

Lotus Notes Fundamentals

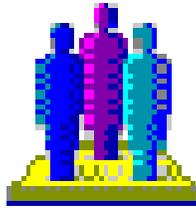


Table of Contents

MODULE 1: NOTES ENVIRONMENT	1
Lotus Notes—Purpose and Advantages	1
What is Notes?	1
Notes Features.....	1
Why Notes?.....	1
Notes Screen Layout.....	2
Workspace.....	2
Title bar.....	2
Menu bar.....	2
SmartIcons	2
Tabs.....	2
Workspace Pages	2
Database icons	3
Status bar.....	3
Lotus Notes Terminology	4
Databases	4
Database Titles.....	4
Documents	4
Forms	4
Fields.....	4
Views	4
Categories	4
Twisties.....	4
Folders	4
Types of Notes Databases.....	5
E-Mail Database.....	5
Bulletin Boards.....	5
Discussion Databases	5
Main and Response Documents	5
Adding a Database to your Workspace using the Catalog.....	6
Add a Database Catalog.....	6
Add a Database Using a Database Catalog.....	7
Opening a Notes Database.....	8
Open a Notes Database.....	8
The About Document.....	8
Screen Layout	8
View Selection.....	8
Pane Resizing.....	8
Open and Close a Notes Document	8
Action bar	9
Expand/Collapse a Category.....	9
Expand/Collapse All Categories.....	9
Select a View	9
Search for a Document.....	9

Database Access Indicators	10
Database Access	10
Check Your Access to a Database	11
Display the About Document.....	11
Close a Notes Database.....	11
Removing a Database from your Workspace	12
Remove a Database.....	12
Organizing Notes Databases.....	13
Workspace Pages	13
Modify the tab of a Workspace Page.....	13
Move a Database to a New Workspace Page.....	14
Add a Workspace Page.....	14
Delete a Workspace Page.....	14
 MODULE 2: NOTES MAIL	 16
Lotus Notes Mail Features.....	16
Notes Mail Features	16
Open the Mail Database.....	16
All By Date View.....	16
Sending a Memo	17
Mail Forms.....	17
Types of Fields.....	17
Using the Memo Template.....	17
Using the Name and Address Book (NAB).....	17
Validate Names	18
Fill in the Memo Form.....	18
Carbon Copy Fields	18
Classification	18
Return Receipt	19
Closing and Sending Mail.....	20
Reading a Mail Message.....	21
Update Views.....	21
Replying to a Mail Message	21
Reply to a Document	21
Typing then Sending a Reply.....	22
Forwarding a Mail Message	24
Forward a Document	24
Sending a Note.....	25
Send a Note.....	25
Validate Names.....	25
Fill in the Note Form	25
Closing and Sending Mail.....	25
Printing Mail Messages	26
Print an Open Document.....	26
Print a View	26
Sending an IC E-Mail Message	29

UNCLASSIFIED

Create a IC E-Mail.....	29
ICE Mail Address Format.....	29
Attachments	29
Attachments	29
Before You Begin	29
Attach a File.....	29
View an Attachment	30
Launch an Attachment	32
Detach a Document.....	32
Creating Folders and Moving Documents	35
Creating a Folder in your E-Mail Database.....	35
Select and Move a Single Document to a Folder	35
Select and Move Multiple Documents to a Folder	36
Select all Documents in a View	36
Deselect a Document	36
Deselect all Documents	36
Deleting Mail Messages.....	37
Why Delete?.....	37
Delete a Document.....	37
Delete Multiple Documents	37
Creating Group Address Lists (Personal Groups)	38
Creating a Personal Group.....	38
Using your Personal Group.....	38
Customizing your Notes Environment.....	39
Change Font Size	39
Textured Workspace	40
Display Database Server Names.....	40
Display Unread Count	40
Update the Unread Count	41
APPENDIX A: ACCESSING ONLINE HELP	42
Help--About This Database Document.....	42
The F1 Key	42
Help Topics.....	42
Hotspots	43
APPENDIX B: ADVANCED PRINTING	44
Classify Printed Views.....	44

COURSE OBJECTIVES

Upon completion of this course, you should:

- Be familiar with Notes screen layout.
- Understand different types of databases and Notes terminology.
- Add/remove databases to/from your Workspace.
- Open databases and select views.
- Understand types of database access.
- Determine your access to a database.
- Name and manipulate Workspace pages.
- Use Notes mail features.
- Use IC-Email Template.
- Send and use Attachments.
- Create Folders and Move Documents.
- Create and use a Group Address.
- Customize your Lotus Notes Environment.

MODULE 1: NOTES ENVIRONMENT

MODULE OBJECTIVES

Upon completion of this module, you should be able to:

- Identify parts of the Notes screen and their purposes
- Define basic Notes terminology
- Understand different types of Notes Databases
- Open and navigate simple Notes databases
- Identify different levels of Database access

Lotus Notes—Purpose and Advantages

What is Notes?

Notes provides multiple tools for sharing information in a secure environment. Databases allow multiple users to access the same data while, behind the scenes, access to that information is tightly controlled.

Notes Features

- Database storage and retrieval
- Automated workflow applications
- Electronic mail
- Electronic document distribution
- Name & Address Books
- Bulletin boards and discussion databases
- Calendar & Scheduling
- Graphics storage
- Multiple character formatting options

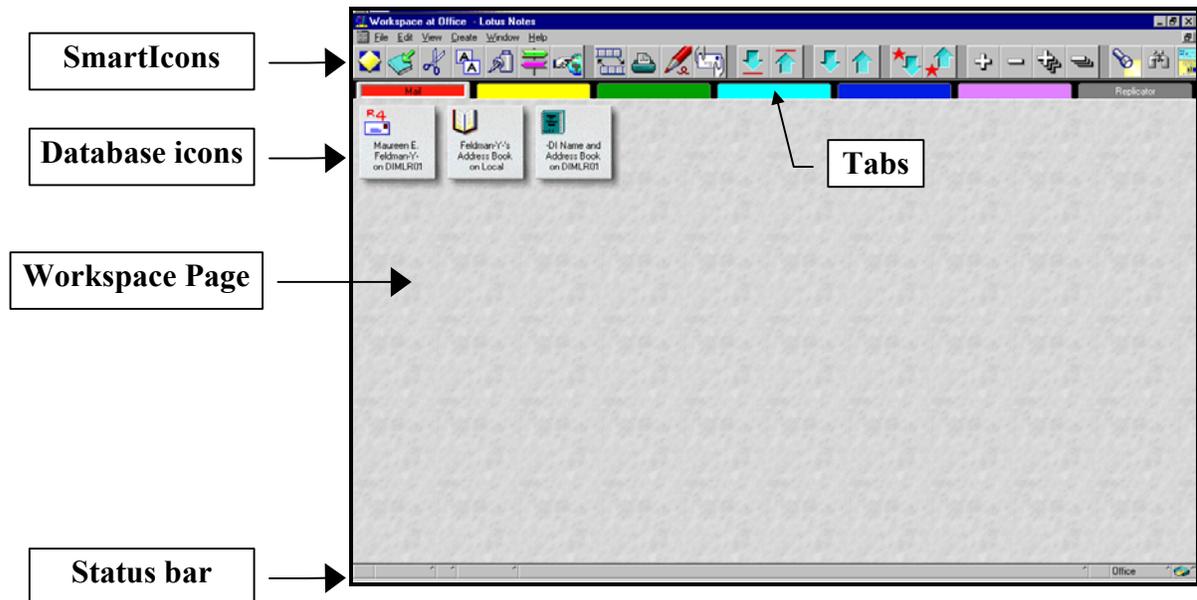
Why Notes?

Notes is a sophisticated commercial off-the-shelf (COTS) product. A corporate move towards using more COTS products is underway since they are more cost-effective in terms of development and support.

Notes Screen Layout

Workspace

The following screen, called the Workspace, displays when you start Notes:



The Workspace includes the Title bar, Menu bar, SmartIcons, Workspace pages and their tabs, Database icons and Status bar.

Title bar

Displays your current location; i.e., your Workspace or the name of the database you are viewing.

Menu bar

Provides access to commands.

SmartIcons

Provide accelerated access to the most commonly used tasks. SmartIcons are context-sensitive; i.e., they change depending upon your location to reflect tasks that are currently available.

Note: Resting your pointer over a SmartIcon displays a Tooltip describing the task that SmartIcon represents.

Tabs

Label Workspace pages and reposition yourself among them.

Workspace Pages

Designed to resemble file folders; used to organize database icons within the Notes Workspace.

Database icons

Three-dimensional squares that graphically represent databases. Each icon displays a picture and the database title.



The database icon may also display the number of unread documents and the server where the database is stored.

Status bar

Displays a variety of information depending upon the type of activity performed.

Lotus Notes Terminology

Databases	Group and store related information called documents.
Database Titles	Typically descriptive of the type of information contained in the database.
Documents	Group of related data items treated as one complete unit of information. Consists of multiple fields; created by filling in a form. Documents may range in size from a brief mail message to a multi-page market analysis filled with text and graphics.
Forms	Consist of a series of fields. Used to enter information into a document and therefore define the format of a document. Most databases have several forms, each serving a particular purpose. Forms will be addressed in Module 2.
Fields	Single piece of data stored in a document.
Views	List documents in a variety of ways in order to facilitate locating documents easily. The selection of views that are available depends upon the database being used.
Categories	Available in some databases to help organize documents. They appear as headings within the views.
Twisties	Graphic characters that allow you to expand or collapse a category by clicking it.
Folders	Enable you to “file” your documents electronically. Folders are not available in all databases.

Types of Notes Databases

E-Mail Database

The Mail database is used to create, send, and receive electronic mail using Notes.

Bulletin Boards

Bulletin boards are a type of shared database that make information available to a wider audience. Bulletin boards are an efficient and effective method for disseminating information since they save server storage space and reduce the amount of mail traffic on the LAN.

As with any Notes database, each Bulletin board has its own forms and views.

Discussion Databases

Discussion databases are another type of shared database. But unlike Bulletin boards, discussion databases allow people to exchange ideas and respond to other people's documents on a particular topic. As with any shared database, the information contained is public and available to anyone with appropriate access.

Each discussion database has its own forms and views.

Main and Response Documents

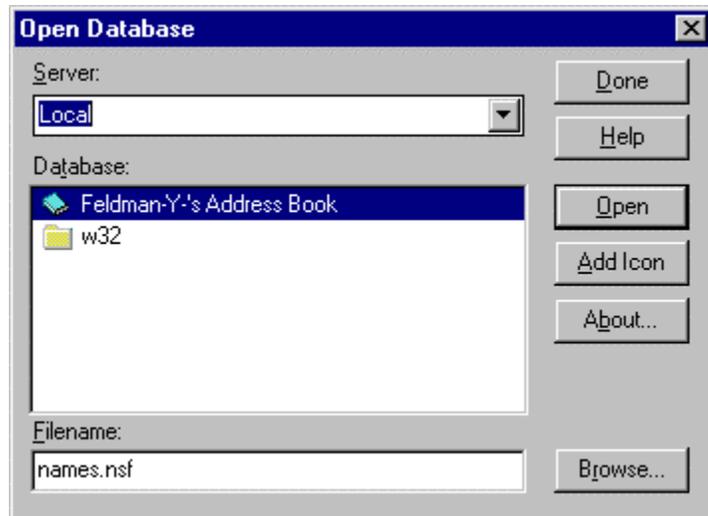
In Discussion databases, the first document pertaining to a topic is referred to as the main document. Replies to the main document are known as responses. In views, response documents typically display directly below and indented from the main document.

Adding a Database to your Workspace using the Catalog

Add a Database Catalog

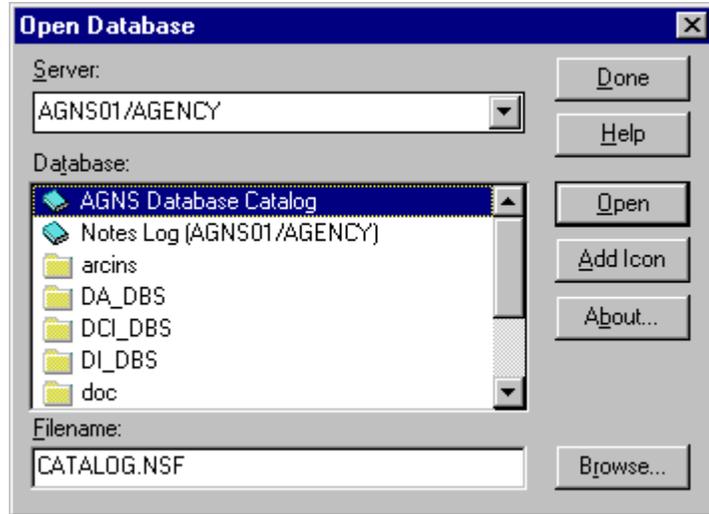
Database catalogs exist to facilitate adding databases to your Workspace.

- ☞ **Select File, Database, Open...**
The Open Database dialog box displays.



Notes databases are located on different servers, depending on who owns the database. You may browse through the server list until you find the server containing the database you want to add

- ☞ **Click the Server drop-down arrow** to display a list of available servers.
- ☞ **Select the NIMA Server.**
The list of databases and directories available on that server displays in the lower box.



 With **Database Catalog** selected, *click* the **Open** button.
This step adds the Database Catalog to your Workspace.

Add a Database Using a Database Catalog

 *Press* the **Escape** key to close the About Document.
The catalog displays listing the available databases in the By Title view.

 *Type* the letter **B**, then *press* the **Enter** key.
The list advances to the B's.

 *Double-click* the **Billing** database.

 *Click* the **Add Database** button at the top left of screen.
This step adds the database to your Workspace.

 *Press* the **Escape** key until the catalog displays.

Opening a Notes Database

Open a Notes Database

 **Double-click** the **NIMA Bulletin Board** icon.

The About Document

The “Help--About This Database” AKA “About” document displays the first time you open a database. This document contains important information about the database - how the database should be used, who has what level of access, and the database manager's name and telephone number.

Read the **About** Document.

 **Press** the **Escape** key to close the About document.

Screen Layout

- The **Navigation pane** on the left lists the views for this database. Views list documents in a variety of ways in order to facilitate locating documents easily. Views differ depending on the database.
- The **Active View pane** on the right shows the documents available within each view.

View Selection

 If necessary, **click** the **By Category** view in the Navigation (left) pane to expand the section, then **click Date Descending**.

Look at the **Active (right) pane** to see the list of documents in that view.

Pane Resizing

 **Position** the mouse **pointer** on the thicker gray border line between the panes.

The mouse pointer becomes a two-headed arrow 

 **Click and drag** the **border** until the panes are the desired width, then **release** the **mouse** button.

Open and Close a Notes Document

 **Double-click** the **first document** in the right pane to open it.

 **Press** the **Escape** key to close the document.

Action bar

The Action bar is displayed below the SmartIcons when a database or document is open. The buttons that display represent tasks that you can perform from your current location. The Action bar from the Bulletin Board Document reflects the following buttons:

**Expand/Collapse a Category**

 **Click the ▼ twisty next to a category listing.**
The category collapses. (Alternately, you could have double-clicked the category name.)

 **Click the ► twisty next to a category listing.**
The category expands to reveal the documents under that category. (Alternately, you could have double-clicked the category name.)

Expand/Collapse All Categories

 **Press Shift and * asterisk** (on the numeric keypad) simultaneously.
All categories expand.

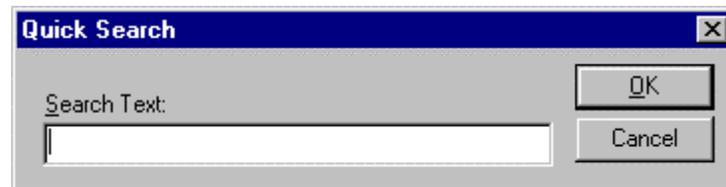
 **Press Shift and - minus** (on the numeric keypad) simultaneously.
All categories collapse.

Select a View

 **Click the By Author** view in the Navigation pane.

Search for a Document

 **Type your last name.**
A Quick Search dialog box displays once you begin to type.



 **Press the Enter** key.
The list advances to your last name.

 **Double-click** a document to open it.

Database Access Indicators

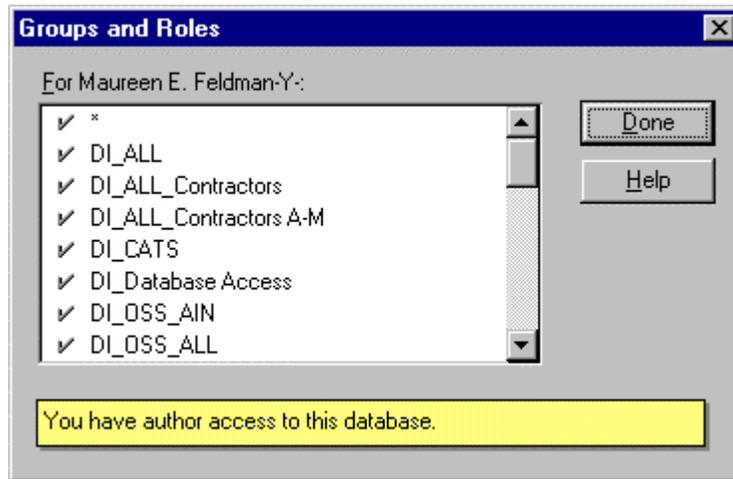
Database Access

Each database has an ACL (Access Control List) that establishes the rights that individuals or groups have to the database. The icon for your level of access is displayed in the Access Level Indicator portion of the Status bar when you open the database.

- 
No Access - User cannot access the database.
- 
Reader - can read documents in a database but cannot create or edit documents.
- 
Depositor - can create documents but can't see any documents in the database views, even the documents he/she creates.
- 
Author - can create documents and edit documents they create.
- 
Editor - can create documents and edit ALL documents.
- 
Designer - can modify all database design elements and also perform all tasks allowed by lower access levels.
- 
Manager - can modify ACL settings, encrypt a database for local security, modify replication settings, and delete a database--tasks permitted by no other access level. Manager can also perform all tasks allowed by lower access levels.

Check Your Access to a Database

- Click the  **Access Level Indicator** on the Status bar. *The Groups and Roles dialog box displays a listing of all of the groups with access to the database and your access level at the bottom.*



- Click the **Done** button. *The Groups and Roles dialog box closes.*

Display the About Document

Note: To display the About document, select **Help, About this Database**.

Close a Notes Database

-  **Press** the **Escape** key to close the database.

Removing a Database from your Workspace

Remove a Database

 From you Lotus Notes Workspace page *click* the **database** to be removed.

 **Press** the **Delete** key on your keyboard.

The following dialog box displays:



 **Click Yes.**

Note: Deleting a database removes it from your Workspace; it does **not** delete it from the server.

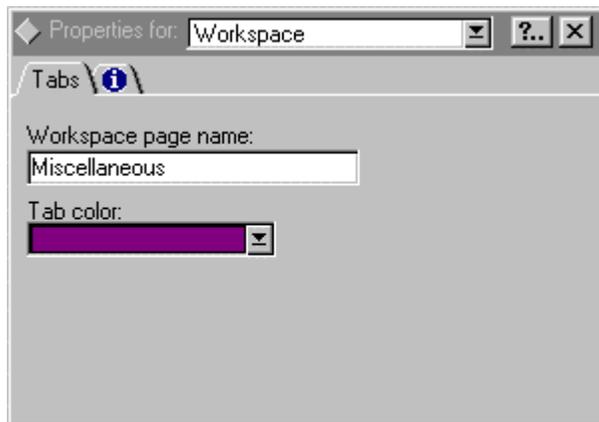
Organizing Notes Databases

Workspace Pages

Similar to file folders in a desk drawer, you can label them to make it easier to find information and/or you can add more when you need them. The exception is the page on the far right-labeled **Replicator**; it cannot be changed or deleted.

Modify the tab of a Workspace Page

- ☞ **Double-click** the **tab** of the workspace page you want to name.
The Properties for Workspace box displays with space for the name and color choices.



- ☞ **Type** the **name** you want to display on the tab.
- ☞ **Click** the **drop-down list arrow** in the Tab color: field
The available color choices display.
- ☞ **Click** the **color** you want for the tab.
- ☞ **Click** the **X** in the upper right corner of the dialog box.
The dialog box closes, and the workspace page tab displays as you specified.

Move a Database to a New Workspace Page

 **Click and drag** the **database** icon you want to move over the tab of the destination workspace page.
As you click and drag, an outline of the icon moves with your mouse.

 When an outline displays around the name of the tab, **release** the **mouse button**.

 **Click** the **tab** of the destination workspace to display the workspace page.
The database displays on the new page.

Add a Workspace Page

 **Right-click** a Workspace page or tab, then **select Create Workspace Page**.
A new page is inserted to the left of the current page.

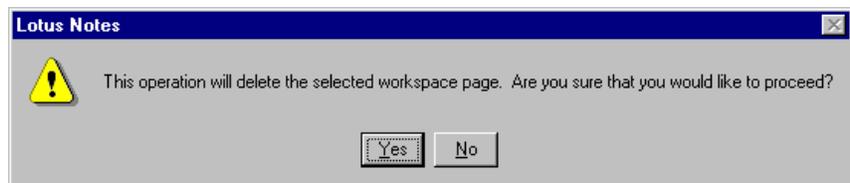
Note: The first time you add a Workspace page, a dialog box displays warning you that if you proceed, your Workspace will not be compatible with prior versions of Notes. Click Yes.

Note: You can have a maximum of 32 workspace pages.

Delete a Workspace Page

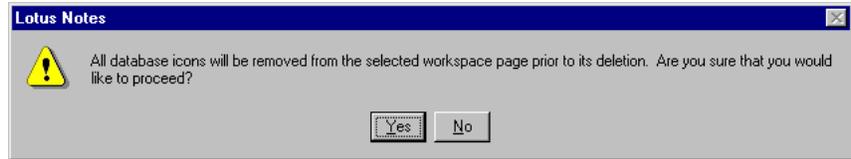
WARNING: If there are any databases on a Workspace page when you delete it, then the databases are removed from your Workspace, too.

 **Right-click** a workspace page or tab to be deleted, then **select Remove Workspace Page**.



 **Click Yes.**

If there are databases on the Workspace page you are deleting, then a second dialog box displays:



☞ **Click Yes.**
The workspace page (and all of its databases) is removed from your Workspace.

MODULE 2: NOTES MAIL

MODULE OBJECTIVES

Upon completion of this module, you should be able to:

- Receive mail and utilize forms to send mail
- Reply to, forward and delete Notes mail
- Print mail
- Manipulate and send mail attachments.
- Sending IC-Email.

Lotus Notes Mail Features

Notes Mail Features

In addition to sending, receiving, replying to and forwarding mail, you can send carbon copies and request return receipts for documents that you send to others.

Notes mail supports several other useful features, including graphics, file attachments, and blind carbon copies.

Open the Mail Database

☞ *Double-click* your **mail database** icon.



All By Date View

☞ If necessary, *click* the **Inbox** folder.

Sending a Memo

Mail Forms

The forms in the mail database are used for creating various types of documents for correspondence.

Types of Fields

- **Text fields** contain letters, special characters, spaces, and numbers that are not used mathematically.
- **Number fields** are used for information that can be used mathematically.
- **Rich text fields** allow users to format text and incorporate graphics and other objects, such as file attachments, covered in this module.
- **Keyword fields** offer predefined text choices that make data entry more convenient and lend consistency to documents.

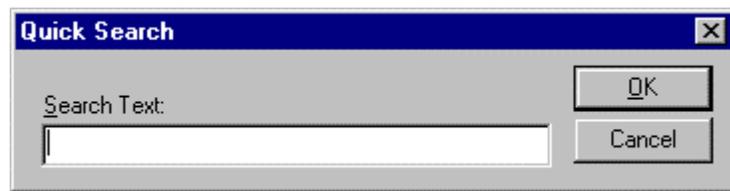
Using the Memo Template

- ☞ **Select Create, Memo, Standard** from the Menu bar.
The Memo form opens. It has a much more formal look than the Note form. The date and FROM: fields are automatically filled in; the OFFICE: field reflects the value you assigned in the note you sent in the previous exercise.

Name and Address Book (NABs)

If you do not know the correct spelling of a recipient's name, you can look it up in the NAB where each Notes user has an entry.

- ☞ **Click the Address** button in the Action bar.
The Mail Address dialog box displays.
- ☞ If the **NIMA Name and Address Book** is not displayed in the first field of the resulting Mail Address dialog box, **click the drop-down arrow** at the end of the field and select it.
- ☞ **Type the first few letters** of the addressee's last name.
The Quick Search dialog box displays with the letters typed in the field.



- ☞ **Click OK.**

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The list advances to that location in the list alphabetically.

 **Select** the **name** of the intended recipient, then **click** the **To:** button.

*The name displays in the **To:** field in the right window.*

Repeat the previous steps for each addressee.

 **Click** the **OK** button when you have finished addressing the document.

*The recipients' names display in the **MEMORANDUM FOR:** field.*

Validate Names

 **Press** the **F9** key to validate the name(s).

Note: If any of the intended recipient names are spelled incorrectly or are not in the Name & Address Book when you try to send the document, Notes prompts you with an Ambiguous Name dialog box listing possible matches. You can choose a replacement, or you can skip a name, and all other recipients will receive the document.

Fill in the Memo Form

 **Click** in the **SUBJECT:** field, then  **type** **Training Memo.**

 **Click** in the **REFERENCE:** field, then  **type** **Official Business.**

 **Click** in the **body**, then  **type** **“This mail form is used for more formal messages.”**

Note: The body is a rich-text field.

Carbon Copy Fields

CC: recipients are listed as recipients on all recipients' copies of the message. BCC: recipients are only listed as recipients on the originator's copy and that BCC: recipient's copy.

 **Click** in the **CC:** or **BCC:** field(s).

 **Type** the **name(s)** ... or ...  **select** the **name(s)** from the Name and Address book(s).

Classification

 **Click** in the Classification Drv **field**, then  **type** the letter **U** for **UNCLASSIFIED.**

Note: This field is a keyword field; only pre-assigned values are acceptable entries for this field.

 **Press the Enter** key.

The Select Keywords dialog box displays, listing the allowable entries for this field.

 **Type** the letter **H**.

The list advances to the first entry starting with H. You would have to scroll down to select subsequent entries beginning with H.

 **Type** the letter **T**.

The list advances to the first entry starting with T.

 **Click** the **Cancel** button to close the dialog box and revert to UNCLASSIFIED.



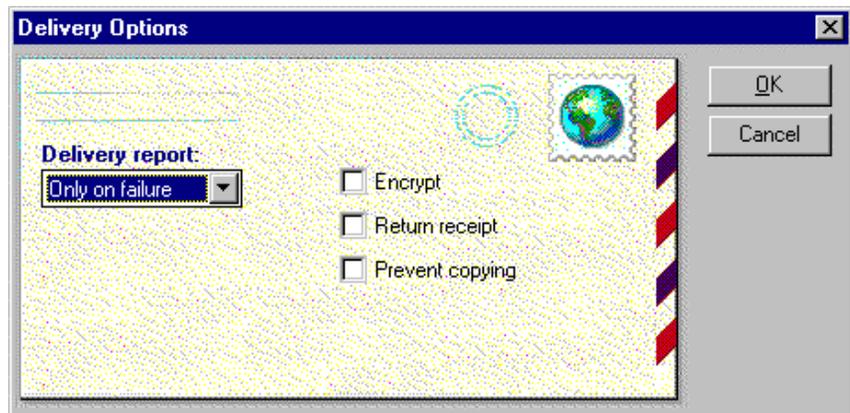
Use the **Classification Guide** icon at the bottom of the note to add both the classification and derivative information for your document.



You can set up the **My Favorite** icon to allow you to reuse combinations of derivatives and classifications. For more information, see the My Favorite Quick Reference Guide.

Return Receipt

 **Click** the **Delivery Options** button in the Action bar.
The Delivery Options window displays:



- **Encrypt** scrambles the information in your messages so

that only the intended recipients can read them.

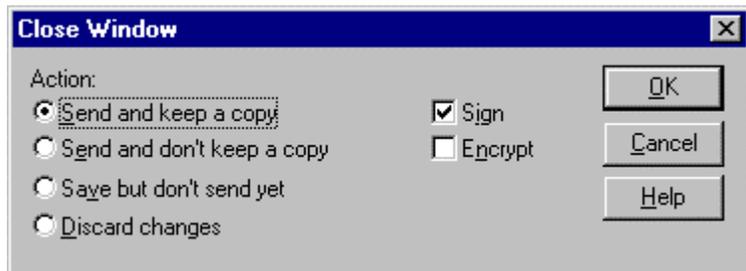
- **Return Receipt** causes Notes to send you a mail message containing the date and time of the first time each recipient opens (or prints) a message that you've sent.
- **Prevent Copying** deters recipients from copying a message that you send. This includes copying with the clipboard, forwarding, creating a Reply with History, and printing.

☞ **Select Return Receipt, then click OK.**

Note: You will not be notified if the note is erased without having been opened.

Closing and Sending Mail

☞ **Press the Escape key.**



- **Send and keep a copy** mails your message to the recipient(s) and saves a copy of it in your mail database for your future reference; this is the default setting.
- **Send and don't keep a copy** mails your message to the recipient(s) but does not save a copy of it in your mail database for your future reference.
- **Save but don't send yet** saves your message in the Drafts folder but does not mail it to the recipient(s) yet.
- **Discard changes** does not mail your message or save any of the editing you have performed on the message since your last save.

☞ **With Send and keep a copy selected, click OK.**
The mail message is sent and there is a copy of it in your mail database.

Reading a Mail Message

Update Views

When you open your mail database, views reflect new messages you've received since you last visited. But while you have your mail database open, views are not updated automatically as you receive mail.



Press the **F9** key to refresh your screen.

New documents received by the server are listed in your view in red with a star next to each.



Double-click your new **mail message** to open it.

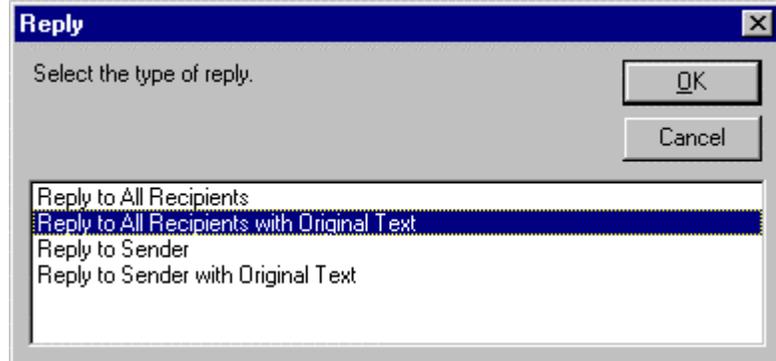
Replying to a Mail Message

Reply to a Document



With a mail message open, **click** the **Reply** button on the Action bar.

The Reply dialog box displays:



- **Reply to All Recipients** will be distributed to all recipients of the original message but does *not* include the contents of the original message
- **Reply to All Recipients with Original Text** will be distributed to all recipients of the original message and includes the contents of the original message as well as your response
- **Reply to Sender** will only be distributed to the original sender of the message but does *not* include the contents of the original message
- **Reply to Sender with Original Text** includes the contents of the original message as well as your response but will only be distributed to the original sender of the message

 With **Reply to All Recipients with Original Text** selected, **click OK**.
A reply form displays on the screen.

Note: Selecting Reply to All Recipients with Original Text causes the document to be classified with the same classification as the original document.

Note: When you create a reply that includes the original text, the original message is compressed into a section. To view the message, click the twisty.

Typing then Sending a Reply

 **Type** your **reply**, then **press** the **Escape** key.
The Close Window dialog box displays.

 **Click OK**.

Forwarding a Mail Message

Forward a Document

Use the forward feature to send a copy of a document with your own comments to parties who were not recipients of an original message.

-  With a mail message open, **click** the **Forward** button on the Action bar.
A new memo that contains the original document opens.

Note: Forwarded documents automatically inherit the same subject and classification as the original document.

-  **Type** the **recipient's name(s)** in the Memorandum For: field.

-  **Optional: Type** text in the Reference: field.

-  **Optional: Type** text in the body.

-  **Press** the **Escape** key, select the appropriate option, then **click OK**.

Sending a Note

Send a Note

 **Select Create, Note, Personalized** from the Menu bar.
The Note form opens. Notice how your name displays at the top of the form, similar to personalized stationary. The FROM: and DATE: fields are also automatically filled in.

Note: Fields in which you may enter data are identified with brackets.

 **Click** in the **field** immediately below “From the Desk of xxx”, then  **type** your **secure number**.

Note: You will only have to supply the information for this field ONCE; when you create a note in the future, this field will automatically reflect what you typed in the first time.

 **Press** the **Tab** key to advance to the NOTE FOR: field, then **type** a recipients name. If you are sending the memo to more than one person, separate the names with a comma.

Validate Names

 **Press** the **F9** key to validate the name(s).

If the addressee’s name is spelled as it appears in the NAB, the name will “validate”, expanding to that person’s full name followed by an @ and the appropriate directorate abbreviation.

Fill in the Note Form

 **Press** the **Tab** key to advance to the OFFICE: field.

 **Type** your **office designation** in the OFFICE field.

Note: You will only have to complete this field ONCE; when you create mail in the future, this field will automatically reflect the information you typed the first time. (If you change offices, type over it once.)

 **Press** the **Tab** key to advance to the SUBJECT: field.

 **Type** **Notes Training** as the subject.

 **Press** the **Tab** key to advance to the body.

 **Type “This mail form is used for more casual messages.”**

Note: The body is a rich-text field; you can modify the text, i.e., change the color, font or size of text. You could also add graphics and file attachments.

Note: Tabs are preset at every half-inch. Once you are in the body of the document, the Tab key moves your cursor to the next preset tab (e.g., indents text).

Classification

 **Classify** the **document** appropriately.

Closing and Sending Mail

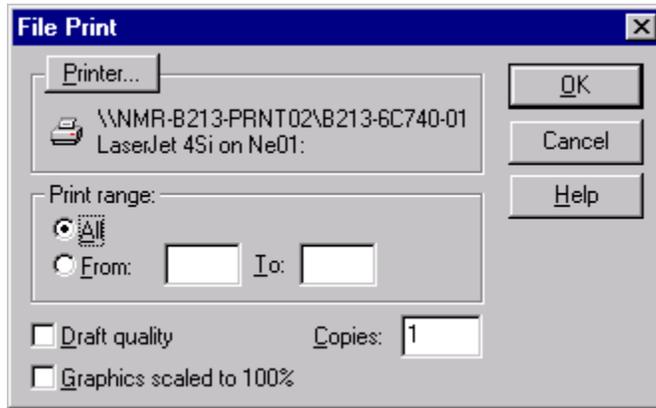
 **Press** the **Escape** key.

 With **Send and keep a copy** selected, **click OK**.
The mail message is sent and there is a copy of it in your mail database.

Printing Mail Messages

Print an Open Document

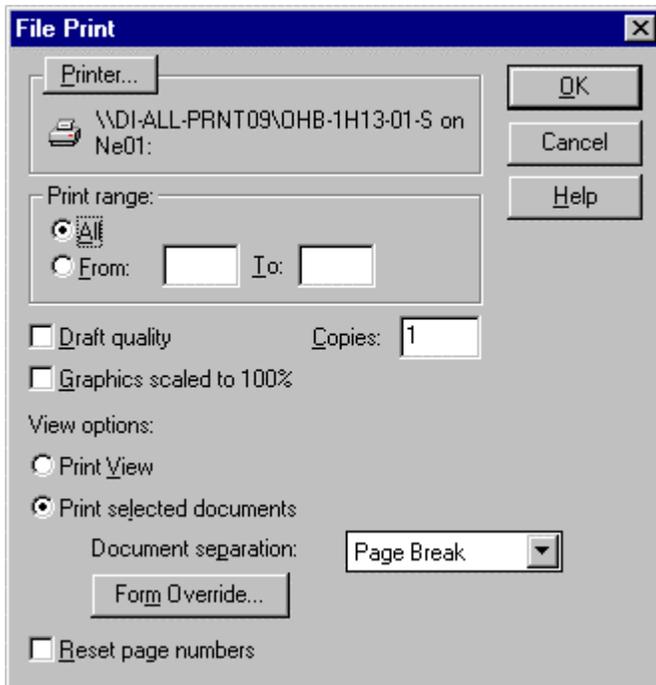
- With a document open, choose the **File, Print...** command.
The File Print dialog box displays:



- Click **OK**.

Print a View

- From a View, choose the **File, Print...** command.
The File Print dialog box displays.



- Select the **Print View** check box, then *click OK*.

UNCLASSIFIED

Note: When you print a view, the printout contains the list of the documents - *not* the contents of the documents.

Note: Refer to Appendix B for instructions on how to classify the printed View.

UNCLASSIFIED

Sending an IC E-Mail

Create an IC E-Mail

IC E-mail is the Intelligence Communities E-mail. When sending mail to users outside of NIMA, you will need to use the .ICE Mail Template.



Select **Create, .ICE, Memo...**

The .ICE mail template will appear.



Classify the message appropriately.

ICE Mail Address Format



In the **Memorandum For** field, *type* the user's mail address. *Use the user's Userid, followed by the @ character, followed by the user's organization designator. For example: veachsl@nima. You may need to call the recipient(s) to get their ICE mail address.*



Type a subject for your message in the **Subject** field.



Type the text of your message in the **Body Text** field.



Press the **Escape** key and send your mail message.

Attachments

Attachments

An attachment is a copy of a non-Notes file that Notes couriers from one user to another. The original file is left intact in its original drive and directory. The attachment retains all of its special formatting and structure. Once the recipient stores the attachment separately (detaches it) from the Notes document, he/she can manipulate the file in its host application. Sending attachments eliminates the need for exchanging hardcopy documents or recreating an existing file.

Note: Attachments do not update when the original document is updated or vice versa.

Before You Begin

Close the file that will be attached; it should not be in use at the time it is attached.

You must know the drive and directory where the file is stored.

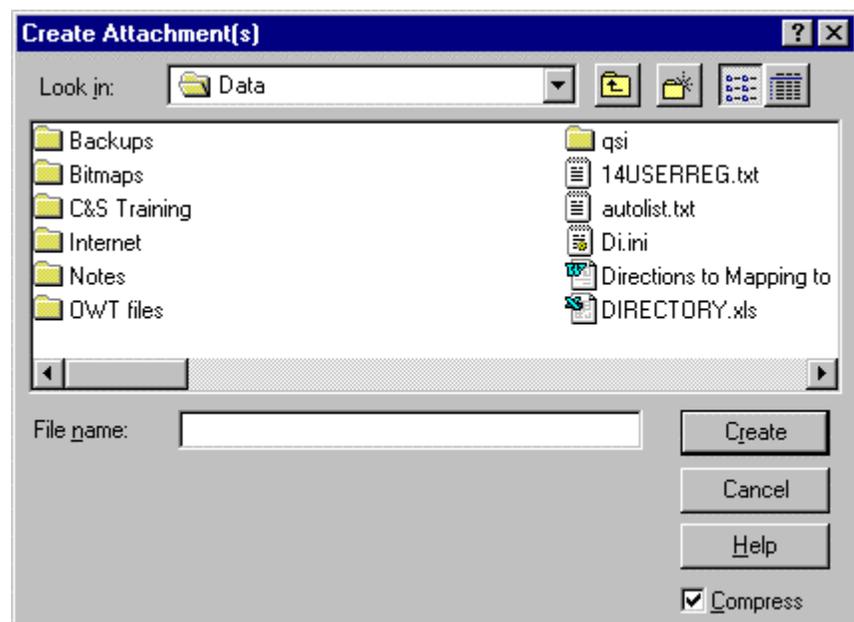
Attach a File

 **Create** a mail message.

 **Click** in the **body** field.

 **Click** the **File Attach** SmartIcon. 

*The **Create Attachment(s)** dialog box displays with the drive, directory, and directory contents shown.*



☞ If necessary, **click** the **Look in: drop-down arrow**, then **select** the **source drive**.

☞ If necessary, **double-click** the correct **directory**.

☞ **Click** the **filename** you need to attach.

Note: If you need to attach several files, and they are within the same drive and directory, select the filenames while holding the Ctrl key.

☞ **Click** the **Create** button.

The file displays in the Notes document as an icon with the document name under it.



DIRECTORY.xls

☞ **Complete and send** the **message**.

When the recipient receives the document, there is an attachment indicator (a paper clip) to the left of the entry in the view.

04/10/2000

Stacey L. Mullins

Lotusphere 2000 Video Tapes Available

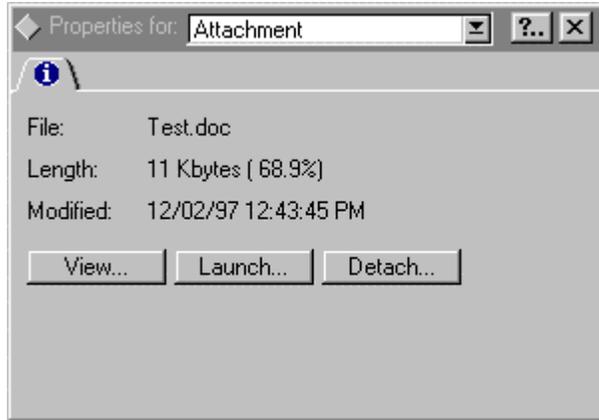
View an Attachment

☞ **Open** the **message** with the attachment.

The attachment displays as an icon within the body.

☞ **Double-click** the **attachment** icon.

*The **Properties for Attachment** dialog box displays:*



- **View** immediately displays attachments in Notes' File Viewer.
- **Launch** displays Excel and PowerPoint attachments in their native application and Word attachments in Word Viewer.
- **Detach** stores the attachment in the location you specify for later use.



Click View...

A Notes window opens displaying the document.

Note: You cannot print from this window.



Press the Escape key to close the window.

Launch an Attachment

 **Open** the **message** with the attachment.
The attachment displays as an icon within the body.

 **Double-click** the **attachment** icon.

 **Click Launch...**

Note: Be patient; initializing the second software application can take a few moments.

The application opens in front of your Notes window and displays the attached document.

Security Note: Make sure that if you launch a Word attachment, you select View from the resulting dialog box! The reason is that a virus scan is not done with Launch, Edit even though all files saved are virus-checked. Security hazard: A user with access to his/her floppy drive could create an attachment from a floppy and mail it. If the recipient selected Launch, Edit, any macros would execute; if a virus resided in the file, it would spread.

If you want to save the attached document for later use in the application in which it was created, you must use Detach rather than Launch.

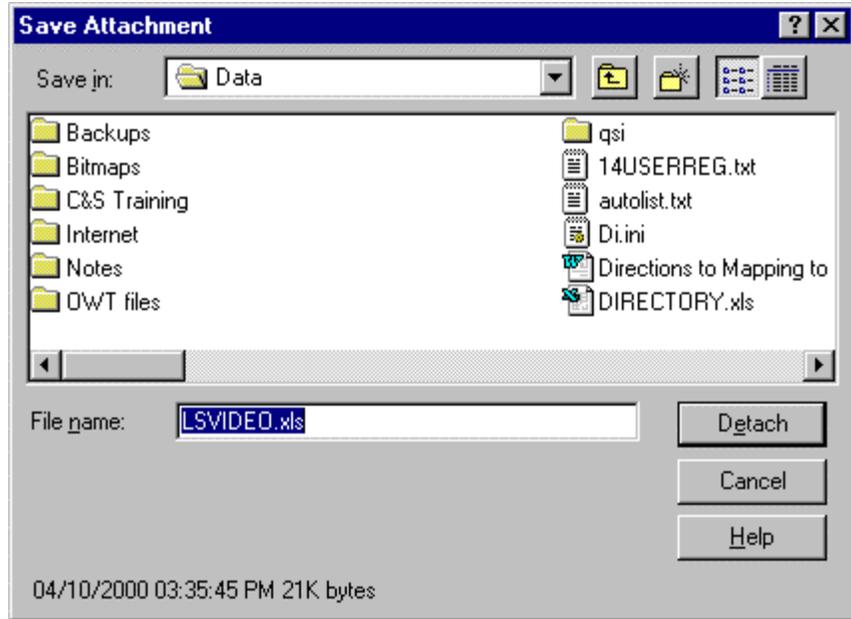
Detach a Document

 **Open** the **document** with the attachment.

 **Double-click** the **attachment** icon.

 **Click Detach...**

The Save Attachment dialog box displays.



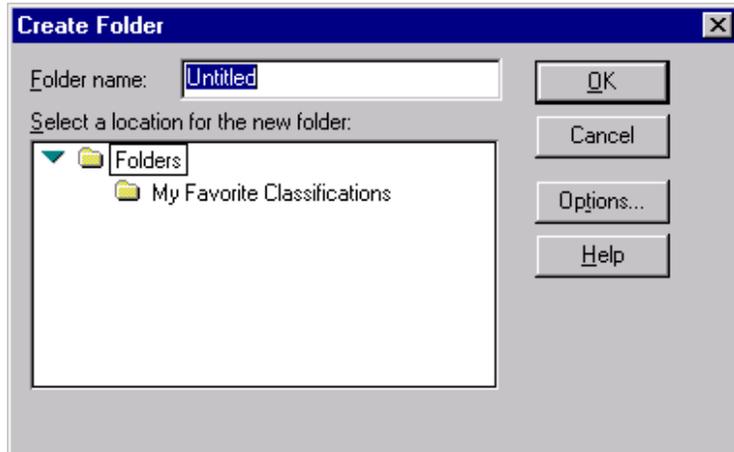
*The current filename displays in the **File name:** field. You can change it if you want to.*

- ☞ If necessary, **change** the **destination drive and directory** where you want to store the attachment.
- ☞ **Click Detach.**
A copy of the attachment is stored in the specified location. If a file exists with the same filename, Notes prompts you before overwriting it.
- ☞ **Start** the attachment's native **application**, then **open** the **document**.

Creating Folders and Moving Documents

Creating a Folder in your E-mail Database

- ☞ **Select Create, Folder...**
The following dialog box appears.



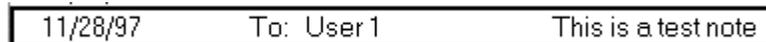
- ☞ In the Folder Name field, *type a folder name*, then click on **OK**.

NOTE: You should see the new folder in the Navigation Pane of your E-mail database.

Select and Move a Single Document to a Folder

To select a single document from the view for some action (for example, to move, print, or delete):

- ☞ **Click the document.**
A rectangle surrounds the document information.



- ☞ **Drag the selected document into the Navigator Pane directly over the Folder you've created.**
The document will be removed from its original location to the new folder.

Select and Move Multiple Documents to a Folder

You can move, print, or delete selected documents as a group. To select multiple documents:

- ☞ *Click in the **left column** next to each document that you need to select.
A checkmark displays in the column to the left of each document selected.*

★	Sheryl L. Veach-Y-	12/04/2000	Training Mail Message
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Note: You can click, hold, and drag the mouse up or down this column to select sequentially listed documents.

- ☞ *Drag any one of the selected documents into the Navigator Pane directly over the Folder you've created.
All selected documents will be moved to the Folder.*

Select All Documents in a View

- ☞ *Click **Edit, Select All**.
Checkmarks display next to all of the documents in the view.*

Deselect a Document

- ☞ *Click the **checkmark** in the left column next to the document.
The checkmark disappears.*

Deselect All Documents

After you display, print, or delete a group of selected documents, it is a good idea to deselect all documents in the view so that another action will not inadvertently be applied to the selected documents.

- ☞ *Click **Edit, Deselect All**.*

Deleting Mail Messages

Why Delete?

As a responsible Notes user, you need to delete documents that you no longer need since the mail server has a finite amount of storage space. Your IS Staff may periodically request that you “clean up” your Notes mail.

Delete a Document

 **Click** the **document** in the view that you need to delete.



Press the **Delete** key.

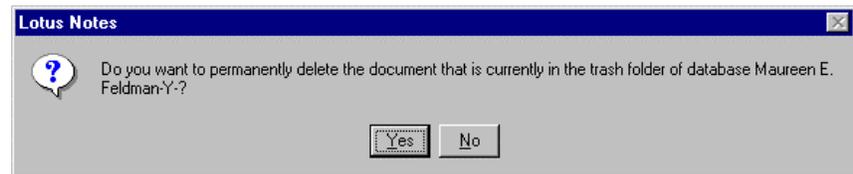
The document is marked for deletion with a trash can icon next to it in the far-left column.

Note: If at this point, you want to “unmark” it for deletion, press the Delete key again.



Press the **F9** key.

F9 is the universal “Refresh” key in Notes that refreshes your screen.



 **Click** **Yes**.

The marked document was permanently deleted.

Note: Notes will display the same dialog box if you close the database without refreshing.

Delete Multiple Documents

 From a view, **click** in the **left column** next to each document that you need to delete.



Press the **Delete** key to mark the documents for deletion.



Press the **F9** key, then  **click** **Yes**.

Note: If you select **No** when prompted to delete the documents, the documents will remain marked for deletion.

Creating Group Address Lists (Personal Groups)

Creating a Personal Group

- ☞ From your Notes Workspace, *open* your **Personal Address Book**.
- ☞ From the left pane, *select* **Groups, Alphabetically**.
- ☞ From the Action bar, *click* the **Add Group** button.

Basics	
Group name:	<input type="text"/>
Group type:	Multi-purpose ▾
Office:	<input type="text"/>
Description:	<input type="text"/>
Members:	<input type="text"/>

- ☞ *Type a name* for your group.
- ☞ *Leave Multi-purpose* as the Group type.
- ☞ *Type an Office designation* and a **description** in the appropriate fields.
- ☞ *Specify* the **members** of your group.
- ☞ *Classify* the document.

Using your Personal Group

- ☞ In the **Note For** field or the **Memorandum For** field, type the Personal Group name.
- ☞ Press **F9** to validate.
All the names associated with the Personal Group will expand.

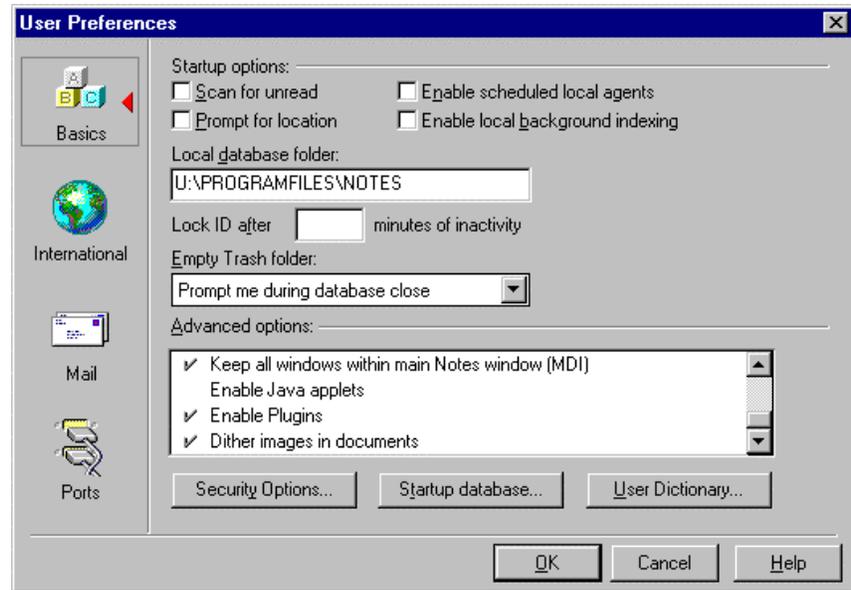
Note: If you cannot remember the name of the Personal Group, choose the Address Book. Select you Personal Address Book, the select the Personal Group.

Customizing your Notes Environment

Change Font Size

Text and icons can be displayed in large or small font. To check the size of your current font:

- ☞ **Click File, Tools, User Preferences....**
The User Preferences dialog box displays.



- ☞ **Click the Basics** button on the left side of the dialog box.
The Basics choices appear and a red arrow points to Basics.
- ☞ **Scroll** in the **Advanced Options** field to find **Large Fonts**.
- ☞ To change the size of your fonts, **select Large Fonts**, then **click OK**.
This change becomes effective the next time you start Notes.

Textured Workspace

You can choose to have a more obvious 3D appearance for your workspace if you are using small fonts. Textured workspace is not available when you display Notes with large fonts. To activate Textured Workspace:

- ☞ **Select File, Tools, User Preferences...**
The User Preferences dialog box displays.
- ☞ **Click the Basics** button on the left side of the dialog box.
*The **Basics** choices display and a red arrow points to **Basics**.*
- ☞ **Scroll** in the **Advanced Options** field to find **Textured Workspace**.
Note: If Textured Workspace does not display in the list, you must deactivate Large Fonts, close and reopen Notes, then return to the User Preferences dialog box.
- ☞ **Click Textured Workspace**.
*A checkmark displays to the left of **Textured Workspace**.*
- ☞ **Click OK**.
Your workspace is now shown with a textured background and a more obvious 3D appearance for database icons.

Display Database Server Names

Every database is located on a server. If you want the server name to appear on the Database icons, from your Workspace page:

- ☞ **Select View, Show Server Names**.
Server names display on every database icon on every workspace page. This option remains in effect until you change it.

Display Unread Count

The **Unread** indicator appears in red on the database icons. It tells you the number of unread documents in the database. To display this indicator, from your workspace page:

- ☞ **Select View, Show Unread**.
A box with a red number or black zero appears on every database icon on every workspace page. The unread indicator remains on unless you change this option.

Update the Unread Count The unread indicator on databases (including your mail database) does not automatically update. To see the latest number of unread documents in databases from your workspace:

 **Click View, Refresh Unread.**

or

 **Press the F9** function key.

The unread count indicator for every database on the workspace page is updated.

APPENDIX A: ACCESSING ONLINE HELP

Help--About This Database Document

Discussed in Module 1, the **Help--About This Database** document displays the first time you open a database. This document contains important information about the database - how the database should be used, who has access, and the database manager's name and telephone number. This document does not open automatically subsequent times that you open the database. To view it, select **Help--About This Database**.

The F1 Key

The **F1** key always accesses Help in Notes. When you press **F1**, Notes displays context-sensitive help for your current location.



Press F1.

A Help window displays on the screen.



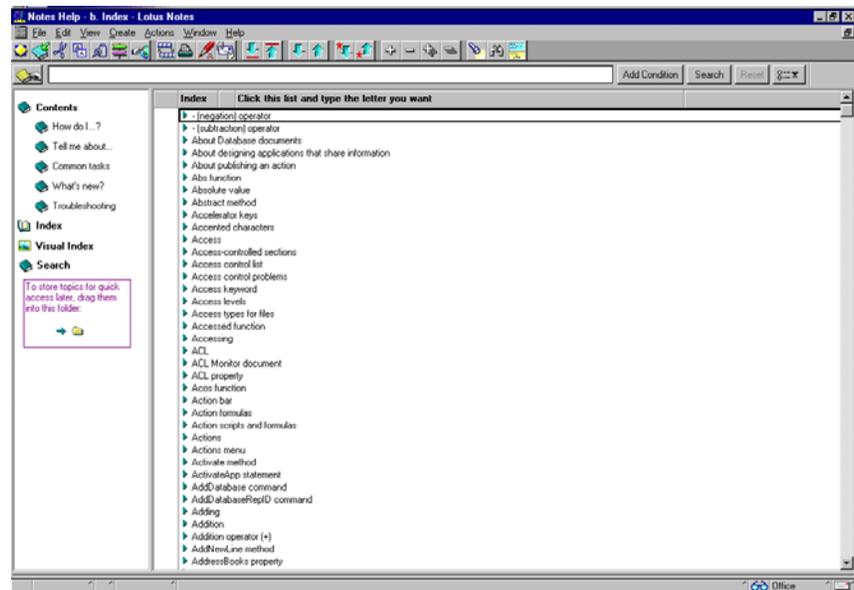
Press Escape to close it.

Help Topics



Select Help, Help Topics.

The first page of the Help Index displays. Help topics display as category names listed alphabetically.



Scroll through the list to find the desired topic.

To expand the category and display a Help document:

☞ **Double-click** to expand the **category** in which you are interested.

☞ **Double-click** the **Help** document you would like to see.

Note: The first time you access Help, the Help database icon is automatically added to the current workspace page.

Hotspots

Hotspots are another source for help in Notes. They are displayed as text with a green box around them:

This is a Hotspot

☞ **Click and hold** the **mouse pointer** on the hotspot.
The information is displayed in a popup box for as long as you hold the mouse button.

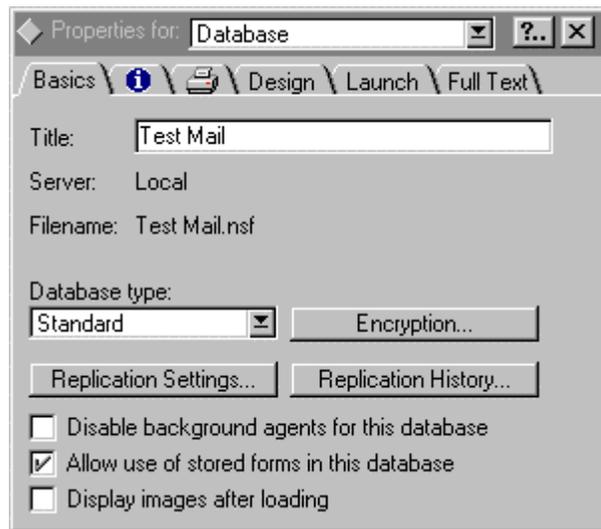
APPENDIX B: ADVANCED PRINTING

Classify Printed Views

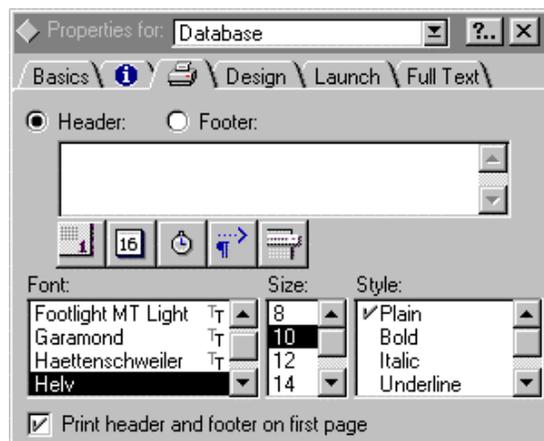
Note: When you print a view from a Notes database, you must first establish the classification in the header and footer. These steps are not necessary when you print individual documents.

☞ From the Notes workspace, **right-click** the database icon.

☞ From the *popup menu*, **select Database Properties....**
The Properties for Database dialog box displays.



☞ **Click** the **tab** with the printer icon.
The printer settings display. Header is selected, and the cursor displays in the field.



☞ **Click** the  button to center the classification.

 **Type** the **classification and controls** as they should appear on the printed view.

 **Click** the **Footer** radio button.

 **Click** the  button to center the classification.

 **Type** the **classification and controls** as they should appear on the printed view.

 If not already selected, **click Print header and footer on first page**.

 **Click** the **X** button in the upper right corner of the dialog box. *When you print a view from this database, the classification and controls will now appear in the header and footer as you typed them.*

Note: Once you have set the classification in the header and footer, you will not need to set it again for this database unless the classification or controls change. These steps must be done on each database from which you print views.