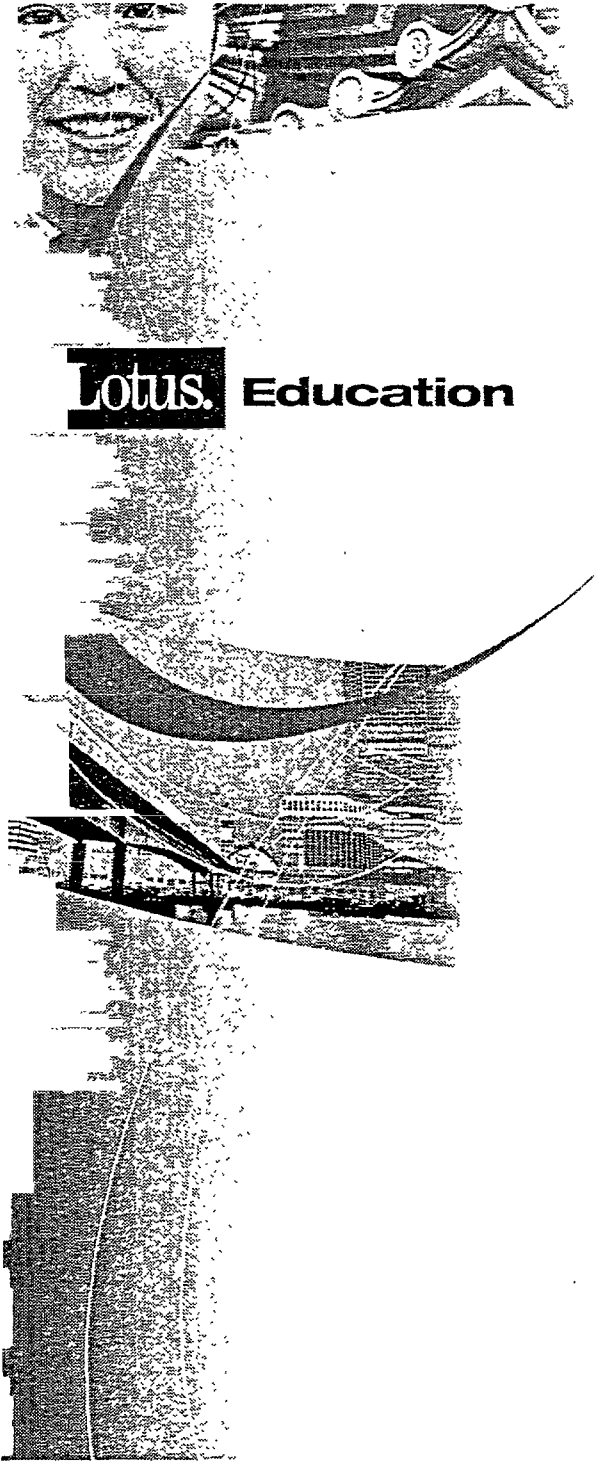


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**CMA System Support Training/Computer Maintenance &  
Administration: Introducing the Notes Client  
IBM  
Contract No. 263-C-00-95-00134-00  
Administration of Justice Support Project  
AMIDEAST/ AOJS Cairo  
February-May 2000**



**Lotus.** Education

## Introducing the Notes Client

Lotus Authorized Education:  
**Knowledge for the Future**

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# Notes to the Student

- About This Course
  - Course Description
- Recommended Agenda
- Icon Quick Reference

# About This Course

## Course Description

### Target audience

---

The **Introducing the Notes Client** course is targeted at those users who have no prior experience with Notes.

### Summary description

---

Using interactive hands-on learning techniques, students will learn basic Notes skills. These skills will allow them to use Notes as an environment for messaging, collaboration, and knowledge management.

### Format and duration

---

Lecture/Lab, half day

### Course goals

---

By the end of this course, you should be able to:

- Navigate the Notes work area using bookmarks and other navigation tools.
- Work comfortably in several types of databases, including Mail and Discussion databases.
- Change basic settings and preferences.
- Use features in documents to edit text, link to other sources, or include files.

**Course Description...***(continued)*

---

**Topics covered**

---

The **Introducing the Notes Client** course covers the following topics:

- Starting Notes
- Navigating the work area
- Working with Welcome page styles
- Creating and using bookmarks
- Using Notes Help
- Opening databases
- Browsing the Web in Notes
- Reading and replying to mail
- Addressing mail
- Formatting messages
- Organizing messages
- Changing passwords
- Working with attachments
- Following links within documents
- Viewing the calendar



# Recommended Agenda

## Agenda

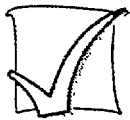
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The following table shows the recommended timing for each lesson in this course.

Time	Lesson
<b>Module A: Getting Started with Lotus Notes</b>	
35 minutes	Lesson 1: Starting Notes
15 minutes	Lesson 2: Navigating with Notes
10 minutes	Lesson 3: Finding Information in Notes Help
<b>Module B: Getting More Information with Notes</b>	
55 minutes	Lesson 4: Beginning with Databases
15 minutes	Lesson 5: Working with Documents
15 minutes	Lesson 6: Adding Document Style
10 minutes	Lesson 7: Changing Notes Settings
<b>Module C: Working with Mail</b>	
10 minutes	Lesson 8: Getting Into Your Mailbox
13 minutes	Lesson 9: Writing and Sending Mail
15 minutes	Lesson 10: Managing Your Mail

# Icon Quick Reference

The following are brief descriptions of each of the learning process icons used in this courseware.



## Activity

---

Using detailed directions, students "learn by doing" on their own.



## Case study

---

Exercises for discovery and exploration in advanced technical courseware which focus on problem solving. These have no right answer. The solution is a set of pros and cons and a recommended answer.



## Caution

---

Short, descriptive paragraphs meant to warn of potential pitfalls or areas where students could experience problems back on the job.

**Icon Quick Reference...***(continued)*

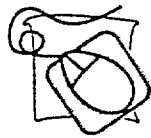
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**Exercises**

---

Exercises are problem-solving learning processes in which students are given a set of criteria that they use to develop a working solution.

There are two types of exercises: online and paper-based. The following two items show the icons that would accompany each.



**Online exercise**

---



**Paper-based exercise**

---



**Procedure**

---

Generic step-by-step instructions that explain how to perform a task. These are always presented in a table format.

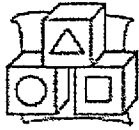


**Review questions**

---

A set of questions that reinforce key concepts and are used to transition from one lesson or module to another.

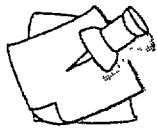
**Icon Quick Reference...***(continued)*



**Step by step**

---

Step-by-step instructions with detailed information that explains how to perform a task. These are always presented in table format.



**Tip**

---

Additional guidance, or a hint, about a topic or task.



# Getting Started With Lotus Notes

- Lesson 1 Starting Notes
- Lesson 2 Navigating with Notes
- Lesson 3 Finding Information in Notes Help

---

# Starting Notes

With Notes, everything you need is available in one place. You can compose messages, schedule events, and browse the Web with one set of tools. You always know where you have been and can quickly find your way back.

## Objectives

---

After completing this lesson, you will be able to:

- Start Notes.
- Receive and send a mail message.
- Check your calendar.
- Get to the Web.
- Receive up-to-date news.
- Run the Notes Guided Tour.

## Beginning Notes

With Notes, you have one integrated environment to:

- Send and receive e-mail.
- Schedule appointments.
- Browse the Web.
- Find any type of information.

### The Notes icon and your password

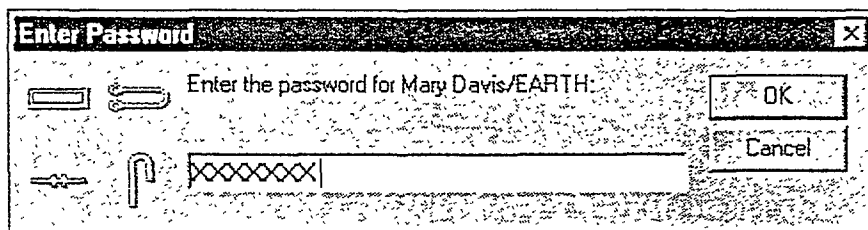
To launch Notes, choose the application from the Start menu, or double-click the Notes icon on your desktop.



The user name and the password that you will use in class are:

---

When entering a password, you will not see the characters you type. Instead, all you see are Xs.



## Beginning Notes...(continued)



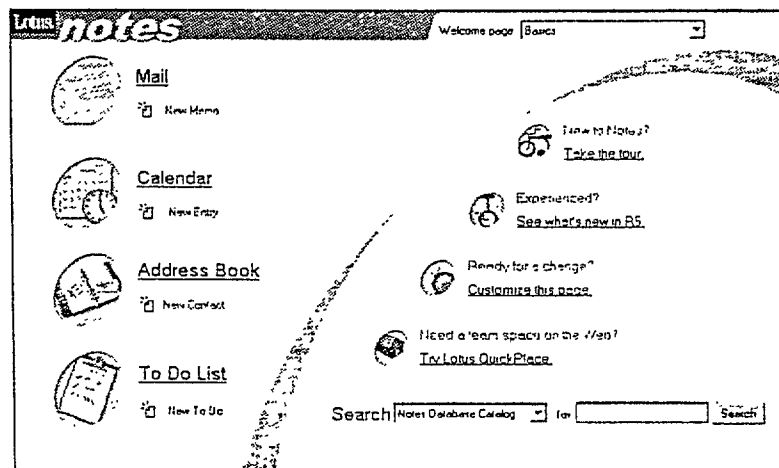
### Start Notes

Follow these steps to start Notes.

Step	Action
1	Click the <b>Notes</b> icon.
2	Enter your password. Then, click <b>OK</b> .

### Instant access with the Welcome page

The Welcome page provides instant access to your mail, calendar, guided tours, and the Search function. You can customize the page to stay up-to-date on important information.





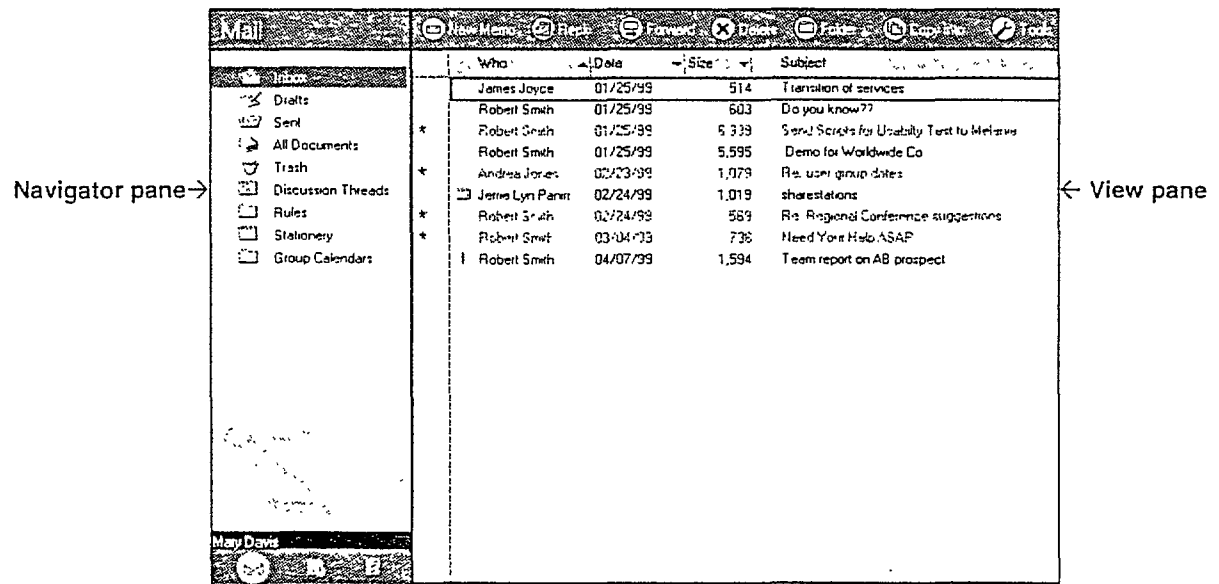
## Receiving and Sending E-mail

The first stop for communicating with the rest of the world is your mail. From the Welcome page, you can go directly to your Inbox or create a mail message.

### You've got mail!

Click the Mail icon to go to your mail. Your mail is displayed in a two-pane format.

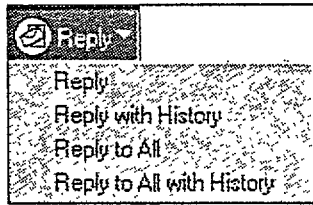
- The **View pane** on the right displays your incoming messages. Each line represents one message.
- The **Navigator pane** on the left contains tools for organizing your mail.



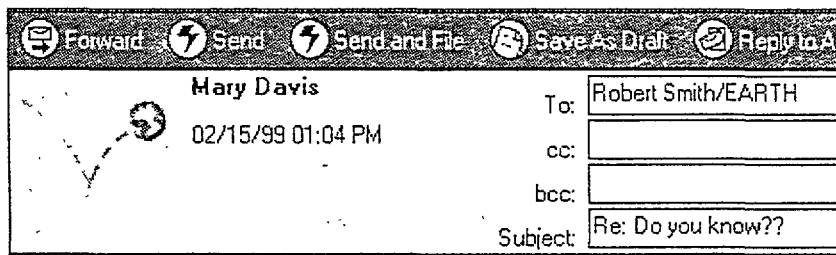
Double-click a message to open it.

After you have read a message, you can reply to it. Click the Reply button at the top of the open message. Select Reply from the drop-down list.

### Receiving and Sending E-mail...(continued)



Notes opens a new message. In the mail header, the name of the sender is automatically entered as the recipient and the original subject title (preceded by Re:) is already entered as the subject of the reply message. Enter your response and click the **Send** button at the top of the message.

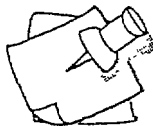


**Note:** The Notes message header is non-scrolling. Even when a long message must be scrolled to view or edit, the header remains on the screen.

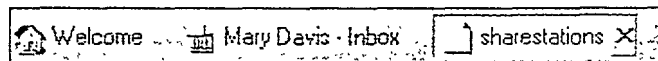
**Receiving and Sending E-mail...***(continued)***Send a reply**

Follow these steps to open and reply to a mail message.

Step	Action
<b>Open a Message</b>	
1	Click the <b>Mail</b> icon on the Welcome page.
2	Click the <b>Welcome to Lotus Notes</b> document. <b>Note:</b> To select a document, click it once.
3	Double-click the selected document. <b>Note:</b> To open a document, double-click it.
<b>Reply to a Message</b>	
4	Click the <b>Reply</b> button. Select <b>Reply</b> from the drop-down list.
5	Enter the text for your message. Then, click <b>Send</b> . <i>Result: The Reply message closes and the original message remains open.</i>
6	Press <b>ESC</b> to close the open message. <b>Note:</b> Your Inbox remains open.
7	Press <b>ESC</b> to close the Inbox. <i>Result: The Welcome page remains open.</i>

**Tip**

You can see which messages are open by looking at the top of the Notes screen. There are corresponding window tabs for your Inbox and each open message.



## Receiving and Sending E-mail...*(continued)*

When creating a new memo, enter the e-mail address of the recipient and the **Subject** title.

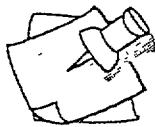


### Write mail

---

Follow these steps to create and send a new mail message.

Step	Action
1	Click the <b>New Memo</b> button on the Welcome page.
2	In the <b>To:</b> field, enter Robert Smith@domain*.com *Ask the instructor for the correct classroom address domain.
3	In the <b>Subject:</b> field, enter Information.
4	In the body of the message, enter your name and address.
5	Click <b>Send</b> .  <i>Result: The message closes and the Welcome page remains open.</i>



### Tip

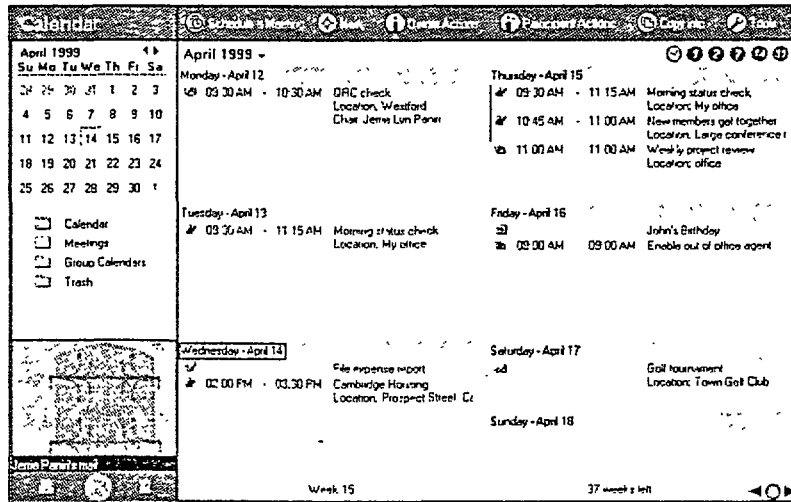
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You can also create a new mail memo by clicking the **New Memo** button on your mail window. After the message is sent, the mail window remains open.

---

## Checking Your Calendar

Stay organized with your Notes calendar. Keep track of your time, tasks, and appointments; manage meetings; and even check the availability of other Notes users.



### First look at the Notes Calendar

Click the **Calendar** icon on the Welcome page to go to your calendar.

The current month's calendar is shown in the left column with the current day highlighted. The right side of the screen shows the calendar in more detail.

Use the buttons in the upper right corner of the screen to switch the displayed number of days.

Click	To View
1	Current day
2	Today and tomorrow
7	One week
14	Two weeks
31	Entire month

## Checking Your Calendar...*(continued)*

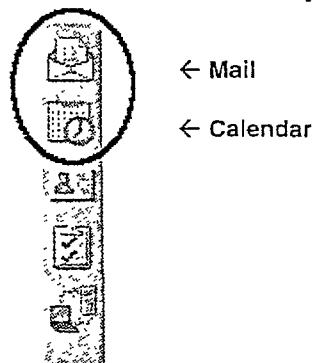
Along the bottom of the screen is information about the current year.

For example, Notes displays that it is Week 40 and there are 13 weeks left in the current year, or that it is Day 288 and there are 76 days left.

In the bottom right corner, use the back and forward arrows to page through your calendar.

## Quicker access to your mail and calendar

On the left side of your Notes screen is a bar containing several icons. The first two are direct links to your mail and calendar.



When you are using either Mail or Calendar, the toolbar in the bottom left corner contains icons that switch from one to the other.



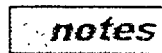
## Getting to the Web

Notes has many options for getting information from the Web. There is no need to launch a separate Web browser. You can open your favorite Web search site, start a Web search, or go directly to the address of a particular Web page.



### Lotus.com

Click the Notes label on the right side of the task bar to go to the Lotus Home page on the Web.

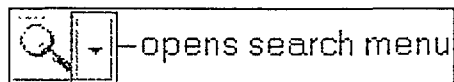


## Browsing the Web

The following are examples of different ways to start a Web search.

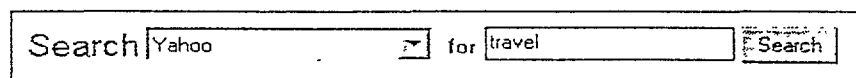
### Opening a predefined Web site

Click the drop-down list next to the **Search** icon in the navigation bar located in the top right corner of the screen. From the list, select a predefined Web site.



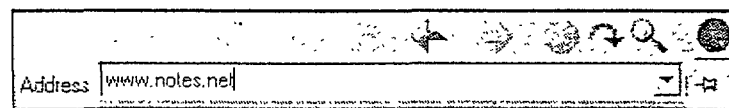
### Starting a Web search

On the Welcome page, click the drop-down arrow next to the **Search** box located on the bottom of the screen. Choose a Web search engine. In the **for** box, enter a word or phrase. Click **Search**.



### Opening a URL

Click the **Open URL** icon in the navigation bar (top right corner). Enter the URL for a Web page in the **Address** box. Press **ENTER**.



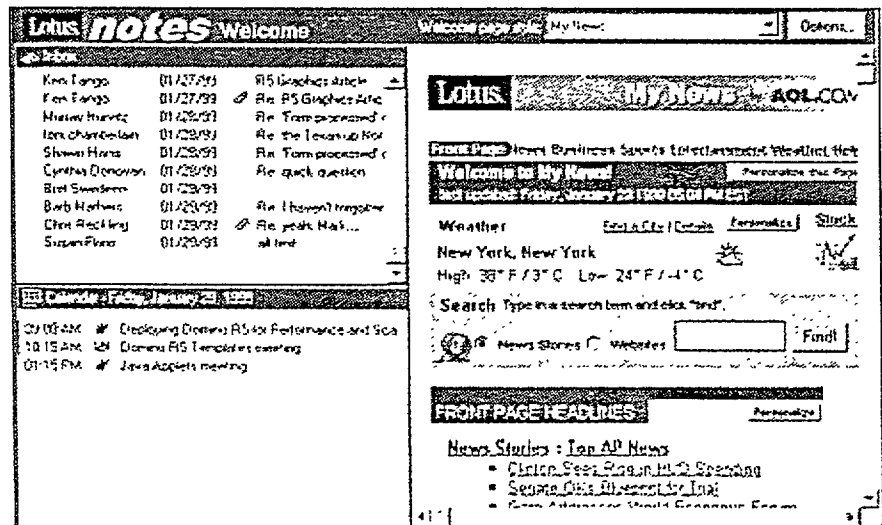
## Receiving Up-to-Date News

The Welcome page is a place for you to receive information important to you. Use the Welcome page to display your mail Inbox, daily calendar, and public information from the Internet, such as stock quotes or local weather.

### Changing the Welcome page style

In the beginning, you should use the **Basics** page style on the Welcome page to accomplish basic tasks. As your Home page, you want the Welcome page to contain links to all of your important information.

You can select from different Welcome page styles. For example, the **Headlines with AOL My News** page style includes the personalized **My News** service from America Online (<http://www.aol.com>). This page is tailored to also display your Inbox and Calendar, as shown here.



The **Lotus Notes and Domino News** page style displays your Inbox, Calendar, and includes a link to the Lotus Web site.

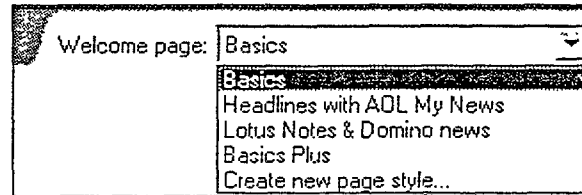
The **Basics Plus** page style displays your Inbox, Calendar, Search tools, and the Basics links to Mail, Calendar, Address Book, and To Do list.



## Receiving Up-to-Date News...*(continued)*

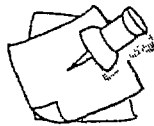
### Choosing a Welcome page style

In the **Welcome page:** box at the top of the Welcome page screen, click the drop-down arrow and select a page style.



**Note:** Welcome pages can be customized to set the number of frames that appear on the page, as well as what type of information appears in those frames.

In a corporate environment, an administrator may determine the style and content for the Welcome page for all users in the organization.



#### Tip

Everything on the Welcome page is a live link, including the title bars of each frame. For example, click the title frame above **Calendar** to go directly to a full display of your calendar.

## The Highlights of Notes R5

This classroom introduction to Notes only begins to demonstrate the rich and dynamic tools available in Notes R5. Already you have used Notes Mail, viewed the calendar, and opened a Web site, all within one integrated environment.

Notes R5 comes with a multimedia tour. This tour addresses some broader Notes concepts and shows how to accomplish different tasks. In the tour are **Show Me** buttons that start short demonstrations.



### Run the Notes Guided Tour

Follow these steps to watch a complete overview of Notes R5 features.

Step	Action
1	From the menu, choose <b>Help</b> → <b>Guided Tour</b> .
2	Click the menu buttons to move through the tour. <b>Note:</b> Viewing the complete tour takes approximately 20 minutes.
3	Click <b>Exit Tour</b> to close the Notes Guided Tour.

---

# Navigating with Notes

Notes R5 provides a seamless way to access information from Notes, the Web, Internet newsgroups, and corporate intranets. You no longer need to manage multiple open applications or think about complex settings; Notes does it for you and more.

## Objectives

---

After completing this lesson, you will be able to:

- Open a Notes bookmark.
- Use the Bookmark bar.
- Open and close window tabs.
- Use the universal navigation tools (such as Back and Forward) in the navigation bar.
- Find the window history list.

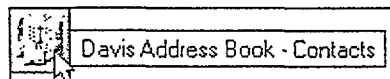
## Introducing Bookmarks

When you use a Web browser, you can mark pages that you visit frequently or that contain key information. In the same way, Notes bookmarks are links to information or places that are important to you. A Notes bookmark can link to both Notes and Internet elements.

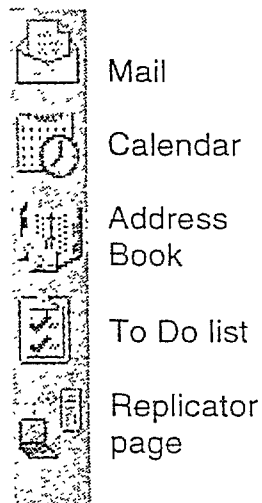
Bookmarks make it easier to return to information and to share that information with others.

### The Bookmark bar

The **Bookmark bar** runs down the left side of the Notes window. Move the cursor over a **Bookmark button** to display the name of the bookmark.



The top set of bookmarks link to Mail, Calendar, Address Book, To Do list, and the Replicator page.



## Introducing Bookmarks...*(continued)*

### Bookmark folders

---

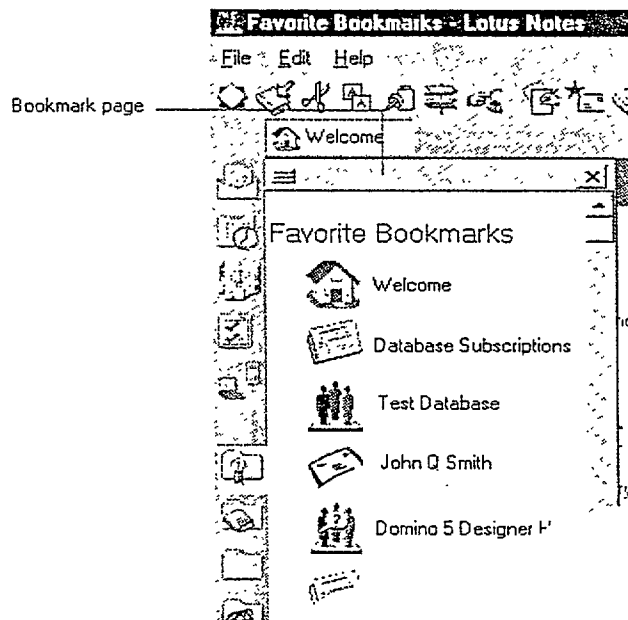
**Bookmark folders** can contain links to databases, specific database views, individual documents, Web pages, Search results, and more. Notes R5 starts you with several Bookmark folders, including a separate folder that tracks your Microsoft Internet Explorer™ and Netscape Navigator™ bookmarks.



### Introducing Bookmarks...(continued)

When you click a Bookmark folder, a window pane opens, pushing the open view to the right.

If the Open Page Is a...	Then...
Database view	The Navigation and View panes are visible to the right of the Bookmark pane.
Web page	The Web page and frames are visible.



## Introducing Bookmarks...(continued)

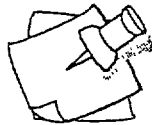
As soon as you focus on the information in the open view, the Bookmarks pane closes. You can keep the Bookmark pane open and resize it as you work.



### Working with an open Bookmarks pane

Follow these steps to work with an open Bookmark pane.

Step	Action
1	Click the button in the top left corner of the Bookmark pane. Select <b>Pin Bookmarks Window</b> .
2	Resize the pane to allow more screen room to the right.



### Tip

From the Notes menu bar, choose **View** → **Show** → **Horizontal Scroll Bar** to open a horizontal scroll bar at the bottom of the screen. Use the scroll bar to see information that is not dynamically sized to fit within the Notes view area.

## What is in the Notes Bookmark folders?

### The Favorite Bookmarks folder

The first bookmark folder is called **Favorite Bookmarks**. This folder includes bookmarks to core applications and can be used to keep bookmarks to other databases and Web sites that you visit frequently.

### The Databases folder

The second Bookmark folder is called **Databases**. This folder contains a **Find a Database** search tool for finding information within your Notes domain.

The **Workspace** icon displays a view of database pages and tiles as they appeared in Notes R4.

## Introducing Bookmarks...*(continued)*

### The More Bookmarks folder

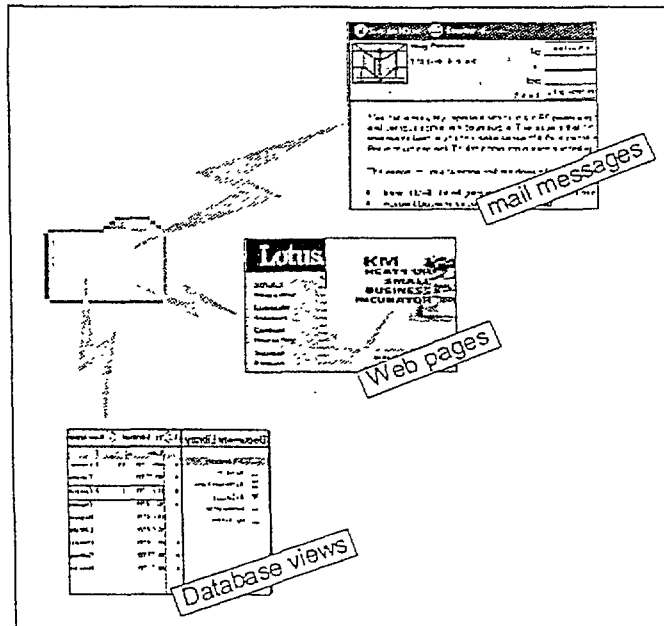
The **More Bookmarks** folder contains bookmarks to commonly used Web search engines. This is also a place to keep bookmarks to views obtained via a Notes database search.

Within this folder is the **Create** folder. This folder contains options for creating new mail memos, calendar entries, contact information, and To Do tasks. This folder might include bookmarks for all the standard forms you use (such as order forms, invoices, tracking, or expense forms).

## What will bookmarks do for you?

Using bookmarks allows you to group together related information in a single folder. For instance, if you are developing a presentation on a certain product, your research folder might contain links to:

- **Databases** related to that product (for example, reference libraries, TeamRoom, or sales discussions)
- **Web sites** and articles relevant to the subject
- **Specific documents** or presentations
- **E-mails** you have received or sent related to the project





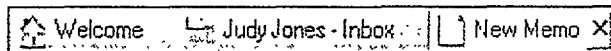
## Navigating with Tabs and Toolbars

Notes tracks your path as you move from one place to another — from Mail back to the Welcome page, from a document library to a Web page. At any time you can view the history of your Notes session and return to a previously opened item.

### Open windows

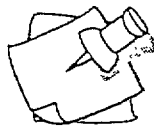
In Notes R5, the **window tabs** help you to easily navigate among your open pages — whether those pages are mail messages, database views, documents, Web pages, or newsgroup articles.

Whenever you open a page, a new tab appears at the top of the Notes window. Switch between open pages by clicking the tabs. Close the pages by clicking the X in the upper right corner of the tab.



With window tabs, you can:

- Have your calendar and your mail open at the same time.
- Have up to 20 tabs open at the same time.
- Always see exactly what is open.



#### Tip

If the full name is not displayed on the window tab, move the cursor over the tab to see the complete label.

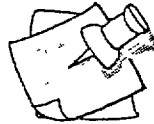
## Navigating with Tabs and Toolbars...*(continued)*



### Open and close windows

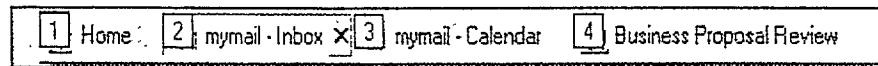
Follow these steps to open and close multiple pages.

Step	Action
1	Open two bookmarks: <ul style="list-style-type: none"> <li>▪ Click the <b>Mail</b> bookmark icon.</li> <li>▪ Click the <b>Calendar</b> bookmark icon.</li> </ul>
2	Click the Notes label icon on the far right of the screen.
3	Click on one of the non-active window tabs.
4	Click the X on a window tab to close that page.



### Tips

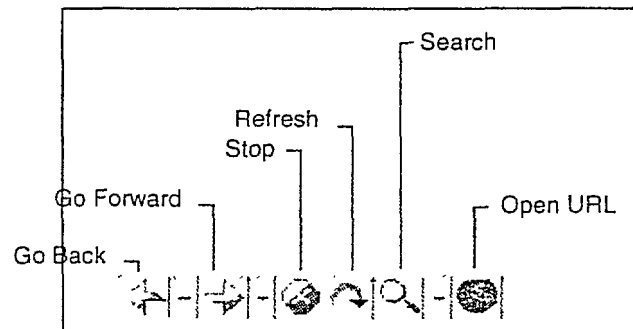
Another way to close an open page is to press **ESC**. Press **ALT+W** to display a number for each open page, then press the number key corresponding to the page to open it.



## Navigating with Tabs and Toolbars...*(continued)*

### Navigating with browser-like buttons

Navigate among open pages using the universal navigation buttons located in the upper right corner of the Notes window. These work the same way as navigation buttons in a typical Web browser.



Button	Action
Go Back	Goes back to the last opened page. Includes a drop-down history list of recently opened pages.
Go Forward	Moves forward through the pages opened with the <b>Go Back</b> button. Includes a drop-down history list of recently opened pages.
Stop	Discontinues the current operation. This is the equivalent of pressing <b>CTRL+BREAK</b> .
Refresh	Refreshes the information displayed in the Notes view area. This is the equivalent of pressing the <b>F9</b> key.
Open URL	Opens the URL box.
Search	Initiates searches ranging from a single database (such as Mail), to searches across multiple databases and the Internet.

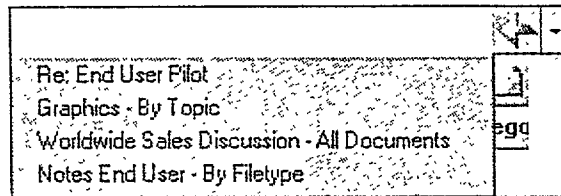
## Navigating with Tabs and Toolbars...*(continued)*



### History of opened pages

You can return to previously opened pages without having to reselect the bookmark or cycle back and forth.

In the universal navigation bar, click the drop-down arrow to the right of the **Go Back** or **Go Forward** buttons. This displays a history list of the most recently opened pages. Select one to open it.



### Return to a page in the history list

Follow these steps to open pages from the history list.

Step	Action
1	Click the drop-down arrow next to the <b>Go Back</b> button on the navigation bar.
2	Click an item to choose a page from the list.
3	Close one of the open window tabs.
4	Click the <b>Go Back</b> button.

## Navigating with Tabs and Toolbars...*(continued)*

### Summary

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Having quick links and being able to get back to your sources of information are key to working effectively.

With Notes, you have:

- Direct links to your mail and calendar
- Access to a variety of Web sites and tools
- A Home (Welcome) page that includes your personal links
- Navigation tools for immediate return to previously used information
- Bookmark links to any type of information
- One complete working environment

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# Finding Information in Notes Help

Notes has a comprehensive online Help system that includes context-sensitive information, an independent structured window, unique navigation tools, and a detailed index and search function.

## Objectives

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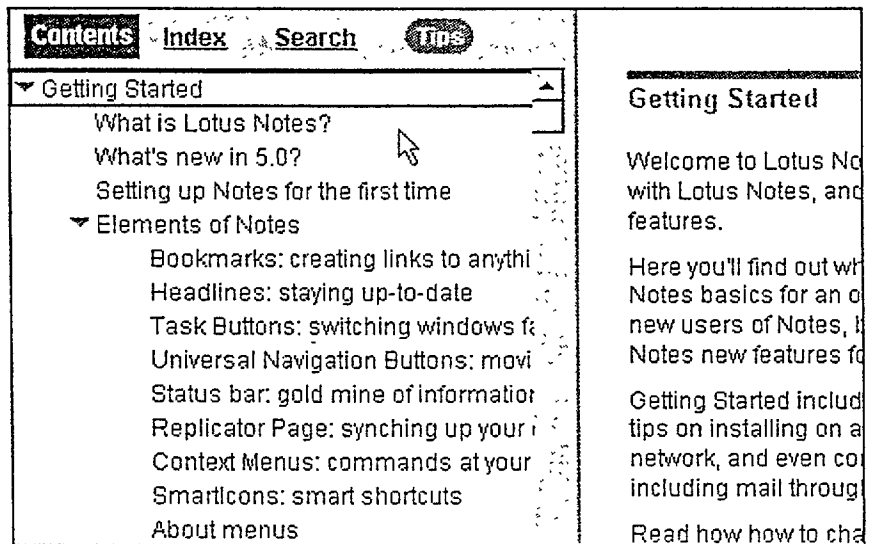
After completing this lesson, you will be able to:

- Open the Help window.
- Use Help tools to find information.

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## Using Notes Help

When you choose **Help**→**Help Topics** from the menu, a separate Notes window opens. This Help window has its own framesets and navigation controls. Selecting any topic in the left frame displays it in the frame on the right.



The Help window is minimized on the Windows task bar at the bottom of the screen.

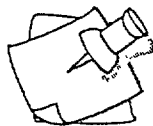
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**Using Notes Help...***(continued)***Find a topic**

Follow these steps to find information about creating mail.

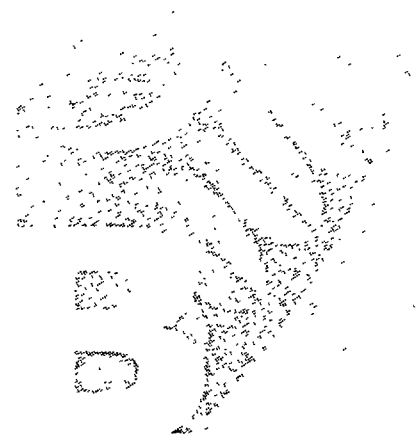
Step	Action
1	From the menu, choose <b>Help→Help Topics</b> .
2	Click the <b>Contents</b> button.
3	In the Navigation pane on the left, click <b>Mail and Address Book</b> . <i>Result: The right pane displays the introductory text for the selected topic, along with links to more specific topics.</i>
4	Click the <b>Creating mail</b> topic.
5	Click the minimized Notes button on the Windows task bar. <b>Note:</b> When you maximize the Notes window, the Help window will minimize to a button on the Windows task bar.

**Tip**

From the Help menu, choose **View→Always on Top** to keep the Help window open as you work.

Open the **Index** view and begin typing the keyword(s) for which you want to search. This opens the **Starts With...** dialog box. Enter the keyword, then click **OK**. Notes lists all topics containing the keyword.





## **Getting More Information with Notes**

- Lesson 4 Beginning with Databases
- Lesson 5 Working with Documents
- Lesson 6 Adding Document Style
- Lesson 7 Changing Notes Settings

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# Beginning with Databases

Notes stores information in databases. The person who creates the database chooses the categories of information the database will contain. A database contains a collection of documents and is also used to manage related information.

## Objectives

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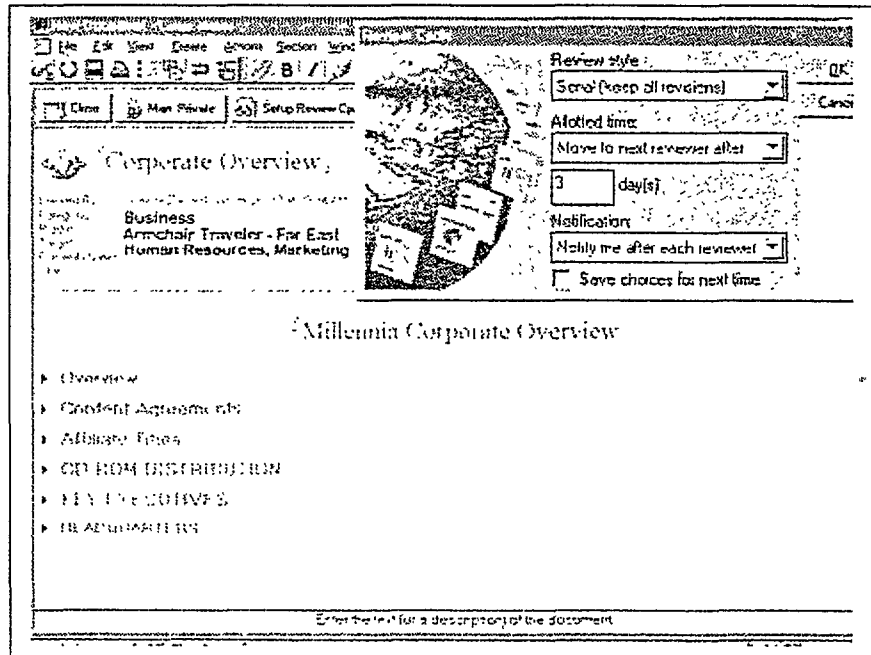
After completing this lesson, you will be able to:

- Describe different types of database applications.
- Open and close a database.
- Expand database categories.
- Sort a Database view.
- Move documents to folders.

Beginning with Databases

## Exploring Other Notes Applications

With Notes, it is easy to automate business processes, such as distributing information, joining a discussion, assigning tasks, ordering equipment, or approving purchase requisitions. Any kind of business process can be automated using a Notes database.



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**Exploring Other Notes Applications...***(continued)***What kinds of databases are there?**

The Mail database is one type of Notes database. Many of the features in your Mail database, such as the layout of the Navigation and View panes, are standard in other types of databases.

Notes databases are used for a broad range of applications. The following table lists different applications for Notes databases.

Type of Applications	Description	Examples
Discussion	All documents are kept in one place; this place is accessible by many people. Participants can read contributions and respond to them.	Suggestion box Brainstorming
Reference	Periodically updated repositories or libraries of reference information.	Policies and procedures Documentation Technical support
Tracking	Frequently updated documents that follow the status of a project to which multiple people contribute.	Sales call tracking Project management
Workflow	Automate routine tasks that require action by multiple departments (or people) in a sequential order.	Purchase requests Expense reports Loan approvals
Mail	Storage and routing facility for receiving, reading, and sending e-mail.	Personal e-mail

## Exploring Other Notes Applications...*(continued)*

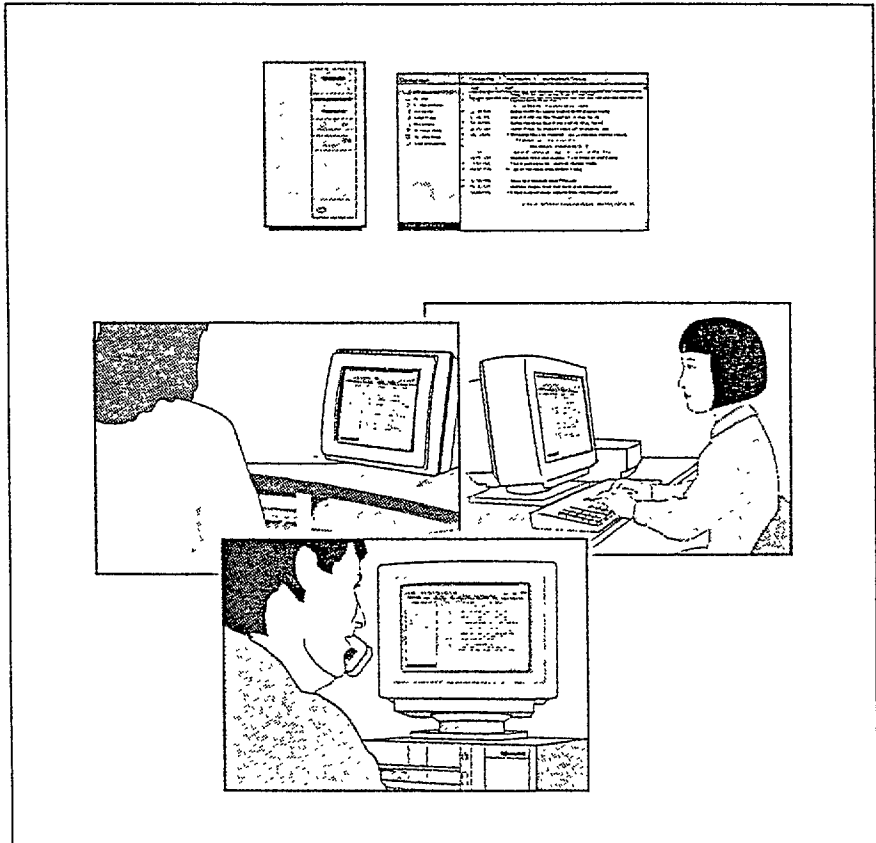
Many databases are customized to meet specific requirements or handle special tasks. Notes comes with a set of basic database templates for creating new databases.

These templates include:

- Mail
- Discussion
- Document Library
- TeamRoom
- Address
- Personal Journal

## Opening a Database

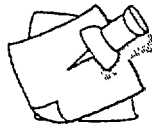
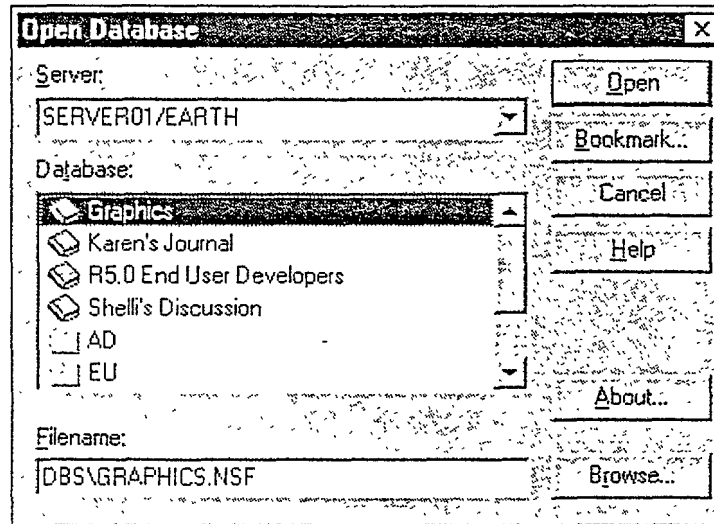
The Domino server stores databases so that many clients can access them at the same time. When you click a database bookmark, you are opening a database on the server.



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**Opening a Database...***(continued)***Where are databases stored?**

Servers and databases have unique names. Databases can be stored in directory folders on servers.

**Tip**

Databases can be stored locally on your own system. These databases may be working replicas of server databases, or ones created for personal use, such as a Journal database. To open a locally stored database, enter Local in the **Server:** field.

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**Opening a Database...**(continued)**Open a database**

Bookmarks to databases are stored in Bookmark folders. To open a bookmarked database, click the database bookmark.

Follow these steps to open a database that is not bookmarked.

Step	Action
1	From the menu, choose <b>File</b> → <b>Database</b> → <b>Open</b> .
2	From the <b>Server:</b> drop-down list, select the classroom server name (given to you by the instructor).
3	From the <b>Database:</b> list, select <b>Worldwide Sales Discussion</b> .  <b>Note:</b> To move back one level from a directory, click the arrow at the bottom of the list.
4	Click <b>Open</b> .  <i>Result: The About This Database page is shown and the database is opened.</i>

**About This Database**

The first time a database is opened, the **About This Database** page is often shown. This page contains information about the database's purpose and a description of its features.

To close this window, press **ESC**. To reopen the **About This Database** document, choose **Help**→**About This Database** from the menu.

Close window

## About Discussion

**What does this database do?**

A workgroup can use this database to share their thoughts and ideas. Almost any group that has use a discussion database. An engineering group can discuss the products they are designing. An art group can discuss the products they are developing. A special interest group can share ideas and opinions on their common interests.

To get started, a user can simply browse through discussion topics and responses that others have posted. This allows workgroup members who need to come up to speed on important issues that the group is working on to find the information they need preserved in the group's discussion database.

A user can also take a more active role in the discussion by composing his/her own responses to topics for discussion.

A discussion database is an informal meeting place, where the members of a workgroup can share their ideas. In a meeting, each member of the workgroup listens to what others have to say and can voice his/her own ideas. In a discussion database, the participants do not have to be in the same room at the same time to share information. People can share information so, and because it is easy for them to share information, they will do so.

**Who will use this database?**

All the members of a workgroup should use the group's discussion database. Some users will just

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## Navigating a Database

There are a variety of tools to help you use the information in a database. The documents may be displayed, categorized, and sorted in different views, or even stored in folders. You can create folders to help you organize documents.

### Displaying the list of documents

Notes displays the contents of the database in a list, called a **view**.

Each line in the View pane represents a document. Each view changes the order and categories of the display of documents. In the image below, the **All Documents** view displays a list of every document in the database.

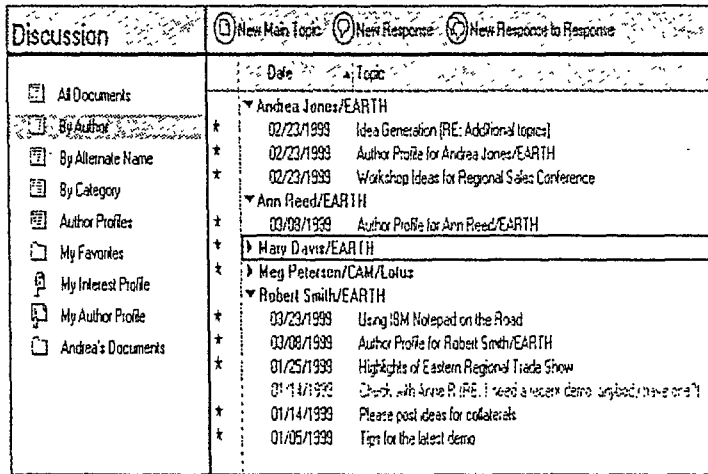
Discussion	<input checked="" type="radio"/> New Main Topic	<input checked="" type="radio"/> New Response	<input checked="" type="radio"/> New Response to Respo
	Date	Topic	
<input checked="" type="checkbox"/> All Documents	*	03/08/1999	Author Profile for Robert Smith/EARTH
<input checked="" type="checkbox"/> By Author	*	03/08/1999	Author Profile for Ann Reed/EARTH (A
<input checked="" type="checkbox"/> By Alternate Name	*	03/08/1999	Author Profile for Mary Davis/EARTH
<input checked="" type="checkbox"/> By Category	*	02/23/1999	Author Profile for Andrea Jones/EART
<input checked="" type="checkbox"/> Author Profiles	*	02/23/1999	2 Workshop Ideas for Regional Sales Co
<input checked="" type="checkbox"/> My Favorites	*		▼ Additional topics (Mary Davis 02/23)
<input checked="" type="checkbox"/> My Interest Profile	*		Idea Generation (Andrea Jones 02/23)
<input checked="" type="checkbox"/> My Author Profile	*	02/09/1999	Technical assistance required for sale
	*	01/25/1999	Highlights of Eastern Regional Trade
	*	01/14/1999	Please post ideas for collaterals (Bob)

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### Navigating a Database...(continued)

To display a list of documents, for example, organized by Author, click the **By Author** view in the Navigation pane.



A triangle, also called a twistie, indicates that there are subsets of documents. Click the triangle to expand or collapse the listed information. Triangles may appear in the following places.

If the Triangle Is...	Then You Can...
Next to a document name	Expand or collapse the list to see additional documents related to, or categorized under the original document.
Next to a folder.	Expand or collapse the list to see additional folders or views.
In the column header	Sort the list in ascending or descending order.



**Tip**

To resize the columns in the View pane, drag the column borders.

## Navigating a Database...*(continued)*

### Marking documents

You can mark one or more documents before choosing an action (for example, delete, print, or move). To mark documents, click in the column to the left of the document name.

	02/08/1999	Technical assista
*	01/25/1999	Highlights of East
* ✓	01/14/1999	Please post ideas
*	01/05/1999	1 ▼ Tips for the latest

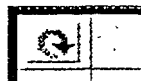
This will insert a checkmark in the column next to the selected documents.



### Refreshing a view

As the contents of a database change, you will need to periodically refresh, or update, a view to display the latest information.

The **Refresh** icon in the top left corner of the View pane indicates there are updates to that database view.



Use any of the actions below to refresh a view:

- Click the **Refresh** icon.
- Press **F9**.
- From the menu, choose **View**→**Refresh**.

**Note:** If there are documents marked for deletion, refresh will request permission to delete them.

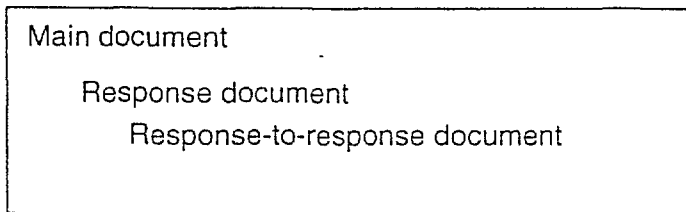
## Navigating a Database...*(continued)*

### Discussion threads

Many databases follow a certain format in order to focus on a main topic. In the Discussion and Library databases, you will see the following:

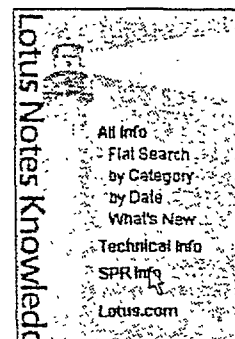
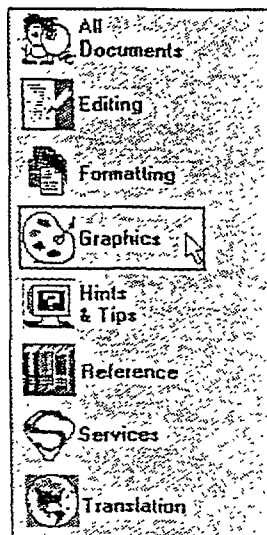
- Main documents based upon a category or main topic
- Response documents created to respond to a Main document
- Response-to-response documents created to respond to a Response document

This hierarchy is called a discussion thread. The view displays the documents as follows.



### Visual navigators

The Navigation pane can be designed with more graphical representations of views and folders.



44

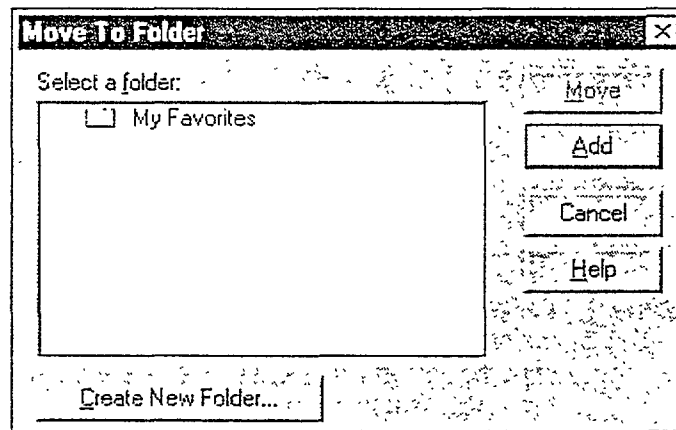
## Organizing Documents Using Folders

Use folders to store related documents that are important to you. A common database element is a **Favorites** folder.



### Moving documents to a folder

From the menu, choose **Actions**→**Move to Folder** to move messages to a new or existing folder with the dialog box shown below.



You can also drag documents from the open view into a folder. Move the cursor over the marked document(s) and drag to a folder in the Navigation pane. The destination folder name changes color when the pointer passes over it.

**Organizing Documents Using Folders...***(continued)*



**Create a database folder**

Follow these steps to create a database folder.

Step	Action
1	Open the <b>Worldwide Sales Discussion</b> database.
2	From the menu, choose <b>Create→Folder</b> .
3	Enter <b>Sales Notes</b> for the folder name. Click <b>OK</b> . <i>Result: The folder appears in the navigation pane.</i>
4	Drag the <b>Northern Region leads</b> from trade show document to the new folder.
5	Click the <b>Sales Notes</b> folder.
6	Open the <b>All Documents</b> view.




**Caution**

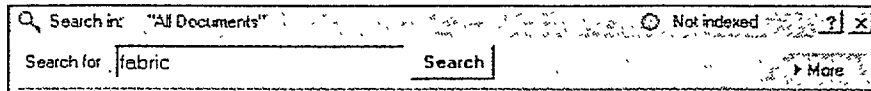
Folders provide access to a select group of documents. Documents within a folder are actually pointers to the actual documents in the database. It is important to note that when you **delete** a document, it physically removes that document from the database.

If You Want to...	Then...
Remove a document from a folder	From the menu, choose <b>Actions→Remove From Folder</b> . <b>Note:</b> The document remains in the database and can be found in the <b>All Documents</b> view.
Remove a document from a database	From the menu, choose <b>Actions→Delete</b> .
Remove a folder	From the menu, choose <b>Actions→Folder →Delete Folder</b> .

## Finding What You Need

Use Notes Quick Search to find documents in a view. Searching is initiated from the **Search** icon  in the upper right corner of the Notes screen.

The Search box appears at the top of the View pane.



### Search a view

Follow these steps to search for documents.

Step	Action
1	Open the <b>Worldwide Sales Discussion</b> database.
2	Click the <b>Search</b> icon.
3	In the <b>Search for:</b> field, enter demo. Then, click <b>Search</b> . <i>Result: The documents that match are displayed in the View pane.</i>
4	Click <b>Clear Results</b> to return to the complete view.
5	Click the <b>X</b> in the upper right corner of the Search window to close the window.



### Tip

You can also navigate to documents in a view by either:

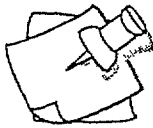
- Choosing **Edit→Find/Next** from the menu.
- Using the **Starts With...** dialog box (enter any letter while a view is displayed to open **Starts With**).

The **Find** dialog box searches text displayed in the view. **Starts With** searches text in only a single column.

## Finding What You Need...*(continued)*

### Web search with Notes

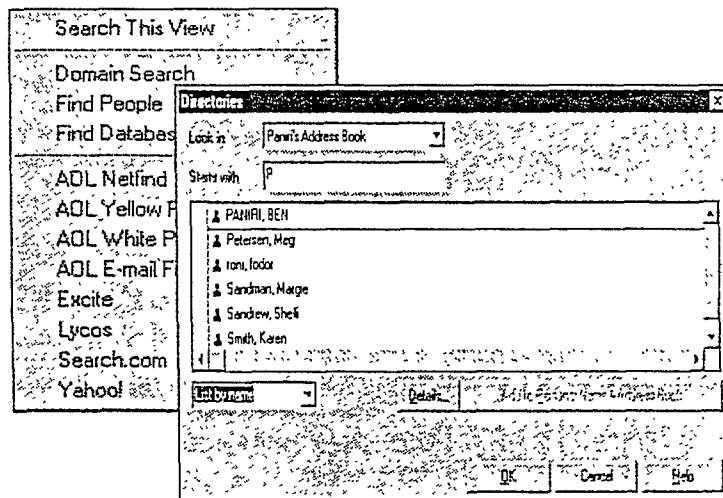
With Notes, you have links to the most popular search engines on the Web. Click the drop-down arrow next to the **Search** icon on the navigation bar, or use the **Search** tool on the Welcome page.



#### Tip

Using Notes Address Books, Directories, and Web directories, you can locate a person.

Click the drop-down arrow next to the **Search** icon in the navigation bar. **Find People** opens the **Directories** dialog box, as shown here.





## Organizing Information with Bookmarks

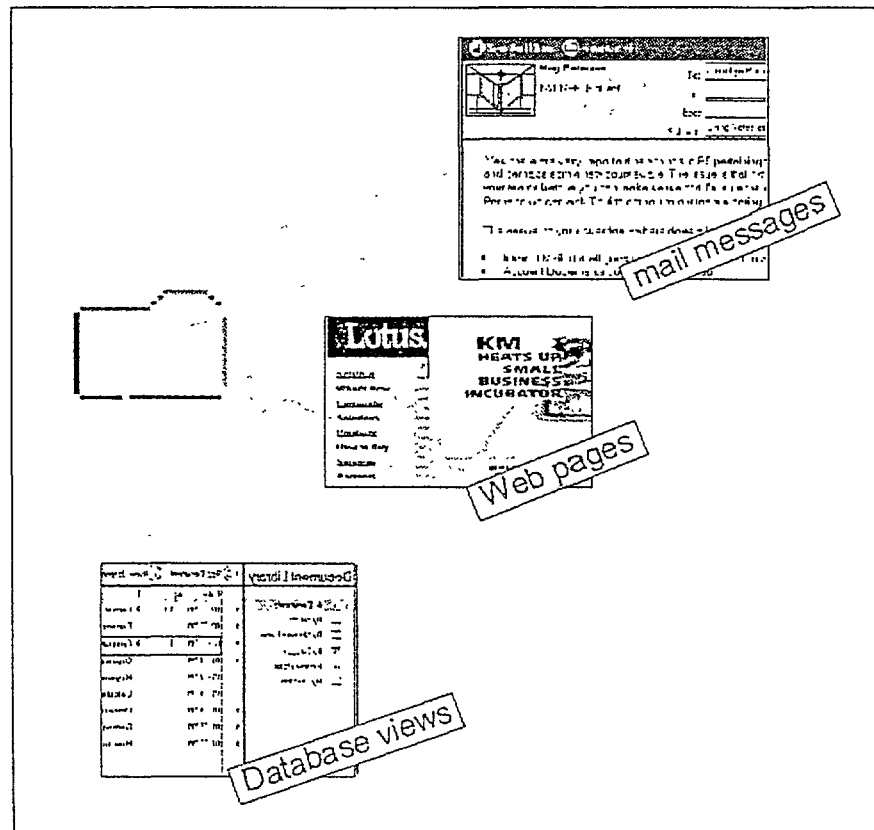
Bookmarks allow users to return to frequently used databases and documents. As in Web browsing, bookmarks are direct links to important information.

With Notes, you create bookmarks the same way you would when using a browser. However, these bookmarks can point to both Notes and Internet elements, including databases, views, documents, Web pages, and newsgroups. Creating a bookmark can be as easy as dragging and dropping a window tab to the Bookmarks bar.

### The purpose of bookmark folders

Notes comes with these standard bookmarks: Favorites, Databases, and More Bookmarks.

Use Bookmark folders to store related information. This allows you to manage projects from one place. For example, a project folder would contain links to relevant databases, Web sites, and mail messages.



## Organizing Information with Bookmarks...*(continued)*



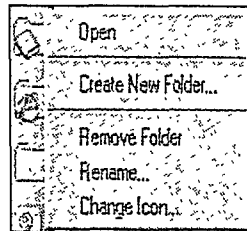
### Create a Bookmark folder

To create a Bookmark folder, do one of the following:

- Click the button at the top left corner of a Bookmark page.



- Right-click a Bookmark folder on the Bookmark bar.



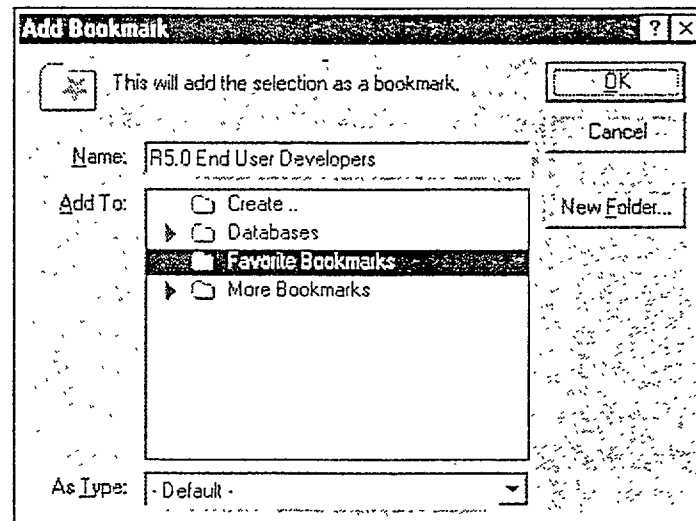
## Working with Bookmarks

Select where and how your bookmarks will be organized. As you accumulate links to databases and Web pages, you can move bookmarks from one folder to another.

### Creating a bookmark link to a database

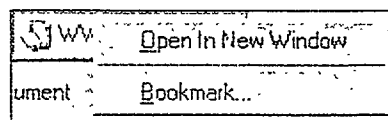
Choosing **File**→**Database**→**Open** from the menu opens the **Open Database** dialog box. This dialog box contains a **Bookmark** button. This allows you to bookmark the selected database.

Then you select the location for the new bookmark.



You can create a bookmark from any open window tab. This allows you to bookmark a Web page, database view, or individual messages or documents. You can:

- Drag the window tab onto a Bookmark folder.
- Right-click a window tab and choose **Bookmark**.

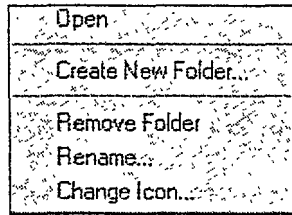


## Working with Bookmarks...*(continued)*

### Change and rearrange bookmarks

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Change the name of bookmarks to make them meaningful to you.



You can drag and drop bookmarks from one Bookmark folder to another.

#### Tip

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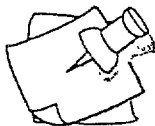
Notes lets you create multiple copies of the same bookmark. Reduce clutter by creating folders to store bookmarks with related information.

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**Working with Bookmarks...***(continued)*

## Create a bookmark folder for Worldwide Corporation

Step	Action
<b>Create the Bookmark folder.</b>	
1	Right-click the <b>More Bookmarks</b> folder. Choose <b>Create Folder</b> .
2	In the <b>Folder Name</b> field, enter <b>Worldwide</b> . Click <b>OK</b> .
<b>Add bookmarks to the folder.</b>	
3	From the menu, choose <b>File</b> → <b>Database</b> → <b>Open</b> .
4	From the <b>Server:</b> list, select the classroom server.
5	From the <b>Database:</b> list, select the <b>Worldwide Sales Discussion</b> database. Click <b>Bookmark</b> . <i>Result: The Add Bookmark dialog box opens.</i>
6	Select the <b>Worldwide</b> folder from the list (below <b>More Bookmarks</b> ). Click <b>OK</b> .
7	Open your <b>Mail</b> database.
8	Open the first document.
9	Move the cursor over the window tab. Click and drag it to the <b>Worldwide</b> folder.
10	Open the <b>More Bookmarks</b> and <b>Worldwide</b> folders. <b>Note:</b> The two bookmark links appear listed below the new folder.
11	Open the <b>Author Profiles</b> view in the <b>Worldwide Sales Discussion</b> database.
12	Drag the window tab to the <b>Worldwide</b> folder.
13	Right-click the new bookmark. Select <b>Rename</b> .
14	Enter <b>Profiles</b> . Click <b>OK</b> .



### Tip

To bookmark and open a database simultaneously, double-click the database name in the list displayed in the **Open Database** dialog box.

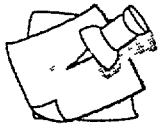
## Working with Bookmarks...*(continued)*



### Deleting a bookmark

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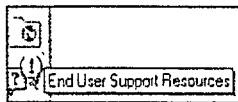
To delete a bookmark, move the cursor over the bookmark icon. Right-click and select **Remove Bookmark**. Notes prompts you to confirm before deleting.



### Tip

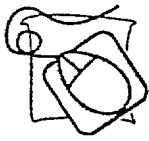
---

For a working shortcut, you can put a frequently used database or Web bookmark directly on the Bookmark bar.



# Adding Bookmarks

## Exercise



### Add bookmarks

---

Add the following two bookmarks to the **Worldwide** folder.

- New Employee database.
- The Knowledge Management document in the Worldwide New Employee database.

## Using Bookmarks and Navigation Tools Effectively

The following are some best practices and tips for using bookmarks effectively.

- **Use multiple copies of the same bookmark.** Access to a database or Web page may be relevant for different projects. Each project folder contains a link to the information, giving you quick access to your resources.
- **Create links to single documents.** This will save you steps and get right to the source.
- **Create links to important mail messages.** This will save you time when trying to locate a message.
- **Add blank documents to the Create folder.** Add standard forms, such as expense forms, to this folder. Whenever you need to create a new form, click that link and the forms are ready for you to complete and send.
- **Keep a few important links directly on the Bookmark bar.** A single click opens your most frequently used and important information.
- **Change bookmark names.** Rename bookmarks so that they are meaningful and easy to locate.
- **Can't open a Bookmark folder?** The Bookmark pane may be pinned open, but the border may be dragged so far left that the window is not visible onscreen. Drag the border to widen the Bookmark pane.
- **Closed a window by mistake?** Click the Go Back button on the navigation bar to reopen it. There is no need to manually locate the link.



---

# Working with Documents

## Objectives

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After completing this lesson, you will be able to:

- Expand a section.
- Follow a link from a document.
- Detach a file from a document.

## Reading Documents

In any Notes database, documents that you have not read are marked with red stars in the left column of the view. After reading the documents, the stars disappear.

### What is in a document?

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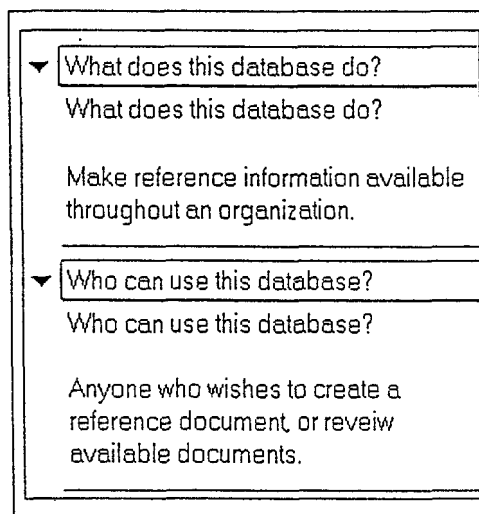
A document can contain fields in which you enter information. Some fields are calculated, but the ones where you enter text are identified by square brackets.

The area of the document that is reserved for formatted text is called the **rich text** field. Attached files, graphics, and links can be included in this area.

### Organized information

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A document may contain one or more **collapsible sections**. This is an area of text that can be expanded or collapsed into a single line. Sections allow you to organize documents that contain a lot of information by grouping related information into sections. The sections expand or collapse when you click the triangle next to the section title.



**Reading Documents...***(continued)***Expand a section**

Follow these steps to open the sections within a document.




Step	Action
1	Open the <b>Worldwide Sales Discussion</b> database. Then, open the <b>For Your Review: Champions</b> document.
2	Click the section header. <i>Result: The information below the header appears.</i>
3	Click the section header. <i>Result: The section collapses.</i>
4	Press <b>ESC</b> to close the document.

## Following the Links in a Document

Links are pointers to other documents, views, Web pages, or Notes databases. When you open a link, the original document remains open in the background. Press **ESC** to close the linked document and return to the originating document.

### Types of links

There are different icons for each type of link in a Notes document.

Icon	Name	Description
	Document link (or doclink)	Connects to another Notes document.
	Database link	Connects to a Notes database.
	View link	Connects to a particular Notes database view.
No icon	Web link	Connects to the specific Web page (URL).

## Following the Links in a Document...*(continued)*



### Connect to a link

Follow these steps to connect to different types of links.

Step	Action
1	Open the <b>Worldwide Sales Discussion</b> database.
2	Open the Response document titled <b>Just filed one (KM)</b> in the company marketing repository.
3	Click the first link on the page. Then, click the link to return to the top of the document.
4	Click the doclink. <i>Result: The document (from the New Employee database) opens.</i>
5	Click the Web link.
6	In the navigation bar, click the <b>Go Back</b> button.
7	Close the open documents.

## Working with Attachments

Almost any type of file can be attached to a Notes document or mail message. When you open a document containing an attached file, you can detach the file and save it. If you have the same application used to create the file, you can launch the application as the file is opened.

### Extra information included

Documents that contain attachments display a **paper clip** icon in the view.

	Date	Size	Subject
ar	12/10/98	5,125	Re: Access to the graphics
erman	12/10/98	1,578,181	New 5.0 Template for Freel
sen	12/10/98	4,408	Re: Help Function
gun	12/15/98	76,306	401(k) Plan Web site enhan

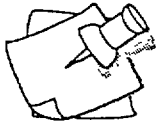
Within a document, an attachment appears as an icon.



The following table describes the different ways you can open an attachment.

Action	Description
View	View allows you to see what the file is even if you do not have the application used to create the file.
Detach	Detach allows you to store the file on your hard disk. You can then open the file using the appropriate application.
Launch	Launch opens the file in the application in which it was created. You can then make changes, save, or print from the application. Notes and the original document remain open.

## Working with Attachments...*(continued)*



### Tip

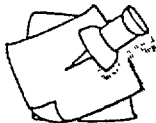
If you have the application, Notes will launch it even if you select **View**. The viewer is used only if the application is not available.



### View an attached file

Follow these steps to view an attached spreadsheet.

Step	Action
1	Open the <b>Expense Form</b> document in the <b>Worldwide Sales Discussion</b> database.
2	Select the icon for the attached Lotus 1-2-3 file.
3	From the menu, choose <b>Attachment</b> → <b>View</b> .
4	Press <b>ESC</b> to close the view.
5	Press <b>ESC</b> to close the document.



### Tip

You can print an opened attachment or copy any portion to the clipboard.

## Summary

In this lesson, we reviewed how to use the elements in a document. You can create documents containing these elements and use a variety of tools to enhance the text.

---

# Adding Document Style

## Objectives

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After completing this lesson, you will be able to:

- Change basic text properties.
- Create a collapsible section.
- Preview a document before printing.

**PREVIOUS PAGE BLANK**



## Editing Text

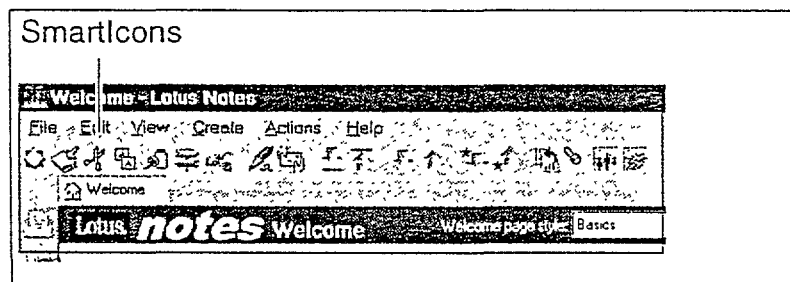
Changing text attributes, such as bold or italic, makes documents more interesting and visually attractive. It also helps to emphasize important information.

### Editing tools

A document must be in Edit mode in order to use the editing tools. When you open an existing document, it is in Read mode. To edit an existing document, press **CTRL+E**. When you create a new document it opens in Edit mode.

#### Display the SmartIcons toolbar

SmartIcons are buttons that perform an action when you click them (for example, italicizing selected text). For many tasks, it is faster to click SmartIcons than to pull down menus or use keyboard shortcuts.



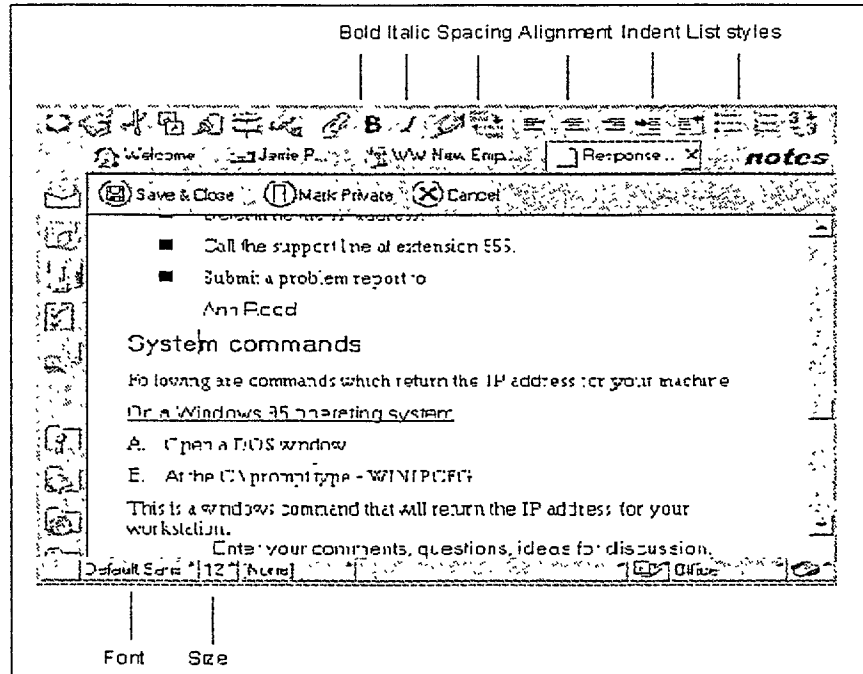
By default, SmartIcons are turned off. To turn on SmartIcons, choose **File→Preferences→SmartIcon Settings** from the menu. Then, select the **Icon Bar** checkbox.

#### Select text before you change format

Select text by clicking and dragging the cursor over it. The selected text appears highlighted.

## Editing Text...(continued)

Formatting tools are available on the status bar (located on the bottom of the Notes window) and the SmartIcons toolbar, as shown here.

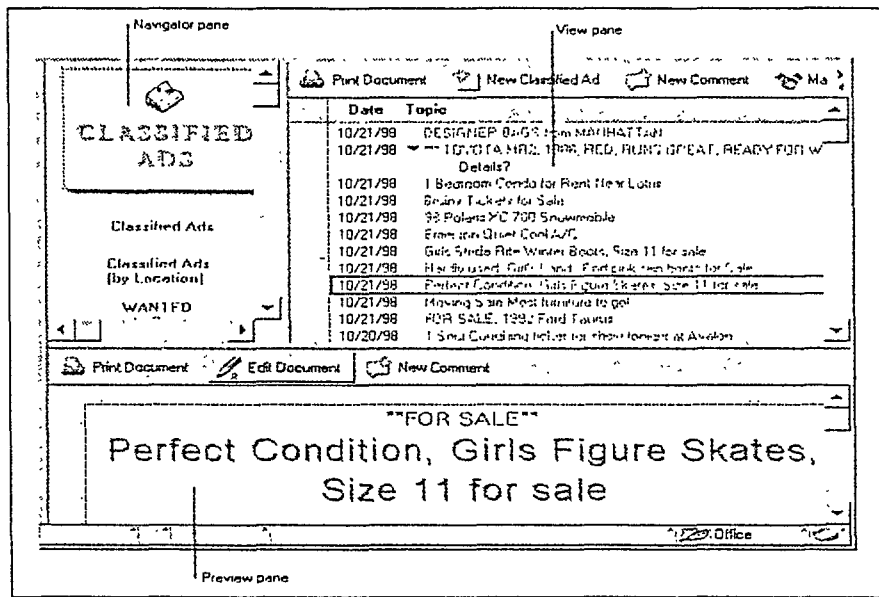


Text style commands are available from the Text menu.

**Editing Text...** (continued)

**Note:** When you create and edit a Response document in a database (or a Reply in mail), you can view the main "parent" document in the Preview Pane.

From the menu, choose **View** → **Parent Preview** or drag the border (heavy line at the bottom of the View pane) until you have a three-panel view, as shown here.



## Extended Skill: Creating Interactive Checklists

When you create a list style using the **Checkmark** option, each item is preceded with an open checkbox.

- Go grocery shopping
- Pick up kids
- Get gas

Readers of your document can select the checkboxes to indicate when an item is done (the document must be in Edit mode).

- Go grocery shopping
- Pick up kids
- Get gas

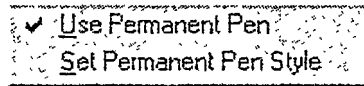
The "checked" indication assumes the same color as the text. The checkbox itself, however, is always black.

**Note:** With smaller fonts, the "checked" indication appears as a filled square. With larger fonts, the indication looks more like an actual check (X) and the checkbox has a more graphical 3-D look.

## Emphasizing Text with Color

Make text stand out by changing the color and font. Use a **Permanent Pen** style to add comments to a document, or highlight text using a **Highlight** pen.

**Note:** Enable and disable **Text** menu attributes by selecting the desired setting. When an attribute is checked, it is **enabled**. When a checked attribute is selected again, the checkmark disappears and the attribute is disabled.



### Using Permanent Pen

By default, Permanent Pen is set to be red and bold. Follow these steps to activate and use Permanent Pen.

Step	Action
1	Select text that has the properties you want for Permanent Pen.
2	From the menu, choose <b>Text→Permanent Pen→Set Permanent Pen</b> .  <i>Note:</i> This command automatically picks up the font, size, and color parameters of whatever text is selected.
3	Move the cursor to another location in the document.
4	Choose <b>Text→Permanent Pen→Use Permanent Pen</b> .  <i>Result:</i> The message <i>Permanent Pen enabled</i> appears in the status bar on the bottom of the screen.
5	Enter text.  <i>Note:</i> Any text entered while Permanent Pen is enabled will have the preset character attributes.
6	Choose <b>Text→Permanent Pen→Use Permanent Pen</b> .  <i>Note:</i> You can enable and disable Permanent Pen from the Text menu, a SmartIcon, or the Text toolbar.

## Extended Skill: Using the Highlighter

The **Highlighter** feature allows you to highlight text in documents as if you were using a highlighter pen. The highlighter is available in yellow, pink, or blue.

To create or remove a highlight, you must enter Highlight mode. The **Text→Highlighter** menu option shows you when you are in Highlight mode (color is checked) or not (no color is checked).

To highlight text, click and drag the cursor over the text from left to right.

To erase a highlight, click and drag the cursor over the highlighted text from right to left.

While in Highlight mode, you can add text, but cannot select text or make any text property edits (such as bold, italic, and so on) beyond adding highlights.

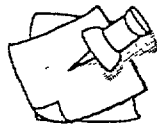


### Highlight mode

Follow these steps to enable or remove Highlighter marks.

Step	Action
<b>Highlighting text</b>	
1	From the menu, choose <b>Text→Highlighter</b> . Select a color.
2	Click and hold down the mouse button while dragging from left to right.  <i>Result: As the cursor is dragged over the text, it appears highlighted in the selected color.</i>
<b>Erasing a highlight</b>	
3	Place the cursor on the right edge of the highlight. Click and hold down the mouse button while dragging it to the left.  <i>Result: As the cursor moves through the highlighted area, it erases the highlight color.</i>

**Extended Skill: Using the Highlighter...***(continued)*



**Tip**

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You cannot highlight text when reading a document. You must have sufficient access to edit the document.

---

## Organizing Content with Sections

Sections allow you to condense paragraphs in a document so the text does not take up as much space.

Once you create a section, you can set attributes:

- For the display of the collapsed section
- To control when the section is automatically expanded or collapsed



### Create a section

Follow these steps to create a section.

Step	Action
1	In the WW New Employee database, open the <b>Champion Program</b> document in Edit mode.
2	Select the heading and second paragraph of the <b>Overview</b> .
3	From the menu, choose <b>Create→Section</b> . <i>Result: The paragraph disappears from the page. Only the first line is displayed as the Section title.</i>
4	Choose <b>Section→Section Properties</b> <i>Result: The Title Information tab is opened.</i>
5	Enter <b>Agenda</b> in the title box. Select a border style and color.
6	Choose <b>File→Close</b> . Save the document.



## Printing

With Notes, you can:

- Print unopened documents from the View pane.
- Preview the way a document will print.
- Print the display list in the View pane.

The **Print** dialog box contains printing preferences.

### Print Preview

When you select **Preview**, Notes displays the document in a Preview window. You can view two pages side-by-side. Use this tool to check margins and print headers.



### Print selected documents

Follow these steps to print a document.

Step	Action
1	To print one document, select the document in the View pane. To print multiple documents, mark the documents with checkmarks in the View pane.
2	From the menu, choose <b>File</b> → <b>Print</b> .
3	Check the printing preferences. Click <b>OK</b> .

### Summary

All of the text enhancement features can be applied to any database document, whether in a Discussion or Library database, or even in a mail message.

As you continue to learn about Notes documents, you will learn how to add links, attach files, embed images, and create tables in your documents.

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# Changing Notes Settings

You can protect and control your working environment in Notes.

## Objectives

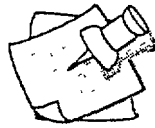
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After completing this lesson, you will be able to:

- Change your Notes password.
- Modify basic preferences.

## Securing Your Notes ID

A user ID is a file unique to each Notes user. Your user ID determines your access privileges to Domino servers and Notes databases. You can switch your ID, create an ID, or modify an existing one.

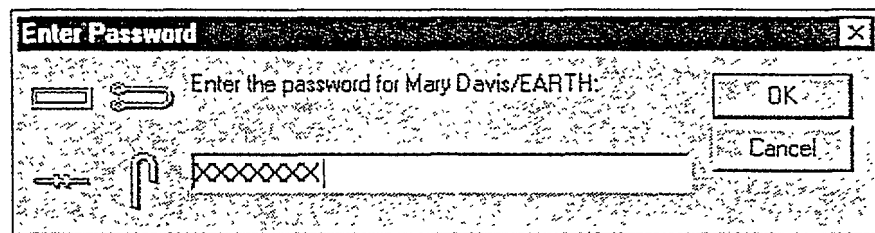


### Tip

It is important to protect who has access to your data. Keep a copy of your user ID on a disk. This can be used for backup or when you are using a shared workstation.

## Passwords

A password ensures that only you can use your ID. When you start a Notes session, Notes prompts you to enter a password. You cannot see the characters you enter. Instead, the **Enter Password** dialog box displays Xs.



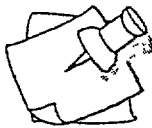
Passwords:

- Can contain a combination of characters, as long as the first character is a letter.
- Are case sensitive.
- Must be at least eight characters.

**Securing Your Notes ID...***(continued)***Set your password**

Follow these steps to change a Notes password:

Step	Action
1	From the menu, choose <b>File</b> → <b>Tools</b> → <b>User ID</b> . <b>Note:</b> You may be prompted to enter the password for the current user ID.
2	Click <b>Set Password</b> .
3	Enter a password. Then, click <b>OK</b> .
4	Click <b>OK</b> .

**Tip**

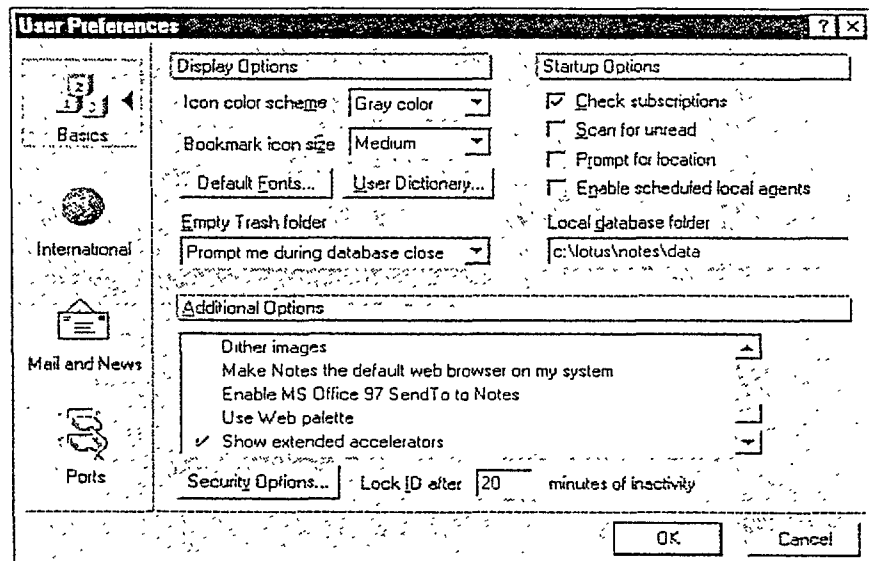
For greater protection, change your password often.

## Choosing Preferences

You can tailor your working environment with options for the Notes window display. These options can remove documents marked for deletion and automatically protect your workstation.

### Setting basic preferences

From the menu, choose File→Preferences→User Preferences to open the User Preferences dialog box.



**Choosing Preferences...***(continued)*

The following table lists some of the **Basics** preferences you might want to change.

Setting	Description
Icon color scheme	The Bookmarks, SmartIcons, and Navigation icons can be displayed in gray, pale color, or full color. When you move the cursor over a gray or pale color icon, the icon color becomes brighter.
Size	Sets the display size of the icons.
Empty Trash folder	<p>Sets how to handle the documents marked for deletion.</p> <ul style="list-style-type: none"> <li>■ Prompt you when database is closed</li> <li>■ Always empty the trash when database is closed.</li> <li>■ Manually</li> </ul> <p>This also affects your Mail database.</p>
Lock ID after __ minutes of inactivity	Notes automatically prompts for an ID when there has not been any activity for the specified amount of time.

**Summary**

Protecting your Notes environment is beneficial. In this lesson, we saw how to change your password and modify the defaults in Notes to suit your working style.



## **Working with Mail**

- Lesson 8    Getting into Your Mailbox
- Lesson 9    Writing and Sending Mail
- Lesson 10   Managing Your Mail

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# Getting into Your Mailbox

The first step for communicating with the rest of the world is mail. Notes makes mail easy to use. Use the Mail database to sort and organize the messages you receive. Use mail to forward documents or Web links, share information, or schedule a meeting.

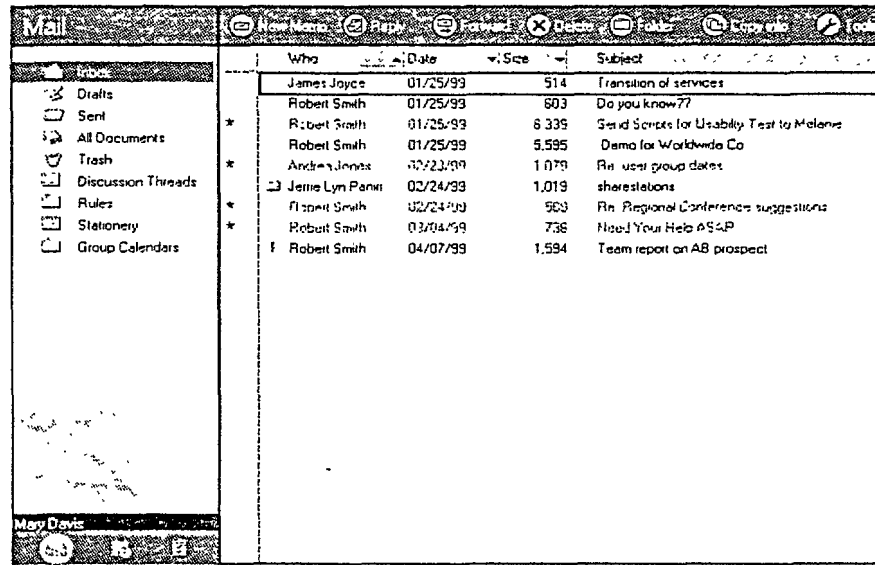
After completing this lesson you will be able to:

- Describe the Mail views.
- Open and close mail messages.
- Preview messages.
- Delete messages.



## Looking at the Mail Database

Notes stores mail in a Mail database. This includes copies of messages you have received or sent. The Mail database comes with a variety of tools allowing you to read and sort messages.



### About the Mail database

The Mail database consists of three parts: the Navigator pane, Mail toolbar, and View pane.

Mail Database	Description
Navigator pane	The graphical representation of view and folder names on the left side of the Notes window.
Mail toolbar	The frame at the bottom of the Navigator pane containing three icons.
View pane	The display containing mail messages on the right side of the Notes window.

**Looking at the Mail Database...** *(continued)*

The following table describes the Mail Database views.

View	Description
Inbox	Displays mail sent to you. Messages remain here until you delete or move them. Unread messages are displayed in red with red stars to the left of the senders' name.
Drafts	Stores mail messages that are saved but not yet sent. You can choose to save a mail message as a draft to be sent at another time.
Sent	Stores the messages you have sent.
All Documents	Displays all messages in the Mail database, including those sent, received, stored, and saved as drafts.
Trash	Stores messages you have marked for deletion until you empty the trash or remove them.
Discussion Threads	Displays messages and their responses, so you see all messages related to a single topic together.
Rules	Displays tools for setting rules to filter mail according to criteria that you set.
Stationery	Displays personal memo styles that you design. These can be used for creating mail messages.
Group Calendars	Provides an overview of a group's scheduled time and lets you display the individual calendars for each member in the group.

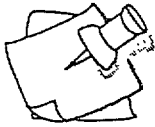
**Looking at the Mail Database...***(continued)*

A triangle in the column header indicates that you can sort the messages in ascending or descending order.

**Sort messages in the view**

Follow these steps to sort a column.

Step	Action
1	Click the column header.
2	Click again to sort in the opposite order.

**Tip**

Resize the panes or columns by dragging the border between them left or right.

## Reading Your Mail

When you open the Mail database, the first message in the view is the selected message. To select another message, click the message. To read a mail message, double-click the message or press **ENTER**.

Unread messages are displayed in red and have red stars in the column to the left of the message. After a message has been opened, the star no longer appears in the view and the message is displayed in black.

★	Robert Smith	01/25/99	6,339	Send Scripts
	Robert Smith	01/25/99	5,595	Demo for Work
★	Andrea Jones	02/23/99	1,079	Re: user group
	<input type="checkbox"/> Jerrie Lyn Paniri	02/24/99	1,019	sharestations
★	Robert Smith	02/24/99	569	Re: Regional

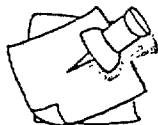
The **Preview** pane enables you to read the messages in the Inbox without opening them. Messages that you read in the Preview pane remain marked as unread messages in the View pane.

The screenshot shows a mail client window with a menu bar (File, Edit, View, Tools, Help) and a toolbar (New Message, Reply, Forward, Delete, Print, Copy, Paste). On the left is a folder pane with icons for Inbox, Drafts, Sent, All Documents, Trash, Discussion Threads, Group Calendars, Rules, and Stationery. The main area displays a list of messages with columns for Who, Date, Size, and Subject. The selected message is from Andrea Jones, dated 02/23/99, with subject 'Re: user group dates'. Below the list is a preview pane showing the sender's name (Andrea Jones), subject (Re: user group dates), and the start of the message body: 'Mary, Sorry that I have not responded to your mail before now. I had a conversation with Richard Beumant the other day and he suggested February or March. His reasoning is based on the fact that people like to travel to warm climates in the winter and would be more inclined to attend. So, assuming we choose either San Diego, New Orleans, or Orlando, his logic applies. However, I plan to bring this up at the Board Meeting next week so let's hold up for...

**Reading Your Mail...** *(continued)***Read messages**

Follow these steps to open or preview mail messages in the Inbox.

Step	Action
<b>Opening messages</b>	
1	Open the Mail database.
2	Double-click the first message in the Inbox.
3	Click the <b>Navigate Next</b> icon on the SmartIcon bar.
4	Press <b>ESC</b> .
<b>Previewing a message</b>	
5	Select a mail message.
6	Move the cursor over the bottom of the View pane until you see a line with two arrows.
7	Drag the bottom of the pane up. <i>Result: The selected message is displayed in the opened Preview pane.</i>
8	Select another message to be read in the Preview pane.
9	Drag the bottom of the Preview pane down to close it.

**Tip**

When reading a message, press **ENTER** or the **BACKSPACE** key to open the next or previous message.

From the menu, choose **Edit**→**Unread Marks** to revert the status of a previously read message to unread.

## Deleting Mail

Messages marked for deletion remain in the Inbox until the trash is emptied or the database closed. When you click the **Delete** button while reading a message, Notes marks the message with a Trash icon and opens the next message.

The Delete command is a toggle switch. If you select a message already marked for deletion, Notes unmarks that message.

### Marking multiple messages

Click in the column to the left of the sender to mark a message before choosing an action (for example, delete, print, or move). You can mark more than one message at a time.

✓	James Joyce	01/25/99	514	Transition of s
	Robert Smith	01/25/99	603	Do you know
* ✓	Robert Smith	01/25/99	6,339	Send Scripts
	Robert Smith	01/25/99	5,595	Demo for Wd
*	Andrea Jones	02/23/99	1,079	Re: user grou

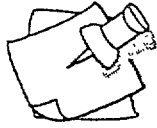


### Discard unwanted mail

Follow these steps to delete a message from the database.

Step	Action
1	Mark the message(s) to delete. Click the <b>Delete</b> button. <i>Result: A trash can icon appears to the left of the message.</i>
2	Click <b>Trash</b> in the Navigator pane. <i>Result: The message(s) marked for deletion are displayed in the View pane.</i>
3	Click the <b>Empty Trash Action</b> button.
4	Click <b>Inbox</b> in the Navigation pane.

## Deleting Mail...*(continued)*



### Tip

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You can drag marked messages to the **Trash** icon in the Navigator pane. The trash is automatically emptied when you press **⌘9**.

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## Summary

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Many features of mail are the same as in other databases, such as:

- The two-pane layout
- The Preview and View panes
- Action bar commands

---

# Writing and Sending Mail

Notes Mail messages can contain text, tables, graphics, links and attachments. You can create and send mail from anywhere in Notes, even when not in a Notes Mail database.

## Objectives

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After completing this lesson, you will be able to:

- Create a new memo.
- Open the Address Book to choose mail recipients.
- Choose recipients using type-ahead.
- Select a letterhead style for your messages.

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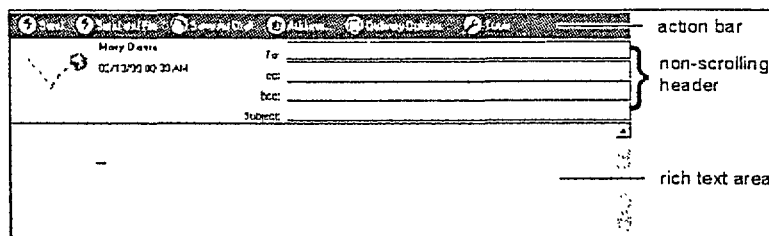


## Creating Mail

There are many ways to create a mail message in Notes. You can use:

- The New Memo link on the Welcome page
- The New Memo option in the Create subfolder in More Bookmarks
- The Create menu from anywhere in Notes.

This is the basic Mail form:



**Note:** Notes uses a **type-ahead** feature that locates and fills in recipient names as you enter characters. When set up to only use a local Address Book, Notes also uses a **type-down** feature that cycles through lists by letter.

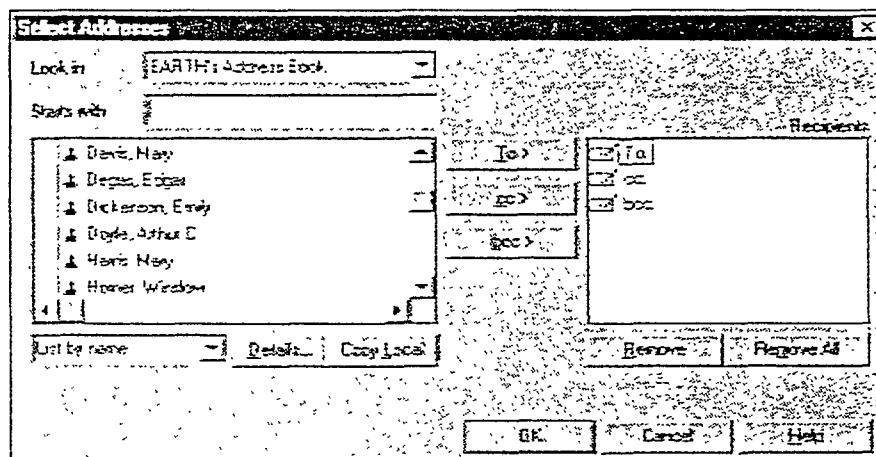
## Creating Mail... (continued)

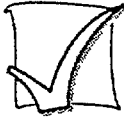


### Enter names and addresses

Follow these steps to enter names in the **To:** field of a mail message.

Step	Action
<b>Using the type-ahead feature</b>	
1	Enter the names of the message recipients. Separate the names with a comma.  <b>Note:</b> As you type a name, Notes searches the Address Book. If it finds a match, it fills in the address for you.
2	If this is not the name you want, continue entering the name. If this is the name you want, press <b>ENTER</b> .
<b>Using the type-down feature</b>	
3	Enter the first letter of the name and press the <b>DOWN ARROW</b> key.  <b>Note:</b> Notes searches the Address Book and fills in the first name beginning with that letter.
4	If this is not a name you want, press the <b>DOWN ARROW</b> key. If this is the name you want, press <b>ENTER</b> .
<b>Using the Address Book</b>	
5	Click the <b>Address</b> button at the top of the mail message.
6	Select the name(s) from the list on the left. Click <b>To&gt;</b> .
7	Click <b>OK</b> .  <i>Result: The selected addresses appear in the mail header.</i>



**Creating Mail...***(continued)***Write a memo**

Follow these steps to create and address a message.

Step	Action
1	Open your Mail database. Choose <b>New Memo</b> .
2	In the <b>To:</b> field, enter the first letter of a classmate's user name.
3	Press the <b>DOWN ARROW</b> key until the full name appears.
4	Press <b>ENTER</b> .
5	Enter the first two letters of a classmate's user name. <i>Result: The first user name that matches appears.</i>
6	Enter the third (and subsequent) letters of the name.
7	Press <b>ENTER</b> when the desired name appears.
8	Click the <b>Address</b> button.
9	Select two names from the list. Click the <b>To:</b> button. <i>Result: The selected names are entered in the Recipients box.</i>
10	Click <b>OK</b> . <i>Result: The recipients' names appear in the Memo header.</i>
11	Choose <b>File</b> → <b>Close</b> .
12	Select <b>Discard Changes</b> . Click <b>OK</b> .

**Note:** When you try to close a memo without sending it, Notes prompts you to send, save, or discard the message.

**Creating Mail...***(continued)*

Save unfinished messages in the **Drafts** view. When you open a message in the Drafts view, it opens in Edit mode.

**Save draft copies of mail**

Follow these steps to save and then send a Draft message.

Step	Action
1	Create a mail message and address it to another student.
2	Click <b>Save as Draft</b> .
3	Open the Drafts view.
4	Open the saved message, complete the message, and click <b>Send</b> .

## Replying to Messages

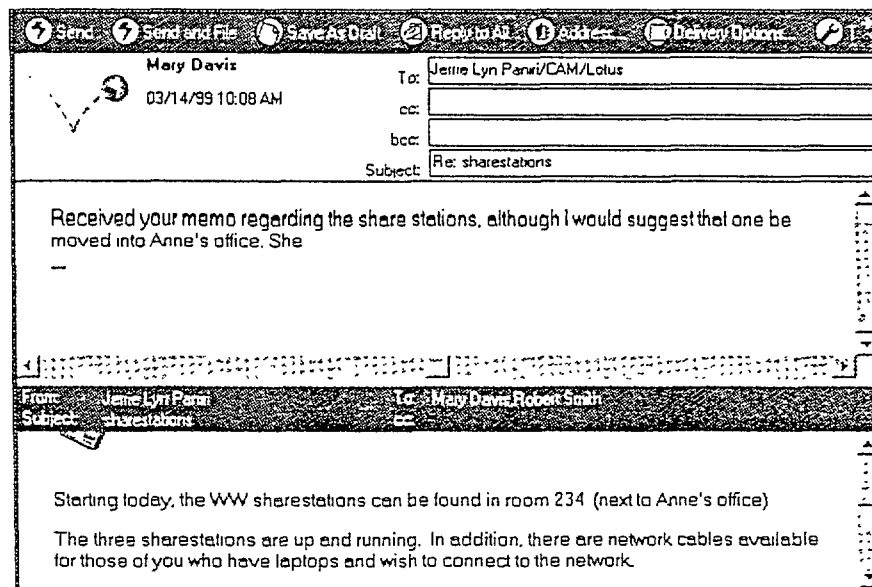
When you reply to a message, you can copy the reply to each original recipient and include the text of the original message.

### Reply options

The Reply button provides options for the way the reply message appears.

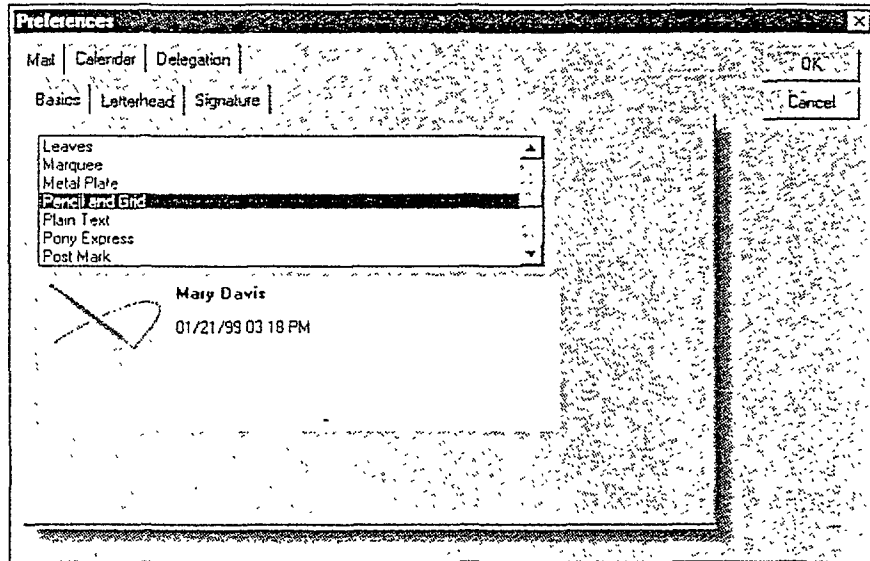
If You Choose...	Then the New Message Includes...
Reply	The sender's name in the <b>To:</b> field
Reply to All	The sender's name in the <b>To:</b> field and all other original recipients in the <b>cc:</b> field
Reply with History	The sender's name in the <b>To:</b> field and the original message in a section in the message
Reply to All with History	The sender's name in the <b>To:</b> field, the original recipients in the <b>cc:</b> field, and the original message in a section in the message

From the menu, choose **View** → **Parent Preview** to open the original message in the Preview pane.



## Changing the Style of Mail Message Headers

You can choose the graphic image that appears in the header of your mail messages from a selection of images supplied by Notes.



### Change the mail letterhead

Follow these steps to select a letterhead for mail messages.

Step	Action
1	From the menu, choose <b>Tools</b> → <b>Preferences</b> .
2	Click the <b>Letterhead</b> tab.
3	Select a style from the list. <b>Note:</b> The style is displayed in the dialog box.
4	Click <b>OK</b> . <b>Result:</b> The next time you create a memo, the header will contain the image you selected.

**Note:** Letterhead images are stripped from mail messages delivered in Internet mail outside the Notes domain.

## **Changing the Style of Mail Message Headers ...** *(continued)*

### **Summary**

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In this lesson, you used the address features to enter recipients for your mail messages. The basic memo form contains a non-scrolling header, which you can personalize with a selected letterhead.

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# Managing Your Mail

There may be incoming messages you want to save or share with colleagues. You can create your own folders in which to save mail. You also can forward a message with your added commentary.

## Objectives

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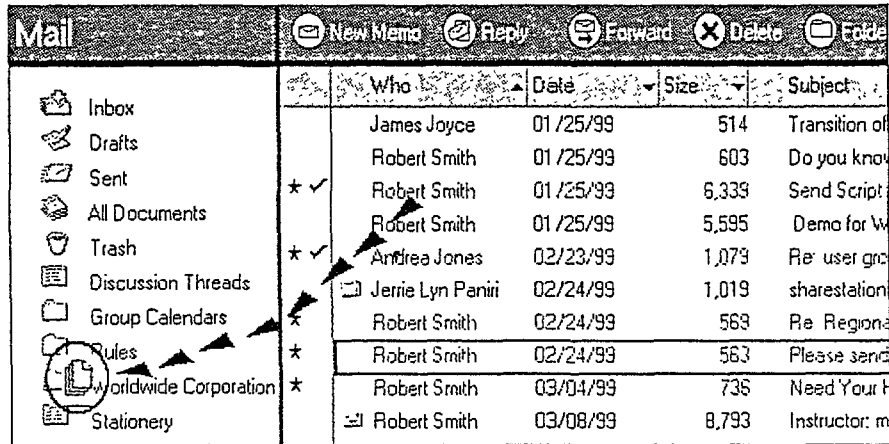
After completing this lesson, you will be able to:

- Create a mail folder.
- Move messages from the Inbox to a folder.
- Remove messages from a folder.
- Forward a document.



## Saving Messages

You can organize your mail by moving messages to folders within your Mail database. You can create as many folders as you want, even creating folders within folders.



### Create folders

Follow these steps to create a folder in a Mail database.

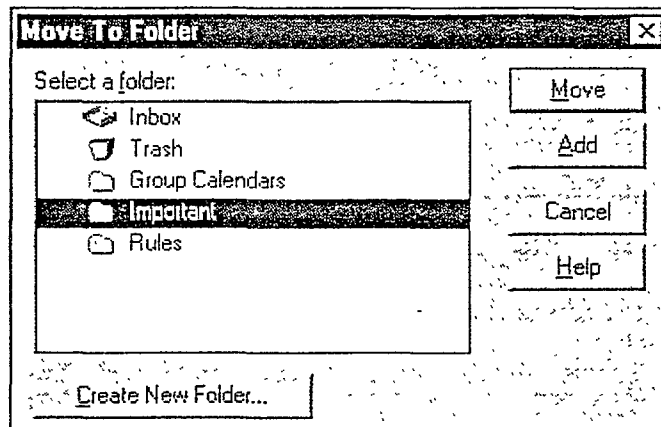
Step	Action
1	Click <b>Folder</b> . Then, choose <b>Create Folder</b> . <i>Result: The Create Folder dialog box appears.</i>
2	Enter the folder name.
3	Select a location for the folder. <b>Note:</b> Click an existing folder to create a new folder within that one.
4	Click <b>OK</b> .

## Saving Messages...*(continued)*



### Move messages to a folder



Click the **Folder** button at the top of the Mail window. From the drop-down list, select **Move To Folder** to move messages to a new or existing folder using the dialog box shown here.



### Drag messages from an open view into a folder

Move the cursor over the selected message(s). Click and drag the message to a folder in the Navigation pane. The destination folder name changes color when the cursor passes over it.

When you move the cursor over a folder, the icon will either display as a stack of documents or a stop symbol.

If	Then
	The selected message(s) can be moved into the folder.
	The folder is not a valid destination for saved messages.

**Saving Messages...***(continued)***File your mail**

Follow the steps below to move a message to a new folder.

Step	Action
1	From the menu, choose <b>Create→Folder</b> .
2	Enter <b>Important</b> in the <b>Folder Name</b> field. Click <b>OK</b> . <i>Result: The new folder appears in the Navigation pane.</i>
3	Open the <b>Inbox</b> and select two messages.
4	Move the cursor over a selected message. Click and drag it to the <b>Important</b> folder.
5	Open the <b>Important</b> folder.
6	Select one of the messages. Choose <b>Folder→Remove From Folder</b> .
7	Click the <b>All Documents</b> view. <i>Result: The message you removed remains in the database.</i>

**Caution**

If you delete a message from a folder, it is **physically deleted from the Mail database**. To keep a message in your Mail database but remove it from a folder, choose **Folder→Remove From Folder**.

**Note:** The **All Documents** view shows you everything in your Mail database, including sent copies and all messages regardless of whether it is still in the **Inbox** or moved to a folder.



If you inadvertently remove a message from a folder, it will appear in the **All Documents** view.

## Sharing Information

You can forward a variety of information via Notes Mail, including received messages, documents, and Web pages. You can also add your own comments and select the recipients.

### Forwarding information through mail

The **Forward** action button initiates the process for forwarding a message. From anywhere in Notes, choose **Actions**→**Forward**. A new memo form opens with the information inserted. The original header information also appears, as shown here.

	<b>Jerrie Lyn Paniri</b> 03/11/99 10:05 PM	To: Robert Smith
		cc:
		bcc:
		Subject: Re: Question on upgrading
<p><b>This is the information you had asked me about.</b>          ----- Forwarded by Mary Davis/Worldwide on 03/11/99 10:03 PM -----</p>		
	<b>Mary Davis</b> 02/02/99 02:38 PM	To: Anne.Reed@Worldwide.com
		cc:
		Subject: Re: Question on upgrading
<p>Anne - don't believe this has anything to do with Ann's problem, but thought</p> <hr/> <p>Here's a note from another user.....</p> <p>Not surprisingly, Scott and Matt are right. There is a tool in the SIMS On-Lin folders and views that don't exist in the template, but this won't bring back th</p>		

**Sharing Information...** *(continued)***Forward information**

Follow these steps to forward different types of information.

Step	Action
<b>Forward a mail message</b>	
1	Open the Inbox and select a message.
2	Click <b>Forward</b> .  <i>Result: A new memo opens. The Subject line is filled in and the original message appears in the memo.</i>
3	In the <b>To:</b> field, enter the user name of another student.
4	Enter a comment above the forwarded information.
5	Click <b>Send</b> .
<b>Forward a Web link</b>	
6	Click the Web icon in the top right corner of the navigation bar.
7	Enter <u>www.lotus.com</u> in the URL Address box. Press <b>ENTER</b> .
8	Choose <b>Actions</b> → <b>Forward</b> .
9	Select to forward the link. Click <b>OK</b> .  <i>Result: The new memo contains the link to the Web page.</i>
10	Enter the recipient's name. Click <b>Send</b> .

# Organizing Mail Exercise



## Organize mail

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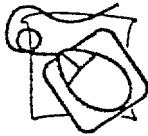
- Save three messages sent to you from the instructor in a **To Be Read** folder. Then, remove one of them from the folder.
- Forward the incoming message about group calendars to one of your classmates. Then, delete it.

# Appendix



## Exercise Solutions

## Lesson 4: Beginning with Databases



### Add bookmarks

Add the following two bookmarks to the **Worldwide** folder.

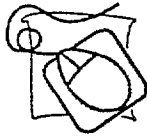
- WW New Employee database.
- The Knowledge Management document in the WW New Employee database.

Follow these steps to complete the exercise:

Step	Action
<b>Add the database bookmark with the Database Open dialog box.</b>	
1	From the menu, choose <b>File→Database→Open</b> .
2	In the <b>Database Open</b> dialog box, choose the server name and the <b>WW New Employee</b> database. Click <b>Bookmark</b> .
3	Select the <b>Worldwide</b> bookmarks folder. Click <b>OK</b> .
<b>Drag the document bookmark to the folder.</b>	
4	Open the <b>Knowledge Management</b> document in the <b>WW New Employee</b> database.
5	Drag the window tab to the <b>Worldwide</b> bookmark folder.



## Lesson 10: Managing Your Mail



### Organize mail

- Save three messages from the instructor in a **To Be Read** folder. Then, remove one of them from the folder.
- Forward the incoming message about group calendars to one of your classmates, then delete it.

Follow these steps to complete the exercise:

Step	Action
<b>Create a folder</b>	
1	Open your Mail database. From the menu, choose <b>Create→Folder</b> .
2	In the <b>Folder name</b> field, enter <b>To Be Read</b> . Click <b>OK</b> .
3	Select three messages from your Mail database. Drag them to the <b>To Be Read</b> folder.
4	Open the <b>To Be Read</b> folder.
5	Select one of the messages. From the menu, choose <b>Actions→Remove From Folder</b> .
<b>Forward a message</b>	
6	Open your <b>Inbox</b> . Select the <b>Group Calendars</b> message.
7	Click <b>Forward</b> .
8	Enter another student's address in the <b>To:</b> field.
9	Enter a line of text above the forwarded information. Then, click <b>Send</b> .
10	Select the original message in your <b>Inbox</b> . Click <b>Delete</b> .