

# GETTING STARTED

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*SmartSuite* Release 3

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# Read Me First

Welcome to Lotus® SmartSuite® — the combination of award-winning Windows™ applications from Lotus Development Corporation.

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## How to use this book

*Getting Started* (the book you are now reading) provides information about the contents of the SmartSuite package, system requirements for running SmartSuite, and instructions for installing the individual applications included in SmartSuite.

**Note** The installation information found in the documentation for individual applications has been combined in this comprehensive *Getting Started* book for SmartSuite. When you see installation instructions in the *User's Guides 1-2-3*®, *Freelance Graphics*®, *Approach*®, *Ami Pro*®, or *Organizer*™, refer to this book instead.

## Who should read this book

All users of SmartSuite should read *Getting Started*. If you are using Windows for the first time, you may want to read the chapter covering basic skills in the *Windows User's Guide* before installing SmartSuite. This book assumes you know how to perform basic operations with your computer in the Windows™ environment.

## Conventions used in this book

*Getting Started* uses the conventions below to indicate notes and tips.

**Note** introduces additional technical information about a command or procedure.

**Tip** introduces additional information you may find helpful when you perform a command or procedure.

*Getting Started* uses the conventions below for key names and information you type.

- Key names appear in small capitals. For example, **ENTER**.
- Information that you are to type appears in a different typeface. For example, Operating Expenses.

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## Steps to get going

Listed below are the recommended steps for using the information in this book. The remaining sections of this book follow the sequence described below and describe what's new in SmartSuite as well as some working together examples.

- Check your package to make sure you received the complete SmartSuite.
- Register as a SmartSuite user.
- Confirm that your computer meets the system requirements for SmartSuite.
- Install the SmartSuite applications. You can install all the applications at once or choose the ones you need at this time. You can always use the Install program again to install the applications you didn't the first time.
- Lotus 1-2-3 for Windows
- Lotus Ami Pro for Windows
- Lotus Freelance Graphics for Windows
- Lotus Approach for Windows
- Lotus Organizer for Windows
- Lotus SmartCenter for Windows
- Lotus ScreenCam for Windows
- Install any additional components included in SmartSuite. From time to time Lotus may include additional software in SmartSuite. When this happens, installation instruction will be included in the software documentation.

When you finish these steps you will be ready to use your SmartSuite software.

## 2 Getting Started/Working Together Guide

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## Checking your package

This section lists the contents of your SmartSuite package. Check the contents of your package against the following lists. If your package is not complete, contact your computer dealer or supplier.

### Disks

Your SmartSuite package should contain a set of 3.5" high-density disks.

### Documentation

SmartSuite includes the following documentation:

#### SmartSuite

- *Getting Started/Working Together Guide* (this book)

#### 1-2-3 for Windows

- *User's Guide*

#### Ami Pro for Windows

- *User's Guide*
- *Style Sheet Guide*
- *Working Together Bonus Pack Manual*
- *Quick Reference Card*

#### Freelance Graphics for Windows

- *User's Guide* (in some locales, this is called *Guide to Freelance*)
- *SmartMaster™ Sets and Symbols*
- *Quick Reference Card*

#### Approach

- *User's Guide*

#### Organizer

- *User's Guide*

### Other contents

Your SmartSuite package also contains the following:

- *Lotus Customer Support Guide* (North America only)
- *Warranty Registration Card* (North America only)

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## Registering as a SmartSuite user

Take a moment to fill out and mail the Lotus Product Registration card to us. Registered users receive.

- **The latest information on product upgrades.** When an upgrade becomes available (and it will — based on customer comments, we frequently issue improved versions of our products), registered users can get it quickly at a reduced price.
- **90-Day introductory access to our technical support service (direct line, not toll-free).** The first time you need technical support, you'll be glad you sent back your card.
- **Replacement disks** if your software ever becomes damaged.

The Lotus Product Registration Card takes only a moment to complete. Please fill out your postage-paid registration card and return it to us today. Or, call 1-800-346-6408 (North America only) to register SmartSuite by phone.

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## System requirements

This section describes the hardware, software, memory, and disk space requirements for using SmartSuite on a standalone computer.

### Hardware

To use SmartSuite you must have the following hardware:

- An IBM PC or compatible (386 or higher) including IBM PS/2 or Compaq
- A VGA (color or grey scale) or higher video adapter
- A mouse

### Software

To use SmartSuite, you must have Windows 3.1 installed on your computer, running with MS-DOS® 3.30 or higher.

### Memory

SmartSuite requires a minimum of 4 megabytes (MB) of random access memory (RAM) to operate one SmartSuite application at a time.

If you plan to use more than one SmartSuite application at a time, your system should have a minimum of 6 MB of RAM, Windows in enhanced mode, and a 6 MB permanent swap file.

## 4 Getting Started/Working Together Guide



## Windows swap file

If you do not already have a permanent Windows swap file, Lotus recommends that you set one up. It should be at least as large as your available system memory. For example, if you have a 6 MB system, you should set up a permanent Windows swap file of at least 6 MB.

For information about creating a permanent Windows swap file, see the Microsoft® Windows *User's Guide*.

## Disk space

Disk space requirements for SmartSuite vary according to which SmartSuite applications and which optional features, tutorials, templates, sample, and demonstration files you install.

You need at least 33 MB of available disk space to install the minimum features of all SmartSuite applications. Lotus recommends 92 MB of available disk space to install all the features, tutorials, templates, sample, and demonstration files, as well as allotting space for temporary files and data files.

You will need less disk space if you choose not to install every SmartSuite application. The table below provides general guidelines for disk space requirements for each application.

<i>Application</i>	<i>Disk Space Requirements</i>	
	<i>Minimum</i>	<i>Default</i>
1-2-3 for Windows	11.0 MB	23.0 MB
Ami Pro for Windows	4.0 MB	16.5 MB
Freelance Graphics for Windows	6.4 MB	23.0 MB
Approach for Windows	8.5 MB	19.0 MB
Organizer for Windows	1.5 MB	2.3 MB
SmartCenter for Windows	.8 MB	8.0 MB
ScreenCam for Windows	1.0 MB	1.0 MB
Total	33.2 MB	92.8 MB

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## What to do next

Now you are ready to begin installing SmartSuite applications. You can install all the applications at once or choose the ones you need at this time. You can always run Install at another time to install the applications that you didn't the first time. For more information, refer to Chapter 2, "Installing SmartSuite Applications."



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# Installing SmartSuite Applications

This chapter describes how to install each SmartSuite application. Remember, you can install the applications in any sequence.

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## Installing SmartSuite

The Install program transfers the SmartSuite application files to your hard disk or to the network server. All standalone and network installation information is available online.

You can read or print all the online information before you actually install SmartSuite. Start the installation, click the Help button the first time it appears, display and print the desired Help topics, and then exit the Help window. You can now proceed with the installation or exit the Install program by clicking the Exit Install button.

### To start the installation

The instructions that follow assume that you are starting the Install program from a high-density A drive. If you start Install from another drive, substitute the letter of that drive in the installation instructions. You will need to open the Install program from the Windows (Version 3.1 or higher) Program Manager running with DOS version 3.30 or higher.

1. Insert Install Disk 1 in drive A and close the drive door.
2. Start Windows and open the Program Manager.
3. Choose File - Run.
4. Type a:install.
5. Click OK.

### To get Help while installing SmartSuite

While you're installing SmartSuite, you can get Help about the options in each Install dialog box.

- You can access the information by clicking the Help button.
- You can print any Help topic by choosing File - Print Topic when the topic is displayed in the Help window.

- You can close the Help window and return to the dialog box by choosing File - Exit or pressing ESC.

**Tip** If you display the Installation Help Contents topic, you can view a list of all the Help topics. You can then choose the topics you want to display and print.

### **To install over a previous release**

If you have previous releases of SmartSuite applications on your computer, you should install over them. You do not need to delete any files before you start the installation. However, you must have read-write access to your SmartSuite applications directories and their subdirectories.

### **To install on a network**

Complete information about installing SmartSuite on a network is available in both the *Network Administrator's Guide* file, READNET.TXT, located on Install Disk 1, and the Install Help screens.

To install on a network server, make sure you are logged in as the network supervisor, and click Install on a file server check box located at the bottom of the Welcome screen.

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# What's New

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## What's new in SmartSuite 3.0?

From desktop to workgroup, SmartSuite gives you all the tools you need to produce results faster and easier than before. SmartSuite helps you to work effectively as part of a team or on your own. It has features that help you to coordinate, collaborate, and communicate with team members. With SmartSuite you get faster results, task-oriented integration, and Notes-enabled workgroup computing.

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## SmartCenter

With SmartSuite 3.0, your applications are just a mouse click away. Lotus SmartCenter™ lets you easily start and switch between applications and provides you with access to SuiteAnswers™ — our cross-application Help center.

- **Navigation:** Start and switch between any application on your PC. SmartCenter even knows about applications that you loaded prior to running SmartCenter.
- **Fully customizable:** Add any application to the SmartCenter menu or icon palette. As with SmartIcons®, you can rearrange icons by dragging them to different positions on the palette.

## SuiteAnswers

SuiteAnswers provides user assistance for cross-application tasks while Working Together® with SmartSuite products. SuiteAnswers includes the following:

- **SmartSuite Guided Tour:** Gives you an animated overview of SmartSuite 3.0. Choose the tour to watch the magician explain and demonstrate how the applications work together.
- **Help Cards:** Offers step-by-step procedures to guide you through common cross-application tasks.

- **SmartSuite Movie Guide:** Lets you select and play “how to” ScreenCam™ movies. Support organizations and users can add their own ScreenCam movies to SmartCenter to provide animated help on difficult tasks or specialized applications.

**Note** Ami Pro contains an icon located on the Bonus Pack SmartIcons set called the Lotus Application Manager. The Lotus Application Manager displays icons that let you start any installed Lotus application for Windows just like SmartCenter icons; however, you can use this feature only in Ami Pro. SmartCenter icons replace the Lotus Application Manager icons, and let you start applications wherever you are.

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## Integration

Lotus offers a task-based approach to integration that enables you to focus on the task at hand.

**Using Lotus Approach with 1-2-3:** Approach 3.0 has been designed to complement 1-2-3 so that you can now analyze and manage worksheet data using Approach features. Explore new ways of working with your data using Approach forms, reports, dynamic crosstabs, and mailing labels accessed directly from 1-2-3 menus. When you install Approach on your system, 1-2-3 will automatically add new menu choices giving you dynamic access to these features in Approach. Complementary integration is an innovation unique to SmartSuite.

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## Ease of use

SmartSuite gives you all the tools you need to produce results faster and easier than before.

**SmartMaster templates:** 1-2-3, Approach, and Freelance Graphics all provide SmartMasters: predesigned templates that streamline preparation of budgets, tracking expenses, customer lists, forms, reports, presentations, and more.

**Smart Assistants:** 1-2-3 and Approach share Smart Assistants that use dialogs to step you through building a chart or querying a database.

**Fast Format:** 1-2-3, Approach, and Ami Pro share fast format, to help you duplicate desired text attributes with just a click of the mouse.

**SmartIcons:** All SmartSuite applications now have bubbles containing icon descriptions. Simply move your mouse across an icon and quickly see what the icon does. Once you know the descriptions, you can turn the bubbles off. You can still access this help by clicking the right mouse button over an icon. SmartSuite applications now also include a common default SmartIcons palette.

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## Workgroup computing

SmartSuite lets you focus on the needs of teams as well as individuals to build desktop applications that help teams collaborate, communicate, and coordinate.

### Notes-enabled

Approach, 1-2-3, Freelance Graphics, and Ami Pro all support Notes/FX™ 1.1, Lotus technology for exchanging data between desktop applications and Lotus Notes®.

**Exchanging data between 1-2-3 and Notes:** Notes/FX lets you combine the power of a Notes™ database with a 1-2-3 template. If you have Notes 3.0 or later, you can create applications that use a 1-2-3 worksheet as a template and then store spreadsheet data in a Notes database.

**Exchanging data between Approach and Notes:** Enhance your workgroup's productivity by allowing users to work with Approach from within Notes using Notes/FX. Approach can publish fields and send information to Notes for easy categorization. You can use Approach to open views or forms in a Notes database. Use Notes as a medium for sharing standard reports, forms, and queries created in Approach.

**Exchanging data between Freelance and Notes:** Publish information that describes a presentation through Notes/FX. This information includes: the subject, description, page titles, page count, size, and date created and last modified. Notes and Freelance Graphics can be used to create a presentation library that can be viewed by subject, author, date created, SmartMaster, or even a user defined field.

**Exchanging data between Ami Pro and Notes:** Exchange three types of data between Ami Pro and Notes via Notes/FX. The first type of data describes the Ami Pro document, which Notes uses to categorize the document in a Notes View. The second type of data is contained in Ami Pro Bookmarks. When used in conjunction with Notes/FX, Bookmarks designate text and table cells that can update a Notes form or be updated by Notes. The third type of data is Doc-Level Variables. Through the Ami Pro macro language, variables can be declared for an individual document.

These variables can participate as Notes/FX fields, so they can be declared from within Ami Pro, used in Notes forms and views, and updated in either Ami Pro or Notes.

**Exchanging data through NotesSQL™ ODBC™:** Both 1-2-3 Release 5 and Approach 3.0 can query and update Notes databases through their support of the NotesSQL ODBC driver. NotesSQL support allows 1-2-3 users to work directly with Notes data in spreadsheets and Approach users to include Notes data in reports and mailings. And, for the first time, Notes users and administrators have powerful, easy-to-use tools for Notes database reports and analysis.

## **Mail-enabled**

SmartSuite applications offer single-click access to Lotus cc:Mail™, Notes, and other VIM or MAPI-compliant mail systems.

**Range and report routing:** You can send a range of worksheet data to other 1-2-3 Release 5 users who use electronic mail. You can send the range simultaneously to everyone in a group, or you can route the range sequentially from one individual to the next in a mailing list. 1-2-3 remembers who sent the range and lets you merge changes into the original file using Version Manager™. Similar to 1-2-3, you can disseminate Approach reports, forms, worksheets, mailings, and crosstabs through any VIM or MAPI-compliant mail system including Lotus Notes and cc:Mail.

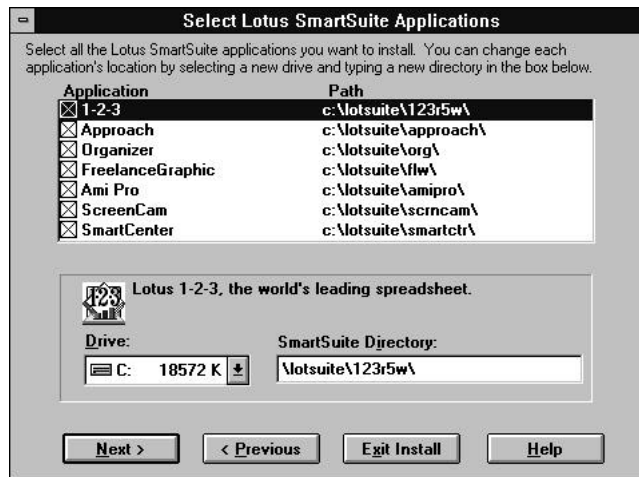
**Mail editor:** Enables you to create mail memos in Ami Pro and mail them directly from the File Send Mail menu to cc:Mail and Notes users as well as other VIM or MAPI-compliant mail users. Ami Pro provides a style sheet for creating mail messages taking advantage of the Ami Pro text editing capabilities. Additional features include the option to copy text from the Ami Pro file into a mail message, attach the Ami Pro file to the mail message, or attach the file in a different file format (including WP, Word, and RTF), as well as an option to suggest that the reply be edited with revision marks.



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## Customizable Install

The SmartSuite 3.0 Install program lets you install all SmartSuite applications at once on a standalone, network, or node machine.



**Single Install program:** SmartSuite now has a single Install program that quickly and easily installs all SmartSuite products, or any parts of the product you choose from a single location.

**Customizable:** Customize Install for greater control over server and node installations.

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## Lotus ScreenCam

ScreenCam is a multimedia screen and sound capture utility designed to enhance learning and informal, everyday communication. With ScreenCam, you can record, distribute and play back multimedia screen movie files. ScreenCam captures sound as well as screen activity. It creates one integrated file for easy distribution. Unlike multimedia products requiring significant hardware investments, ScreenCam provides an easy-to-use, low-cost solution.

For more information on what's new in each application, refer to the "What's New" sections of the User's Guides or the online Help in each application.



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# Working Together

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## Using SmartSuite applications together

This chapter shows how you can use SmartSuite applications together to perform common tasks. It also suggests ways you can take advantage of SmartSuite, and where to find more information. SmartSuite provides:

- SmartCenter icons which allow you quick access to all of your SmartSuite applications.
- SmartIcons, which give you quick and consistent access to powerful functions within each application.
- Status bars that let you quickly change styles and settings in your document, spreadsheet, presentation, or database.
- Data sharing between applications using the Windows clipboard, Dynamic Data Exchange (DDE), and Object Linking and Embedding (OLE).

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## Using SmartCenter

SmartCenter gives you single-click access to all your SmartSuite applications. SmartCenter also includes SuiteAnswers, which include Help Cards, ScreenCam movies, and a Guided Tour to provide cross-application assistance.



The SmartCenter icon palette appears in the upper right corner of your screen, but you can move the palette wherever you want.

The first time you start SmartCenter, it automatically adds icons for any Lotus applications you have installed. You can add icons for other applications to SmartCenter, so you can access these applications as well.

If you are in the Welcome dialog box, you can click the Guided Tour button to take a tour of SmartCenter and SmartSuite features.

## Changing the applications SmartCenter displays

You can change the applications SmartCenter displays on the icon palette and menu. To do this follow these steps:



1. Click the SmartCenter icon to display the SmartCenter menu.
2. Choose Customize SmartCenter.
3. Select where you want SmartCenter to display the application. You can select either the icon palette or the menu.
4. Select the check box for the application.



5. To add a new application, click Add Application. Then specify the name of the application, the path for the application's program file, a path for the data files (if necessary), and an icon to display in the palette.

**Note** If your application supports OLE Drag and Drop, click the box to activate it. This feature lets you drag data from the source application to the target application on the SmartCenter icon palette and drop it into that application after SmartCenter starts it.

6. To change the directory SmartCenter uses to search for an application, select the application, click Change Application, and specify the new directory for the application.
7. To remove an application from the list, select the application, click Remove Application, and click Yes.
8. Click OK.

## Changing the SmartCenter Display

You can change the startup, icon palette, and placement options for SmartCenter. To do this follow the steps below:



1. Click the SmartCenter icon to display the SmartCenter menu.
2. Choose Customize SmartCenter.
3. Click the Preferences tab.
4. Select the options you want to use.

**Note** If you want to use large icons, do not anchor the SmartCenter icon palette to the top-right corner of the screen.




## SuiteAnswers




SmartCenter includes three types of assistance, called SuiteAnswers. The type you use depends upon the type of assistance you need.

- **Help cards** — With Help cards, you can get information on SmartCenter dialog boxes by clicking the Help button in each dialog box. You can also get information on how to complete tasks using more than one SmartSuite application.

For example, you can get a Help card that gives you the steps to create a Freelance presentation in an Ami Pro document. To access the Help

cards, click the  and choose How Do I? or Search. Once you are

looking at a Help card you can use  to go back to the main list of topics,  to print the current topic, and  to shrink the display of the Help card.

- **Guided Tour** — The Guided Tour gives you a visual overview of SmartCenter and SmartSuite features. You can access the Guided Tour by clicking  and choosing Guided Tour or by clicking the Guided Tour button in the Welcome dialog box.
- **ScreenCam movies** — SmartCenter comes with three ScreenCam movies: Copying a 1-2-3 range to an Ami Pro table, Copying an Organizer address into Ami Pro, and Creating Approach mailing labels in 1-2-3. You can view these movies or other ScreenCam movies you create yourself by clicking  and choosing Movie Guide or clicking  from the Help cards.

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## Using ScreenCam

Lotus ScreenCam allows you to record, save, and play back episodes of screen activity. You can create movies of screen sessions showing all screen activity and cursor movements, with an optional voice-over narration. Each movie can be

- Saved as a native Lotus ScreenCam movie (.SCM format).
- Saved as a program (.EXE) file, with a built-in playback-only control panel.
- Saved as a soundtrack only (.WAV format) file.
- Embedded in an OLE-capable application.

### Creating a ScreenCam Movie

Follow these steps to create a ScreenCam movie:



1. Start the ScreenCam recorder.
2. Choose File - New.
3. Click either the Microphone button to record sound only, the Camera button to record video only, or the Both button to record both sound and video.
4. Click the Record button to begin recording.
5. To stop recording, click the Stop button.  
You can play the movie back by clicking the Play button.
6. To save the movie:
  - If you want to save the movie as a new file, choose File - Save As.
  - If you want to replace a file you opened using the File - Open command, choose File - Save.
  - If you want to update an embedded movie you opened by double-clicking the ScreenCam icon in another application, choose File - Update.

### Clearing a Movie

If you decide that you don't want the movie you just created, click the Clear button.

**Note** To delete a movie file, use the File - Delete command in the File Manager.

**Tip** To delete a movie object in another application, use the command in that application. (In most cases, you first select the ScreenCam icon, and then choose Edit - Delete, Edit - Clear, or Edit - Cut.)

### **Saving a ScreenCam File**

To save a ScreenCam file, follow these steps:

1. Choose File - Save.
2. Enter a file name.
3. Tab to the box file description and enter a description.

**Note** If you want SmartCenter to display the title of a movie in the Available ScreenCam Movies window in the ScreenCam Movies tab, press **CTRL-BREAK** and then **ENTER** at the end of the first line of the file description. If this is not done, you will only have an 8-character file name as the title of the movie.

4. Click OK.

### **Viewing ScreenCam movies**

You can view ScreenCam movies that come with SmartCenter or ones that you or others create.



1. Click the SuiteAnswers icon.
2. Choose Movie Guide. The Movie Guide will list all the ScreenCam movies in the SmartCenter movie directory you selected.
3. Select the movie you want to view.
4. Click Play ScreenCam Movie.

### **Changing the ScreenCam movies SmartCenter displays**

You can change the movies SmartCenter displays when you select Movie Guide from the SuiteAnswers menu.



1. Click the SmartCenter icon.
2. Choose Customize SmartCenter.
3. Click the ScreenCam Movies tab.
4. To add a location to search for ScreenCam movies, click Add Location and specify a directory.
5. To remove a ScreenCam movie directory from the list, select the directory and click Remove Location.
6. Click OK.

When you select a ScreenCam movie, SmartCenter displays information about the movie in a list box.

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## Using SmartIcons

SmartIcons are a good example of the common appearance and behavior built into SmartSuite applications.

SmartIcons give you single-click access to frequently used features. Many SmartIcons are common to all the SmartSuite applications. They save you time, and when you learn to use an icon in one application, you have learned it for all applications.

Each application also has SmartIcons to perform specific tasks.



To display the description of the function or command the SmartIcon represents, position the mouse pointer over the desired icon and the icon's description appears in a bubble. Once you know the descriptions, you can turn the bubbles off by choosing Tools - SmartIcons and turn off the Show icon Descriptions options. You can still access these descriptions by pressing the right mouse button over an icon.

### SmartIcons help you work fast

With SmartIcons, you focus on your work, not on remembering what you need to do to make things work. To use SmartIcons:

1. Select the data, text, or object the icon acts on.
2. Click the icon.

### You control SmartIcons

To make it easy to get started, each application starts out with a default set of SmartIcons. Once you gain experience, you can:

- Remove SmartIcons you don't use or add SmartIcons from an extensive set of standard SmartIcons.
- Size and move the SmartIcons to any position on the screen.
- Create your own Icons and assign macros to them.

SmartIcons can be accessed by selecting Tools - SmartIcons. SmartIcons can be dragged from the *available* icons on the left and dropped into the current palette on the right. To drag and drop an icon, click and hold down the left mouse button, drag it over to the current palette, and drop it by releasing the left mouse button.



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## Using status bars

The status bar provides shortcuts to functions and commands, and information about the current settings. Status bars allow you to display and change settings, such as font, point size, and the SmartIcons sets. They also give you access to features such as formatting ranges in 1-2-3, paragraph formats in Ami Pro, and page layouts in Freelance Graphics.



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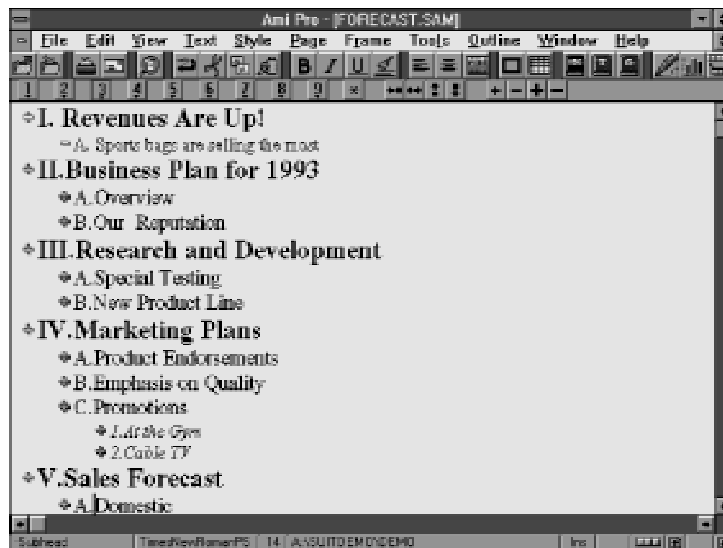
## Sharing data between applications

With SmartSuite, it's easy to share data between applications. You create the data once, then copy, move, link, or embed it wherever it needs to go.

### Outlining a presentation in Ami Pro

Using Ami Pro's outline mode is a great way to quickly generate a Freelance presentation. Use the outline mode to organize your thoughts by entering headings and supporting points and then moving them into the sequence that you want for your presentation.

Or, if you already have a report or white paper that will be the basis for your presentation, choose View Outline Mode to change your view of the paper into an outline format.

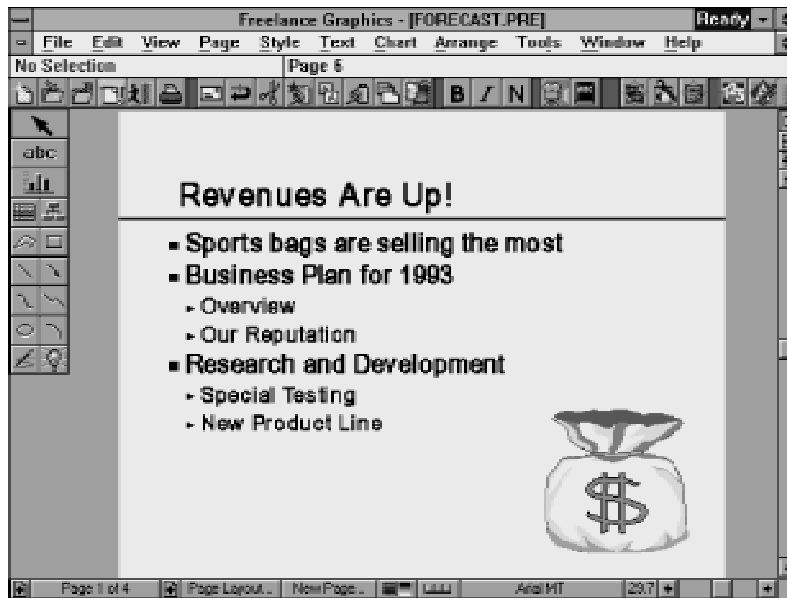


When you are ready to transform your thoughts into a great-looking presentation, follow these steps:

1. Start Ami Pro.
2. Select the outline points you want to include in your presentation.
3. Click the Copy icon, (or choose Edit Copy) to copy your outline to the Clipboard.
4. Start Freelance Graphics and choose the SmartMaster you want for your presentation.
5. Choose View - Outliner and then click the Paste icon, (or choose Edit - Paste).
6. Choose View - Current Page to see the first page of your presentation or View Page Sorter to view all pages at once.

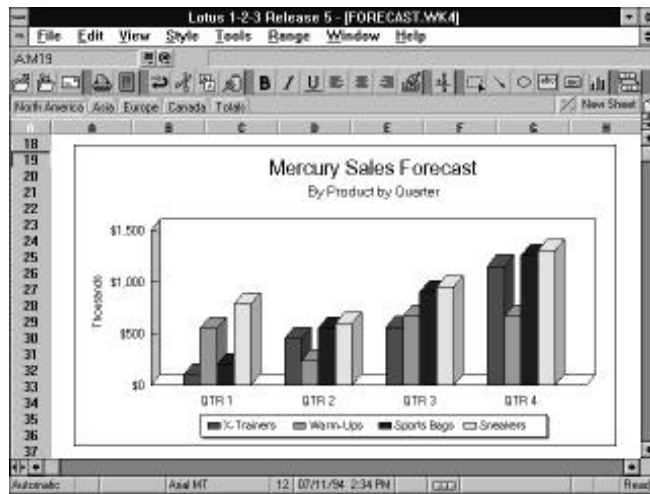


Instantly your outline is transformed into a complete presentation — divided into slides at each major heading, formatted and positioned according to the SmartMaster you selected, and ready to print or be used as a screen show!



## Linking a 1-2-3 chart to a Freelance presentation

Assume you are analyzing data in 1-2-3 and have created the chart below.

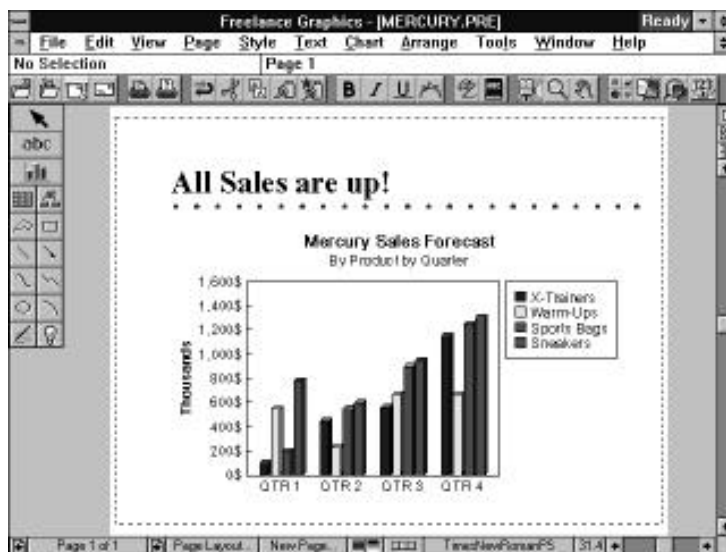


To include the chart in a presentation, follow these steps:

1. Select the chart by clicking it once.
2. Click the Copy icon (or choose Edit - Copy) to place the chart information on the Clipboard.
3. Start Freelance Graphics and open the presentation you want to use for the chart.
4. Click New Page on the status bar and select 1 Chart in the Page Layout dialog box.
5. Click the Paste Special icon (or choose Edit - Paste Special).
6. Highlight 1-2-3 Chart and click Link.



Instantly your chart appears in your presentation. Not only that, but it is resized and reformatted with colors, fonts, and placements that work well with any SmartMaster you choose.



If you choose another SmartMaster, the chart is reformatted to be consistent with your new choice. And if you go back and change the data in your 1-2-3 worksheet, your chart is automatically updated in Freelance Graphics.

Also, you can edit the chart in Freelance Graphics just by double-clicking on it. Freelance takes you into the Chart Data and Titles tool where you can change and add information to the chart.

### Creating a dynamic crosstab with data in a 1-2-3 file

From 1-2-3, you can connect with Approach and create a dynamic crosstab from data in a 1-2-3 database table. A dynamic crosstab is like a pivot table; it lets you reorganize your data by simply dragging. Follow these steps:

1. Select the 1-2-3 database table from which you want to create a cross-tabulation table.  
Be sure to include column headings when you select the database table.
2. Choose Tools - Database - Dynamic Crosstab.

If you did not preselect a database table range, the Crosstab dialog box appears. Select the range and click OK. 1-2-3 starts the Approach Crosstab Assistant.



3. Perform Step 1 and choose fields for the Crosstab's row.
4. Perform Step 2 and choose fields for the Crosstab's column.
5. Perform Step 3 and choose a field for the summary.
6. When you are finished, click Done.  
**Note** You cannot modify data in the crosstab.
7. After you create the crosstab, you can return to 1-2-3 by doing one of the following:
  - To exit Approach, choose File - Exit & Return to Lotus 1-2-3.
  - To leave Approach running in the background, choose File - Close & Return to Lotus 1-2-3.

1-2-3 embeds the crosstab as an icon in the worksheet.

To connect to Approach and open the crosstab again, double-click the icon. If you changed data in your 1-2-3 database table, Approach updates the crosstab.

If you change your database table definition in 1-2-3, you must also change the definition of the range containing the table. For example, if you added a field, you must expand the range definition to include this new field.

For more information about using the Approach Crosstab Assistant, click the ? button in the Crosstab Assistant dialog box.

## Creating mailing labels from a 1-2-3 data file

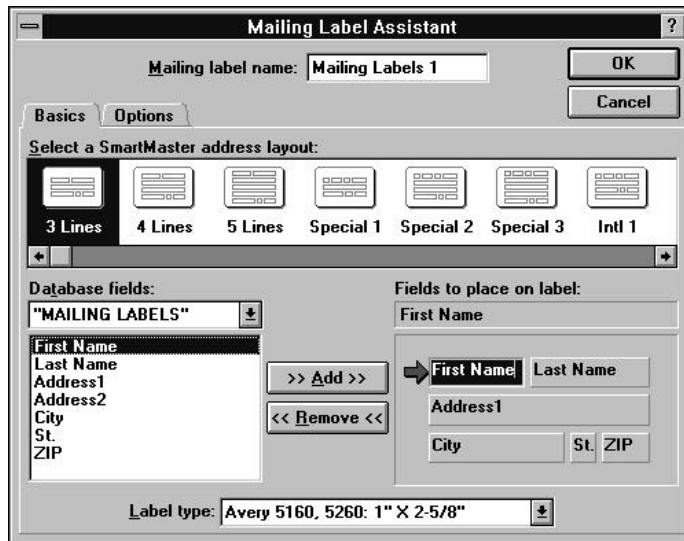
From 1-2-3, you can connect with Approach and create mailing labels from data in a 1-2-3 database table. Follow these steps:

1. Select the 1-2-3 database table from which you want to create mailing labels.

Be sure to include column headings when you select the database table.

2. Choose Tools - Database - Mailing Labels.

If you did not preselect a database table range, the Mailing Labels dialog box appears. Select the range and click OK. 1-2-3 starts the Approach Mailing Label Assistant.



3. Select a SmartMaster layout for the mailing labels, then select and click the Add button for each database field you want to add to the label.
4. Once you have finished, select a label type and any other options you might want and click OK. You can modify data in your Approach mailing labels and these changes will appear in your 1-2-3 database table.

**Note** You cannot modify protected cells or formulas. You also cannot change field definitions while working with data in the mailing labels.

5. After creating the mailing labels, you can return to 1-2-3 by doing one of the following:

To exit Approach, choose File - Exit & Return to Lotus 1-2-3.

To leave Approach running in the background, choose File - Close & Return to Lotus 1-2-3.

1-2-3 embeds the mailing labels as an icon in the worksheet. To connect to Approach and open the mailing labels again, double-click the icon. If you changed data in your 1-2-3 database table, Approach updates the mailing labels.

If you change your database table definition in 1-2-3, you must also change the definition of the range containing the table. For example, if you added a field, you must expand the range definition to include this new field.

**Caution** 1-2-3 allows up to 512 characters in a database table field. Approach allows up to 256 characters in a field. If you refresh the Approach mailing labels, any data longer than 256 characters in a field will be truncated in your 1-2-3 database table.

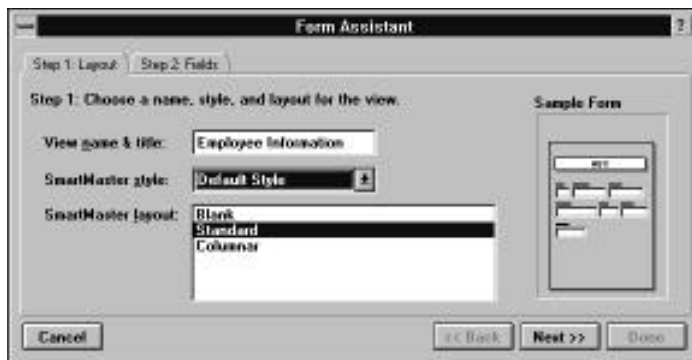
For more information about using the Approach Mailing Label Assistant, click the ? button in the Mailing Label Assistant dialog box.

### Creating a form based on a 1-2-3 data file

From 1-2-3, you can connect with Approach and create a form for viewing and changing records in a 1-2-3 database table. Follow these steps:

1. Select the 1-2-3 database table you want to view in the form.  
Be sure to include column headings when you select the database table.
2. Choose Tools - Database - Form.

If you did not preselect a database table range, the Form dialog box appears. Select the range and click OK. 1-2-3 starts the Approach Form Assistant.



You can modify data in your Approach form and these changes will appear in your 1-2-3 database table.

**Note** You cannot modify protected cells or formulas. You also cannot change field definitions while working with data in the form.

3. After you create the form, you can return to 1-2-3 by doing one of the following:

To exit Approach, choose File - Exit & Return to Lotus 1-2-3.

To leave Approach running in the background, choose File - Close & Return to Lotus 1-2-3.

1-2-3 embeds the form as an icon in the worksheet. To connect to Approach and open the form again, double-click the icon. If you changed data in your 1-2-3 database table, Approach updates the form.

If you change your database table definition in 1-2-3, you must also change the definition of the range containing the table. For example, if you added a field, you must expand the range definition to include this new field.

**Caution** 1-2-3 allows up to 512 characters in a database table field. Approach allows up to 256 characters in a field. If you refresh the Approach form, any data longer than 256 characters in a field will be truncated in your 1-2-3 database table.

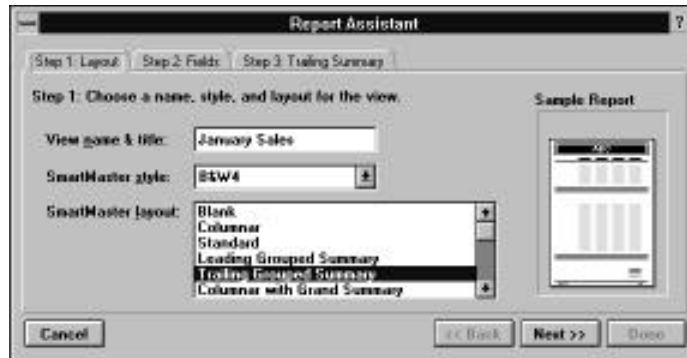
For information about using the Approach Form Assistant, click the ? button in the Form Assistant dialog box.



## Creating a report from data in a 1-2-3 file

From 1-2-3, you can connect with Approach and create a report about records in a 1-2-3 database table. Follow these steps:

1. Select the 1-2-3 database table for which you want a report.  
Be sure to include column headings when you select the database table.
2. Choose Tools - Database - Report.  
If you did not preselect a database table range, the Report dialog box appears. Select the range and click OK.  
1-2-3 starts the Approach Report Assistant.



You can modify data in your Approach report and these changes will appear in your 1-2-3 database table.

**Note** You cannot modify protected cells or formulas. You also cannot change field definitions while working with data in the report.

3. After you create the report, you can return to 1-2-3 by doing one of the following:  
To exit Approach, choose File - Exit & Return to Lotus 1-2-3.  
To leave Approach running in the background, choose File - Close & Return to Lotus 1-2-3.

1-2-3 embeds the report as an icon in the worksheet. To connect to Approach and open the report again, double-click the icon. If you changed data in your 1-2-3 database table, Approach updates the report.

If you change your database table definition in 1-2-3, you must also change the definition of the range containing the table. For example, if you added a field, you must expand the range definition to include this new field.

**Caution** 1-2-3 allows up to 512 characters in a database table field. Approach allows up to 256 characters in a field. If you refresh the Approach report, any data longer than 256 characters in a field will be truncated in your 1-2-3 database table.

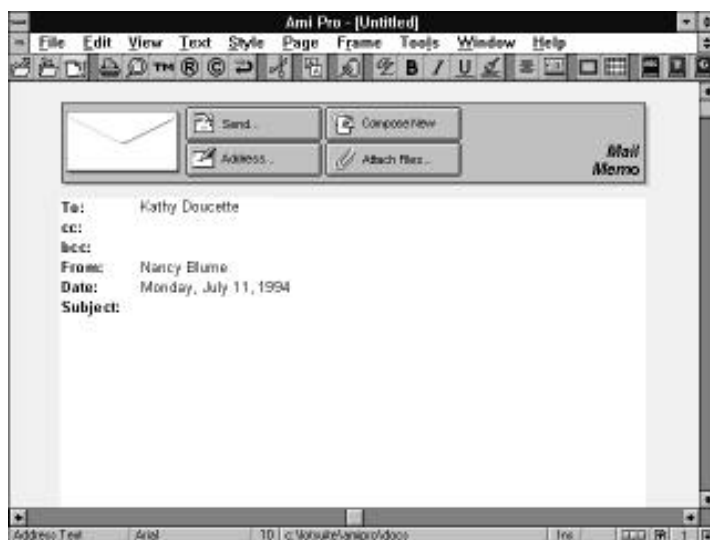
For more information about using the Approach Report Assistant, click the ? button in the Form Report Assistant dialog box.

## Using Ami Pro as a mail editor

You can compose, send, and reply to a message through Notes or cc:Mail without exiting Ami Pro.

### To compose a new mail message

You can use Ami Pro's word processing capabilities to create mail messages using the Send Mail Memo style sheet.



1. Choose File - Send Mail - Compose Mail Message.

**Note** If you want to compose and send a different mail message while you are composing the current message, you can choose Compose New and Ami Pro launches a separate Send Mail Memo style sheet. After you compose and send the mail message, you can return to the unfinished message.

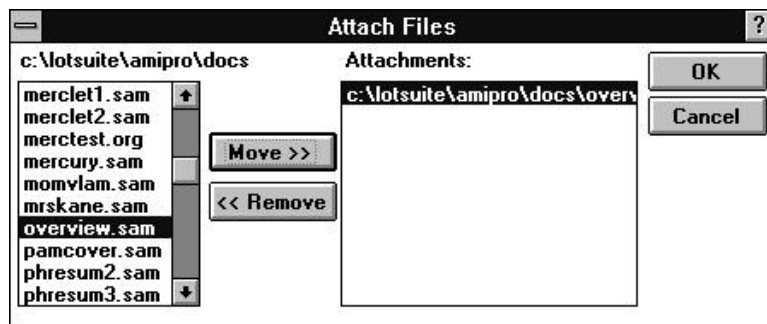
2. Type the address information and the body of the memo.

**Note** Instead of typing address names, you can address your mail message using the Address option that Ami Pro provides with the Send Mail Memo style sheet. For more information, refer to “To address the mail message” in this booklet.

### To attach a file to the mail message

You can attach a file to the mail message you are creating.

1. After you have composed the mail message, click Attach Files.
2. Select the drive, directory and the file you want to attach and click Move.



**Note** In the file list box, you may have to scroll to the bottom of the list to select a drive and directory.

3. Repeat step 2 for each file you want to attach to the mail message.
4. Click OK.

Ami Pro attaches the file with the message you create. When you send the message, the attached file is sent with it.

### To address the mail message

Instead of typing address names, you can address your mail message using the Address option Ami Pro provides with the Send Mail Memo style sheet.

1. After you have composed the mail message, click Address.
2. Select an Address Book.
3. Select a name to insert into mail message and click Add.
4. Repeat this procedure for each person who is to receive the mail message.
5. Click OK.

Ami Pro addresses the mail message with the names you selected in the Address dialog box.

### To send the mail message

When you send a mail message, Ami Pro creates file attachments for the person receiving the message.

The MAILMEMO.SAM file attachment is the mail message with Send Mail options. This file attachment is mailed with the message when you select “attach current Ami Pro document” in the Send Mail option dialog box.

1. After you compose and address the message, click Send.

**Note** You can also choose File - Send Mail - Mail.

2. Select the desired options.

<i>Send Mail Options</i>	<i>Description</i>
Log (Save) message	Copies and saves the message you created in Ami Pro to either Lotus Notes or cc:Mail.
Return receipt requested	Returns a receipt to the sender when the receiver opens the message.
Priority	Delivers the message with a priority of normal, low, or urgent.
Display memo text in E-mail message	Copies the message contents into the memo area of the Lotus Notes or cc:Mail message.
Send this memo as an Ami Pro attachment	Copies the message as a file attachment, MAILMEMO.SAM, into the Lotus Notes or cc:Mail message.
Send this memo as an attachment in different format(s).	Converts this memo to selected file format(s) and attaches the converted file into the Lotus Notes or cc:Mail message.
Suggest that receiver use Revision Marking	Suggests that the person opening the Ami Pro file attachment should use revision marking when changing the message.

3. Click OK.

**Note** If you want Ami Pro to automatically choose the options you selected each time you send a mail message, choose Make Default.

Ami Pro informs you when the message has been sent and if any problems occurred during the process.

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## Replying to Ami Pro mail messages

You can reply to an Ami Pro mail message through Notes or cc:Mail. You can also save your response in Ami Pro as you would with any other document.

### To reply to an Ami Pro mail message

1. Using Notes or cc:Mail procedures, open the mail notification.  
Once you open the mail notification, Ami Pro starts and opens the message with the Send Mail Memo style sheet. The person who creates the mail message determines how the message appears.
2. Double-click the file attachment MAILMEMO.SAM.  
Ami Pro displays the mail message with the Send Mail Memo style sheet.
3. Select the appropriate Reply Option.

<i>Reply Options</i>	<i>Description</i>
Reply	Allows you to create a response to the person who sent you the mail message.
Reply to all	Allows you to create a response to the person who sent you the mail message and any other people listed in the address.
Reply with History	Allows you to create a response to the person who sent you the mail message with a copy of the original message.
Reply to all with History	Allows you to create a response to the person who sent you the mail message with a copy of the original message. The response and the original are also sent to any other people listed in the address.
Forward	Forwards the mail message to the person you specify in the address.

**Note** Once you select a reply option, Ami Pro changes the reply options to send options.

4. Type your response.
5. Click Send from the mail memo options.
6. Specify Send Mail options.
7. Click OK.  
Ami Pro sends your response to the appropriate people.

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## Integration among SmartSuite applications

The Ami Pro Working Together Bonus Pack is a unique set of SmartIcons designed to enhance the integration among SmartSuite applications.

These SmartIcons are a collection of tools to simplify the process of sharing information across applications, and using functions from one application while working within another.

You can use the status bar or SmartIcons dialog box to select the Working Together Bonus Pack icon set. Follow one of these procedures:

### To use the status bar

1. Click the SmartIcons button in the status bar.
2. Choose the Bonus Pack set of SmartIcons:



### To use the SmartIcons dialog box

1. Choose Tools - SmartIcons.
2. Select the Bonus Pack set of SmartIcons.
3. Click OK to return to the document.

The following sections describe several of the Bonus Pack Tools.

## Collect & Copy for 1-2-3

Collect & Copy for 1-2-3 enables you to quickly and easily collect several ranges of 1-2-3 data and arrange and print them all on one page of an Ami Pro document. The ranges can be discontinuous, from one or several files, and can contain numeric data or charts and graphics. The ranges are linked to the original spreadsheet so that navigation back to the spreadsheet is only a double-click away.

### To add Collect & Copy to the icon palette in 1-2-3

1. Choose Tools - SmartIcons.



2. Drag the Collect & Copy icon from the *available icons* on the left and drop it into the current palette on the right and click OK.

### To run Collect & Copy from 1-2-3

1. Start 1-2-3.
2. Click the Collect & Copy icon.



3. Select the range you want to copy.
4. Click Copy to Ami Pro.
5. Repeat Steps 3 and 4 for each range you want to copy.

You can select ranges from multiple sheets and files, and you can select ranges that include text, data, and graphics.

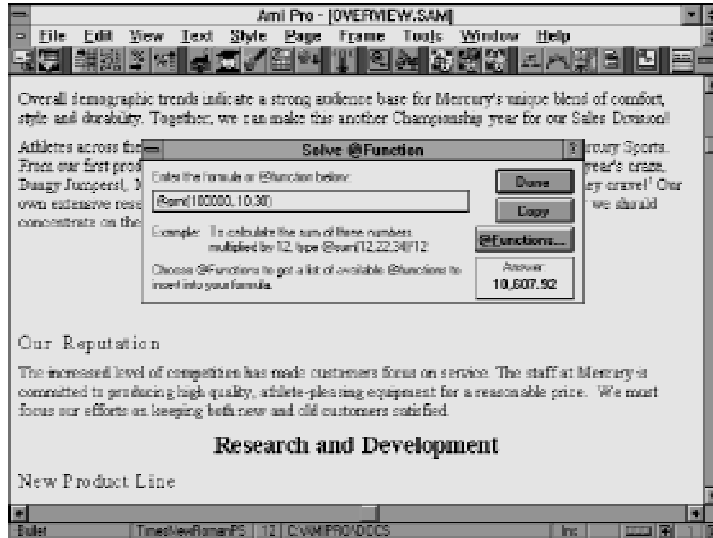
6. Click Done.
7. Click Switch to Ami Pro.

The data can now be processed from the Ami Pro document.

## Quick @Function Calculator

Using the 1-2-3 calculation engine, you can now quickly perform practical calculations within Ami Pro. The Quick @Function Calculator calculates your formula and displays the result in the Answer box. Follow these steps:

1. In Ami Pro, click the @Function Calculator icon.
2. Specify the 1-2-3 @function.



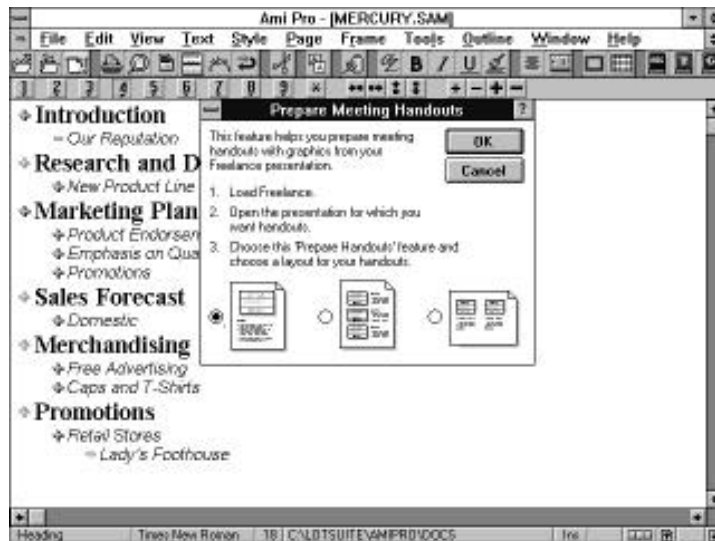
The result displays in the *Answer* box.



## Creating a Freelance presentation from an Ami Pro document

The Automatic Presentation Creator takes an Ami Pro document and creates a Freelance presentation and screen show out of it. You select the text to be included in the presentation and choose the look of the presentation, and Ami Pro and Freelance do the rest. Follow these steps:

1. Open the Ami Pro document from which you would like to create a presentation.
2. Select the text to be included in the presentation.  
If you do not select any text, a message displays and you can specify whether you want to include the entire document in the presentation.
3. Click the Freelance Presentation Creator icon.
4. Select the Freelance background for your new presentation.



Sit back and watch as Ami Pro and Freelance work together to create a screen show out of your document.

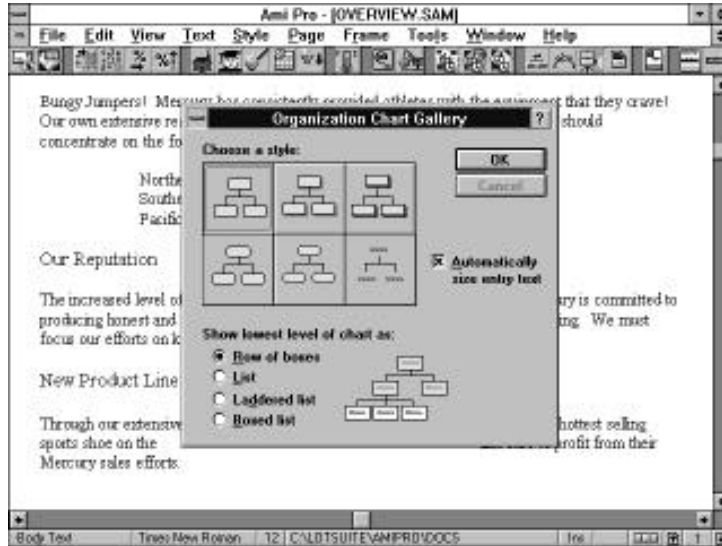
## Inserting a Freelance organization chart into an Ami Pro document

Using the Organization Charting Tool in Freelance, you can quickly insert an organization chart into your Ami Pro document. Follow these steps:

1. Open the Ami Pro document in which you want to include a organizational chart.



2. Click the Organization Charting Tool icon.



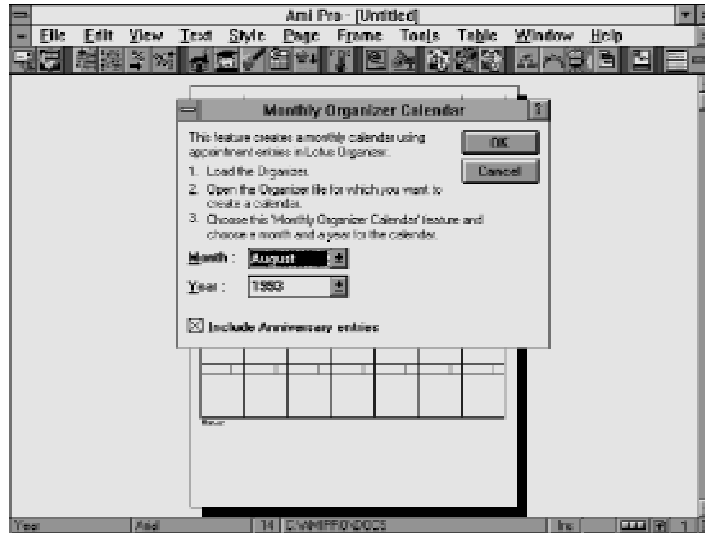
3. Select the type of organization chart you want to create and click OK.
4. Type your organization chart data and click OK.

The Organization Charting Tool creates a frame for the chart and places it into your Ami Pro document. You can copy, move, resize, and modify the frame layout for the chart.

## Creating an Organizer monthly calendar in Ami Pro

Quickly print out a month containing your information with an Ami Pro automated style sheet. You choose the month, and Ami Pro and Organizer will work together to print a calendar with the anniversaries and calendar events stored in your Organizer file. Follow these steps:

1. Start Organizer.
2. Start Ami Pro.
3. Click the Organizer Calendar icon.



4. Select the month and year of the calendar you want to create and click OK.

The Monthly Organizer Calendar generator exports the data from your Organizer file and places it in an Ami Pro calendar. You can then edit, print, and save the calendar.



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## Where to Go from Here

The following pages suggest ways for you to begin using the applications included in SmartSuite. Each application comes with printed documentation and extensive online Help.

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### SmartSuite Help cards

With Help cards, you can get information on SmartCenter dialog boxes by clicking the Help button in each dialog box. You can also get information on how to complete cross-application tasks using more than one SmartSuite application. For example, you can get a Help card that gives you the steps to create a Freelance presentation in an Ami Pro document.

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### 1-2-3 for Windows documentation

1-2-3 comes with the following printed and online documentation:

- The *User's Guide* is a task-oriented book that explains basic concepts, gives you step-by-step procedures for the most common 1-2-3 tasks, and tells you where to look in online Help for information not in the *User's Guide*.
- Online Help documents every 1-2-3 feature, menu command, and dialog box. Help is the primary source for detailed information about @functions and macros. Choose Help - Using Help from the 1-2-3 menu to learn more about Help's features.
- The online Tutorial provides hands-on lessons for using 1-2-3. If you choose to install the Tutorial, it appears in the Help pull-down menu. To start the Tutorial, choose Help - Tutorial.
- The online Guided Tour explores basic concepts and new or enhanced features, such as charting, drawing, macros, working with databases, auditing your worksheets, and managing scenarios. The Tour takes about 30 minutes to complete. To start the tour, double-click the Guided Tour icon in the Lotus Applications window, or the group window that contains 1-2-3. The Guided Tour requires Windows 3.1.

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## Ami Pro for Windows documentation

Ami Pro comes with the following printed and online documentation:

- *User's Guide* provides information about and procedural steps for all Ami Pro functions. Includes a summary of the Ami Pro menus, draw files, and ANSI and ASCII character sets.
- *Style Sheet Guide* introduces style sheets, and provides samples of the Ami Pro style sheets and the paragraph styles they contain.
- *Working Together Bonus Pack Manual* contains examples of integration features that assist you in using the applications in SmartSuite together.
- *Quick Reference Guide* provides a list of SmartIcons, a summary of all status bar, mouse, and keyboard shortcuts, and basic instructions for using frames.
- Online Tutorial provides an overview of Ami Pro features. Use the tutorial to become familiar with the Ami Pro window, SmartIcons, paragraph styles, page layout, frames, pictures, and editing techniques.
- Online Help provides procedural steps for all Ami Pro functions, explanations of all Help messages, a summary of all new features in the software, and documentation for the Ami Pro macro language.

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## Freelance Graphics for Windows documentation

Freelance Graphics comes with the following printed and online documentation:

- *User's Guide* describes, in step-by-step procedures, common Freelance Graphics tasks such as creating a presentation, working with text, and printing a presentation.
- *SmartMaster Sets and Symbols* provides a quick reference to the Freelance Graphics SmartMaster sets, page layouts, and symbols.
- *Quick Reference Card* summarizes Freelance Graphics accelerator keys, SmartIcons, and Toolbox functions. It also provides procedures for performing common Freelance Graphics tasks.
- Online Help, the online reference manual, includes instructions for performing many Freelance Graphics tasks. It also provides context-sensitive help about commands, dialog boxes, and error messages.
- QuickStart, the online tutorial, provides a quick, hands-on, interactive introduction to Freelance Graphics.

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## Approach for Windows documentation

Approach comes with the following printed and online documentation:

- *User's Guide* gives a first look at handling data. There are sections which describe, in step-by-step procedures, common tasks such as creating forms, reports, form letters and mailing labels, as well as exchanging data with other files or applications.
- Online Help, the online reference manual, includes instructions for performing many Approach tasks.

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## Organizer for Windows documentation

Organizer comes with the following printed and online documentation:

- The *User's Guide* explains how to get started, opening and saving files, getting information from Help, and using shortcuts. It provides information on the Organizer sections: Calendar, To Do, Address, Notepad, Planner, and Anniversary as well as more advanced topics such as customizing sections, linking information, and integrating the Organizer with other applications.
- Open the sample files in the \ORGANIZE\SAMPLE directory. These files show you different ways to use the Organizer.
- Use the online Help system. For example, press F1 and find the information you want to look up in the index, or search for a specific topic.