or phrase and replace it with different text. Notes starts searching from the point in the document where the cursor is currently located. If you want to search from the beginning of the document, place the cursor at the beginning of the document.
1. While creating or editing a document, choose **Edit** and then choose **Find/Replace** on the Notes menu.

   **YOU SHOULD KNOW**
   Notes starts searching from the point in the document where the cursor is located.

2. In the Find box, type the text you want to find. Then click in the Replace box, and type the replacement text.

3. Click the **Find Next** button. Notes highlights the first occurrence of the text.
If you want to replace the highlighted text with the replacement text, click the **Replace** button. Otherwise, skip this step.

Repeat steps 3 and 4 until you have found all the occurrences of the text you want to find. Then click the **Done** button.
Finding all documents that contain a specific word

How will this help me?

There are several reasons that you might want to look for all documents that contain a particular word or phrase. For example, you might want to find every document that is about a particular subject. Or you might want to change a phrase that you typed into several documents. Or you might want to find a specific document, and you know it is the only document that contains a particular phrase.

To find all documents that contain specific text, you type that text into the "search bar." This is a long rectangular box that Notes displays just for this purpose. After finding the documents you want, you can edit them or read them to find the information you want.
While looking at the document titles in the view pane, choose View and then choose Search Bar on the Notes menu. Notes displays the search bar below the SmartIcons.

**YOU SHOULD KNOW**
If the search bar is already visible, you can skip this step.

2

In the search bar, type the text you want to find.

3

Click the Search button. (This tells Notes to display only the titles of documents that contain the text you’re looking for.)
To display all the document titles again, click the **Reset** button.

**YOU SHOULD KNOW**

You can remove the search text from the search bar by clicking the **Reset** button again.
Finding document titles that contain a word or phrase

How will this help me?
Finding the titles that contain a word or phrase is another way to find documents about specific topics. It is also a way to find words that you may want to change to other words.
While looking at the document titles in the view pane, choose **Edit** and then choose **Find/Replace** on the Notes menu.

**YOU SHOULD KNOW**

Notes starts searching at the title that is currently highlighted in the view pane.

1. In the Find box, type the text you want to find. Then click the **Find Next** button. Notes highlights the first title that contains the text.

2. If you want to find a different title that contains the text, click the **Find Next** button again. When you're done looking for titles, click the **Done** button.
Printing stuff

Notes lets you view and create a lot of information online. Sometimes, you may want to print some of that information. Printing gives you copies to distribute to other people or to place in your file cabinet.

When you print, you may want to add a header at the top of each page or a footer at the bottom of each page. You also may want to print more than one document. Or you may want to print just the titles of the documents in a database rather than the documents themselves.

This chapter tells you how to do the following:

- Create headers and footers
- Print documents
- Print the titles in a view
Adding headers and footers to documents

How will this help me?
You can add a header and a footer to a specific document or to all documents that you print in a database. The header and footer let you repeat information at the top and bottom of each printed page. In the header and footer, you can add page numbers, the current date, the current time, the title of the document, or any other information that you think is important.
With the database open, choose **Edit** and then choose **Properties** from the Notes menu. Notes displays an InfoBox.

In the "Properties for" box, click the down arrow and choose either **Document** or **Database**, depending on whether you want the header and footer to print on just the document that is currently selected or on every document that you print from the database.

Click the Printer tab in the InfoBox.
If you want to enter text for the Header, enter it in the text box.

If you want to enter page numbers, the date, the time, or the title of each document, use the buttons below the text box. (When you click a button, Notes uses a symbol to represent the action you want.)

<table>
<thead>
<tr>
<th>Button</th>
<th>Result</th>
<th>Symbol</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Page Number Icon]</td>
<td>Prints page numbers on every page</td>
<td>&amp;P</td>
</tr>
<tr>
<td>![Date Icon]</td>
<td>Prints today's date on every page</td>
<td>&amp;D</td>
</tr>
<tr>
<td>![Time Icon]</td>
<td>Prints the current time on every page</td>
<td>&amp;T</td>
</tr>
<tr>
<td>![Alignment Icon]</td>
<td>Pushes header or footer text following it to the right by 1/3 of a page</td>
<td></td>
</tr>
<tr>
<td>![Title Icon]</td>
<td>Prints the document title on every page</td>
<td>&amp;W</td>
</tr>
</tbody>
</table>
If you want to enter a footer, click the **Footer** button and then enter the footer in the text box. You can also use the buttons below the text box, as described in Step 5.

Click the "X" in the upper right corner of the InfoBox to close it. If you're using a Macintosh, click the button in the upper left corner of the InfoBox to close it. If you're using OS/2, double-click the button in the upper left corner of the InfoBox to close it.
Printing a document while reading it

How will this help me?

Sometimes it’s easier to read a long document if you print it. At other times, you may want to print a document to give it to another person or to place it in your file cabinet. You can print a document while you’re reading it or while you’re looking at its title in a folder or view. You can also print multiple documents from a folder or view.

This topic tells you how to print a document while you’re reading it.
1 While reading a document, choose **File** and then choose **Print** from the Notes menu.

2 (Optional) If the printer displayed in the Printer box is not the printer you want, click the **Printer** button and choose a different printer from the list that Notes displays.

3 Click **OK**.
Printing documents from a folder or view

How will this help me?
When you’re looking at document titles in a folder or view, you can print one or more documents. This lets you print documents without opening them. It also lets you print multiple documents with a single procedure.
While looking at the document titles, highlight the document you want to print. To print multiple documents, select each document by highlighting it and pressing the space bar. Notes places a checkmark beside each document you select.

1. Choose **File** and then choose **Print** from the Notes menu.

YOU SHOULD KNOW
In most databases, you can also select documents by clicking in the left-most column in the view pane (where the checkmarks are in this picture).
3. (Optional) If the printer displayed in the Printer box is not the printer you want, click the Printer button and choose a different printer from the list Notes displays.

4. Click OK.
Printing document titles from a folder or view

How will this help me?
You might want to print all the titles that are in a database or all the titles that appear in a specific folder or view. This gives you a printed summary of the contents of the database. You can use this as a table of contents if you print all the documents in a particular folder or view.
1. Open the folder or view whose titles you want to print. (To print all the titles in the database, open the All Documents view, if the database contains one.)

2. Choose **File** and then choose **Print** from the Notes menu.

3. In the "View options" section of the dialog box, click **Print View**.
4 (Optional) If the printer displayed in the Printer box is not the printer you want, click the **Printer** button and choose a different printer from the list Notes displays.

5 Click **OK**.
Tracking your schedule using Notes

In today’s world, it is increasingly difficult to keep track of all the things you need to do. At work alone, there are meetings to attend, projects to complete, information to find, phone calls to make, projects to complete, memos to write, seminars to attend, and projects to complete. If you also have a personal life, managing all the things you have to do can be overwhelming. (By the way, did you remember that today is your fifteenth wedding anniversary?)

Well, I’m sure you guessed that I wouldn’t have brought up the subject unless Notes has a solution for this problem. It’s the Notes calendar and task tracker. The calendar lets you schedule and track your activities and reminds you where you need to be and when you need to be there. The task tracker lets you create and track your “To Do” list. You can display items from your “To Do” list on your calendar as well. The calendar and task tracker are both in your Notes mail database.

You can add the following types of entries to your calendar:

- **Appointments**, which are entries that have a start and end time, such as meetings, conference calls, and doctors’ appointments.

- **Reminders**, which are entries that remind you of things you need to do, such as make a phone call, send someone a message, or pick up a loaf of bread on your way home from work.

- **Events**, which are entries that span one or more entire days, such as conventions, classes, and vacations.

- **Anniversaries**, which are entries that remind you of important dates, such as birthdays, wedding dates, or other special days. Anniversaries typically repeat on a regular basis, such as yearly.

- **Meeting invitations**, which invite people to a meeting at a specified time and place. If your company has implemented Notes free-time searching, you can have Notes look at other people’s calendars to find the best time to schedule a meeting.

This chapter tells you how to do the following:

- Open and set up your calendar
- Add calendar entries to your calendar
- View your calendar in different ways
- Open to a particular page in your calendar
- Edit and delete calendar entries
- Create and track your “To Do” list.
Opening your Notes calendar

How will this help me?
You must open your calendar in order to use it. (I bet you already knew that.)
1. Open your mail database.

2. Click Calendar in the navigation pane.
Setting up your Notes calendar

How will this help me?
You do not really have to set up your Notes calendar — it is already set up for you. However, you may want to change one or more of the default settings. These are contained in the Calendar Profile document.

The Calendar Profile document tells Notes some of your calendar preferences, such as the default amount of time to schedule for a meeting and whether you want Notes to notify you prior to meetings. Many of the other settings in the Calendar Profile deal with the free-time system, which lets you look up people’s free time to find out the best time to schedule a meeting. If your company has implemented the free-time system and you want to find out more about the other settings in the Calendar Profile, press F1 while the Calendar Profile document is open.
1 Choose Actions and then choose Calendar Tools and then choose Calendar Profile from the Notes menu.

2 Make any changes you want to make. (Many people accept the default settings and make no changes at all.)

3 Click OK.

YOU SHOULD KNOW
To change the choices you made on your Calendar Profile, you can follow the steps in this procedure again.
Adding an appointment to your calendar

How will this help me?
You can create an Appointment to remind you about a meeting you must attend or something you want to do. Appointments have a beginning time and an ending time. (Don't forget to schedule time for lunch.)
1. While the Calendar view is open, click the **New Entry** button.

**YOU CAN ALSO...**

... create a new appointment (or any calendar entry) from other views in your mail database. To do so, choose **Create** and then **Calendar Entry** from the Notes menu.

2. On the Calendar Entry form, click **Appointment**.

3. In the "Brief description" box, briefly describe the purpose and location of the appointment. If you want to add more details, add them in the "Detailed description" field.

**YOU SHOULD KNOW**

The "Brief description" is what shows up on your calendar.
4. Type the date of the appointment in the Date box, or click the Date button and select the date from the pop-up calendar.

5. Type the beginning and ending times in the Time box, or click the Time button and then drag the beginning and ending times to the times you want. When you're done dragging, click anywhere on the form to accept your times.

6. Click the Save and Close button.
Adding a reminder to your calendar

How will this help me?
Sometimes you may want a reminder to do something, such as make a phone call or pick up some milk at the store. You can add a reminder to your calendar so that you don't forget what you have to do.
1. While the calendar view is open, click the **New Entry** button.

2. On the Calendar Entry form, click **Reminder**.

3. In the "Brief description" box, briefly describe the item you want to remember. If you want to add more details, add them in the "Detailed description" field.

You can also...

... create a Reminder (or any calendar entry) by double-clicking any date in your calendar.
4 In the Date box, type the date you need to do this thing, or click the Date button and select the date from the pop-up calendar.

5 In the Time box, type the time you need to do this thing, or click the Time button and use your mouse to drag the time indicator to the time you want. When you're done dragging, click anywhere on the form to accept your time.

6 Click the Save and Close button.
Adding an event to your calendar

How will this help me?
You can add an Event to your calendar to block off time for special types of full-day events, such as seminars, classes, trade shows, and vacations.
On the Calendar Entry form, click the **New Entry** button.

While the calendar view is open, click the **Event** button.

In the "Brief description" box, briefly describe the event. If you want to add more details, add them in the "Detailed description" field.

On the Calendar Entry form, click **Event**.
4. Type the starting date in the Date box, or click the Date button and select the date from the pop-up calendar.

5. In the Duration box, type the number of days the event lasts.

6. Click the Save and Close button.
Adding an anniversary to your calendar

How will this help me?
An anniversary is an event that occurs on a regular basis, such as yearly. This can be a wedding anniversary, a birthday, or any other special day that occurs on a regular basis. You can add an anniversary to your calendar to remind you of the special day.
1. While the calendar view is open, click the **New Entry** button.

2. On the Calendar Entry form, click **Anniversary**.

3. In the "Brief description" box, briefly describe the anniversary. If you want to add more details, add them in the "Detailed description" field.
4 Type the date of the anniversary in the Date box, or click the Date button and select a date from the pop-up calendar.

YOU CAN ALSO...

... click the Alarm Options button and set a time for Notes to display a reminder about this anniversary.

5 Click the Repeat button. In the Repeat drop-down list, choose how often you want this anniversary to repeat, such as Yearly. Then click "For" and enter the length of time you want the anniversary to repeat, such as for 10 years. Then click OK.

6 Click the Save and Close button.
Creating a meeting invitation

How will this help me?

If you are going to be running a meeting, you can send a meeting invitation to the people you want at the meeting. By creating a meeting invitation, you can track the responses of the people you invite. You can look in the Meetings view to see who has accepted and who has declined your invitation.

If your company has set up Notes free-time searching, you may be able to have Notes look at other people’s calendars and suggest the best time to hold a meeting. This can save you a lot of time trying to find out when most people can attend.
1. While the calendar view is open, click the **New Entry** button.

2. On the Calendar Entry form, click **Invitation** (unless it's already chosen).

3. In the "Brief description" box, briefly describe the meeting. If you want to add more details, add them in the "Detailed description" field.
4. Type the date of the meeting in the Date box, or click the Date button and choose a date from the pop-up calendar.

5. Type the beginning and ending times in the Time box, or click the Time button and then drag the beginning and ending times to the times you want. When you're done dragging, click anywhere on the form to accept your times.

6. In the "Send invitations to" field, enter the names of the people you want to invite.

YOU CAN ALSO...
... click the Alarm Options button and set a time for Notes to display a reminder about this meeting.
Click the **Save and Close** button. (This tells Notes to place the meeting on your calendar.) When Notes asks if you want to send the invitation to the people and resources you invited, click **Yes**.

---

**YOU SHOULD KNOW**

Invitation is the default type of calendar entry, but you can change this. Choose **Actions**, then **Calendar Tools**, then **Calendar Profile** from the Notes menu. In the Advanced Calendar Options section at the bottom of the document, change the selection in the "Calendar entry type" field.
Viewing your calendar in different ways

How will this help me?

Viewing a calendar in different ways makes it easier to see the information you want. For example, viewing just two days at a time shows you all the things you need to do today and tomorrow. Viewing a month at a time lets you do long-term planning, perhaps helping you to schedule a vacation or a class.

Notes lets you view your calendar in the following ways: two days at a time, one week at a time, two weeks at a time, and one month at a time.
1. To change the way you view your calendar, click the button for the view you want to see. For example, click **Two Days**.

2. To change to a different view, click one of the other buttons, such as **Two Weeks** or **One Month**.

YOU CAN ALSO...

... turn to the next calendar page or the previous page by clicking the lower right corner or lower left corner of the calendar.
Opening a particular page in your calendar

How will this help me?
Sometimes you may want to see what you have scheduled in the future, or what you did in the past. Notes lets you move directly to any page in your calendar.
1. While the calendar view is open, choose View and then choose Calendar and then choose Go To from the Notes menu.

2. Type the date you want in the Date box, or click the Date button and choose a date from the pop-up calendar.

3. Click OK.

YOU CAN ALSO... click the Go To Today button in the action bar to open the calendar to today's date.
Editing a calendar entry

How will this help me?
Sometimes the date or time of an appointment will change or you will decide to add details to a meeting description. You can edit the appointment to reflect any changes.
1. On your calendar, double-click the entry you want to edit.

2. Click **Edit Document**.

3. Make the changes you want to make.
Click Save and Close.
Deleting an entry from your calendar

How will this help me?

If a meeting is canceled, you should remove that entry from your calendar. You can also delete old entries to make your calendar less cluttered and save a little disk space. (Calendar entries are really Notes documents. Therefore, they are listed in the All Documents view in your mail database.)

As with regular mail messages, there are two parts to deleting calendar entries. First you tell Notes which entries you want to delete. Notes places a line through these entries. Then you tell Notes to actually delete the entries.
1. In your calendar, click the calendar entry you want to delete.

2. Choose Edit and then choose Clear from the Notes menu, or press the delete key on your keyboard. (Notes places a line through the entry to show it’s marked for deletion.)

3. When you want to delete the calendar entries you marked, choose Actions and then choose Empty Trash from the Notes menu.

YOU SHOULD KNOW
Choosing Empty Trash deletes any messages in your mail database that are marked for deletion (not just calendar entries).
Creating and tracking tasks

How will this help me?
Most people have many tasks that they need to complete. Often they create a "To Do" list that includes these tasks and shows which tasks are the most important. You can create and prioritize your "To Do" list right in Notes. Notes includes a special view, the To Do view, that lets you look at and track your progress on the tasks you need to complete.

When you look at the To Do view, Notes shows you which tasks you still have to work on, which tasks are finished, and which tasks are overdue.
1. While your Mail database is open, choose **Create** and then choose **Task** from the Notes menu.

2. Type a subject for the task.

3. (Optional) Click one of the priority buttons to indicate the importance of the task.
4. (Optional) In the Due box, type the date on which you want to finish the task; or click the Date button and select the date from the pop-up calendar.

5. (Optional) In the Start box, type the date on which you want to start working on the task; or click the Date button and select the date from the pop-up calendar.

6. (Optional) Add more details about this task in the "Additional information" field.
(Optional) Click the **Display Task on My Calendar** button if you want this task to show up when you look at your calendar.

**YOU SHOULD KNOW**

If you entered a Start Date, the task will show up on that date in your calendar. If you entered a Due Date but no Start Date, the task will show up on the Due Date in your calendar.

Click the **Close** button. (When Notes asks if you want to save the task, click **Yes**.)

**YOU CAN ALSO...**

... show when you've completed a task. To do so, open the **To Do** view, click the completed task, and then click the **Mark Completed** button.
It's hard to live in the world today without hearing about the Internet and the World Wide Web. More and more, companies are using the Web as a business tool. The Web lets you visit places around the world and find out information about almost any topic.

So, how do you access all of this information? Well, you can use Notes, of course (if your Notes administrator has set up Notes to communicate with the Internet). Although there is more than one way to use Notes to visit the Internet, this chapter discusses the Server Web Navigator database (which I will call "the Web Navigator database" to save a little space).

The Web Navigator database includes a Web browser that lets you search for and access information on the Web. Unlike other Web browsers, however, the Web Navigator database puts the Web pages you access into a Notes database that other people at your company can look at. This lets many people see the same information without searching the Web for it. People can also rate Web pages according to how useful they are, so that others will know whether or not to look at those pages. If there is a Web page that you particularly want someone to see, you can forward the page to that person.

When you first open the Web Navigator database, Notes displays the **Home navigator**. From this navigator, you can open a particular Web page, search for Web pages about a particular topic or category, find out how people have rated particular Web pages, or open the **Database Views** navigator.
The Home navigator looks like this:

![Home Navigator Diagram]

The table below describes the items that are labeled on the Home navigator.

<table>
<thead>
<tr>
<th>Item</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our Home</td>
<td>Opens the home page of your company’s Web site or a Lotus Web site.</td>
</tr>
<tr>
<td>Sampler</td>
<td>Lets you view Web pages about particular topics.</td>
</tr>
<tr>
<td>Database Views</td>
<td>Lets you see Web pages that other people at your company have visited. Also lets you search for and open other Web pages and create bookmarks.</td>
</tr>
<tr>
<td>Recommended</td>
<td>Lets you see Web pages that people at your company have recommended.</td>
</tr>
<tr>
<td>Directory Search</td>
<td>Lets you search for Web sites and pages about a particular topic.</td>
</tr>
<tr>
<td>Open URL</td>
<td>Lets you type the address of a Web page to open that page.</td>
</tr>
<tr>
<td>User’s Guide</td>
<td>Opens a view in Notes Help that includes documents about using Notes with the Internet.</td>
</tr>
</tbody>
</table>

The **Database Views navigator** is probably the most commonly used navigator in the database. From this navigator, you can do most of the things you can do from the Home navigator and more. As with the Home navigator, you can open a particular Web page and search for Web pages about particular topics. From Database Views, however, you can also see the Web pages that other people at your company have visited and see how they have rated those pages. In addition, you can create bookmarks so you can easily return to particular pages you want to visit repeatedly.
The Database Views navigator looks like this:

<table>
<thead>
<tr>
<th>Item</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Bookmarks</td>
<td>Displays a list of the bookmarks you have created.</td>
</tr>
<tr>
<td>Folders</td>
<td>Displays Notes folders in the navigation pane.</td>
</tr>
<tr>
<td>All Documents</td>
<td>Displays a list of all the Web pages in the database.</td>
</tr>
<tr>
<td>By Host</td>
<td>Displays a list of all the Web pages in the database sorted by the Web server that contains each page.</td>
</tr>
<tr>
<td>File Archive</td>
<td>Displays a list of Web pages that contain attachments.</td>
</tr>
<tr>
<td>Web Tours</td>
<td>Displays a list of Web tours that people at your company have created. A Web tour is a collection of Web pages about a particular topic.</td>
</tr>
<tr>
<td>Recommended</td>
<td>Displays a list of Web pages that other people at your company have recommended.</td>
</tr>
<tr>
<td>Back to Home</td>
<td>Returns you to the Home navigator.</td>
</tr>
</tbody>
</table>

This chapter tells you how to do the following:

- Open the Web Navigator database
- Open a Web page you know about
- Search the Web for information
- Forward a Web page to someone else
- Create and use bookmarks
- Return to a Web page you visited during the current session
- View Web pages that others at your company have visited
Opening the Web Navigator database:
The first step toward full Web access

How will this help me?
To use the Web Navigator database to browse the Web, you must first add the database icon to your workspace and open the database. After you open the database, you can browse the Web and look at the Web pages that other people in your company have already opened.
Choose **File** and then choose **Database** and then choose **Open** from the Notes menu.

1. Click the tab for the workspace page where you want to put the database icon.

2. In the Server box, enter the name of the server that contains the database. You can choose the server name from the drop-down list or type the name. If you type the name, press ENTER when you're done.

3. You should know if you aren’t sure of the name of the server, ask your Notes administrator.
4 In the Database box, click "Server Web Navigator 4.5."

5 Click the **Open** button.
Opening a Web page you know about

How will this help me?
If you know the address of a particular Web page, you can visit that page by typing its address. This lets you open Web pages whose address you see on television, hear on the radio, or read about in newspapers or magazines.

By the way, people on the Internet call an address a URL (Uniform Resource Locator). The main reason for this is...well, nobody really knows the reason for this, but it certainly sounds more important than “address.”
1. If the Home navigator is open, click **Open URL**.
   If a database view is open, choose **Actions** and then choose **Open URL** from the Notes menu.

2. Type the address of the Web page (the URL).

3. Click **OK**.

You can also ...

... open a Web page from anywhere in Notes by choosing **File** and then **Open URL** from the Notes menu.
Searching the Web for information

How will this help me?
Searching the Web lets you find Web pages about topics you want to know about. Perhaps you are doing research for a report for your boss. Perhaps you are going to start jogging and want to learn about running shoes. Perhaps you are going on a trip to a foreign country and want to learn about that country.

When you do a search, Notes displays a list of Web pages related to the topic you search for. You can click on any of the pages listed to see its contents.

Notes provides four search products for you to use.
1. If the Home navigator is open, click **Directory Search**. If a database view is open, choose **Actions** and then choose **Directory Search** from the Notes menu.

2. In the text box, type the topic you want to search for. If the topic contains multiple words, place a + between the words.

3. Click one of the search product buttons.
When Notes displays the search results, scroll down to the topic you want to view, and click its underlined link.

4

(Optional) If you want to return to the list of search results, click the Previous button (the left-pointing arrow in the action bar).

5

To do the same search with a different search product, press ESC and then click the button for the other search product.

To return to the Database Views navigator, press ESC when the "Internet Directory Search" page is open.

6
Stopping a search or a page lookup before it finishes

How will this help me?
Sometimes, opening a Web page or doing a search can take a long time. This can happen when the system is very busy or is having a problem locating what you are looking for. By stopping a search, you can use the Web Navigator to do other things and then retry the search at a later time.
Start a search, or try to open a Web page (by clicking a link to the page or using its URL).

While the search is in progress, click on the floating documents next to the search bar, or press ESC.
Forwarding a Web page to someone else

How will this help me?
If you find a Web page that you want someone else to see, you can mail that page to the other person. Notes creates a mail message that contains the Web page. You can add a comment to the message if you want.
While reading a Web page, click the **Forward** button. (Notes creates a mail message that includes the Web page you are reading.)

1. Address the message the same as you would any new mail message.

2. If you want to add your own comment to the message, add it above the Web page you are forwarding.
When you are ready to send the message, click the Send button.

To: [Email Address]
Subject: [WebMuseum Famous Paintings Exhibition]

Take a look at this Web site. It has a lot of information for your report.
Creating a bookmark so you can return to a Web page

How will this help me?

Often, you'll find Web pages that you'll want to look at again. Rather than enter the page's address each time you want to view the page, you can create a bookmark. When you click the bookmark, the Web Navigator automatically opens the page you want.
1. While reading a Web page, click the Bookmarks button.

2. In the "Select a folder" box, click My Bookmarks.

3. Click Add.

You can also...
...create a bookmark while looking at a database view. To do this, drag a Web page title to the heading "My Bookmarks" in the navigation pane.

You can also...
...click a different folder name, if one exists, or click Create New Folder if you want to store the bookmark in a different folder.
Using a bookmark to return to a Web page

How will this help me?
Once you've created a bookmark, you can use it whenever you want to open that Web page. You do not have to remember the page's address or do a search for the page. This saves you time (and aggravation).

When you use a bookmark, Notes opens the version of the Web page that is stored in the Web Navigator database. If you want to be sure that this page is up-to-date, you can tell Notes to reload the page from the Web.
Open the Database Views navigator. You can use one of the following methods:

1. If the Home navigator is open, click Database Views.
2. Otherwise, choose Window and then choose Server Web Navigator 4.5 from the Notes menu, or click Database Views if it is present in the navigation pane.

3. Double click the title of the Web page you want to view. Notes opens the version of the Web page that is stored in the Web Navigator database.
If you want to be sure that you're looking at the latest version of the Web page, click the **Refresh** button. (Notes gets the latest version from the Web.)

If you want to return to viewing all the documents in the Web Navigator database, click **All Documents**.
Returning to a page you visited during the current session

How will this help me?
You may want to revisit a Web page that you opened earlier in the current session. You would do this to remind you of what the page said or to find a link to a different Web page. To help you, Notes creates a list of the pages you visited. This list is called the history list. You can move backwards and forwards through this list and go to any of the pages in the list.

As long as you continue to open Web pages, Notes adds to the history list. When you close a page (by pressing ESC or choosing File and then Close from the Notes menu), Notes clears the history list.
While reading a page, click the History button. Notes displays a list of Web pages you’ve visited during the current series.

1. Click the page you want to return to.

2. Click the page you want to return to.

3. Click Go To.
YOU CAN ALSO...
...click the Previous and Next buttons (the left and right arrows) in the action bar to move sequentially backwards or forwards through the pages in the history list.
Viewing Web pages that others at your company have visited

How will this help me?

You can browse through the topics in the Web Navigator database to find Web pages that others at your company have visited. Because they are stored in the Web Navigator database, you can open them quickly, without accessing the Internet. You can also refresh them if you want to see the latest version from the Internet.
Open the Database Views navigator. You can use one of the following methods:
If the Home navigator is open, click Database Views. Otherwise, choose Window and then choose Server Web Navigator 4.5 from the Notes menu, or click Database Views if it is present in the navigation pane.

1. Click All Documents. (This is not necessary if the All Documents view is already open.)

2. Double-click the Web page you want to view. (Notes opens the version of the Web page that is stored in the Web Navigator database.)
(Optional) If you want to be sure that you’re looking at the latest version of the Web page, click the Refresh button. (Notes gets the latest version from the Web.)
Finding your way back home

How will this help me?
Each time you open the Web Navigator database, Notes displays the Home navigator. As you use the database, you may want to return to the Home navigator to do something that you can do only from that navigator, such as look at the User's Guide or look at Web pages in the categories listed in the Sampler section of the navigator. You can return to the Home navigator from anywhere in the Web Navigator database.
Click **Actions** and then click **Home** on the Notes menu.

**YOU SHOULD KNOW**

At times (depending on what you’re doing), **Home** will appear in a different position on the **Actions** menu.

**YOU SHOULD KNOW**

In many places in the Web Navigator database, you can click **Back to Home** to return to the Home navigator.
Congratulations!
You have completed the basic Notes tasks.

Are you ready for a few advanced tasks?
This book has gotten you started using Notes. There are many things you can do with Notes that weren’t described in this book. This appendix tells you about a few of those things. Rather than give you step-by-step instructions for doing them, however, we just give you some hints and then leave you to flounder work on your own. For some of these things, the hints will be all you’ll need to figure them out. For other things, you may have to look in the Help system for additional assistance.

I hope this book has been useful to you. If it has, feel free to write and let me know. You can even send gifts, flowers, or chocolate. If the book wasn’t useful, please keep it to yourself. (You can still send gifts, though.)

This chapter briefly describes the following:

- Adding a page to your workspace
- Changing the letterhead on your mail messages
- Using the permanent pen
- Creating a collapsed section
- Creating and editing a table
- Using a full text index to search for documents
- Using database libraries to find databases
- Using Notes from another location
- Creating a new view for your own use
- Creating a new database
- Some additional tips
Adding a page to your workspace

By default, Notes includes six workspace pages you can use to store database icons. If you want to add more pages, choose Create and then choose Workspace Page from the Notes menu. To delete a workspace page, click the tab for the page, and then choose Edit and then choose Clear from the Notes menu. Notes deletes the page and all the database icons on it. It does not delete any databases, however, so you can add the database icons back at a later time.

Changing the letterhead on your mail messages

Notes lets you choose from more than 30 letterheads to place at the top of the mail messages you create. Letterheads make your messages look fancier and say something personal about you. (Hmm...better be careful about the one you choose.)

To change letterheads, choose Actions and then choose Mail Tools and then choose Choose Letterhead from the Notes menu. Select the letterhead you want and then click Done.
Using the permanent pen

The permanent pen lets you insert comments into a document in a different color and style than the rest of the text in the document. If you’re creating a document with black text, for example, you can use the permanent pen to create comments in green italic text (or any style text you want).

To use the permanent pen, choose Text and then choose Permanent Pen from the Notes menu. To turn off permanent pen, choose Text and then choose Permanent Pen again. The default color and style for permanent pen is red, bold, 10 point Helvetica®. You can change these default settings in the Text Properties InfoBox.

Creating a collapsed section

As you have seen, you can collapse a section of text so that it takes up less space in a document. The reader can expand the section to read it.

To create a section, highlight the text you want Notes to include in the section, and then choose Create and then choose Section from the Notes menu.
Creating and editing a table

You can add tables to your Notes documents. Tables often make information easier to see and to understand.

To create a table in a document you are creating or editing, choose Create and then choose Table from the Notes menu. When you create the table, Notes adds the Table command to the Notes menu to help you customize your table. Whenever the cursor is in the table, Notes displays the Table command on the menu.

Using a full text index to search for documents

If a database has a full text index, you can do more advanced searches than if it doesn't. For example, you can search databases for documents created by a particular author or created before a particular date. You can also create complex search formulas using multiple criteria to find specific documents in databases.

- To find out if a database has a full text index, display the search bar (choose View and then choose Search Bar from the Notes menu). If the first button to the right of the text box says "Add Condition," the database has an index. If the button says "Create Index," the database doesn't have an index.
- To search in a database that has a full text index, display the search bar and then click the Add Condition button.
- To create a full text index, display the search bar and then click the Create Index button. (If the database is on a server, you must have Designer or Manager access to the database in order to create a full text index.)
Using database libraries to find databases

Your company may have set up database libraries to make it easier for you to find databases that are available to you. A database library contains lists of databases and their descriptions. You can open databases directly from the database library. To find out if your company has created any database libraries, ask your Notes administrator.

Using Notes from another location

Although your office may be the main location at which you use Notes, you can use it from other locations, such as a hotel room or your home. You can use Notes from anywhere in the world, as long as you have a computer, a modem, and access to a phone line.

The details for doing this are too involved for the scope of this book. For more detailed information, open the "How Do I...?" view in Notes Help. Then open the section named "Do Everyday Tasks" and look in the section named "07 Use Mobile Notes."
Creating a new view for your own use

Usually, a database designer creates several views and folders for you to use in a database. But what if the designer didn't create a view that displays document titles the way you want to display them? Well, you can create your own private view that you can use whenever you open the database. To create a view, it is often a good idea to copy an existing view and then modify it.

Again, the details for doing this are too involved for the scope of this book. For assistance, look in the Notes Help index under "Views." There you'll find topics such as "Creating from scratch," "Copying," and "Building." The first two topics tell you how to start creating a view; the last topic tells you how to customize it.

Creating a new database

Notes gives you many templates to help you create new databases. A template includes the basic design elements of a database, such as forms and views and folders. After you create a database using a template, you can customize it if you want (but you don't have to).

To create a database, choose File and then choose Database and then choose New from the Notes menu. Choose the template you want to use, give the database a title and a file name, and then click OK.
Some additional tips

You may have noticed some of these as you worked with Notes, but I'll mention them just to be sure.

1. When you click on an object or location in Notes and then click the right mouse button, Notes displays a menu that relates to the object or location you clicked.

2. While reading a document in a database, you can press ENTER to close the current document and display the next document in the database.

3. Whenever you want to create something new in a database, such as a new document, table, or folder, look at the Create menu. The items on the menu change depending on which database you are using and which part of that database is active.

4. The items on the Actions menu also change, depending on which database you are using and which part of the product is active.

5. Experiment. Learn. Have fun.