Lotus

SmartSuite 97 Edition

The Best Suite For Today's Connected World — Powered by 1-2-3.

EXPLORING SMARTSUITE

WINDOWS 95 and NT 4.0

COPYRIGHT

Some of the products referenced appear in online documentation.

Contents

31 Creating Databases 31-1

32 Designing and Modifying Views 32-1

43 Getting Started with Organizer ... 43-1

44 Printing in Organizer ... 44-1

45 Customizing Your Organizer Notebook ... 45-1

46 Managing Your Time with Calendar ... 46-1

53 Putting It All Together 53-1

54 Team Computing with Organizer 54-1

55 Organizer Print Layout Guide 55-1

Chapter 1
Read Me First

Welcome to Lotus® SmartSuite® 97 Edition for Windows® 95 and Windows NT™ 4.0 — the combination of award-winning Windows applications from Lotus Development Corporation.

How to use this book

Exploring SmartSuite 97 (the book you are now reading) presents concepts and features of each of the SmartSuite products. Though the book is only around 600 pages, it is designed to give you knowledge of the broad range of ways SmartSuite can help you get your job done. For the how-to information on specific tasks, the book then directs you to the appropriate Help topics through references in the text or through the index.

In addition to presenting the capabilities of each product, you'll find the following topics in this book:

- The contents of the SmartSuite package
- System requirements
- Installation instructions
- Time-saving ways to perform tasks across the SmartSuite applications
- New features in each of the SmartSuite applications
- Instructions for starting each application
- The tools common to all SmartSuite applications and application-specific tools
- Team computing concepts
- New Internet features

Who should read this book

All SmartSuite users should read *Exploring SmartSuite 97*. If you are using Windows 95 or Windows NT 4.0 for the first time, you may want to read the chapter covering basic skills in the Microsoft® Windows manuals before installing SmartSuite. *Exploring SmartSuite 97* assumes you know how to perform basic operations in the Windows 95 or Windows NT environments.

Conventions used in this book

Exploring SmartSuite 97 uses the conventions below.

- **Note** introduces additional technical information about a command or procedure.
- The **For More Information** section directs you to more information in Help.
- Key names appear in small capitals, for example, **ENTER**.
- Information that you are to type appears in a different typeface, for example, Operating Expenses.
-  **Cool tricks** Introduces shortcut tricks or additional information you may find helpful when you perform a command or procedure.

Steps to get going

Listed below are the recommended steps for installing SmartSuite. The rest of this chapter and Chapter 2 follow the sequence described below.

☐ Check your package using the list on pages 1-2 and 1-3 to make sure you received the complete SmartSuite package.

☐ Confirm that your computer meets the system requirements for SmartSuite.

☐ Install SmartSuite. You can install all the applications at once or choose only the applications you need at this time.

☐ Register as a SmartSuite user.

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

Checking your package

Check the contents of your SmartSuite package against the following list. If your package is not complete, contact your computer dealer or supplier or call Lotus Customer Service at 1-800-343-5414.

Disks

Your SmartSuite package should contain one CD-ROM or a set of 3.5" high-density disks.

Other contents

In addition to this book, your SmartSuite package contains the following:

- *Getting the Most Out of LotusScript in SmartSuite 97*
- Lotus Product Registration Card
- *Lotus Customer Support Guide*
- Coupon for the *LotusScript Application Developer's Kit* (see the back cover of *Getting the Most Out of LotusScript in SmartSuite 97)*
- Warranty Registration Card for Canada (North America only)

System requirements

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

Hardware

SmartSuite requires the following hardware:

- An IBM® PC or compatible (486 or higher)
- A VGA or higher video adapter
- A mouse or other pointing device
- One 1.44 megabyte (MB) 3.5" disk drive or one CD-ROM drive

Software

To use SmartSuite, you must have Microsoft Windows 95 or Windows NT 4.0 or later installed on your computer. If you are installing from a CD-ROM, you must have your CD drivers installed and running in Microsoft Windows 95 or Windows NT 4.0.

Memory

Windows 95

SmartSuite requires a minimum of 8MB of random access memory (RAM). 12MB is recommended when you are running more than one application.

Windows NT 4.0

SmartSuite requires a minimum of 16MB of RAM.

Disk space

Disk space requirements for SmartSuite depend on the SmartSuite applications you install. If you are installing from CD-ROM or want to install optional features, such as templates, sample files, and Help, you will need more than the minimum required disk space.

You need at least 82MB of available disk space to install the minimum features of all the SmartSuite applications. To use less than 82MB of disk space, you can choose to install only some of the SmartSuite applications, or you can use the Customize features option in Install to select only the features you want. Lotus recommends you have 133MB of available disk space for the default installation, and 220MB to install all the features, tours, templates, sample files, and Help, as well as to allot space for temporary files and data files.

For more information on disk space requirements for each SmartSuite application, follow the steps below:

1. Insert Disk 1 or the CD-ROM in the appropriate drive.
2. Choose Start - Run from the Windows taskbar.
3. Type *x*:\install (where *x* is the letter of your disk drive or CD-ROM drive).
4. Follow the instructions on the screen until you reach the Install Options dialog box.
5. Choose Customize features - Manual install and click Next.
6. In this dialog box you can select each application individually and then click Customize to see all the specific features and their disk space requirements.

What to do next

Now you are ready to install SmartSuite and register as a SmartSuite user. You can install all the applications at once or choose the applications you need at this time. You can always run Install again to install the applications or features you didn't install the first time. For more information, refer to Chapter 2.

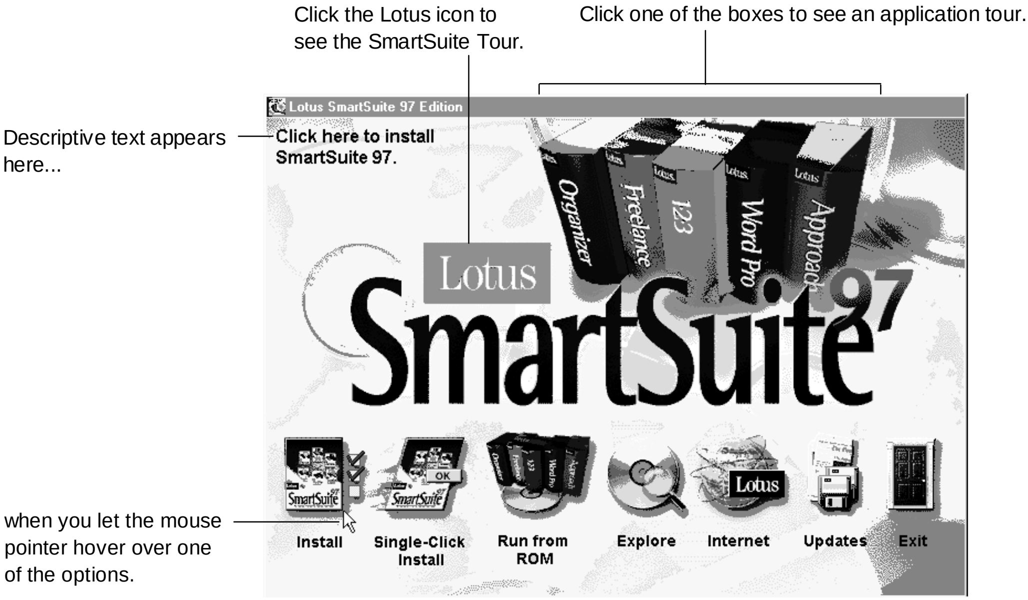
For any technical assistance, see information in the *Lotus Customer Support Guide* on contacting Lotus Customer Support.

Chapter 2
Installing SmartSuite

The SmartSuite Install program transfers the SmartSuite files from disks or a CD-ROM to your hard disk or to the network file server. Install lets you install all SmartSuite applications at once or individual applications as you need them.

Installing from Autorun

If you are a CD user, when you put the SmartSuite CD-ROM in the drive, Autorun automatically starts and you see this screen:



Autorun lets you choose from the following options:

- Install with one click of a button.
- Take the SmartSuite Tour or a tour for each of the applications.
- Choose between installing SmartSuite to your hard disk or running it from the CD-ROM.

- View the contents of the CD using the Windows Explorer.
- Go to the Lotus Web site on the Internet (if you have an Internet connection).
- Read the SmartSuite README.WRI file.

To start Autorun manually

Autorun does not automatically start if SmartSuite 97 is already installed or if you have turned off the autoplay feature in Windows 95 or Windows NT 4.0.

To start Autorun manually

1. Insert the CD-ROM in the appropriate drive.
2. Choose Start **-** Run from the Windows taskbar.
3. Type *x*:\autorun\autorun.exe (where *x* is the letter of your CD-ROM drive).
4. Click OK.

Running Install

When you run the Install program, the Install screens lead you through the SmartSuite directory structure so you know where your files are being placed.

Information about installing SmartSuite on a stand-alone computer is available online in the README.WRI file. Information about network installation is available online in the READNET.TXT file. You can read or print this information before you transfer files.

To read and print the README files

You can read and print information about installing or uninstalling SmartSuite in the README.WRI or READNET.TXT file. Do the following:

1. Insert the CD-ROM or Disk 1 in the appropriate drive.
2. Choose Start - Run from the Windows taskbar.
3. If you are a CD-ROM user, type

   x:\lotus\readme.wri (where *x* is the letter of your CD-ROM drive) to read about installing SmartSuite on a stand-alone computer

   or

   x:\lotus\readnet.txt (where *x* is the letter of your CD-ROM drive) to read about installing SmartSuite on a file server.

   If you are a disk user, type *x*:\readme.wri or *x*:\readnet.txt (where *x* is the letter of your disk drive).
4. Click OK.
5. To print, choose File - Print.

Note You can also read and print READNET.TXT by clicking Open when the Network Administrator's Guide dialog box appears during a network Install.

To get Help while installing SmartSuite

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

- To see information, click Help.
- To print any displayed Help topic, click Print.
- To switch between Help and the Install program, press **ALT+TAB**.
- To return to Install from Help, click the Close button or press **ESC**.

To install on a stand-alone computer

To start the installation

If you choose to install through Autorun, click one of the Install options at the bottom of the screen.

If you install from disk or wish to run Install without Autorun, follow these instructions:

1. Insert Disk 1 or the CD-ROM in the appropriate drive.
2. Choose Start - Run from the Windows taskbar.
3. Type *x*:\install (where *x* is the letter of your CD-ROM or disk drive).
4. Click OK.
5. Follow the installation instructions on the screen.

Choosing default, minimum, or custom Install

There are three types of Install: default, minimum, and custom.

Default Install includes the typical SmartSuite features used by most of the SmartSuite customer base.

Minimum Install installs only the minimum features needed to run each application in SmartSuite. If you are a laptop user with limited disk space, you may want to choose minimum Install.

Custom Install allows you to make your own decisions about disk space and to choose those features you want, including some that do not install with the default Install. For example, using custom Install you can choose to install SmartSuite and application tours, the dictionary for SmartCenter™, an equation editor or grammar checker for Word Pro®, the DocOnline manuals (for CD-ROM users), TeamConsolidate™ in 1-2-3®, and a Notes™ library for Freelance Graphics®.

To install on a network

To install on a network file server, make sure you are logged in as the network administrator. Click the “File server or multiple user install” check box at the bottom of the initial Welcome screen in the Install program.

Information about installing SmartSuite on a network is available in the Install Help screens and the READNET.TXT file. The READNET.TXT file answers your network questions, provides troubleshooting information, and includes information on automated Install, Uninstall, and MLC (multi-lingual computing) Install.

To use automated Install

If you are a network administrator and want to standardize the SmartSuite installation for all the users in your organization, you can use the automated Install option in SmartSuite. To do so, you define directory locations and install options using a response file (.RSP). Automated Install lets you distribute SmartSuite without requiring any user input. To read more about automated Install, see the sample response file, INSTSUIT.RSP, that ships with SmartSuite.

Installing tours and online manuals

SmartSuite includes online tours of each application for all users and online manuals for CD-ROM users. The manuals include: *Exploring SmartSuite 97*, *Developing SmartSuite Applications Using LotusScript*, *Getting the Most Out of LotusScript in SmartSuite 97*, the *LotusScript Programmer's Guide*, and the *LotusScript Language Reference.*

SmartSuite 97 also ships with Adobe Acrobat® Reader 2.1, which lets CD-ROM users view and print the manuals.

If you are a CD-ROM user

To conserve disk space, the default Install program does not automatically install the tours or online manuals to your hard disk. If you are a SmartSuite CD-ROM user, you can view the tour for an application by inserting the CD-ROM in the drive, opening the application, and then choosing Help - Tours from the Help menu. (If you want to view the 1-2-3 Tour, you will need to install it to your hard disk.)

You can view or print the online manuals by choosing the appropriate icon for a manual from the DocOnline folder in the Suite Help drawer in SmartCenter.

If you are a disk user

If you are a disk user and you refer to the tours often, you may want to install them to your hard disk. If you want to view the 1-2-3 Tour, you will need to install it.

To install tours

Use custom Install to install any or all of the SmartSuite Tours:

1. Insert Disk 1 or the CD-ROM in the appropriate drive.
2. Choose Start - Run from the Windows taskbar.
3. Type *x*:\install (where *x* is the letter of your CD-ROM or disk drive).

4. Follow the instructions on the screen until you reach the Install Options dialog box.
5. In the Install Options dialog box, select Customize features - Manual install, then click Next.
6. Select an application whose tour you want to install and then click Customize.

   To install the SmartSuite Tour, select SmartCenter and then click Customize.
7. Select the tour files you want.

   In 1-2-3, click the Help and Samples tab and then select Guided Tour.
8. Repeat steps 6 and 7 until you have installed all the tours you want.

After installation, the tour icons appear in SmartCenter in the Tours folder of the Suite Help drawer.

To Install the Suite DocOnline

Use custom Install to install the Suite DocOnline:

1. Insert the CD-ROM in the appropriate drive.
2. Choose Start - Run from the Windows taskbar.
3. Type *x*:\install (where *x* is the letter of your CD-ROM drive).
4. Follow the instructions on the screen until you reach the Install Options dialog box.
5. In the Install Options dialog box, select Customize features - Manual install, then click Next.
6. Select Suite DocOnline and then click Customize.
7. Click the Suite DocOnline tab and select the manuals you want to install.
8. Click OK.

After installation, the manual icons appear in SmartCenter in the DocOnline folder of the Suite Help drawer. The DocOnline icons also appear on the Start menu in the Lotus DocOnline folder.

To use Uninstall

The Uninstall feature of SmartSuite not only removes the directory for SmartSuite or for a SmartSuite application, but also removes references to the applications in system files.

To run Uninstall

1. Choose Start - Settings - Control Panel from the Windows taskbar.
2. Double-click Add / Remove Programs.
3. From the list, select "Lotus SmartSuite 97."
4. Click Add / Remove.
5. Select the applications you want to remove or select "Uninstall all of SmartSuite applications."
6. Click OK.

You can get more information about uninstalling SmartSuite on a network in the READNET.TXT file, located in the root directory of Disk 1 or on the CD-ROM. See "To read and print the README files" earlier in this chapter.

Registering as a SmartSuite user

If you have a modem, you can register online as a SmartSuite user by completing the electronic forms that appear after you complete installation. You can also fill out the postage-paid registration card and return it to Lotus, or call 1-800-346-6408 in the United States or 1-800-GO-LOTUS in Canada to register by phone. In all other countries, you should contact the local Lotus office, whose phone number is listed in the *Lotus Customer Support Guide*.

Registered users receive the following:

- **Product upgrade information.** When an upgrade becomes available (we frequently issue upgrades of our products based on customer comments), registered users can get it quickly at a reduced price.
- **Replacement disks.** If your distribution disks ever become damaged, Lotus will replace your disks.

Chapter 3
Getting Started with SmartSuite

SmartSuite 97 is a package of software applications that work together to make your work easier and help you communicate more effectively with your coworkers.

SmartSuite includes the following applications:

- **Lotus SmartCenter** 97 Edition for Windows 95 and Windows NT 4.0, the command center that gives you easy access to all your desktop applications and application files
- **Lotus 1-2-3**® 97 Edition for Windows 95 and Windows NT 4.0, the only spreadsheet for you and your team
- **Lotus Word Pro**® 97 Edition for Windows 95 and Windows NT 4.0, the team word processor
- **Lotus Approach**® 97 Edition for Windows 95 and Windows NT 4.0**,** the high-powered database the whole team can use
- **Lotus Freelance Graphics**® 97 Edition for Windows 95 and Windows NT 4.0, the presentation graphics package for everyday communication
- **Lotus Organizer**® 97 Edition for Windows 95 and Windows NT 4.0, the personal information management tool
- **Lotus ScreenCam**® 97 Edition for Windows 95, the show-and-tell communication tool for your personal computer.

What's new in SmartSuite?

SmartSuite is a complete 32-bit Suite, designed with all the features you'll want to meet your business needs.

- **The next generation of 1-2-3** includes Team features, outlining capabilities, HTML publishing, full OLE support, the AutoTotal feature that detects the word *Total* and automatically sums, the InfoBox for one-stop formatting, and other common Lotus user interface tools.

- **Organizer™**, the industry's leading time management software, includes a new, more graphically manipulated Calendar; support for TAPI dialing; animation, sounds and symbols that make Organizer fun to use; and expanded support for international addresses. Notepad now features rich text formatting and container capabilities that let you link and embed OLE objects.
- **Internet features and enhancements**, included in all products, give you built-in access to news, weather, stock quotes, and dozens of links to useful sites directly from SmartCenter.
- **Advanced installation features** let you install with one click of a button or specify the features you want installed.
- **LotusScript®**, an object-oriented programming language, helps you build custom business solutions. LotusScript is BASIC-compatible, which means it is easily integrated with Visual Basic.

SmartSuite is the only office suite that is uniquely designed to take advantage of Lotus Notes®.

Starting SmartSuite products with SuiteStart and SmartCenter

When you install SmartSuite applications, two tools are automatically installed, SuiteStart and SmartCenter. Both tools help you run and use SmartSuite applications.

SuiteStart

SuiteStart is the icon palette that appears in the right-hand corner of the Windows taskbar. To start a SmartSuite application, click its icon in SuiteStart.

To find out which icon goes with which application, let the mouse pointer hover over the icon. The application name appears.

SmartCenter

The file-cabinet drawers of SmartCenter form a command center that organizes your work and reduces desktop clutter. From SmartCenter, you can:

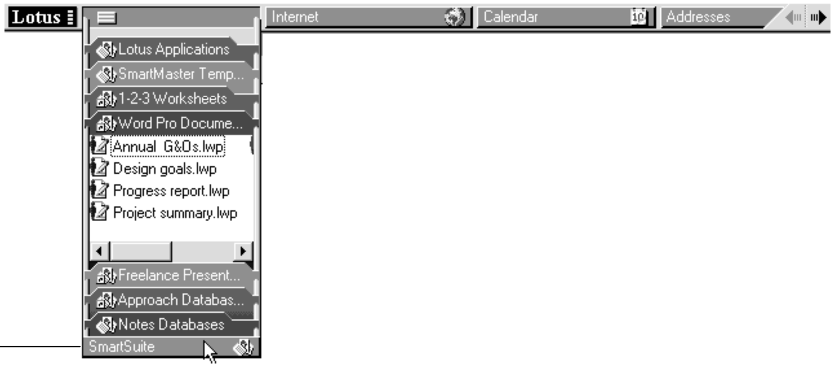
- Start all your SmartSuite applications or files you created in the applications

- Open your Organizer address book and calendar
- Create a reminder list
- Check spelling in the dictionary or synonyms in the thesaurus
- Access the Internet, with direct links to weather forecasts, stock quotes, headlines, and your favorite Web sites
- Get help for performing cross-application tasks and using SmartCenter

SmartCenter initially appears opposite the Windows taskbar and looks like this:

You can anchor SmartCenter to either the top or bottom of the screen. You can also add other, non-Lotus products or files to SmartCenter.

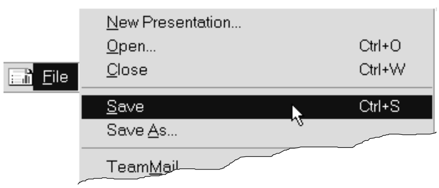
To open or close a drawer, click the front of it.



Click here to close.

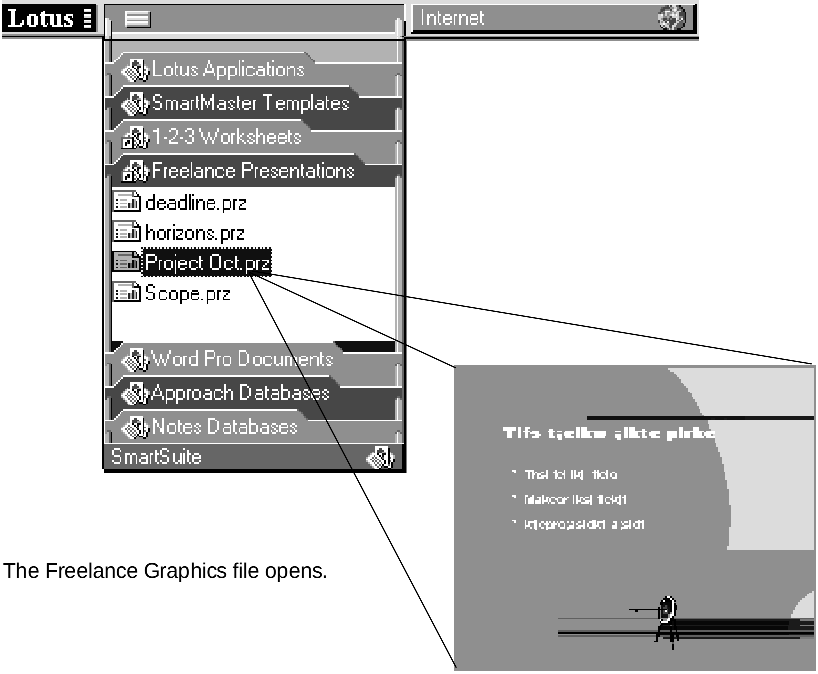
Getting started by saving and opening a file

To save a file you have created in any SmartSuite application, choose File - Save from inside that application.



To open a file you've saved, use SmartCenter:

Open the folder for the product and double-click the file you want.



The Freelance Graphics file opens.

All files you've saved to an application's work directory automatically appear in the corresponding SmartCenter folder. For example, the Freelance Graphics default directory is \lotus\work\flg, and when you save a file to this directory, it also appears in the SmartCenter folder for Freelance Graphics.

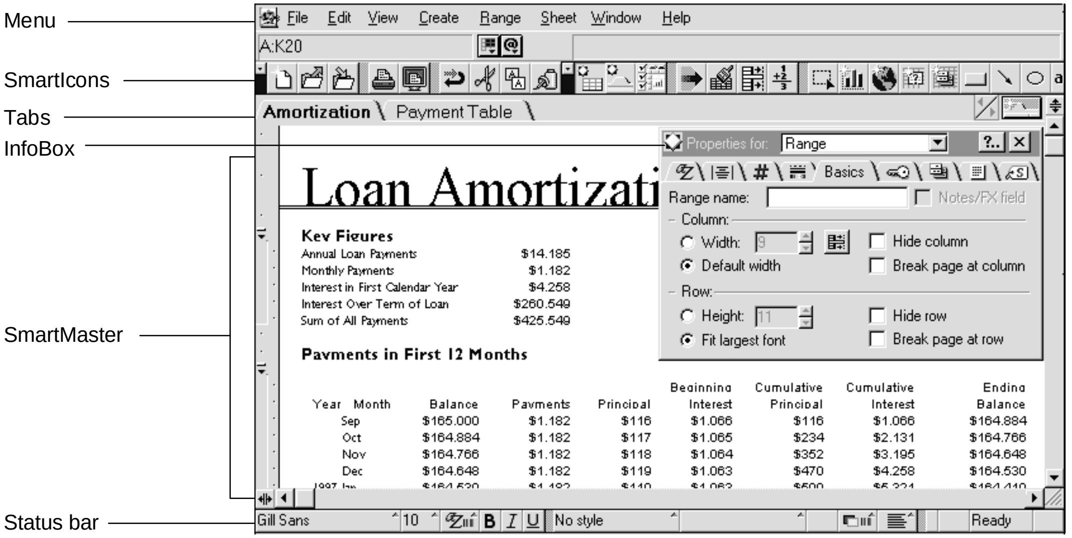
Chapter 4
SmartSuite Tools

Helping you be a self-reliant user

This chapter will show you where to find useful tools in the SmartSuite applications and how to use them. Once you know where to go and what to do, you'll be a more self-reliant user.

The right tools

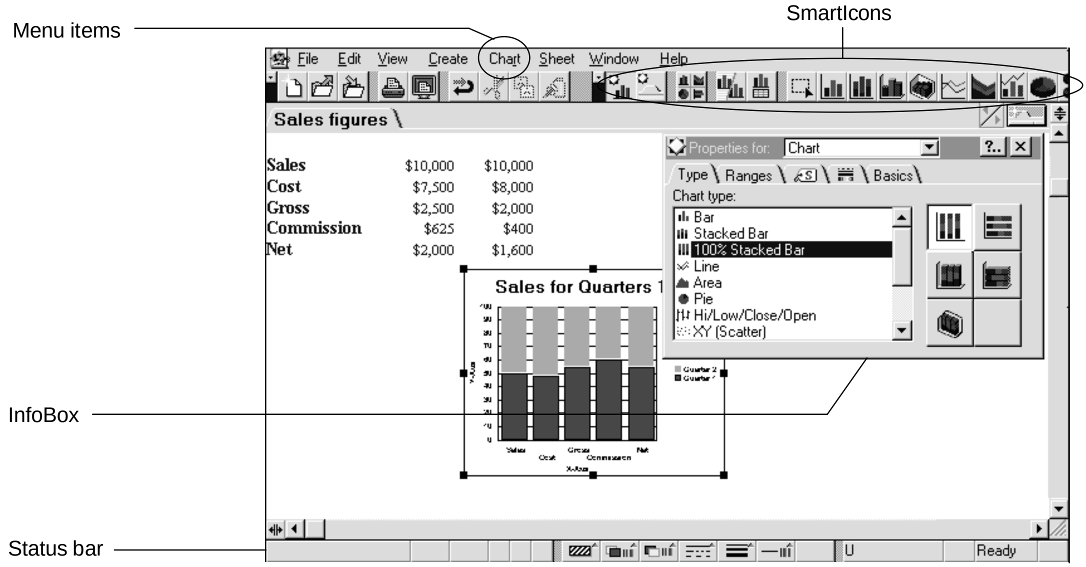
Here are most of the tools described in this chapter:



SmartSuite tools are context-sensitive

Tools in SmartSuite applications are context-sensitive — they appear when you need them. For example, if you are working in a frame for charts (as shown below), the menu, SmartIcons®, InfoBox, and status bar reflect options specific to charts. When you click outside the chart, the options for charts disappear.

Compare this desktop with the one on the previous page, where the tools reflect options for typing in text.

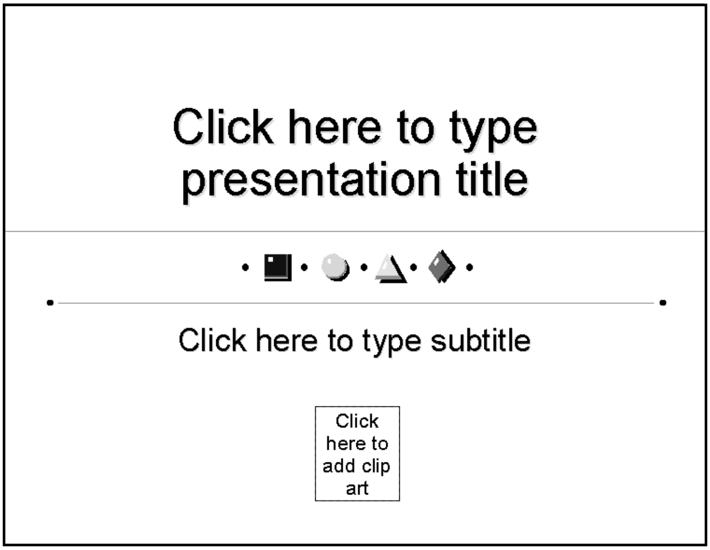


SmartMaster templates

A SmartMaster™ is a professionally designed template that gives you a quick start to everyday tasks — all you do is add your own data. 1-2-3, Word Pro, Approach, and Freelance Graphics each come with a library of SmartMaster templates. You can start any new workbook, document, database, or presentation with a SmartMaster.

With its Click here blocks, a SmartMaster can be more than an attractive format; it can help you think through your tasks.

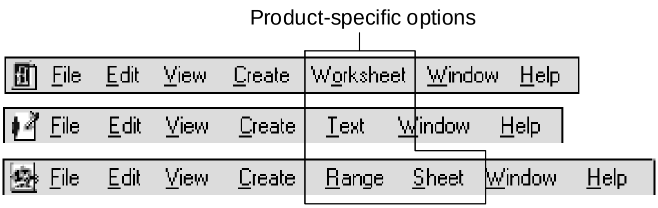
Click a block and start typing the text you want.



Common menus

All SmartSuite menus work the same way, with the same basic commands. Once you know that User Setup is under the File command in Approach, you know that it is under File in 1-2-3, Word Pro, and Freelance Graphics as well.

Options outside the outline are the same in all SmartSuite applications.



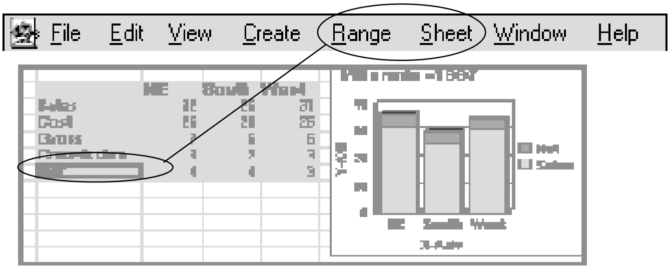
Menus are also context-sensitive, meaning that the commands change depending on what you are working on. For example, if you use the Create command to create a group object in Freelance Graphics, the menu bar displays a Group command for changing the group.

If you can’t find a menu

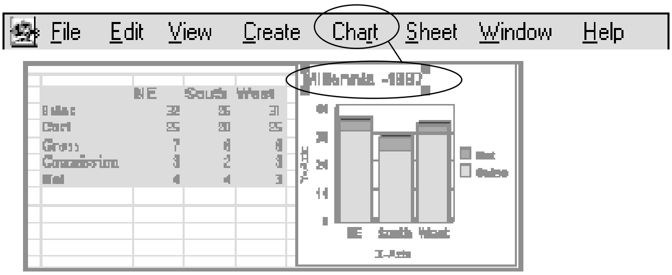
You may not be able to find the menu you want for one of two reasons:

- You must create the object (using the Create menu) before you can work on a task related to the object. For example, you must create a chart before Chart appears in the menu.
- You must click the object to select it. Remember, you must be working in the object you want to change before its menu appears.

Menu when a cell is selected



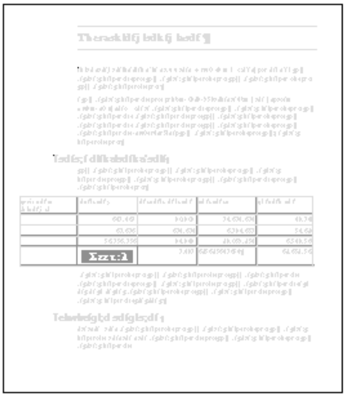
Menu when part of the chart is selected



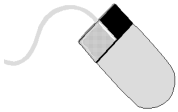
Shortcut menus

When you are working on text or an object such as a table or a drawing, right-click the mouse to see a context-sensitive menu for the text or object.

When text in the table cell is selected...



click the right mouse button to...



display this table shortcut menu on your screen.

SmartIcons

SmartIcons are small pictures that appear in a row just beneath the menu bar. They give you single-click access to frequently used features. Click an icon to save a file, cut a selected object, preview what you are printing, and perform dozens of other actions as you are working in SmartSuite applications.

Many SmartIcons are common to all SmartSuite applications, so when you learn to use an icon in one application, you learn it for all applications. Each application also has SmartIcons to perform tasks specific to that application.

To display the description of the action an icon performs, let the mouse pointer hover on the icon. A description appears in a bubble. Once you are familiar with the icons, you can turn bubble help off by choosing File - User Setup - SmartIcons Setup. You can still access these descriptions by holding down the right mouse button when the mouse pointer is on an icon.

Making SmartIcons work the way you do

To make it easy to get started, each application contains 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 actions to them.

For more information

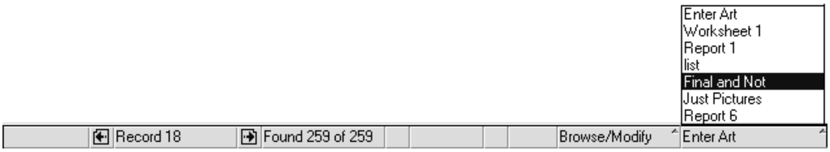
While working in any SmartSuite application:

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   SmartIcons
3. Click the index entry you want, then click Display.

The status bar

The status bar, located at the bottom of the application window, offers immediate feedback on current selections and shortcuts for many commands. The status bar lets you display and change settings, such as font and point size in Word Pro, number formats in 1-2-3, page layouts in Freelance Graphics, and views and environments in Approach. Some status bar buttons display a list when you click them; other buttons toggle between options.

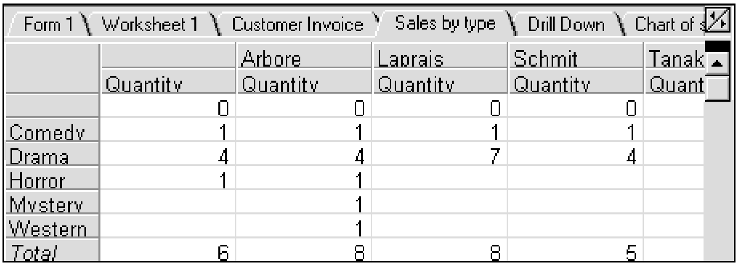


Tabs

Tabs make it easy to organize and manage large volumes of information.

In 1-2-3, tabs organize your sheets within a workbook.

In Approach, tabs let you see all the views of your database application.



In Word Pro, you can use tabs to organize all the sections of a long document or to keep related documents together.

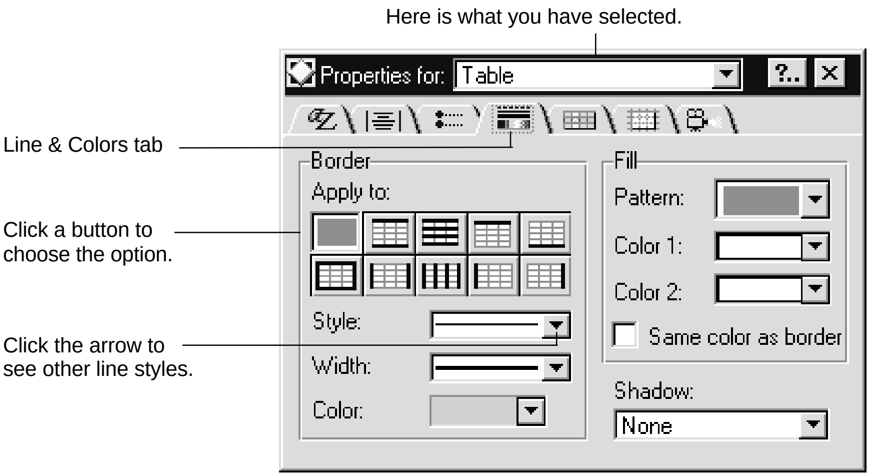
In addition, the tabs on assistants lead you through all the steps in a procedure. For example, tabs lead you through all the steps in setting up a team review of a document.

Freelance Graphics provides tabs for views that make it easy to concentrate on the text in your presentation or to rearrange your presentation.

The InfoBox

Think of the InfoBox when you want to change the look of a range, text, or an object in 1-2-3, Word Pro, Approach, or Freelance Graphics. The InfoBox stays open so you can make multiple changes. The options change as you change the focus of your work.

For example, if you click inside a table in Freelance Graphics, the InfoBox displays options for changing the table's properties. If you click in the text above the table, the InfoBox displays options for text.

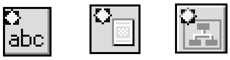


What makes the InfoBox so useful?

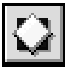
- It stays open and on top so you don't have to open and close multiple dialog boxes.
- It displays different options as you change your selection.
- You immediately see the results of options you select.

To display the InfoBox

Select the text or object you want to change, then click the InfoBox icon:



InfoBox SmartIcons vary somewhat because they show you what you have selected, but you can recognize an InfoBox icon by the yellow diamond on a blue square:



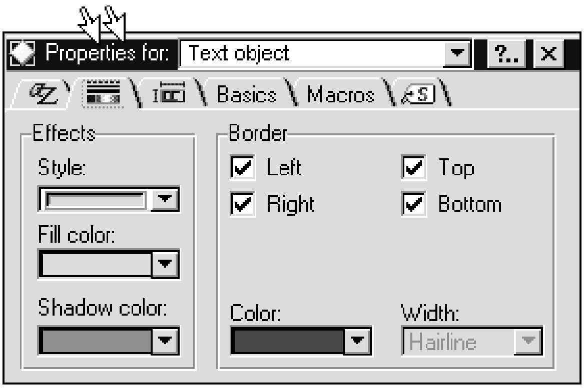
To display different InfoBox options

You can click the “Properties for” box in the InfoBox to see a drop-down list of other InfoBox options. For example, if you selected text when you clicked the InfoBox icon, the “Properties for” box will read “Text.” But you can click the box to select InfoBox options for Page layout.

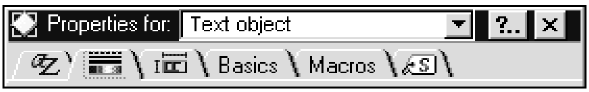
Collapsing the InfoBox

When you expect to make multiple changes to the look of something, collapse the InfoBox to keep it handy without crowding your desktop.

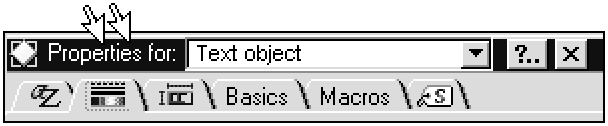
1. Double-click the title bar to collapse the InfoBox.



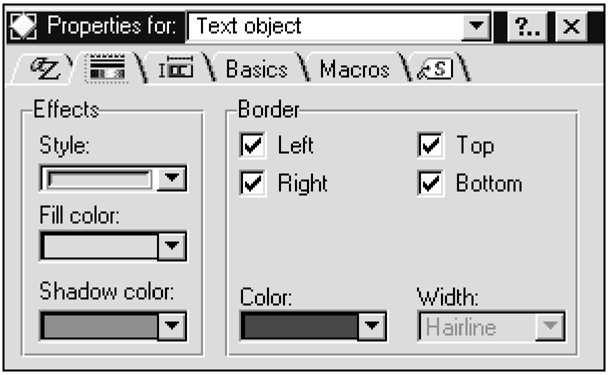
Result



2. Double-click the title bar to return the InfoBox to normal size.



Result

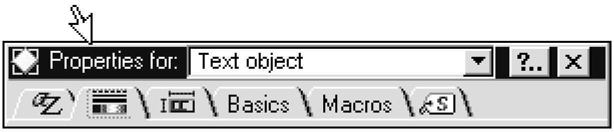


Closing the InfoBox

Click the Close button.

Moving the InfoBox

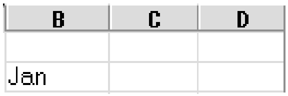
Click the title bar and drag the box to a different part of the screen.



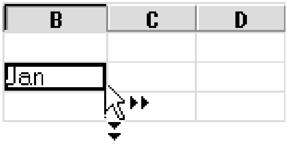
SmartFill

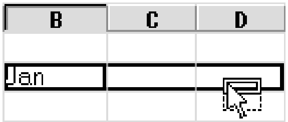
SmartFill lets you speed up data entry in tables, sheets, and documents by automatically filling in routine information, such as dates, times, or sequential numbers.

Type in the first entry in the series.

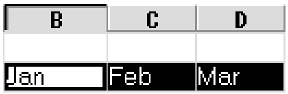


Drag from the bottom corner.





Result



Fast Format

With Fast Format you can quickly duplicate a format by selecting an object with the format you want and applying the format to one or more other objects.

Select the text or object with the format you want to copy.

Click the Fast Format icon.

Select the text you want to format.

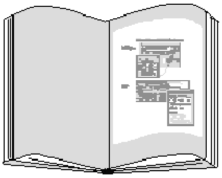
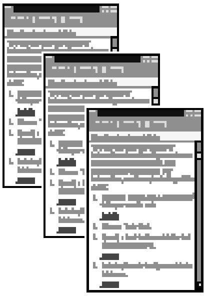
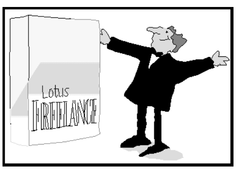
The mouse pointer becomes a paintbrush.

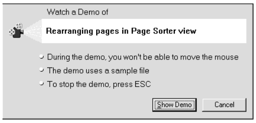
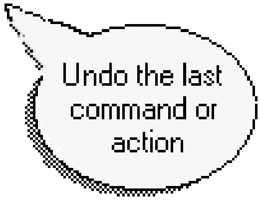
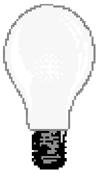
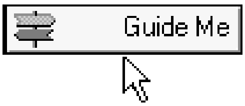
Result

Click the icon again to turn off Fast Format.

Chapter 5
The Right Help at the Right Time

SmartSuite applications deliver the kind of assistance you need when you need it. SmartSuite offers you Help systems that are concise and organized by task. It also offers you other types of help to let you get the job done right. The user assistance features listed below are available for all applications unless qualified in the *Location* column.

Feature	***Description***	***Location***
This book 	Tells the benefits of using a feature and provides conceptual information. Refers you to Help when you need specific how-tos.	Included in the SmartSuite package.
Help 	Provides information about all the tasks you can perform using SmartCenter and SmartSuite applications. Provides overviews of features.	Available when you click Help in a dialog box or from the Help menu. SmartCenter Help is available from the Suite Help drawer.
Tours 	Provide a quick introduction to the applications and let you learn at your own speed.	Can be run from the SmartSuite Autorun menu or the CD. Choose Tours from the application Help menu or from the Suite Help drawer and insert the CD. Disk users must install tours using custom Install.

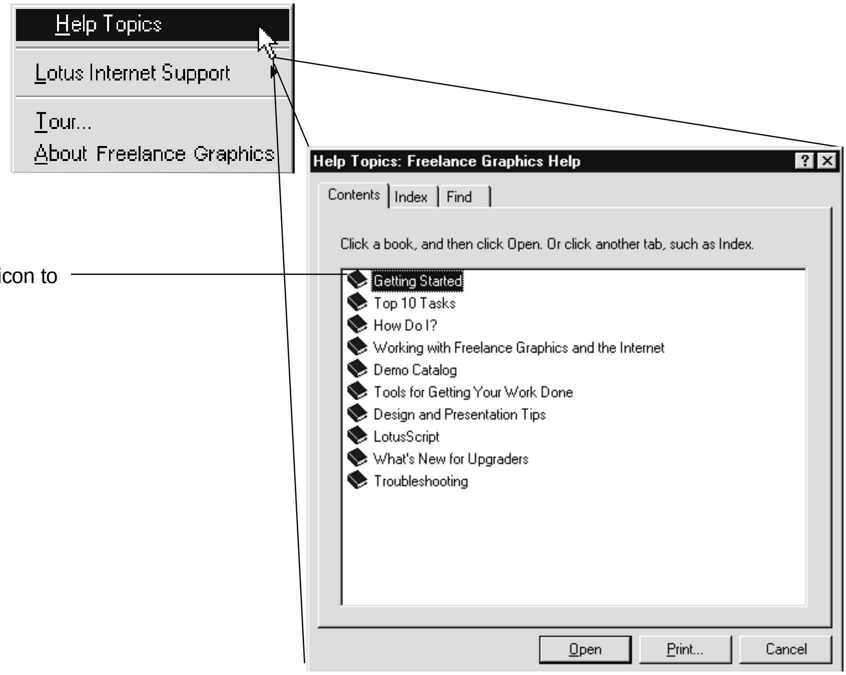
Feature	*Description*	*Location*
Demos  	Provide step-by-step demonstrations. Present procedures that are easier to understand when you see how they work.	Available when a movie icon appears in a Help topic.
Assistants  	Guide you through the completion of complex tasks, such as building an index or a dynamic crosstab.	Provided when you issue menu commands that require further instructions.
Bubble help  	Tells you what each icon in the SmartIcons bar and each tab in the InfoBox does.	Available by letting the mouse pointer hover on the icon or an InfoBox tab.
Ask the Expert 	Takes you to the appropriate Help topic when you ask a question in your own words. Ask the Expert understands 2,000 word processing terms and their relationship to your task.	Available from the Word Pro Help menu.
Guide Me  	Presents you with questions related to what you are doing that guide you to the appropriate Help topic.	Available from the Guide Me button or the Help menu in Freelance Graphics.

Help: streamlined and redesigned

Help for SmartSuite applications is organized by task. These Help systems provide brief procedures rather than lengthy descriptions. Because they are concise and oriented toward helping you complete tasks, SmartSuite Help systems are Help systems you'll like using.

Choose Help - Help Topics.

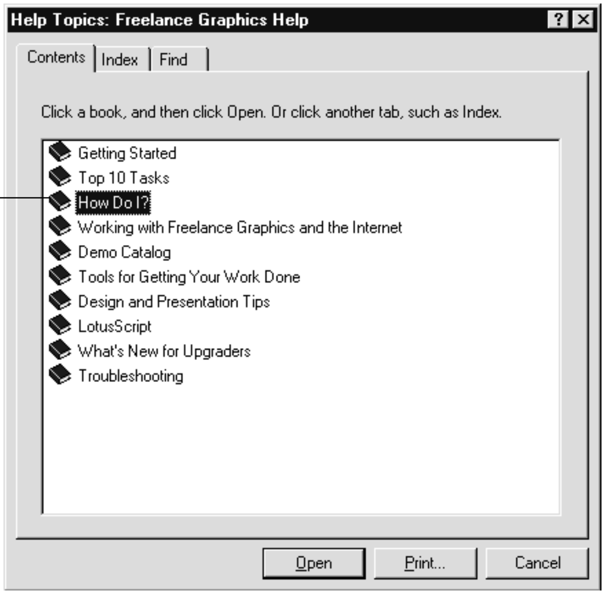
Double-click a Help book icon to see a list of Help topics.



Using How Do I?

When you double-click How Do I? on the Contents tab, you get a list of topics that tell you step-by-step how to complete a procedure.

Start by double-clicking the How Do I? book.



Book icons represent general topics, as in a table of contents. The ? icon represents an actual Help topic.

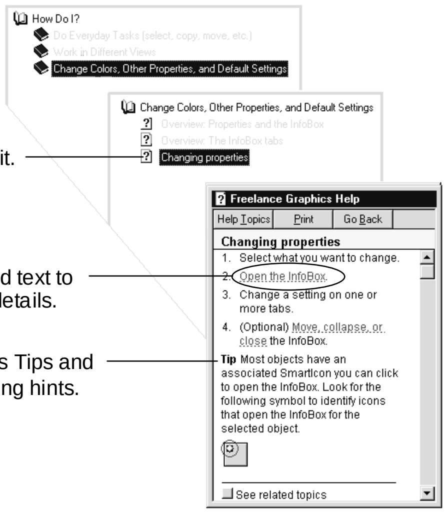
The book opens to a list of topics.

Double-click books until you find the Help topic you want.

Double-click the Help topic to display it.

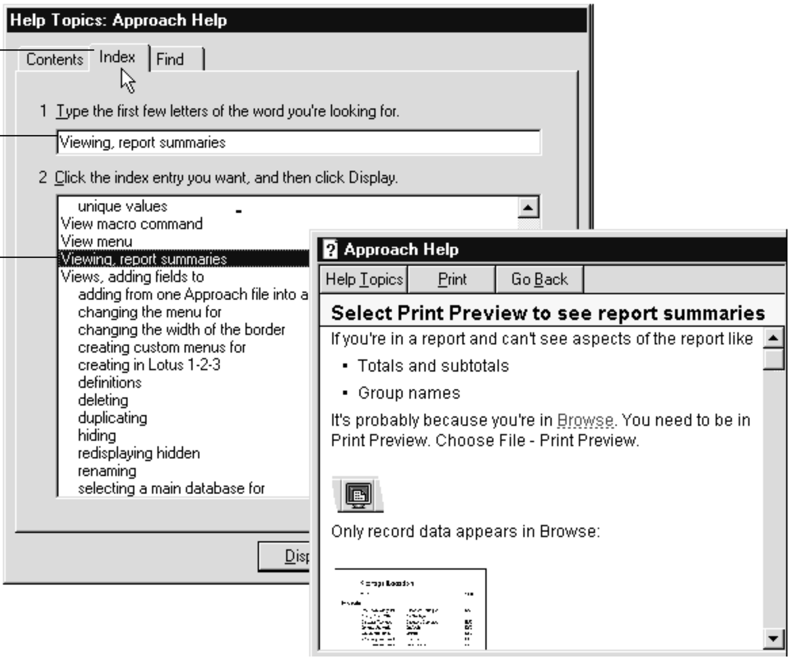
Click the green, underlined text to see a window with more details.

Help contains Tips and troubleshooting hints.



Using the Index

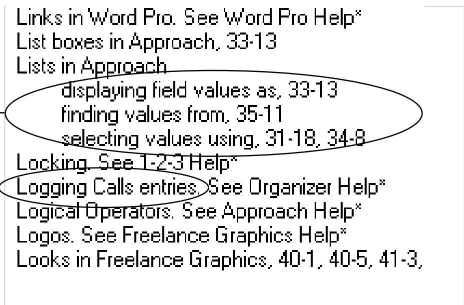
When you click the Index tab, SmartSuite applications display an Index of Help topics. Help systems are organized by task, not by menu command.



Using this book with Help

This book works easily with the Help system and provides two ways to get more information from Help. First, when you want to know more than the book provides, look for the heading “For more information.” Open Help for the application you want to know about, click the index tab, and type the word or phrase you see in bold.

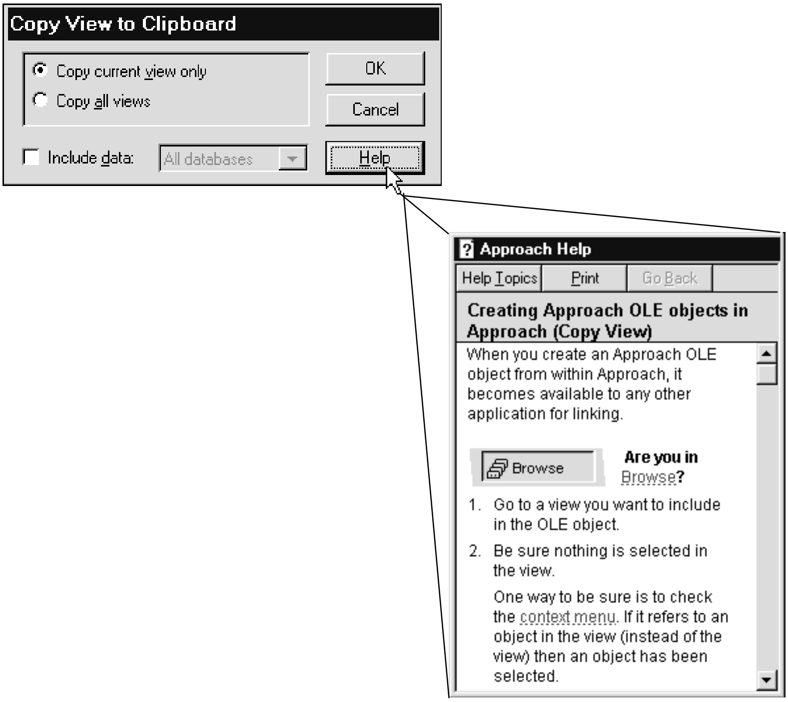
If you don’t see the topic you want in the book, check the index for additional topics that reference Help in each of the SmartSuite applications.



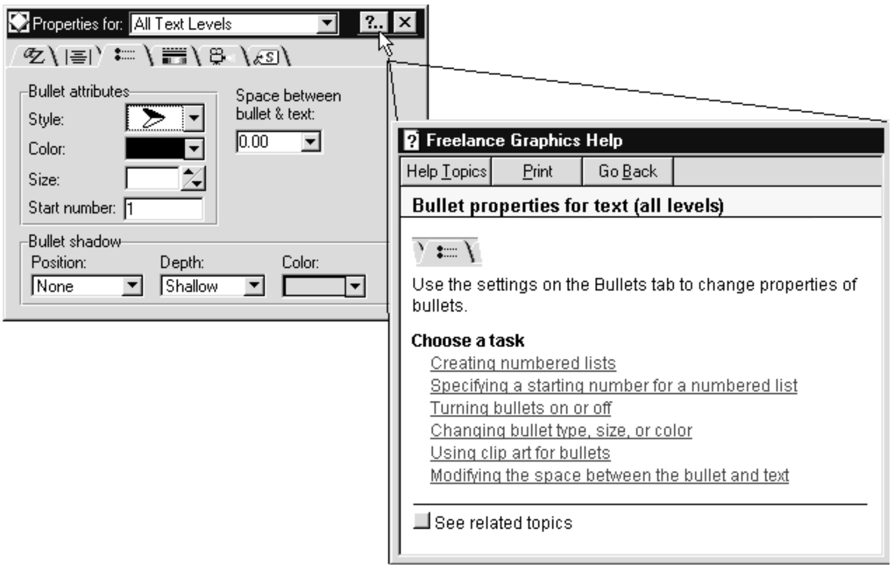
Links in Word Pro. See Word Pro Help*
List boxes in Approach, 33-13
Lists in Approach
displaying field values as, 33-13
finding values from, 35-11
selecting values using, 31-18, 34-8
Locking. See 1-2-3 Help*
Logging Calls entries. See Organizer Help*
Logical Operators. See Approach Help*
Logos. See Freelance Graphics Help*
Looks in Freelance Graphics, 40-1, 40-5, 41-3,

Getting Help for a dialog box or the InfoBox

You can get Help immediately on dialog box options.

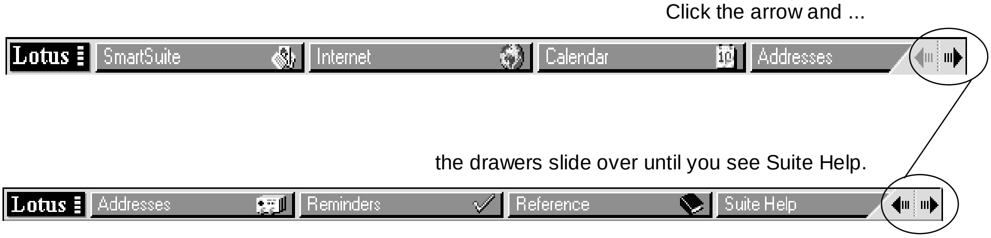


You can also get Help immediately on InfoBox tabs by clicking the ? button.

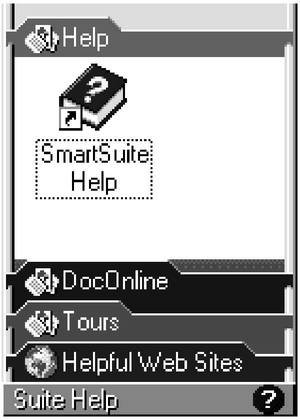


Getting Suite Help

You can get a helping hand with cross-application tasks, SmartCenter, and features you see in all SmartSuite applications by checking Suite Help. On some monitors you may not be able to see the Suite Help drawer when SmartCenter opens. If you don't see Suite Help, click the arrow:



In the Suite Help drawer, click the Help folder and double-click the SmartSuite Help icon to open Help.

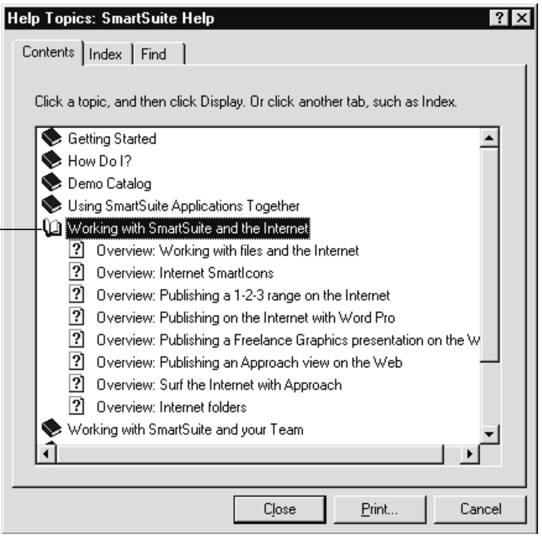


Using Help

When Suite Help opens, click the Contents tab to see a list of Help topics.

Double-click the book you want to open.

Help topics provide information about SmartCenter and about using the applications together.



Using ScreenCam

ScreenCam is a show-and-tell teaching and communication tool that lets you record and play back movies of screen activity, including mouse pointer movements, sound, and dialog box choices. You can easily create help for your coworkers by creating screen movies that demonstrate techniques and procedures.

Creating a screen movie

1. Click the SmartSuite drawer.
2. Click the Lotus Applications folder.
3. Double-click Lotus ScreenCam.
4. Choose File - New.
5. Click the Microphone button to record sound only, the Camera button to record screen activity only, or the Both button to record both sound and screen activity.
6. Click the Record button and then OK to begin recording.
7. When the stopwatch pointer disappears, perform the screen actions you want to record. If you have sound hardware, you can also include sound.
8. To stop recording, click the red Stop button.

9. To play back the screen movie, click the Play button.
10. To save the screen movie, choose File - Save, enter a name in the File Name box, click the description box and enter the description, and then click OK.

The versatility of ScreenCam

Each screen movie can be saved and used in several ways:

- Saved as a native Lotus ScreenCam movie (.SCM format)
- Saved as a stand-alone screen movie (.EXE format) that lets you distribute movies to users who don't have ScreenCam
- Saved with just its soundtrack (.WAV or .SCM format) or with just its screentrack (.SCM format)
- Linked to or embedded in an OLE-compliant application

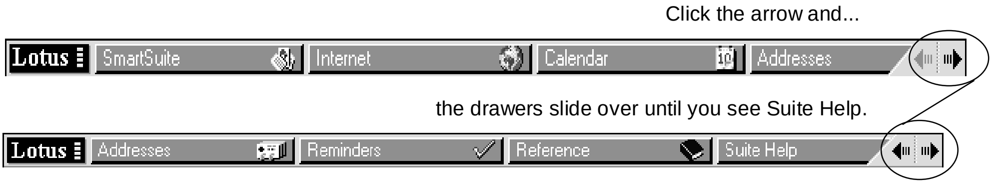
For more information

1. Click the Suite Help drawer, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type this phrase:

   Screen movies
3. Click the index entry you want, and then click Display.

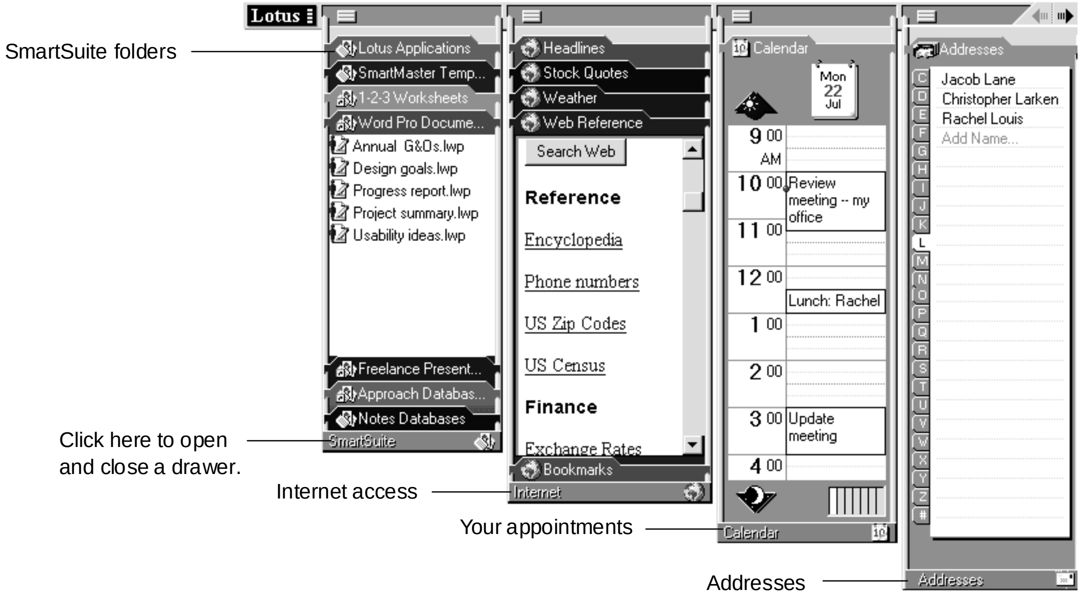
Chapter 6
Using SmartCenter

SmartCenter, the SmartSuite command center, contains seven default drawers that are anchored to the top of your screen. The drawers open to help you perform your daily tasks. You can track your daily appointments, open the Word Pro file you are working on, look up a synonym for a word, create a reminder list, check the weather, stock quotes, or headlines, and go directly to your favorite Web site.

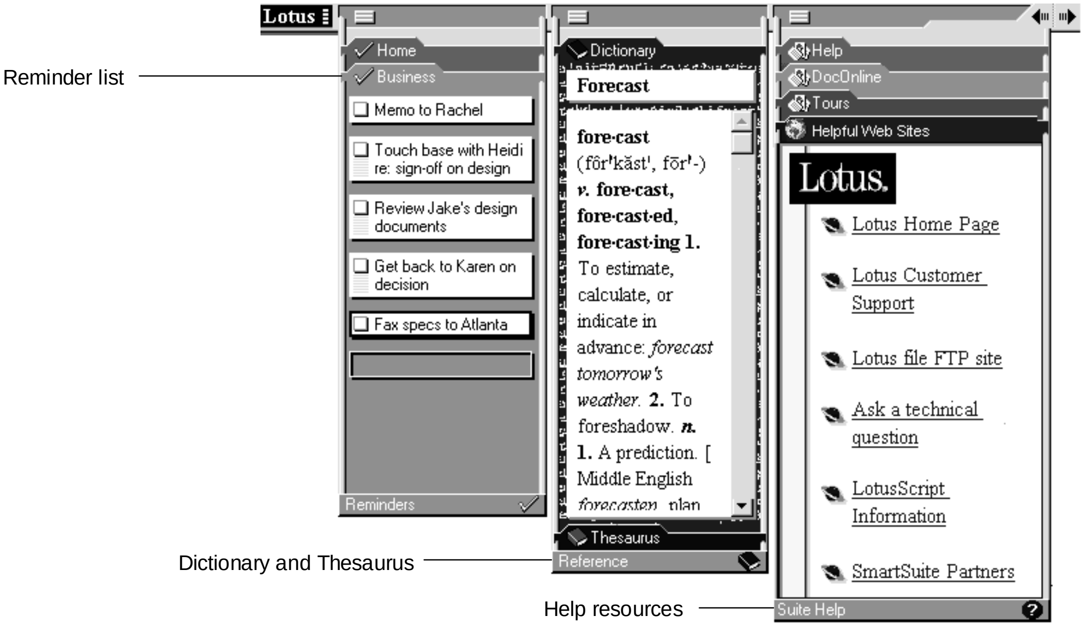


What's in SmartCenter?

Each drawer contains a set of folders filled with helpful tools and your work, once you create it. The SmartSuite drawer contains folders for the SmartSuite applications, your work files, SmartMaster templates, and Notes databases.



More drawers



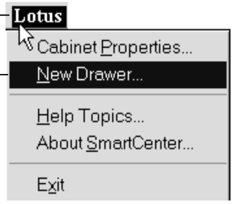
Creating your own drawers and folders

Besides the drawers and folders that come with SmartCenter, you can create drawers and folders that match your own work habits and needs.

To create a drawer...

click here...

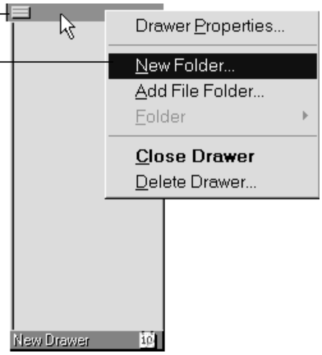
and then here.



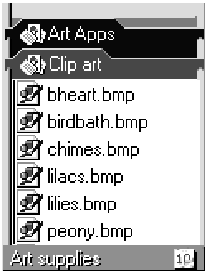
To create a folder in the new drawer...

right-click here...

and then click here.



Result: new drawer and folders



You can create Windows-style shortcuts to your favorite files and applications, then drag the shortcuts into the folder.

You can also remove any drawers or folders that are not useful to you.

For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab and type one of these phrases:

   Drawers, properties

   Folders, overview
3. Click the index entry you want, then click Display.

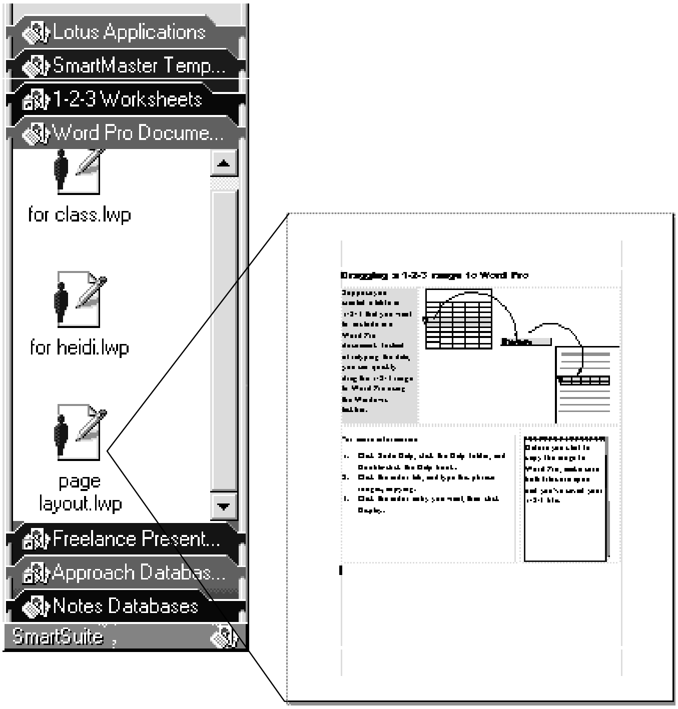
A closer look at some of the drawers

SmartCenter drawers contain tools that are immediately useful for organizing and accessing your work.

SmartSuite

You can open your work from SmartSuite drawers without first opening the application.

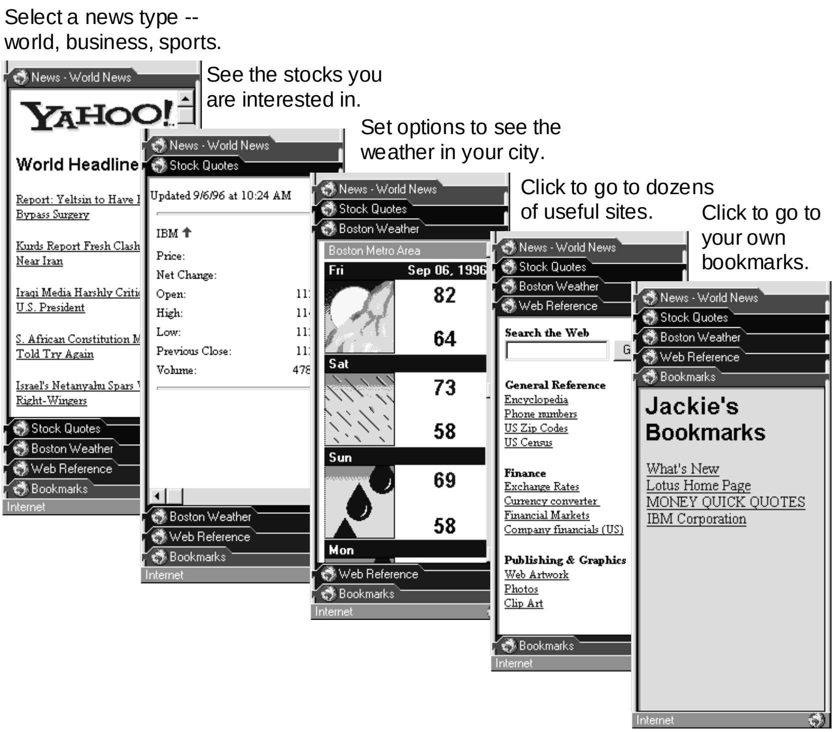
Double-click the file icon to open the file.



All files you've saved to an application's work directory automatically appear in the corresponding SmartCenter folder. For example, the Freelance Graphics default directory is \lotus\work\flg, and when you save a file to this directory, it also appears in the SmartCenter folder for Freelance Graphics.

Internet

SmartCenter gives you easy access to helpful Internet sites. You can customize the drawers and folders to fit your needs.



Chapter 9 describes more of the SmartSuite Internet features.

For more information

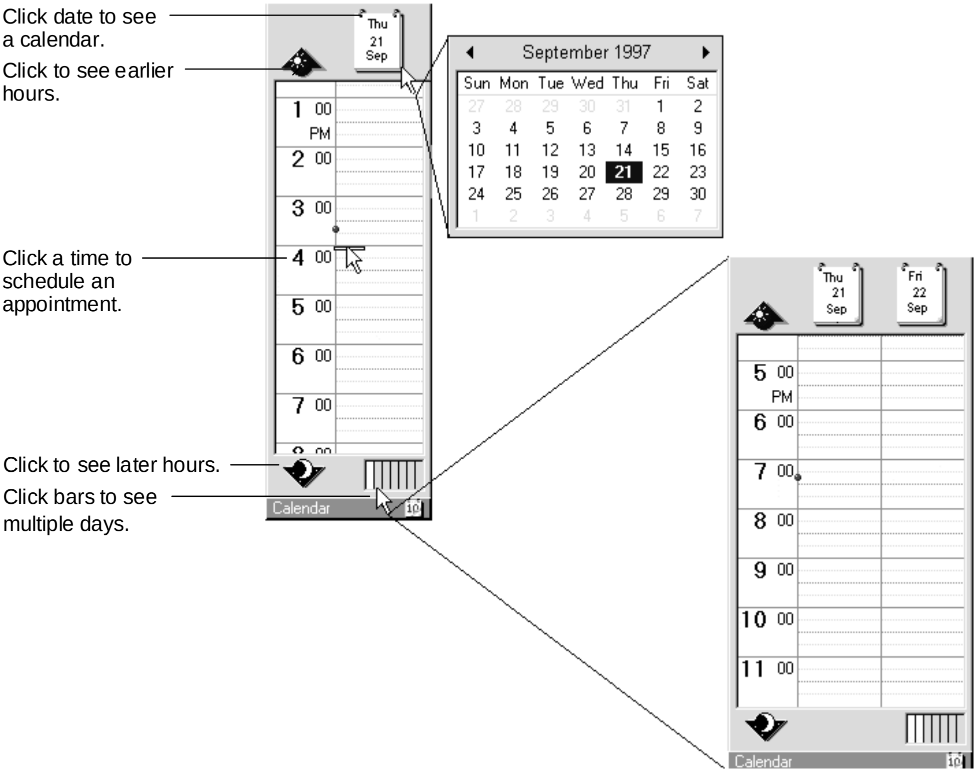
1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab and type this phrase:

   Internet, accessing

3. Click the index entry you want, then click Display.

Calendar

The Calendar folder displays a view of your Organizer calendar. You can use the Calendar folder to schedule, change, or delete appointments. SmartCenter automatically updates your Organizer file. Initially, the Calendar folder displays one day, but you can expand the view to show up to seven days.



Even if you don't use Organizer, you can still use the Calendar folder as you see it above for entering your appointments and tracking your daily schedule.

For more information

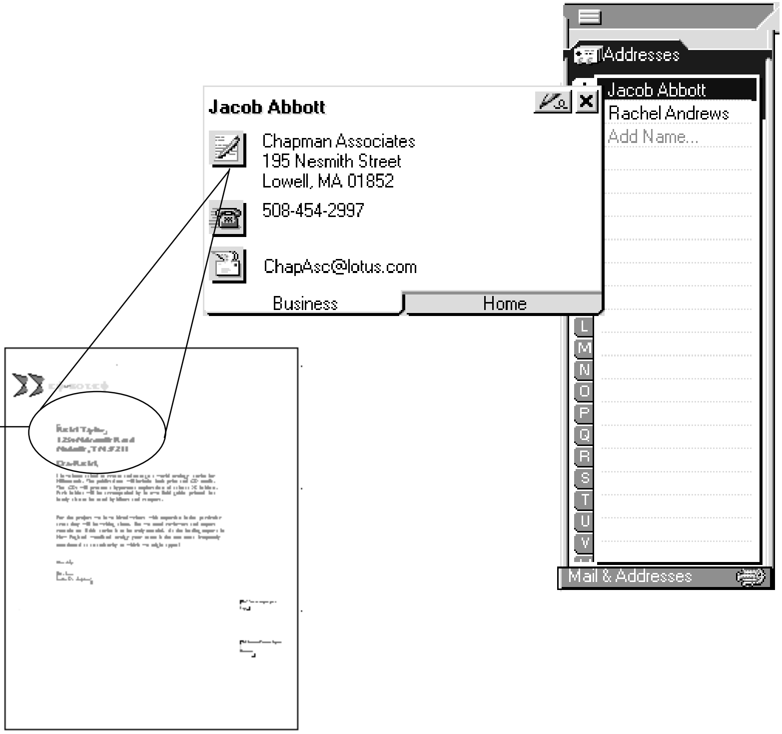
1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab and type this phrase:

   Calendar folders, overview
3. Click the index entry you want, then click Display.

Addresses folder

The Addresses folder makes it easy for you to collect addresses and phone numbers. You can then use the information to automatically address a letter, dial a telephone number, or send e-mail.

Click the Write a letter icon...



to automatically insert an address into a Word Pro letter.

For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab and type this phrase:

   Address folders

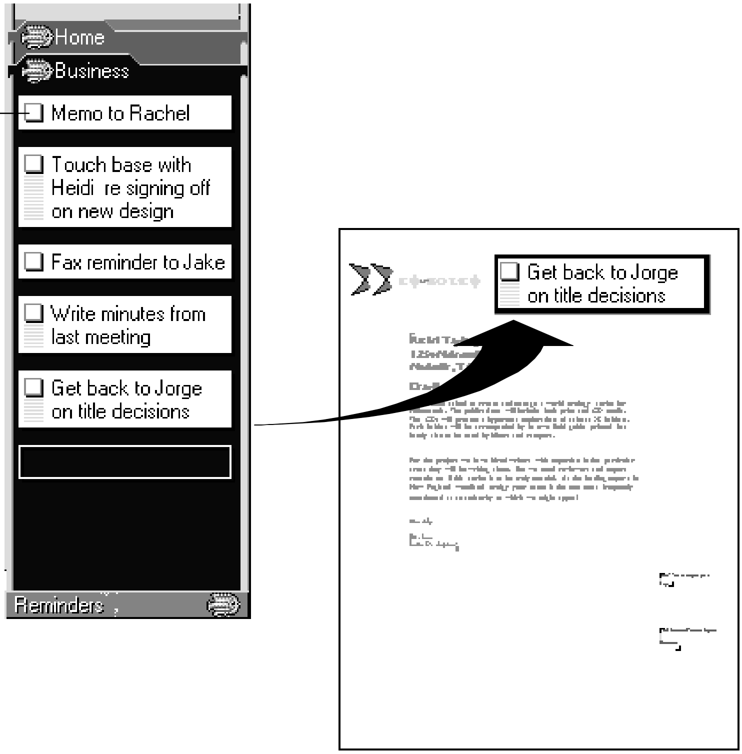
3. Click the index entry you want, then click Display.

Reminders

You can keep track of your daily tasks using the SmartCenter Reminder list. If there's something you have to remember to do by 11:00, drag the item to your desktop. It will stay on top of anything you are working on so you won't forget.

Type in your notes.

Drag a note out of the drawer and drop it on top of whatever you are working on.



For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab and type one of these phrases:

   Reminders, checking off

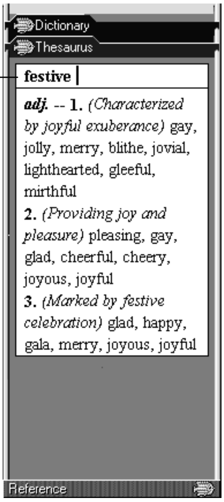
   Reminders, importing text
3. Click the index entry you want, then click Display.

Reference

SmartCenter offers you reference tools to look up definitions and synonyms.

Type in the word you want a synonym for here.

The synonym appears here.



For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab and type one of these phrases:

   Dictionary

   Thesaurus
3. Click the index entry you want, then click Display.

Chapter 7
Sharing and Integrating Data

With SmartSuite, it's easy to share data among Lotus applications. You can create the data once, then copy, move, link, or embed it wherever you want it to go. You can also do the following:

- Automate tasks by creating your own custom applications using LotusScript.
- Seamlessly link data between two SmartSuite applications. This means you can edit embedded data in place or drag an object to the Windows taskbar to copy it to another application.

Here are some of the many other ways you can use SmartSuite applications together:

- Use the outline of your Word Pro document to automatically create a Freelance Graphics presentation
- Use Organizer to insert addresses in the Word Pro document you create for a mass mailing
- Use Word Pro as a notebook to organize all the files for a project
- Copy a chart from 1-2-3 to a Freelance Graphics presentation
- Use Approach to create dynamic crosstabs, forms, reports, and address labels from your 1-2-3 data

This chapter describes integration tools and ways you can use the applications together.

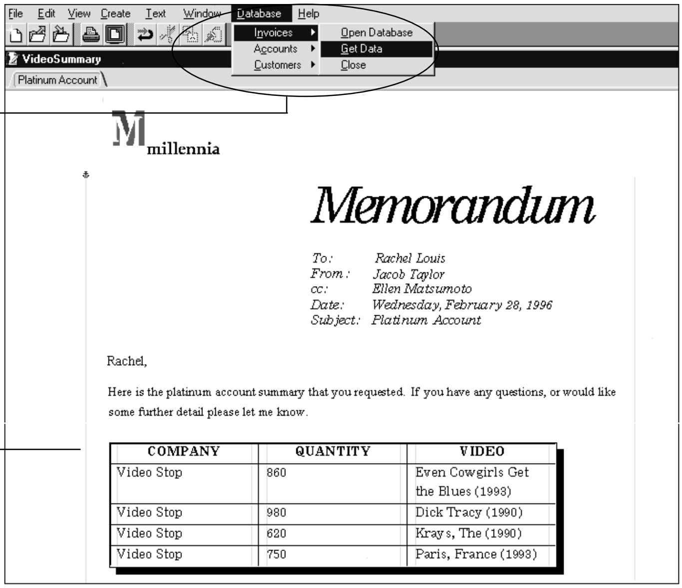
Integration tools

LotusScript

LotusScript is a standard BASIC scripting language that lets you write custom applications for one or more Lotus applications. Using LotusScript you can also automate common tasks.

An example of a LotusScript application

In the example below, the LotusScript application lets you regularly generate a vendor sales report in Word Pro by extracting invoice data from an Approach database.



Script-generated menu that lets you extract Approach data

The Approach data in a Word Pro document

LotusScript provides a high degree of control over the flow of a program. With LotusScript, you can do the following:

- Automate passing data to and from other Lotus applications that use LotusScript
- Automate passing data to and from any application that uses OLE automation
- Update, distribute, and use data for calculation
- Test conditions in data so that you can control when actions are performed
- Automate repetitive tasks

Each SmartSuite application that uses LotusScript has its own set of LotusObjects™. Some objects are unique to a particular application, but all LotusObjects share a common design. This commonality provides an efficient platform for developing and implementing applications.

For more information

From a SmartSuite application:

1. Choose Help - Help Topics.
2. Click the Contents tab.
3. Double-click the LotusScript book to see a list of LotusScript topics.

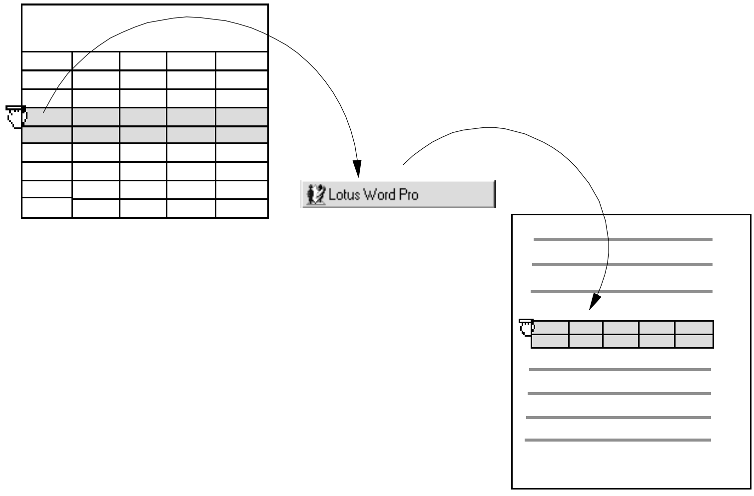
You can also order *Developing SmartSuite Applications Using LotusScript*, a developer's guide. You send in the order form on the back cover of *Getting the Most Out of LotusScript in SmartSuite 97*, which is in your SmartSuite package. If you are a CD user, you can also read *Developing SmartSuite Applications Using LotusScript* and *Getting the Most Out of LotusScript in SmartSuite 97* by clicking the icon for the book in the DocOnline folder of SmartSuite Help.

Linking data between applications

OLE (object linking and embedding) lets you seamlessly link data between OLE applications. When you link data, you can update it either in its original file (the source file) or in a file you've copied it to (the destination file). The data is updated in both places.

Dragging to copy

It's easy to copy data by dragging it to another application. Suppose you created a range in 1-2-3 that you want to include in a Word Pro document. Instead of retyping the data, you can quickly drag the 1-2-3 range to Word Pro using the Windows taskbar.



1-2-3, Word Pro, Freelance Graphics, and Approach all fully support OLE functionality.

Note Before you start to copy an object to another application, make sure both files are open and that you've saved your source file.

For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type this phrase:

   Dragging

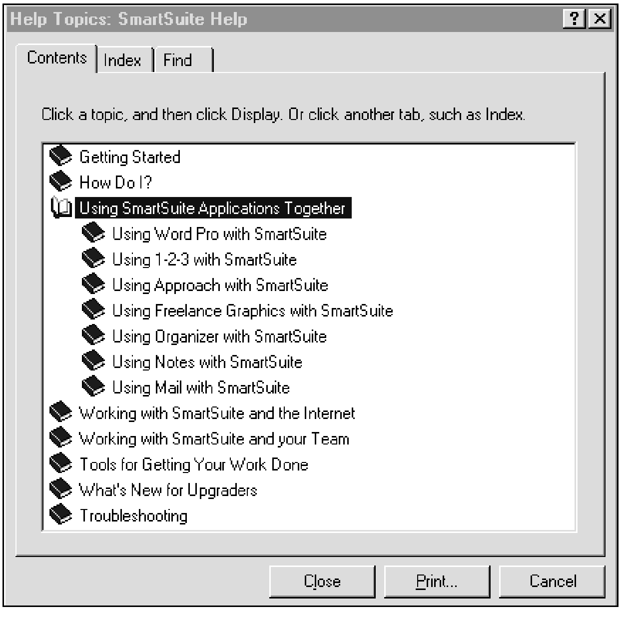
3. Click the index entry you want, then click Display.

Using applications together

SmartSuite makes it easy to use Lotus applications together. This section gives you a few examples.

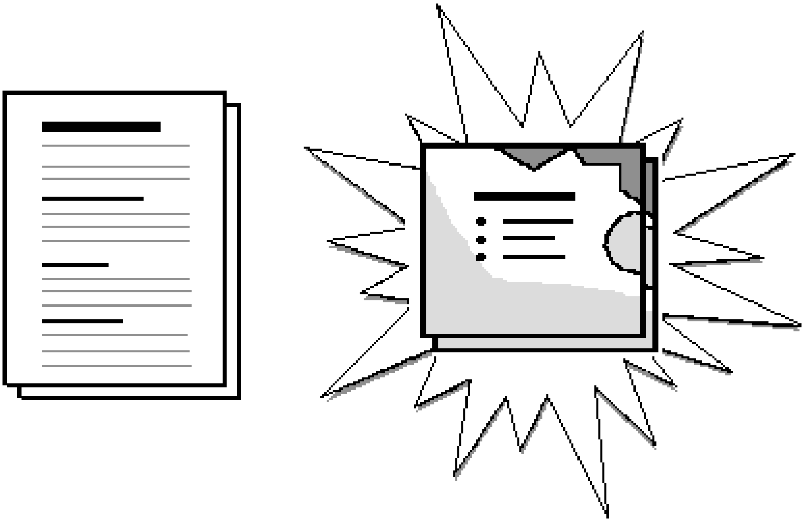
For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Contents tab, and double-click the Using SmartSuite Applications Together book icon.
3. Click the topic you are interested in.



Turning Word Pro outlines into automatic presentations

With Present It! you can automatically turn the outline of your Word Pro document into a Freelance Graphics presentation. Let your outline serve double-duty, as the basis of your Word Pro report and your Freelance Graphics presentation.



Select your Word Pro outline and choose Edit - Scripts & Macros. Then type PRSIT.LSS. Freelance Graphics turns the major headings of your outline into titles for presentation pages and your subheadings into bulleted text.

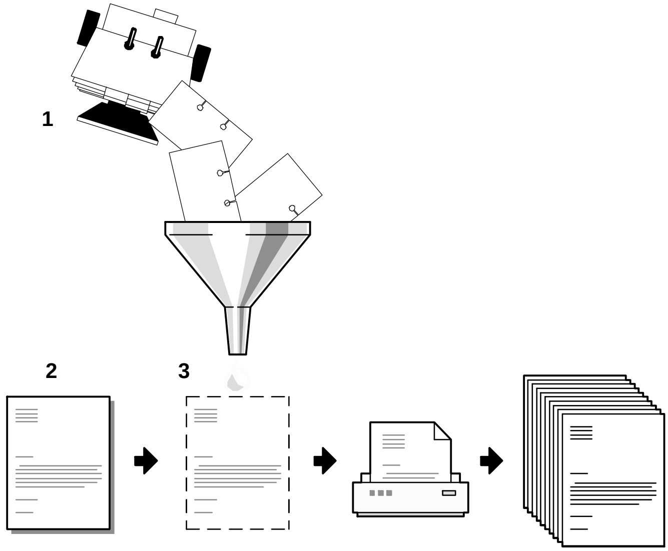
For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type this phrase:

   Presentations
3. Click the index entry you want, then click Display.

Using Organizer addresses in Word Pro mailings

You can use your Organizer addresses to personalize the letters in a mass mailing by adding the names and addresses of your clients to your Word Pro document.



You create the letter, select the Organizer addresses, and merge the letter and address files. Then you're ready to print your letters.

For more information

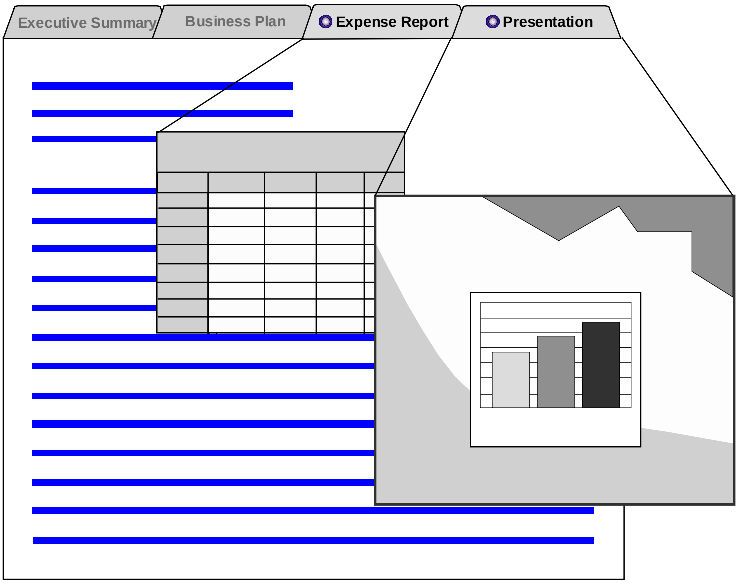
1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type this phrase:

   Merge

3. Click the Index entry you want, then click Display.

Using Word Pro as a project notebook

Use Word Pro to hold all the important files for a project. For example, you can create a business plan in Word Pro with tabs that hold a Word Pro marketing plan, a 1-2-3 expense report, and the Freelance Graphics presentation you created from your Word Pro outline.



Word Pro allows you to import files with different formats by using OLE technology. The files become separate OLE divisions in your document, with tabs identifying the divisions.

For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type this phrase:

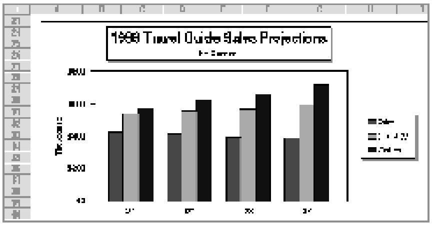
   Notebooks

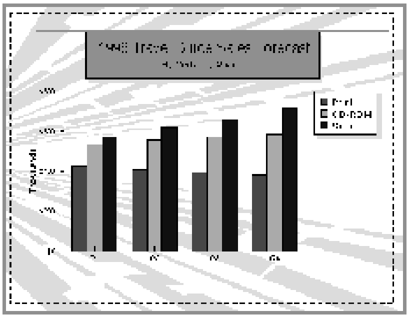
3. Click the index entry you want, then click Display.

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

Suppose you want to use a chart you created in 1-2-3 in a Freelance Graphics presentation. You simply copy and paste it into your presentation. This easy procedure links the 1-2-3 chart with the Freelance Graphics presentation so that when you update data in 1-2-3, the Freelance Graphics chart reflects the change.

Freelance Graphics automatically reformats the chart to fit the style and look of the Freelance Graphics SmartMaster you are using.





Note For the procedure to work correctly, make sure you've saved your 1-2-3 file before you link charts.

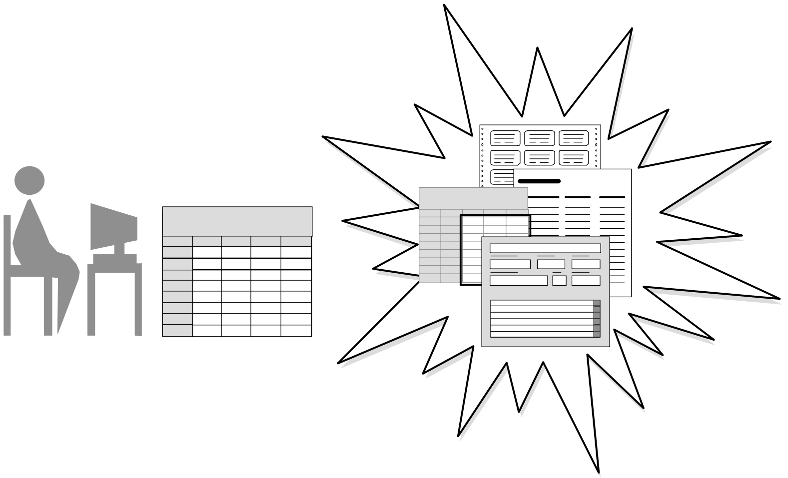
For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type this phrase:

   Linking, charts
3. Click the index entry you want, then click Display.

Using Approach with 1-2-3

You don't have to leave 1-2-3 to take advantage of a number of powerful Approach capabilities.



You can create the following:

- **Entry forms** let you streamline data entry and ensure accuracy in your spreadsheet.
- **Reports** let you create sophisticated summaries of your spreadsheet data, using the exclusive PowerClick reporting in Approach. You can select the columns and rows you want to report on, and then sort, group, and calculate information by clicking the appropriate icon from the set of SmartIcons.
- **Dynamic crosstabs** let you summarize and analyze data that depends on more than two variables.
- **Form letters** let you communicate with customers according to the information you have stored about them in 1-2-3.
- **Query tables** make it easy to display only the data you want to see.
- **Mailing labels** let you turn address information stored in 1-2-3 into ready-to-use mailing labels. The labels can be matched to standard Avery labels or customized to virtually any specification.

All these capabilities are available from the Create - Database menu in 1-2-3. When you choose Form, Report, Dynamic Crosstab, Form Letter, Query Table, or Mailing Labels from the Create - Database menu, Approach starts, and assistants guide you through each step as you create the feature.

1-2-3 embeds the form, report, or crosstab as an icon in the 1-2-3 spreadsheet. Double-click the icon to open Approach and the view you created of your data.

For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type one of these phrases:

   Forms

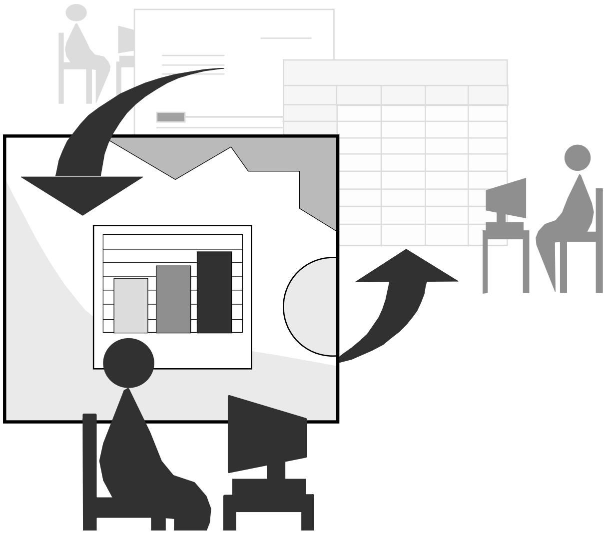
   Reports

   Crosstabs

   Mail, labels
3. Click the index entry you want, then click Display.

Chapter 8
Team Computing with SmartSuite

Team computing offers you new ways to communicate, collaborate, and coordinate with your coworkers. Whether you are working on a project with one person or working in a large, structured group, team computing tools automate how you gather, work with, and distribute information.



Here's a list of some of the exciting team features:

TeamMail™ lets you mail a file directly from any SmartSuite application.

TeamReview™ lets you automate and control reviews of 1-2-3 ranges, Word Pro documents, and Freelance Graphics presentations.

TeamConsolidate™ lets you put all review copies into one file to simplify updating your document, presentation, or 1-2-3 workbook.

TeamShow™ lets you deliver a Freelance Graphics presentation to remote locations.

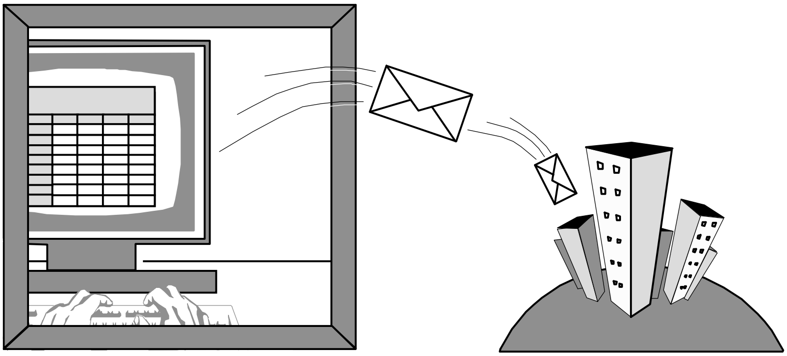
TeamSecurity provides controls to secure data in files you store across networks.

Notes/FX™ lets you exchange data between SmartSuite applications and Lotus Notes.

The following sections describe each of these features and their benefits. For specific task instructions, see the Help topics cited.

TeamMail: versatile and quick

If you use cc:Mail™, Lotus Notes, or any other VIM- or MAPI-compliant mail system, you can use the File - TeamMail command to send a mail message without leaving your SmartSuite application. You can attach a file to a mail message and send it to a list of people.



For example, suppose you are working in 1-2-3 and remember you need to send information to two coworkers. From your File menu you can create a note, attach your workbook, and send it to your coworkers using your e-mail system.

For more information

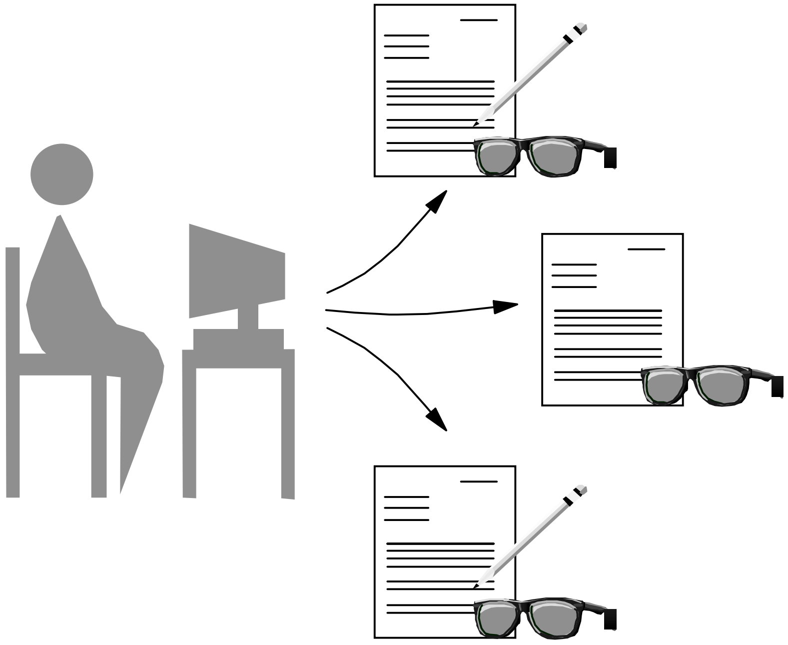
While working in a SmartSuite application:

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamMail
3. Click the index entry you want, then click Display.

TeamReview: getting feedback efficiently

In SmartSuite products, TeamReview provides a guide for sending a range of data, a document, or a presentation to review. TeamReview lets you send a message to reviewers and control the editing privileges for individuals or for teams. You can also distribute the material for review in a number of ways: on a network drive, through e-mail, or by floppy disks.



Mark-up tools let reviewers highlight information and tie the highlighted information to a review note. These notes are color-coded so that when you consolidate the range, document, or presentation, you can easily identify the reviewer.

For more information

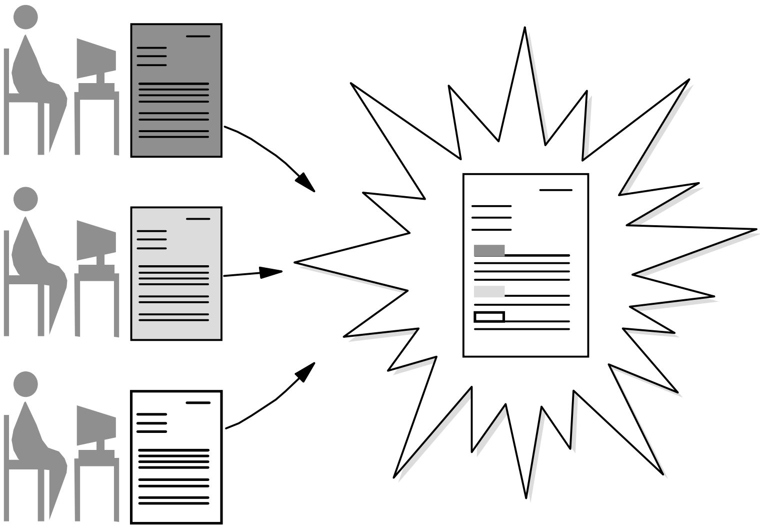
While working in a SmartSuite application:

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamReview
3. Click the index entry you want, then click Display.

TeamConsolidate: keeping it all together

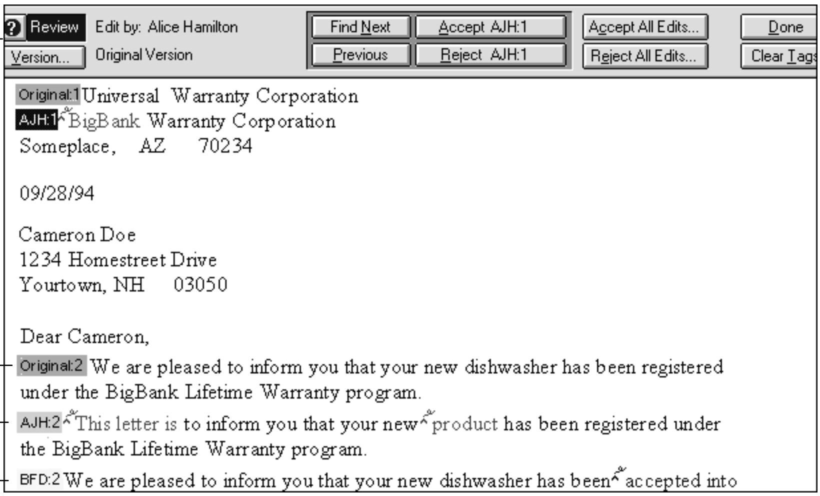
TeamConsolidate lets you consolidate multiple documents into one file so you can easily evaluate reviews from your coworkers. This feature also lets you consolidate presentations. In 1-2-3, you can merge versioned data from separate workbooks into a single file as well as distribute and consolidate spreadsheet data using Notes.



Here’s what a consolidated document looks like in Word Pro, with the edits for each reviewer appearing in identified sections.

Toolbar lets you control consolidation.

Color coding also helps you keep track of each editor's changes.



For more information

While working in 1-2-3, Word Pro, or Freelance Graphics:

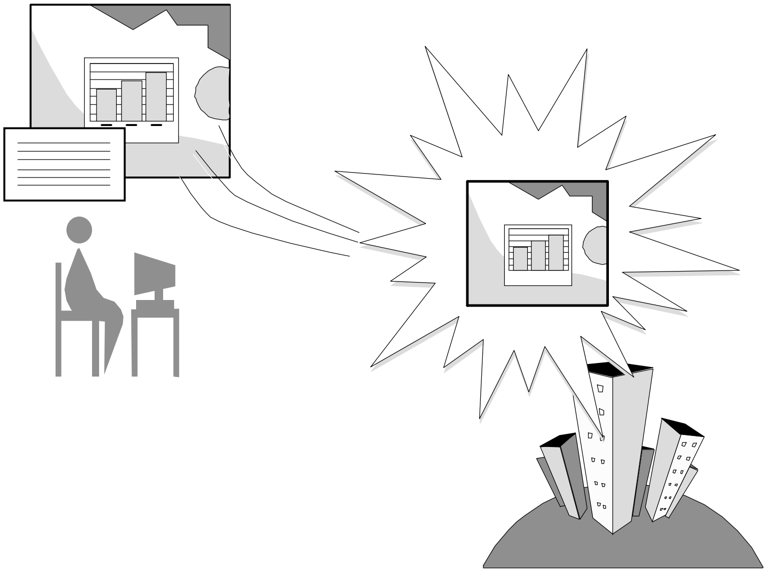
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamReview

3. Click the index entry you want, then click Display.

TeamShow: serving a far-flung audience

TeamShow lets you deliver a Freelance Graphics presentation to an audience in another location. When you use the Mobile Screen Show Player, a viewer in another city can watch your presentation or give you feedback on a presentation you are planning — even if the viewer doesn't have a complete copy of Freelance Graphics.



When you use TeamShow, you see the speaker notes as well as the presentation, while your audience sees only the presentation.

For more information

While working in Freelance Graphics:

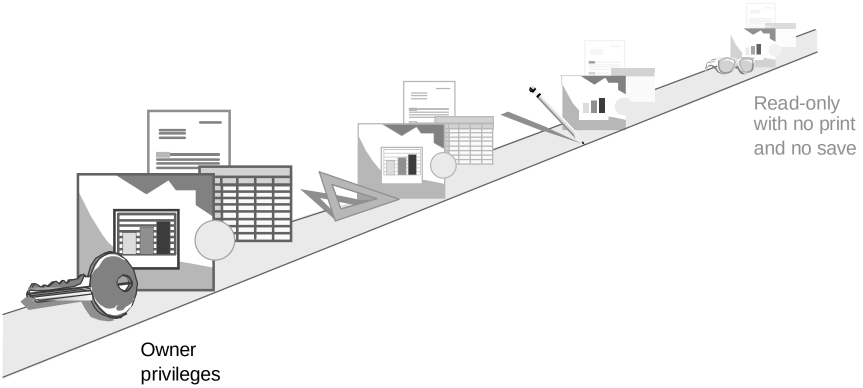
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamShow

3. Click the index entry you want, then click Display.

TeamSecurity: sharing data safely

Using Team Security in Approach and Word Pro lets you protect your data while sharing it. You set file-sharing controls to secure your data while your coworkers view or manipulate it across a network.



You can set access privileges for teams or individuals. In Approach, you can set privileges that range from reading, to editing, to designing, to managing a database that you have created. In Word Pro, you can set privileges for a document from reading it, to editing it, to designing it.

For more information

While working in Approach or Word Pro:

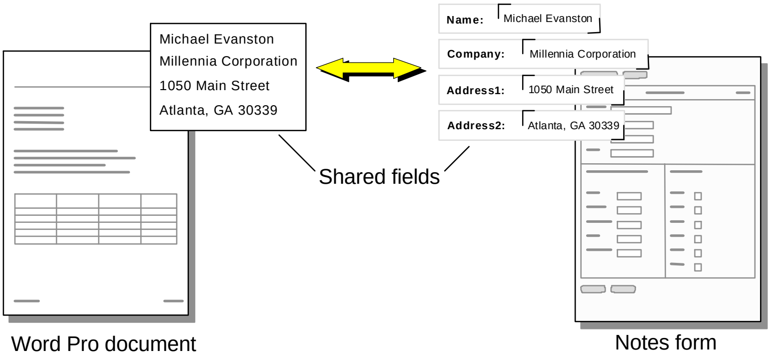
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamSecurity

3. Click the index entry you want, then click Display.

Exchanging data using Notes/FX

Notes/FX lets you exchange data between Lotus Notes documents and files created in other SmartSuite applications. If you are a Lotus Notes user, you can use Notes/FX together with SmartSuite to organize, store, access, track, and share information with your coworkers around the world.



For example, suppose your company wants to track contract information. You can create a Word Pro document that is a contract template. This template contains the formal language of the contract and blank Notes/FX fields for information such as the name, address, and company of your client. You also create a Notes form in which you embed the Word Pro document.

After you enter the information in the fields in Word Pro, you can print the contract and send it to the client. The data you entered appears in the corresponding fields in the Notes form.

You can extract and manipulate data without opening the Word Pro document. When you modify the fields in the Notes form, the embedded Word Pro file is updated. The contract agreement is stored in a Notes database with other contract agreements where you can view contracts by name or company.

Note For Notes/FX to work, all SmartSuite applications you use for Notes/FX must be properly registered as OLE server applications.

For more information

While working in any SmartSuite application:

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Notes/FX

3. Click the index entry you want, then click Display.

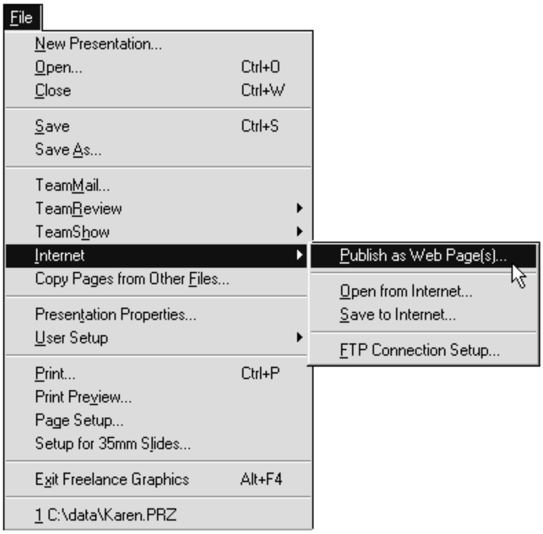
Chapter 9
SmartSuite: The Internet Connection

With SmartSuite applications, you have direct access to the Internet or the Intranet. The Intranet lets you share information within your company using Web technology.

- From SmartSuite applications, you can find information on the Internet and use it directly in your calculations, presentations, or documents.
- You can create HTML files in the SmartSuite applications and publish them directly to the Web.
- You can create hyperlinks, or URLs, between Web pages.

Ways to the Internet

SmartSuite applications offer you two avenues to the Internet: menus and SmartIcons. Menus in each application may vary slightly, given the needs of the application, but you always find Internet in the File menu.



SmartSuite products have Internet SmartIcons that allow you one-click access to Internet functions.

Publish as Web Pages

Open a file from the Internet

Save a file to an FTP server

Go to Lotus Home page

Go to Lotus Customer Support Home Page

Go to Lotus FTP Server

Go to the SmartSuite Internet Directory

Perform Internet Search on selected text

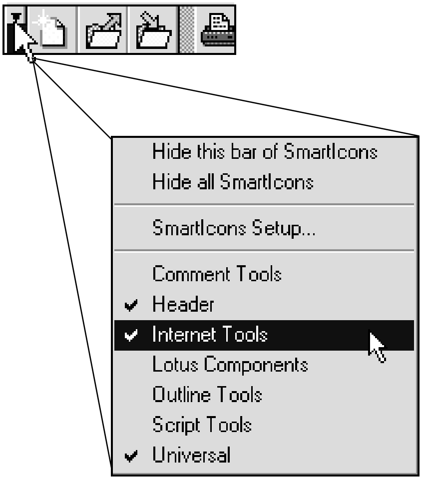
Go to Internet Options

Show/hide Internet tools

Finding the Internet SmartIcons set

To display the Internet SmartIcons set, look for the small arrows in the SmartIcons palette.

Click the arrow to select the Internet SmartIcons set.



For more information

From any SmartSuite application:

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Internet, overview(s)
3. Click the index entry you want, then click Display.

Sharing and applying Internet resources

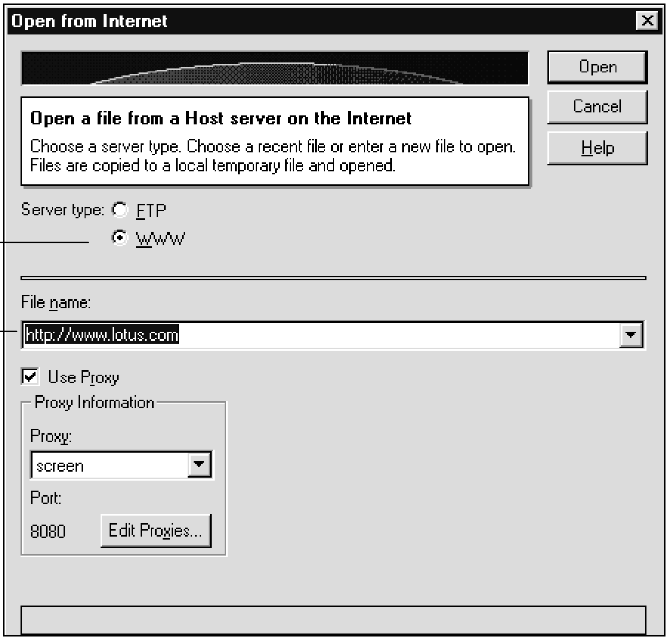
When you open files from the Internet, your SmartSuite application copies the file to your hard disk, where you can make changes.

Open a file from the Web

You open files that have been published to the Web by choosing File - Internet - Open from Internet and selecting a Web server.

Choose the Web server.

Enter the Web address.



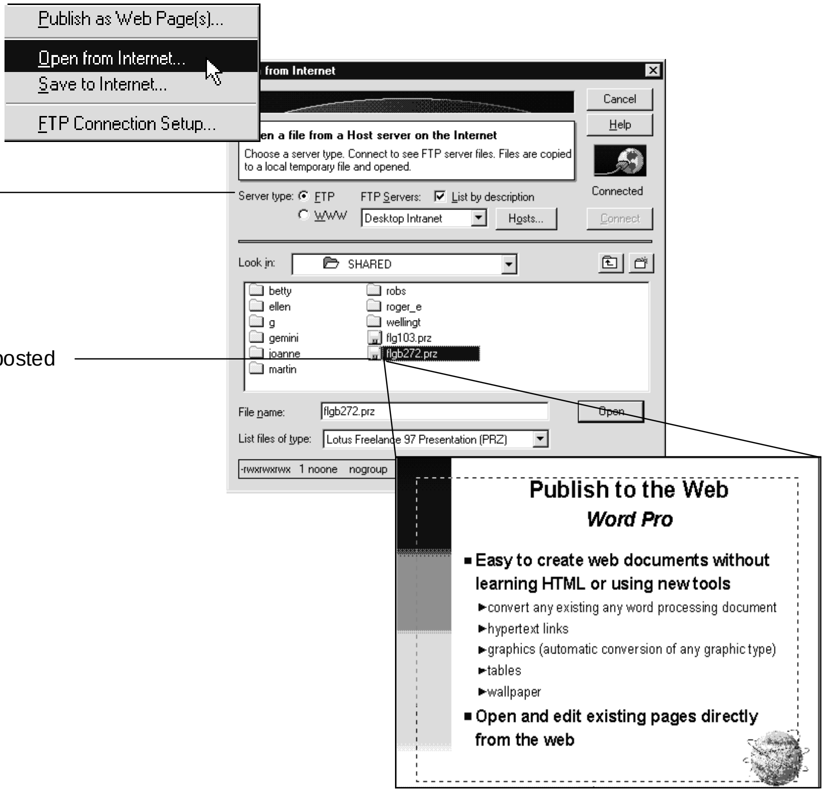
Open a file from an FTP server

SmartSuite lets you open a document from an FTP server in the same way you open any document. SmartSuite also maintains an address list of your most frequently used FTP servers.

Open the file you want...

from an FTP server.

A Freelance Graphics file posted to the server opens.

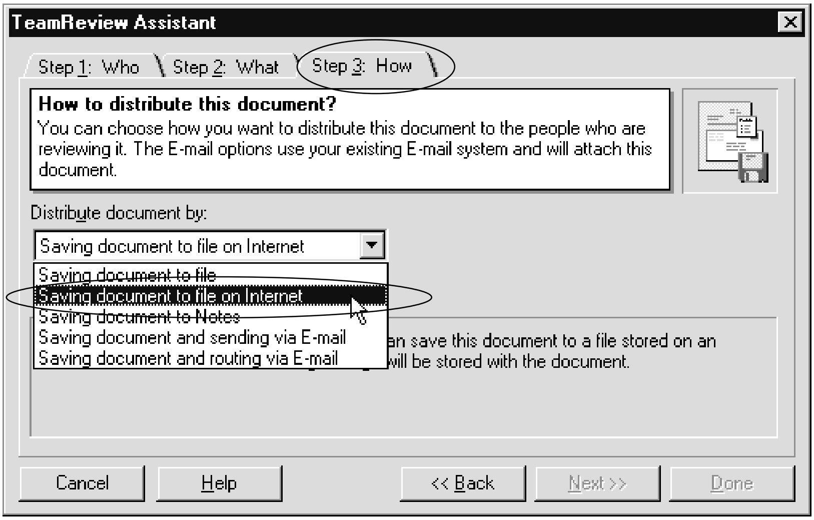


Sharing files

When you save documents to the Internet or Intranet, you can share data using SmartSuite features like TeamReview, TeamConsolidate, and TeamShow. For example, you can send your Word Pro document to colleagues half-way around the world to get feedback. Your colleagues can use the Word Pro editing tools to send back memos, and marked up and highlighted documents.

Use the How tab of the TeamReview Assistant...

to distribute a document on the Internet.



Publishing to the Web

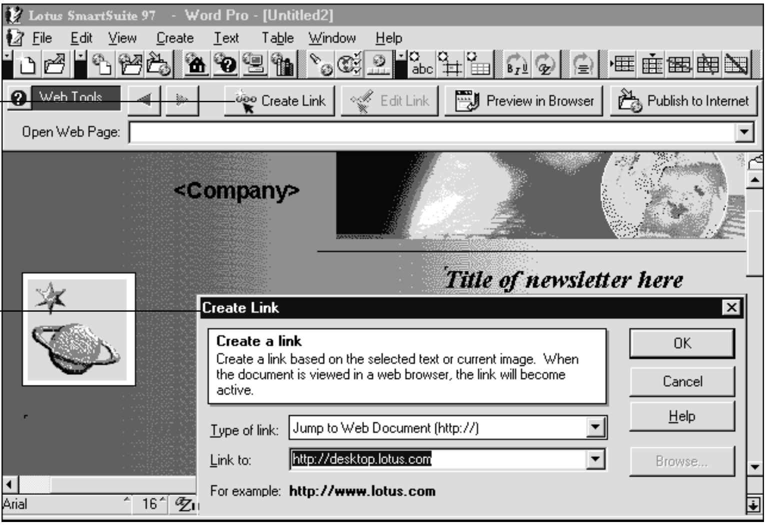
You don't need any special know-how to publish to the Web using SmartSuite products. That means you don't have to hire a specialist or buy and learn add-on products to create your own Web pages.

Word Pro is the perfect Internet publisher because it lets you use Web SmartMaster templates to create home pages. You can add hyperlinks, graphics, tables, HTML forms, and even wallpaper backgrounds. The process is as simple as creating a regular word processing document.

Click here...

to create links.

Use an HTML SmartMaster to create your document. Then save it as an HTML file.



1-2-3 lets you create an HTML table from a range, which you can then use to create a new Web page, complete with title and text.

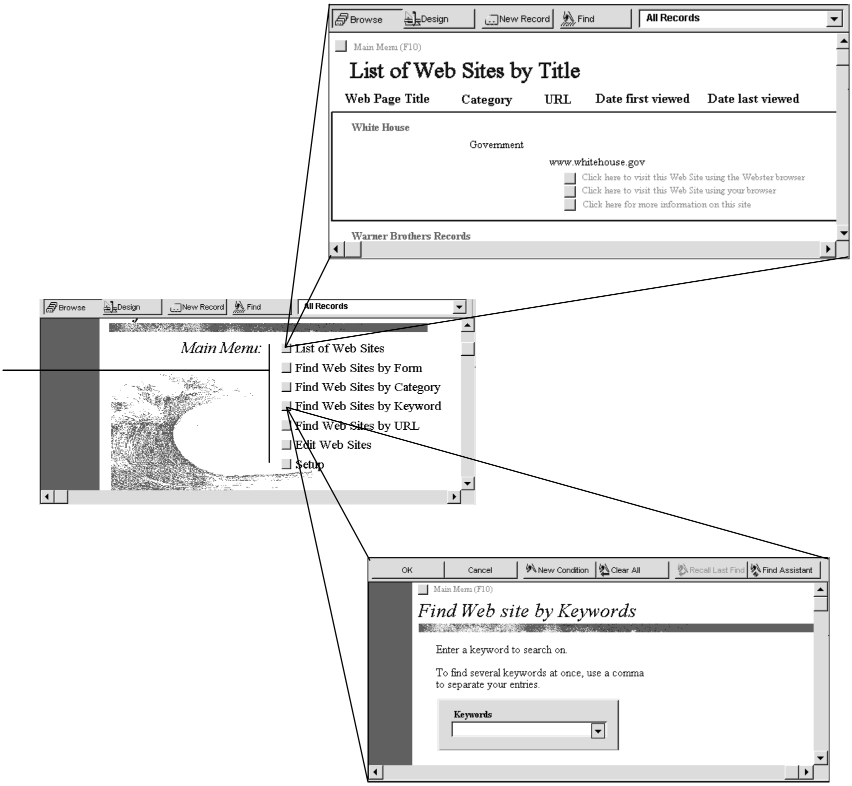
Freelance Graphics supports HTML so that presentations and graphics are automatically converted to HTM and GIF formats, the text and graphics formats that can be read on the Internet. HTML frames make it easy to navigate on the Web by letting you choose one topic, then another in the presentation, rather than watching sequentially.

You can also see the presentation as a PRZ file — even if you don't have Freelance Graphics — because you can download the free Mobile Screen Show Player from the Lotus Home page. For a direct link to the Lotus Home page, see the Helpful Web Sites folder in the Suite Help drawer.

Approach lets you publish reports, tables, and forms in HTML format.

Using Approach to surf the net

Approach lets you catalog, store, and search for links to your favorite Web sites. From Approach you simply click a link to go directly to the page you want. The Internet World Wide Web Sites, an Approach SmartMaster application, comes with over 500 links to top business sites, and you can also add your own favorites. The powerful Approach search capability makes browsing the Internet easy and fast — whether you have 500 links or many times that number.



Choose from a menu which way you want to search.

For more information

While working in Approach:

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Internet, **overviews**

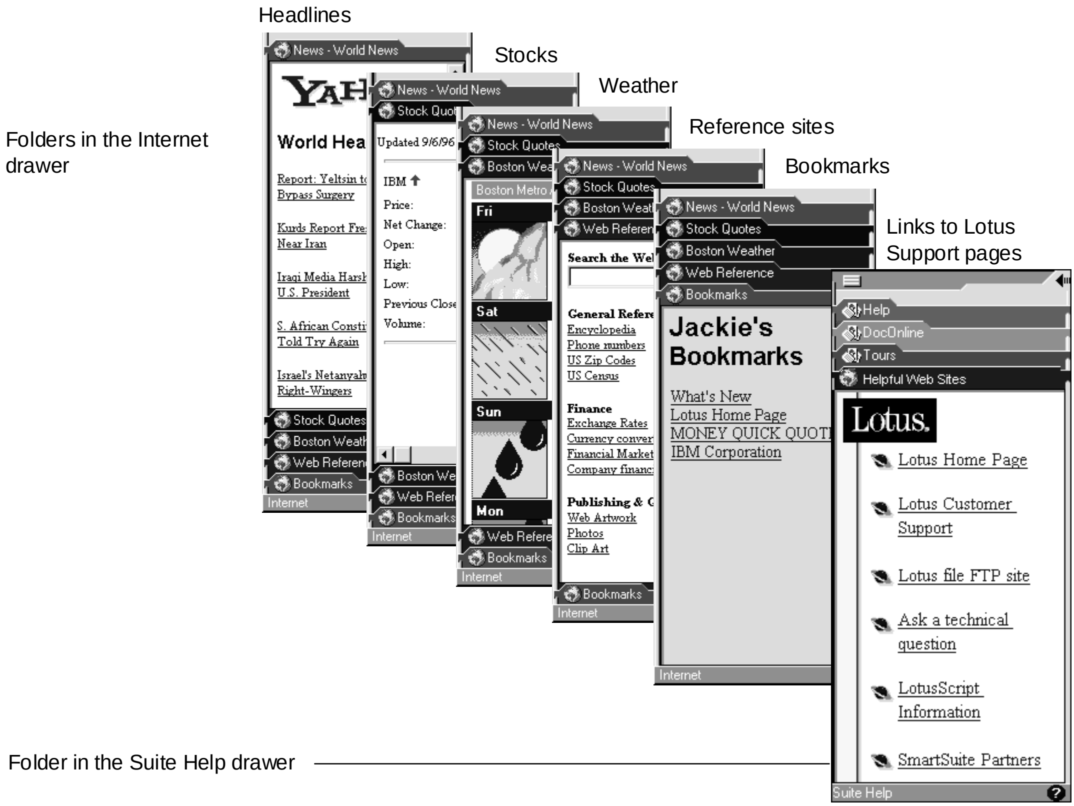
3. Click the index entry you want, then click Display.

Using Organizer on the Web

Organizer lets you embed a Web page as an OLE object into the Notepad section. You can then easily access resources from within Organizer.

SmartCenter: the Internet hub

SmartCenter offers you a drawer of links to the Internet and a folder that links you to Lotus Support pages.



For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type one of these phrases:

   Drawers, closing

   Drawers, opening

   Drawers, properties

3. Click the index entry you want, then click Display.

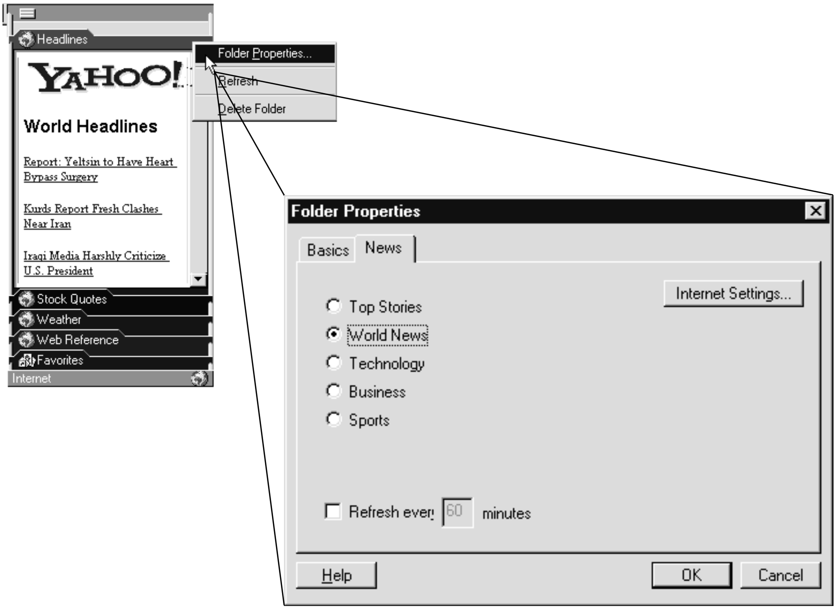
Customizing the SmartCenter links

You can customize SmartCenter links to use a different news source, to see different stock quotes, or to view the weather for different cities.

To customize links in a folder, right-click the folder tab.

Choose Folder Properties.

Then select the options you want.



For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type one of these phrases:

   Weather

   Stocks

3. Click the index entry you want, then click Display.

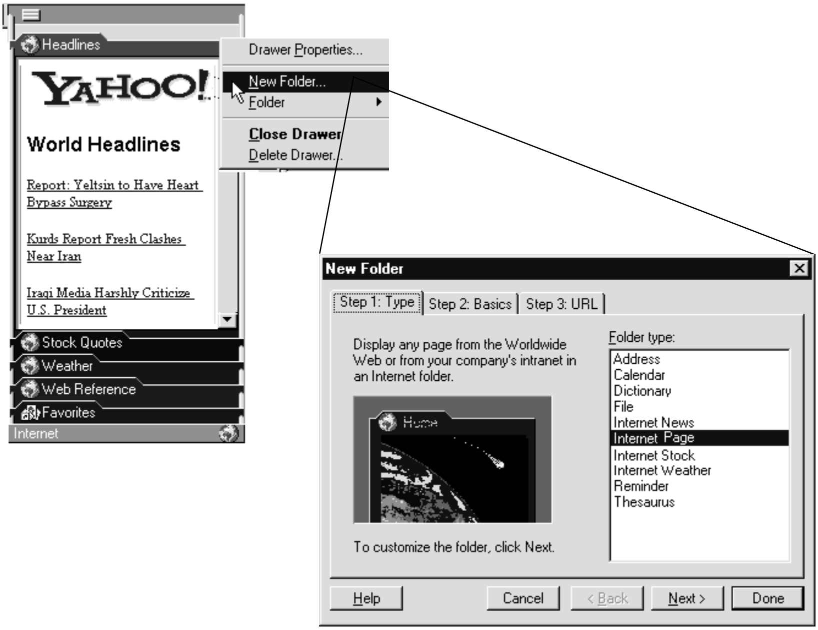
Organizing your links in SmartCenter folders

You can link any World Wide Web site to a SmartCenter file folder. In the file folder, the link appears as an Internet page.

To link to a site, right-click the Internet drawer.

Click New Folder.

Follow the steps on the tabs.



You can add as many links, or URLs, as you want.

For more information

1. Click Suite Help, click the Help folder, and double-click the Help book.
2. Click the Index tab, and type this phrase:

   Dragging, URL shortcuts
3. Click the index entry you want, then click Display.

Chapter 10
Getting Started with 1-2-3

1-2-3 is the easiest, most powerful, and best-connected spreadsheet.

If you're new to 1-2-3, you'll be amazed how quickly you can create effective spreadsheets to organize and manipulate your data. If you're a long-time customer, you'll appreciate the many enhancements to 1-2-3.

1-2-3 makes your most common spreadsheet tasks uncommonly simple.

Cool new features

1-2-3 helps you fly through your spreadsheet tasks with more ease than ever before. Full of innovations that streamline standard spreadsheet tasks, 1-2-3 increases the productivity of individuals as well as workgroups.

Accomplish everyday spreadsheet tasks quickly and easily

1-2-3 has the tools you need to be productive right away.

Shared Lotus design

1-2-3 has the same design as other Lotus applications, such as Lotus Word Pro® 97 Edition for Windows 95 and Windows NT 4.0, Lotus Freelance Graphics® 97 Edition for Windows 95 and Windows NT 4.0, and Approach. For example, shared features include the menu structure, SmartIcons®, the status bar, charting, and the InfoBox. Consistent design lets you transfer your knowledge from one Lotus application to another, reducing the time needed to get up and running.

InfoBox

Use the InfoBox to view and change properties for any object in 1-2-3 without interrupting your work to open or close a dialog box. All changes that you make in the InfoBox are live, so you see your results reflected instantly. You can leave the InfoBox open while you work, or collapse it to keep your workspace uncluttered.

Outlining

Use the 1-2-3 outlining features to collapse and expand data so you can view and print summary data or details.

Help

New Help features include a book-like table of contents and index, full-text search, and animated demos. Help provides the steps you need to get your work done, with jumps to the details about those steps, if you want more information.

Try using bubble help as a handy way to explore the 1-2-3 workspace. Just rest the pointer on different SmartIcons or InfoBox tabs to see pop-up descriptions.

Assistants

Assistants give you step-by-step instructions for performing complex tasks such as creating charts and query tables, for working with 1-2-3 data in Approach, for publishing a range to the Internet, and for managing multiple versions of data.

Cell comments

You can improve communication by attaching comments to any cell. Visual markers indicate at a glance which cells contain comments. You can also display markers on cells that have formulas to make those cells easy to find.

Print preview

Use dynamic preview to check your work before printing, make adjustments, and see the results immediately. You can even print out formulas and cell comments.

AutoTotal

You can automatically sum values by just typing the word “Total” or “Totals” — you don’t even need to click an icon.

Object Linking and Embedding

Object Linking and Embedding (OLE) lets you share data between 1-2-3 and other Windows applications that support OLE.

1-2-3 provides full OLE 2 support, which makes it easy to edit embedded objects from other Windows applications. When you double-click an embedded object, the 1-2-3 menu switches to reflect the commands you need from the other application.

Tour

Use the 1-2-3 Tour to quickly learn about major 1-2-3 features. You can run the Tour at any time by choosing Help - Tour.

Work together across our suite

Using Lotus applications together is easy and seamless. Our desktop applications not only have a common look and feel but also are tightly integrated to help you accomplish tasks that cross product boundaries.

LotusScript

LotusScript® is an object-oriented programming language that lets you automate your work in 1-2-3 and other Lotus applications. You can use LotusScript for a wide variety of tasks, from performing simple commands to developing complex cross-product applications.

Because 1-2-3 provides the same development environment as other Lotus applications, it's easy to create, debug, and run programming applications. LotusScript is compatible with BASIC.

1-2-3 and Approach

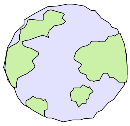
1-2-3 and Approach are more tightly integrated than ever, to make it easy to combine the power of Approach databases with the ease-of-use of a spreadsheet. From within 1-2-3, you can create Approach views, such as forms, mailing labels, form letters, reports, and crosstabs. You can also perform queries on your data from within 1-2-3 and send the output of the query to a 1-2-3 range for further analysis.

Collaborate with your workgroup

1-2-3 is the best spreadsheet to use in a workgroup. 1-2-3 is designed to help your workgroup work better together.

- Use **TeamMail**™ to send a 1-2-3 workbook, range, or just a message to your coworkers from within 1-2-3. You can send data to everyone simultaneously or route the message from one person to the next.
- **TeamReview**™ lets you send a specific range of data, with comments, to one or many users or to a pre-selected routing list. Tracking tools tell you when information is received and forwarded. All comments come back to you for consolidation.
- **TeamConsolidate**™ joins 1-2-3 with Lotus Notes® so you can distribute data, gather updates and input from team members, and pull it all together in one document.
- The improved **version management tools** help you keep track of changes to data, either from coworkers' review comments or from your own modifications.
- Use **NotesFlow**™ to develop custom workflow applications using Notes™ Release 4.0 and OLE. With NotesFlow, each menu command in a Notes form runs a script that you specify, and you can access the commands from both Notes and 1-2-3.

Take advantage of the Internet



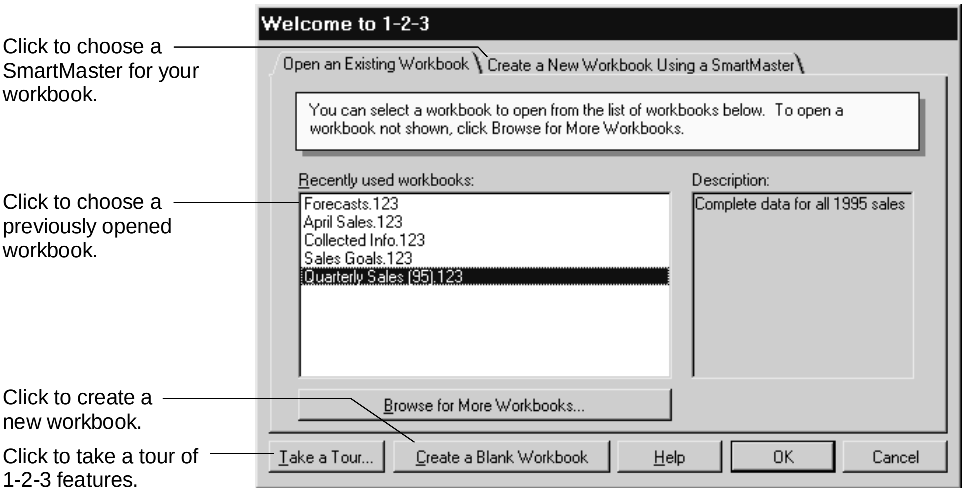
1-2-3 is the best spreadsheet to use for connecting to the World Wide Web. You can easily save workbooks to the Internet, open Web pages from within 1-2-3, create your own Web pages from 1-2-3 ranges, and search the Web for data in 1-2-3 cells.

For more information

1. Choose Help - Help Topics and click the Contents tab.
2. Double-click the **What's New for Upgraders** book.
3. Double-click the **New Features** book, choose a topic to display, and then click Display.

Welcome to 1-2-3

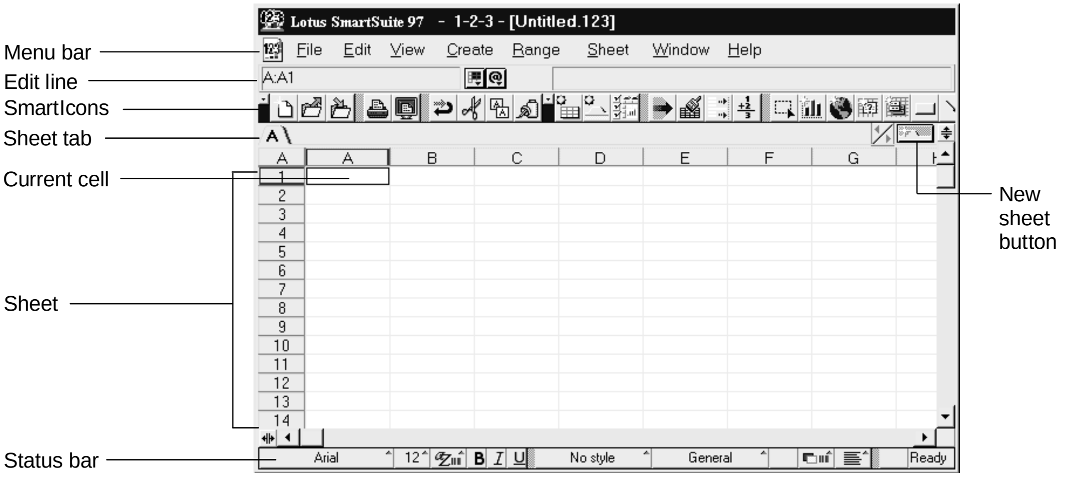
When you start 1-2-3, you see the Welcome to 1-2-3 dialog box.



The "Recently used workbooks" list contains names of workbooks — 1-2-3 files — used in previous sessions. If you are starting 1-2-3 for the first time, the dialog box opens to the "Create a New Workbook Using a SmartMaster" tab.

Creating a blank workbook

When you create a blank workbook, the workspace looks like the one below.



You do your work in a new, untitled workbook and then give the workbook a name when you save it.

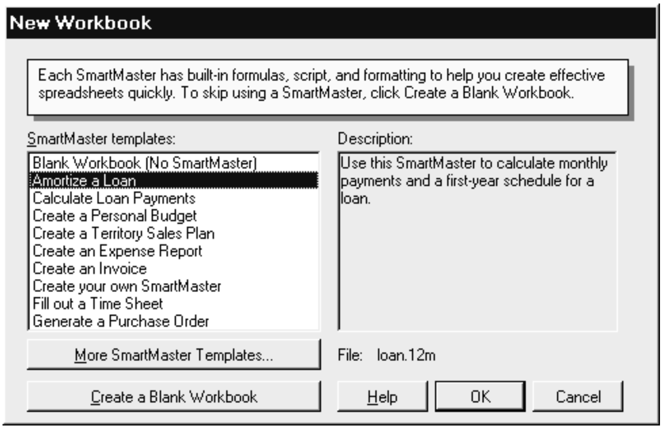
Using SmartMaster templates

A SmartMaster template is an attractive template that lets you create good-looking and useful spreadsheets with minimum effort. A SmartMaster template features not only a designer "look," but also a structure for entering your information.

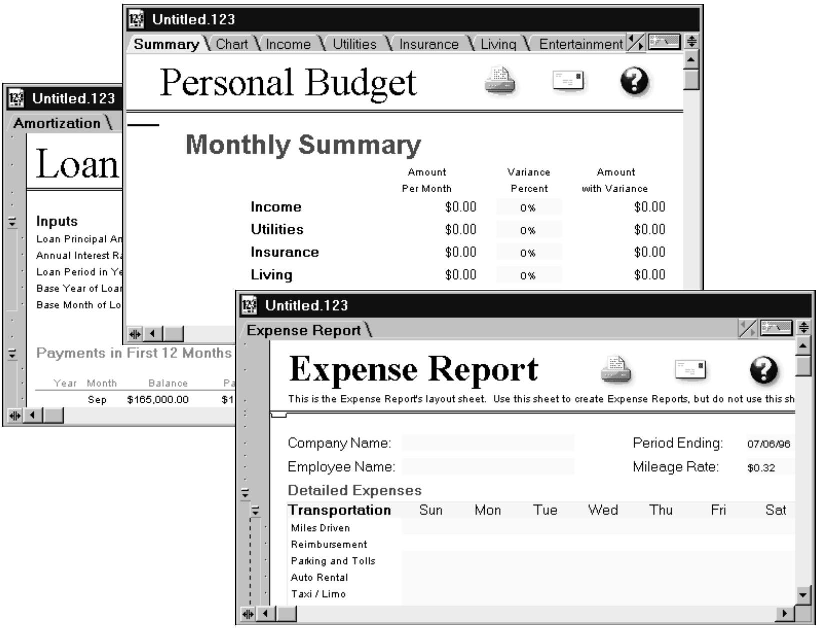
1-2-3 comes with a number of SmartMaster templates, including ones for:

- Loans
- Timesheets
- Personal budgets
- Sales plans
- Invoices

The Welcome to 1-2-3 dialog box lists a number of SmartMaster templates to choose from. Click the one you want, and click OK to open it.



If you create a workbook using a SmartMaster template, the sheet area of the workbook has portions already filled in.



Fill out the sections in the SmartMaster template with your data. Each SmartMaster template comes with formulas and scripts that analyze the data you enter.

For information on using the SmartMaster template, click the Help button in the form.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

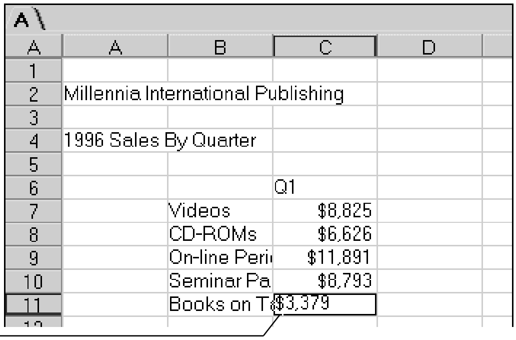
   SmartMaster templates
3. Click the index entry you want, then click Display.

Chapter 11
Creating a Simple Spreadsheet

To create a simple spreadsheet in 1-2-3, you enter text, numbers, and formulas. 1-2-3 has many features that make data entry quick and easy, so you can create a new spreadsheet in a snap.

Entering data

You enter data in a 1-2-3 sheet simply by clicking and typing in the cells. When you finish entering data in a cell, press **ENTER** or one of the arrow keys to move to the next cell.



Click and type to enter data.

Cool tricks

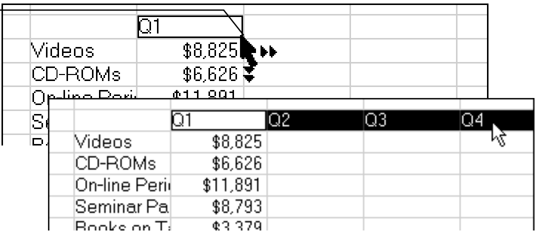
You can enter text that begins with numbers, as in “1996 Sales By Quarter.” Just type '(apostrophe) before entering the data.

Entering data automatically

If your data follows a sequence, use drag and fill to enter data automatically using the SmartFill cursor. For example, if your data starts with “Q1,” you can drag to enter “Q2,” “Q3,” and “Q4.”

Place the SmartFill cursor at the edge of the cell, and drag...

to fill the cells with data based on the first cell.



1-2-3 comes with many built-in SmartFill lists, including numbers, months, days, and times. You can also create your own custom SmartFill lists for data you enter frequently.

To clear data, use drag and clear. Just select a range and move the SmartFill cursor back over it.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

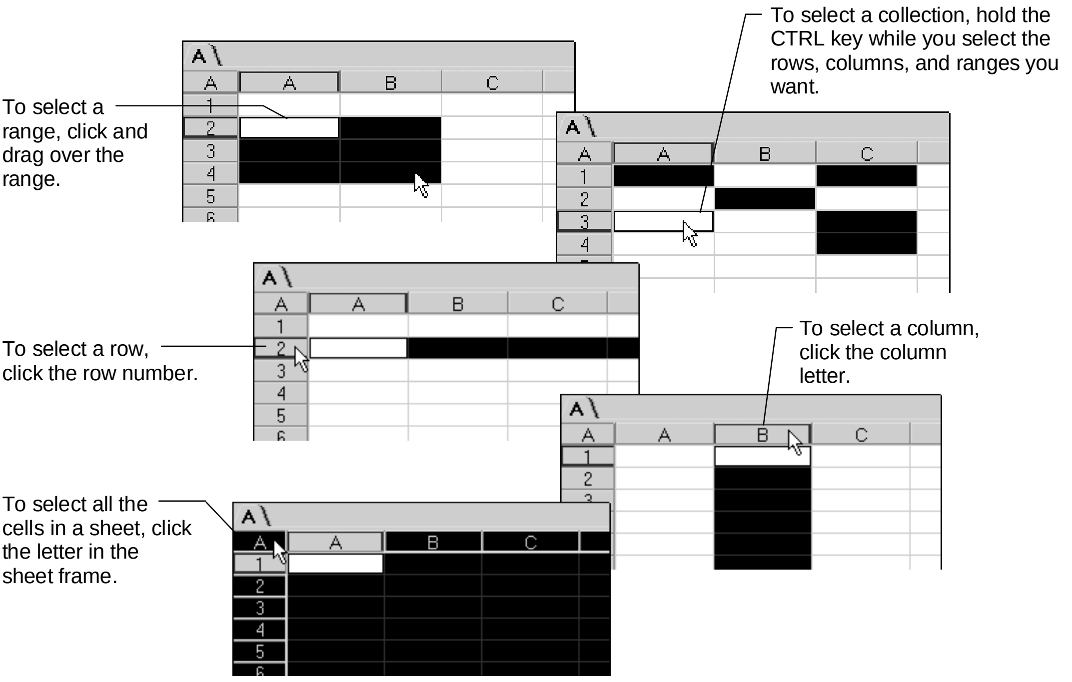
   Drag and fill

   Drag and clear

   SmartFill lists, changing
3. Click the index entry you want, then click Display.

Selecting data

You select a cell by clicking it. You can also select ranges, rows, columns, and collections.



You can make three-dimensional selections (selections that go across multiple sheets) by selecting a range on one sheet, and then holding the **SHIFT** key and clicking the tabs of the sheets you want to extend the selection to.

Cool tricks

Use the Range - Name command to name selected data ranges. Then you can find them easily when you want to refer to them in charts, maps, versions, @functions, and LotusScript routines.

For more information

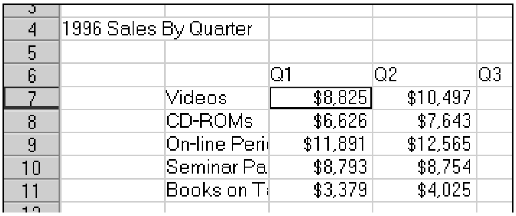
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Selecting
3. Click the index entry you want, then click Display.

Editing data

To modify data, double-click the cell you want to change and edit the data that's there. When you finish making your changes, press **ENTER**. To cancel the change before you press **ENTER**, press **ESC**.

Double-click a cell to edit what's there.



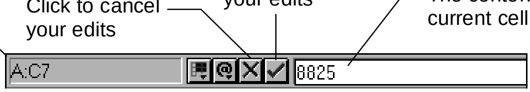
You can also edit data by selecting a cell and clicking the contents in the edit line.

The address of the current cell

Click to cancel your edits

Click to accept your edits

The contents of the current cell



To undo your changes, choose Edit - Undo.

For more information

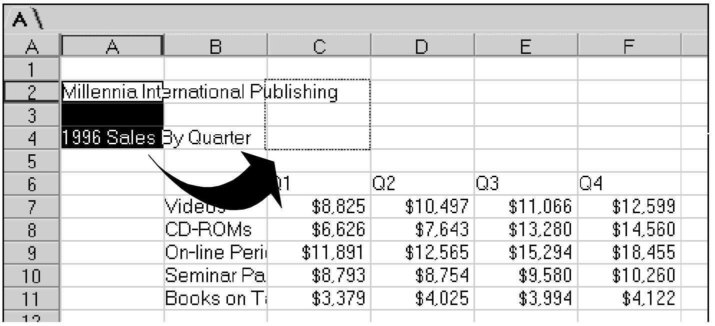
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Editing, overview
3. Click the index entry you want, then click Display.

Copying and moving data

Use drag and drop to move data from one place to another.

Select the range, move the cursor to the edge of the range, and drag to the new location.



When the cursor is positioned correctly for dragging, it looks like a hand.

To copy data instead of moving it, hold the **CTRL** key while you drag to the new location.

Cool tricks

Drag and drop data to other sheets by dragging the data up to the tab for the other sheet and then dragging the data to the cells you want. When you drag the data to a sheet tab, 1-2-3 makes that sheet the current sheet.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Copying, overview

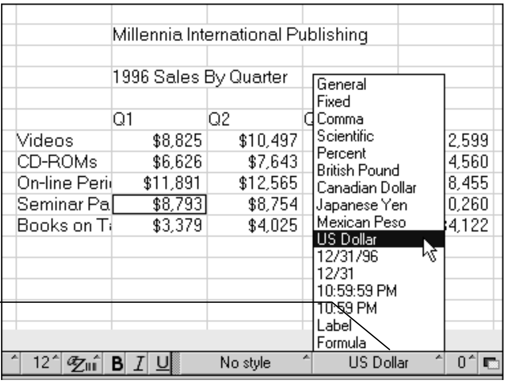
   Drag and drop
3. Click the index entry you want, then click Display.

Formatting numbers

1-2-3 automatically formats numbers based on what you enter. For example, if you enter % (a percent sign), 1-2-3 recognizes that symbol and formats the data in Percent format.

You can also easily change the format of your data. To change a number format, select a cell or range, and then choose another format from the status bar button.

Click to choose a number format for the current selection.



The status bar shows only a small number of the many formats available in 1-2-3. See the InfoBox for ranges for the full list.

For more information

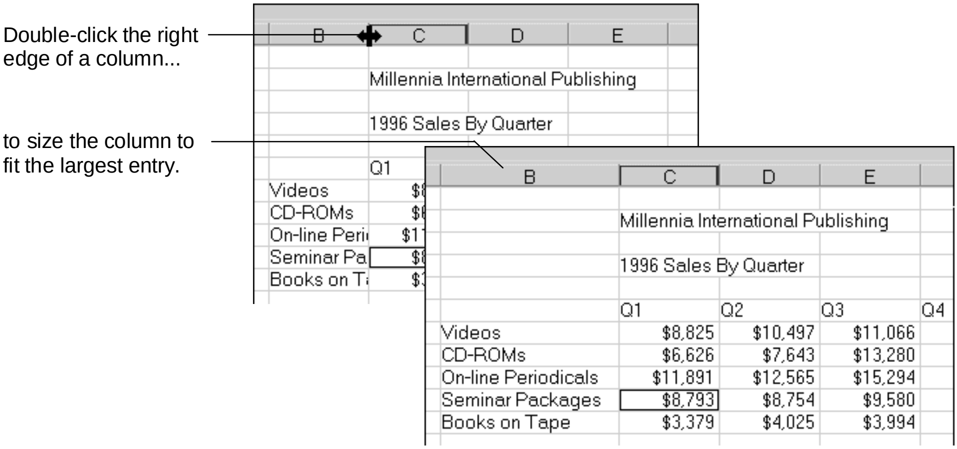
1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Formatting, numbers

   Number formats, frequently used
3. Click the index entry you want, then click Display.

Resizing columns and rows

You can click to adjust the column width and row height. To adjust the column to fit the widest entry, double-click the border to the right of the column letter.



To resize to a specific width, drag the border to the right to widen the column or to the left to make it narrower. 1-2-3 displays an indicator under the column letters to show the number of characters the column will hold.

To change the height of a row, drag the bottom border down to make the row taller or up to make it shorter. To adjust the row height to the tallest entry, double-click the border below the row number.

You can hide columns and rows by dragging until the indicator reads 0 (zero) characters.

Cool tricks

To resize a column to fit the widest numeric entry, hold down **SHIFT** while you double-click.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

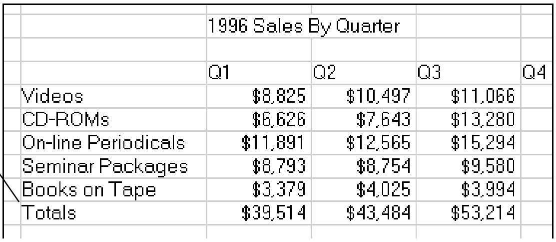
   Sizing, columns

   Sizing, rows
3. Click the index entry you want, then click Display.

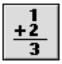
Calculating totals

The 1-2-3 AutoTotal feature sums your data in a single step — you just type "Total" or "Totals," and 1-2-3 does the rest for you.

Enter the word "Total" or "Totals," and 1-2-3 automatically sums your columns or rows.



	1996 Sales By Quarter			
	Q1	Q2	Q3	Q4
Videos	$8,825	$10,497	$11,066	
CD-ROMs	$6,626	$7,643	$13,280	
On-line Periodicals	$11,891	$12,565	$15,294	
Seminar Packages	$8,793	$8,754	$9,580	
Books on Tape	$3,379	$4,025	$3,994	
Totals	$39,514	$43,484	$53,214	



To calculate totals without using a heading, select cells to the right of a row or below a column and click the SmartSum icon. 1-2-3 automatically enters the sums in the selected range.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

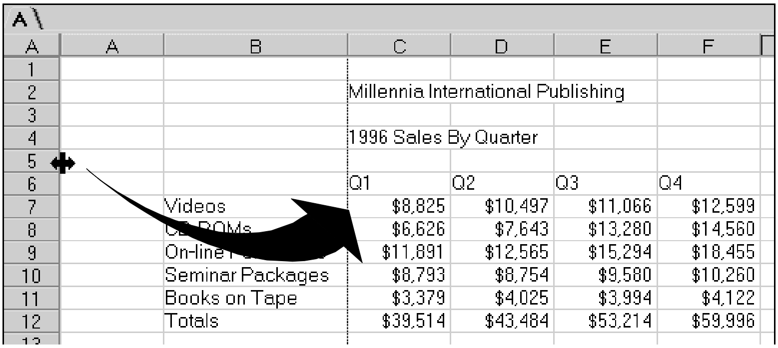
   Summing ranges

   Copying, to fill a range
3. Click the index entry you want, then click Display.

Keeping headings in sight

You freeze rows and columns to keep your headings in view while you scroll through the data.

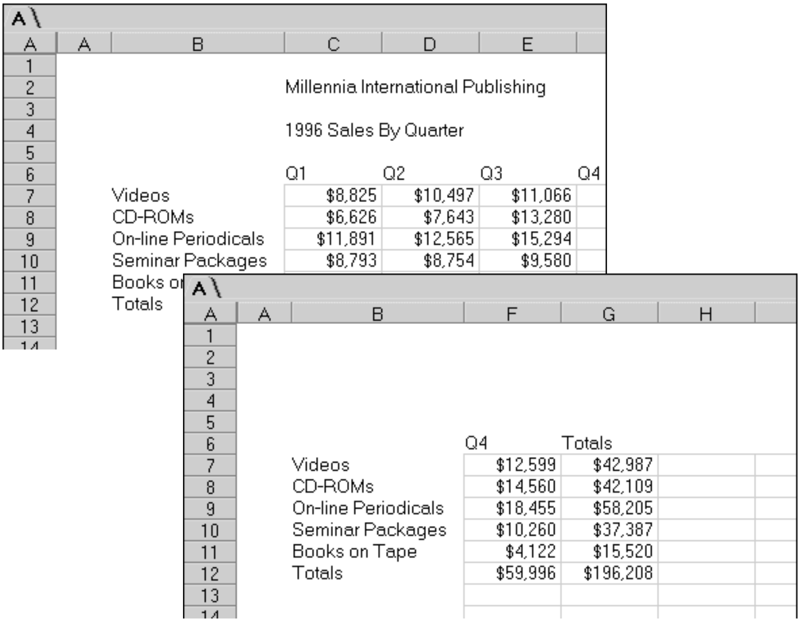
Drag the pointer from the right of the row number to the right of the last column you want to freeze.



A	A	B	C	D	E	F
1						
2			Millennia International Publishing			
3						
4			1996 Sales By Quarter			
5						
6			Q1	Q2	Q3	Q4
7		Videos	$8,825	$10,497	$11,066	$12,599
8		[illegible]	$6,626	$7,643	$13,280	$14,560
9		On-line [illegible]	$11,891	$12,565	$15,294	$18,455
10		Seminar Packages	$8,793	$8,754	$9,580	$10,260
11		Books on Tape	$3,379	$4,025	$3,994	$4,122
12		Totals	$39,514	$43,484	$53,214	$59,996

To freeze rows, drag the pointer from below the column letter to below the row you want to freeze.

When you freeze rows or columns, the frozen cells stay in view even when you scroll through the sheet.



To unfreeze columns, place the mouse pointer at the grid line to the right of the frozen area and drag back to the right of the row numbers. To unfreeze rows, place the mouse pointer at the grid line just under the frozen area and drag back to the bottom of the column letters.

Cool tricks

You can edit the data in frozen cells just as you do in other cells — just double-click the cell and type.

For more information

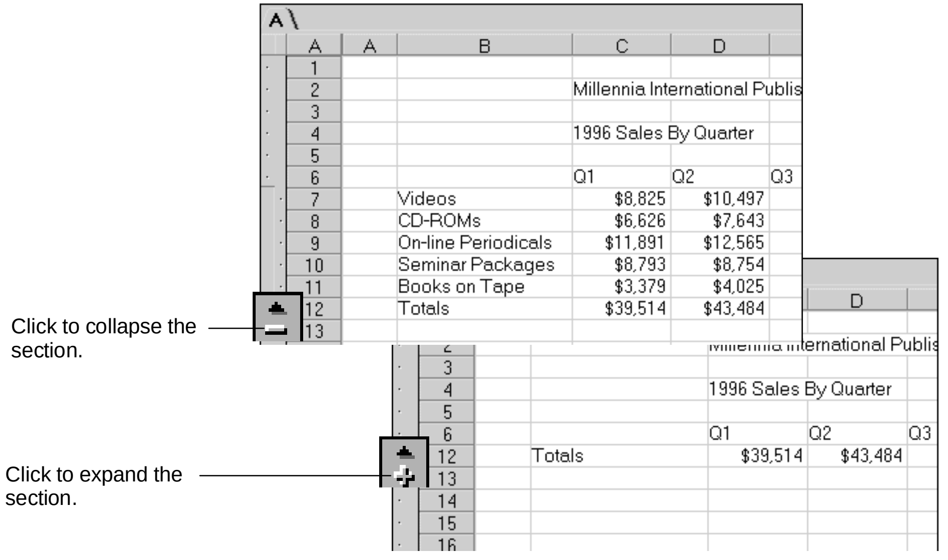
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Titles, freezing columns and rows as
3. Click the index entry you want, then click Display.

Outlining data

Use outlining to expand and collapse areas of a sheet so you can see and print more or less detail. You can create an outline with up to eight levels of rows or columns, or both.

You create an outline by demoting the selected rows or columns. Once you create the outline, click the outline symbols to expand or collapse the demoted rows and columns.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Outlines, creating

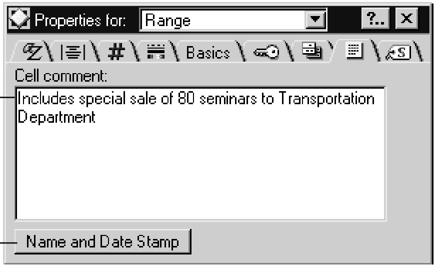
3. Click the index entry you want, then click Display.

Annotating cell contents

Use cell comments to document individual cells of your sheet — without taking up valuable display space. Select the cell and click the cell comment tab on the InfoBox for ranges.

Enter the comment for the current cell.

Click here to add the date and author name.



When a cell has a comment, 1-2-3 displays a red comment marker in the top left corner.

Comment marker

To hide comment markers, choose View - Set View Preferences, and uncheck the box for cell comment markers.

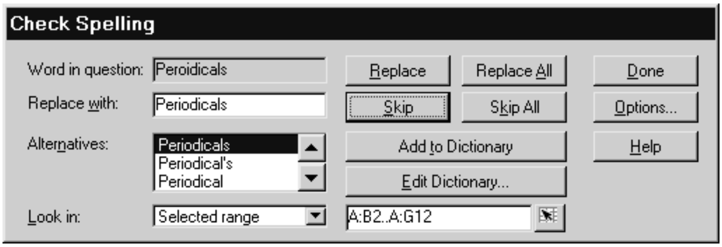
For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Cell comments
3. Click the index entry you want, then click Display.

Checking spelling

1-2-3 has a powerful spell-checking facility to help you find misspelled words in your workbooks. To check for misspelled words, choose Edit - Check Spelling or click the icon.



You can look in the current workbook, just the current sheet, a selected range, or even all your workbooks.

By specifying different options, you can tell 1-2-3 whether to check for repeated words, or words with numbers or @functions. You can also create multiple personal dictionaries, each with the spellings you use.

For more information

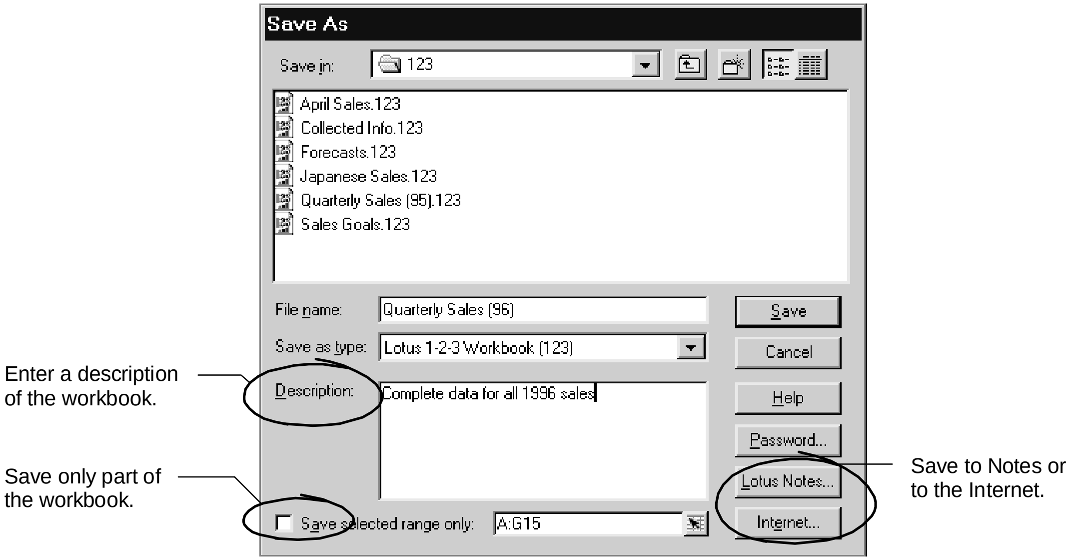
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Spelling, checking

3. Click the index entry you want, then click Display.

Saving files

Convenient file saving features help you work efficiently and avoid losing data. You can save your workbook by clicking an icon. Or use the File - Save As command to save your work to another file, to a Notes document, or even to the Internet.



For more information

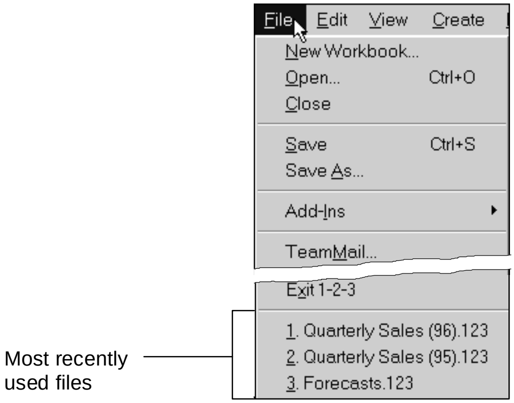
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Workbooks, saving

3. Click the index entry you want, then click Display.

Opening files

1-2-3 lists recently used files at the bottom of the File menu, so you can reopen a file simply by choosing it from the menu.



You can also easily open files stored on the Internet, as well as files stored in Notes. Choose File **-** Open to see all the files available.

For more information

1. Choose Help **-** Help Topics and click the Index tab.

2. Type this phrase:

Workbooks, opening

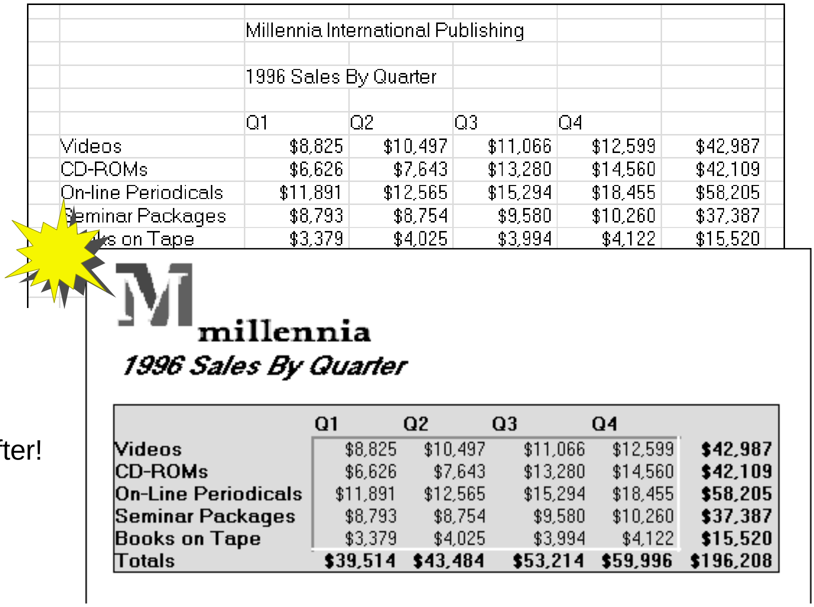
3. Click the index entry you want, then click Display.

Chapter 12
Showing Off Your Spreadsheets

You can easily spruce up a spreadsheet to make your data stand out. Use the techniques shown in this chapter to give your sheets the look you want.

Before...

After!



Millennia International Publishing

1996 Sales By Quarter

	Q1	Q2	Q3	Q4	
Videos	$8,825	$10,497	$11,066	$12,599	$42,987
CD-ROMs	$6,626	$7,643	$13,280	$14,560	$42,109
On-line Periodicals	$11,891	$12,565	$15,294	$18,455	$58,205
Seminar Packages	$8,793	$8,754	$9,580	$10,260	$37,387
Books on Tape	$3,379	$4,025	$3,994	$4,122	$15,520

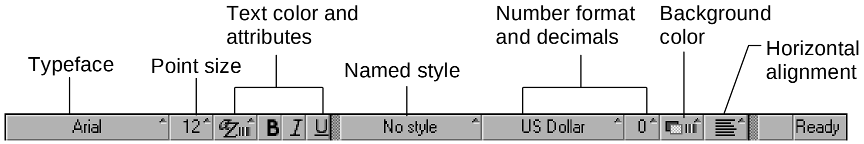
millennia

1996 Sales By Quarter

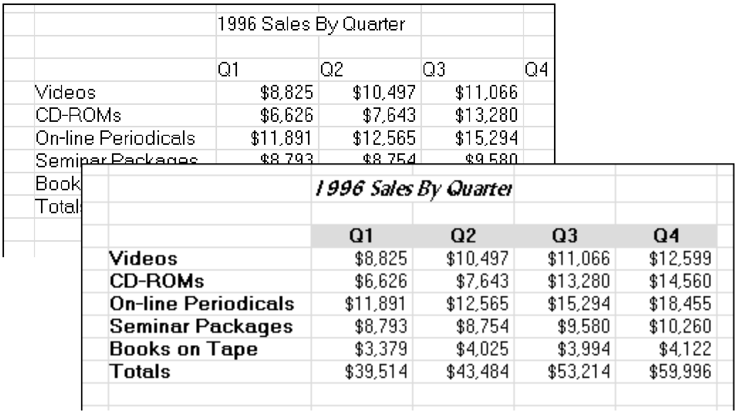
	Q1	Q2	Q3	Q4	
Videos	$8,825	$10,497	$11,066	$12,599	**$42,987**
CD-ROMs	$6,626	$7,643	$13,280	$14,560	**$42,109**
On-Line Periodicals	$11,891	$12,565	$15,294	$18,455	**$58,205**
Seminar Packages	$8,793	$8,754	$9,580	$10,260	**$37,387**
Books on Tape	$3,379	$4,025	$3,994	$4,122	**$15,520**
Totals	**$39,514**	**$43,484**	**$53,214**	**$59,996**	**$196,208**

Changing styles with a single click

Use the status bar to make changes to a selected range with a single click.



For example, you can quickly make data bold or italic, change horizontal alignment, and put a background color in the cells.



	1996 Sales By Quarter			
	Q1	**Q2**	**Q3**	**Q4**
Videos	$8,825	$10,497	$11,066	$12,599
CD-ROMs	$6,626	$7,643	$13,280	$14,560
On-line Periodicals	$11,891	$12,565	$15,294	$18,455
Seminar Packages	$8,793	$8,754	$9,580	$10,260
Books on Tape	$3,379	$4,025	$3,994	$4,122
Totals	$39,514	$43,484	$53,214	$59,996

For more information

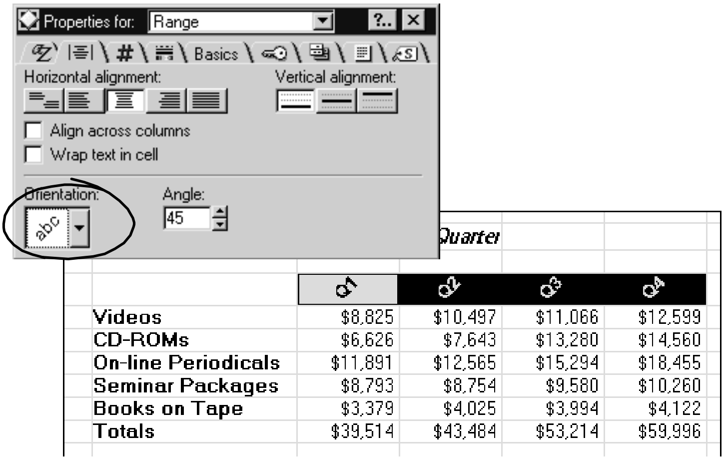
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Status bar

3. Click the index entry you want, then click Display.

Making changes using the InfoBox

Use the InfoBox to make more elaborate changes, such as rotating text in a selected range.



You can use the InfoBox to make dozens of other changes to your data, including:

- Aligning data
- Changing the font, size, and color of data
- Adding frames to ranges
- Changing the number format

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   InfoBox, overview

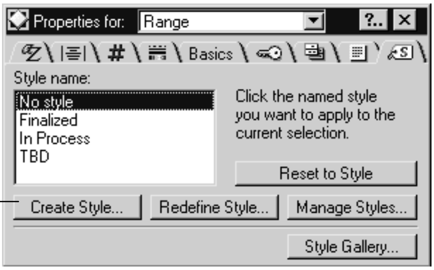
   InfoBox, using
3. Click the index entry you want, then click Display.

Reusing the look you like

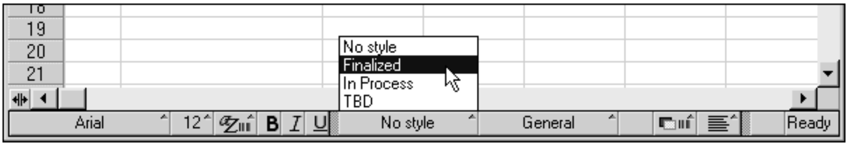
If you use a particular set of attributes over and over, save them as a named style. Then you can apply that named style to other ranges in the workbook.

To create a named style, modify a cell so it looks as you want, and then open the Named Style tab of the InfoBox for ranges.

Click this button and then give your look a name.



To use the named styles you create, select the cells you want to change and choose the named style you want from the status bar.



You can also use the fast format feature to copy a style from one range to another. Select the data you like, click the fast format icon or choose Range - Fast Format, and click the cells you want to change. To turn off fast formatting, click the icon again or press **ESC**.

Cool tricks

Copy a named style to another workbook by copying a cell that uses the named style and pasting it into the other workbook.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Fast format

   Styles, named styles
3. Click the index entry you want, then click Display.

Enhancing sheets

You can easily add sheets to your workbook, name sheets, and customize the way they look. To add a sheet, choose Create - Sheet or click the New Sheet button at the top-right corner of the 1-2-3 window.

Give your sheet a name to help document the contents of the sheet and make it easier to find if you have several sheets in your workbook.

To name a sheet, double-click the tab and enter a name.

You can easily change the look of your sheets using the InfoBox. For example, you can:

- Change the default colors in the cells.
- Add lines around a selected area by adding a border.
- Turn off the grid display.
- Change the default font and colors used for data.
- Automatically display negative values in red.

Cool tricks

Group your sheets before you style them so that changes you make to one sheet apply to all the others. Use Sheet - Group Sheets to group your sheets together. When you're done designing the sheets, use Sheet - Clear Sheet Group to undo the grouping.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Sheets, defaults

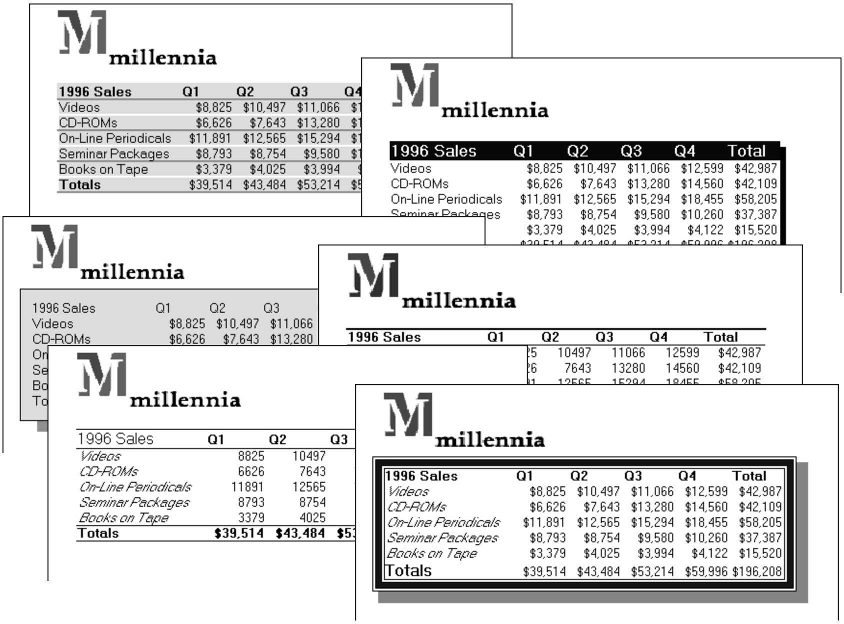
   Sheets, adding

   Sheets, naming

   Sheets, grouping
3. Click the index entry you want, then click Display.

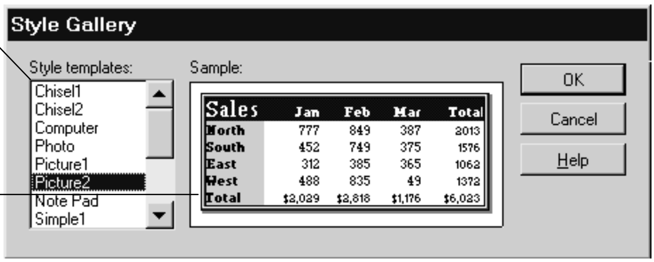
Designing sheets with a single click

1-2-3 comes with a gallery of professionally designed style templates that you can use to quickly make your data look snazzy.



To apply a style template, select the data, open the InfoBox, click the Named Style tab, and then click Style Gallery. You see a list of templates, along with a picture of how each template looks.

Select a style template from the list.



A picture of the selected style template appears here.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Styles, gallery of templates
3. Click the index entry you want, then click Display.

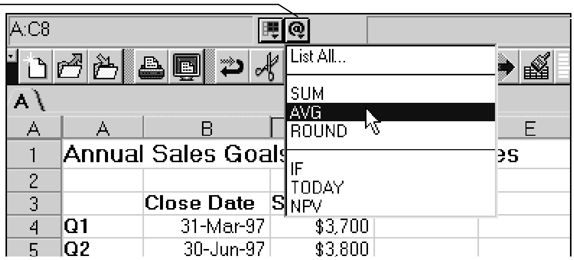
Chapter 13
More Power with @Functions and Formulas

1-2-3 includes more than 200 built-in formulas, called @functions, that perform many different types of calculations. You can use these @functions, or write your own formulas, to manipulate the data in your spreadsheet.

Building @functions quickly

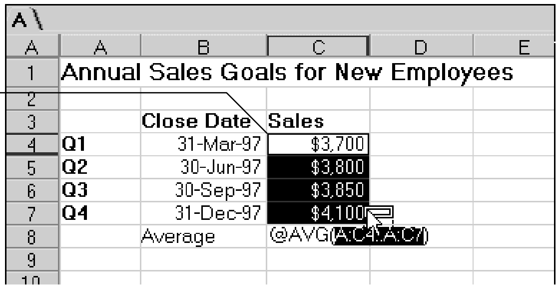
Performing calculations on your data is as easy as selecting an item from a menu.

Click the @function selector to see the menu.

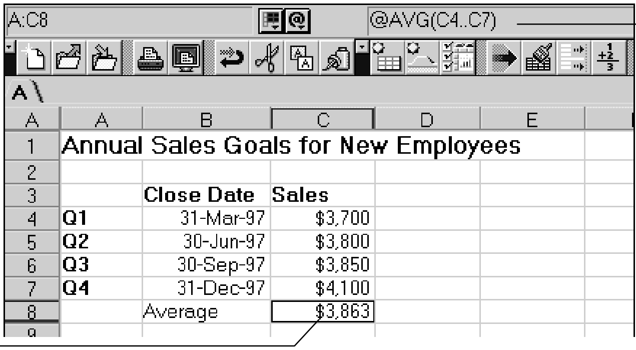


When you select an @function, 1-2-3 puts the @function in the current cell, along with placeholders for any arguments the @function takes. When an @function takes a range, you can specify the range by dragging.

Drag over the cells to calculate.



1-2-3 evaluates the formula and displays the result in the cell. The exact text of the formula appears in the edit line when you select the cell.



Cool tricks

Turn on formula markers to show which cells contain formulas. Choose View - Set View Preferences and select “Formula Markers” to see a green marker in the bottom left corner of each cell that contains a formula.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

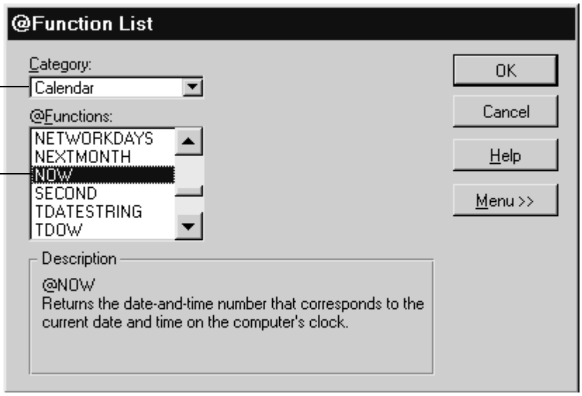
   @Functions, entering
3. Click the index entry you want, then click Display.

Choosing other @functions

The @function menu comes with a few commonly used @functions. Choose List All from the @function menu to select from the full list.

Select a category to see a specific set of @functions.

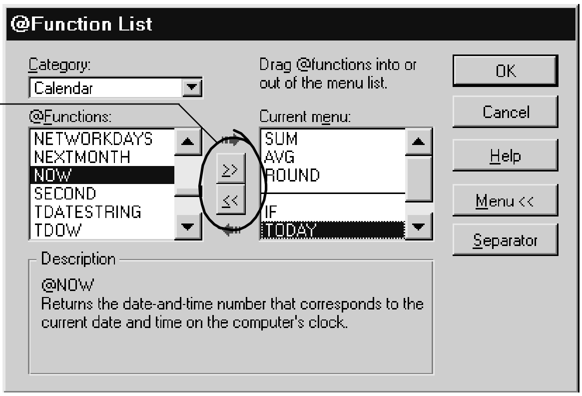
Select an @function from the list.



Adding your favorite @functions to the menu

Put your favorite @functions on the menu, so you can get to them quickly. Just click the Menu button in the @Function List dialog box and add whatever functions you want.

Click to move @functions on and off the menu.



For more information

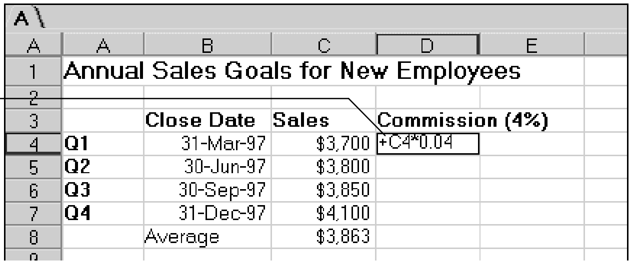
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   @Functions, adding to menu
3. Click the index entry you want, then click Display.

Writing your own formulas

You can write your own formulas when you need a specialized calculation not found in the @functions.

Enter your own formulas by starting the value with + (a plus sign) or = (an equals sign).



When you press **ENTER**, 1-2-3 calculates the formula and puts the result in the cell.

Formulas use standard symbols for operators:

- * (asterisk) for multiplication
- + (plus sign) for addition
- **-** (hyphen) for subtraction
- / (slash) for division

For more information

1. Choose Help **-** Help Topics and click the Index tab.
2. Type this phrase:

   Formulas, entering
3. Click the index entry you want, then click Display.

Copying formulas and @functions

Once you put an @function or formula in one cell, you can easily copy it to other cells to perform the same calculation on those cells. Select the cell with the formula and the cells below it, and choose Edit - Copy Down. 1-2-3 recalculates the formula for each row.

You can see the new formula in the edit line.

1-2-3 recalculates the formula based on the current location.

You can also use Edit - Copy Right to copy formulas and data to cells to the right.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Formulas, copying

3. Click the index entry you want, then click Display.

Chapter 14
Picturing Data with Charts, Maps, and Drawings

1-2-3 makes charting, mapping, and drawing easy. Charts and maps are linked directly to your data so that changes appear instantly. You can quickly add your own drawings and import pictures to further enhance your workbooks.

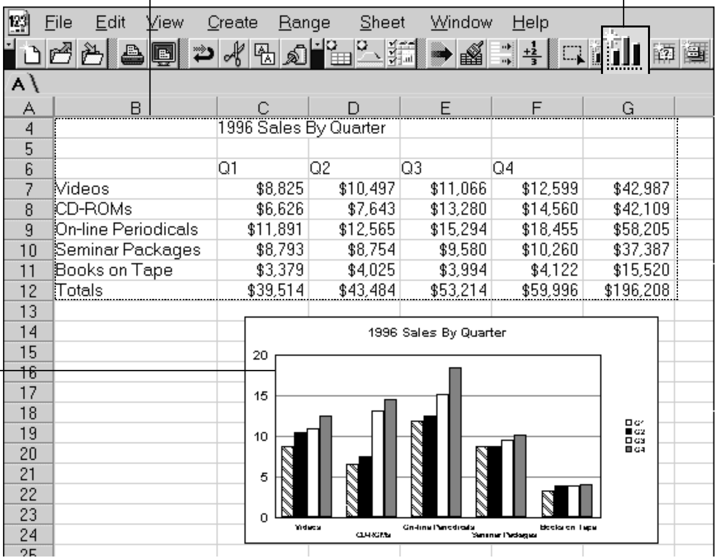
Viewing data visually with charts

In 1-2-3, you can create a chart in three easy steps.

1 Select these cells.

2 Click this icon.

3 Click in the sheet.



For more information

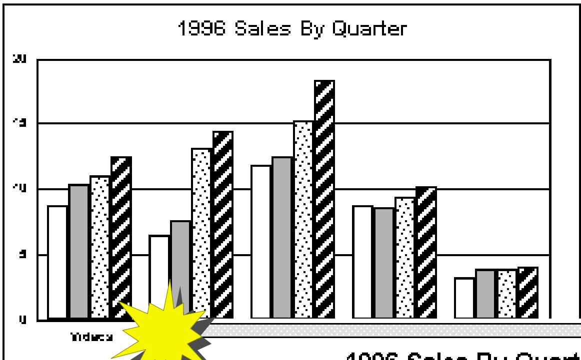
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Charts, creating
3. Click the index entry you want, then click Display.

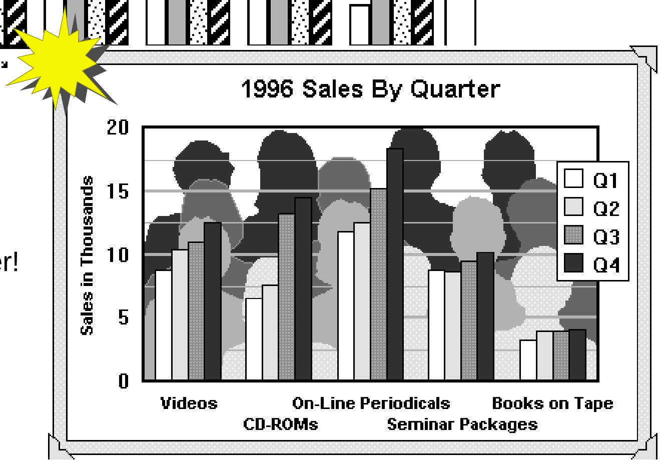
Enhancing a chart

Using the InfoBox, you can easily enhance a chart to add pizzazz to your workbooks. Some great enhancements you can make to charts are:

- Fill the plot or bar chart bars with pictures
- Change the marker used in an x-y scatter chart
- Add a note to a chart to clarify the information in it
- Change the border around the legend, title, or the whole chart
- Rotate a three-dimensional chart
- Show data values in the chart



Before...



After!

Cool tricks

Save your favorite formats as named styles so that you can apply them to other charts. Use the Named Style tab in the InfoBox for charts to create and name the styles.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

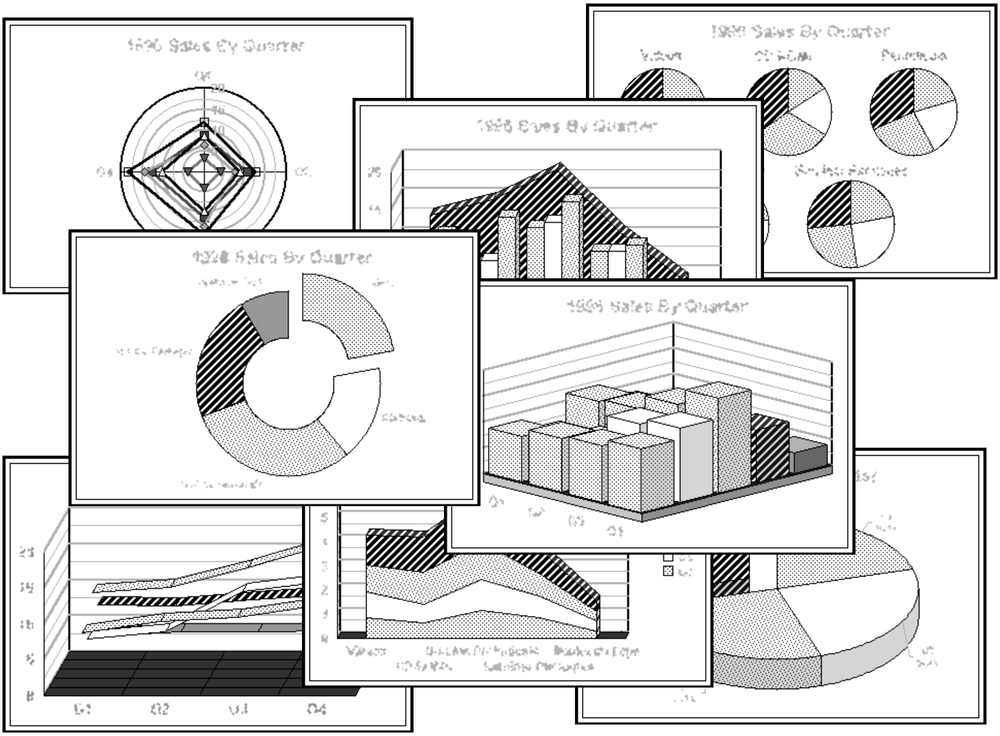
   Charts, designing

3. Click the index entry you want, then click Display.

Changing the chart type

1-2-3 provides 12 different chart types so you can present your data in the most useful way. You can also create three-dimensional views of the charts, to better represent your data.

Here are a few examples of the types of charts you can create.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

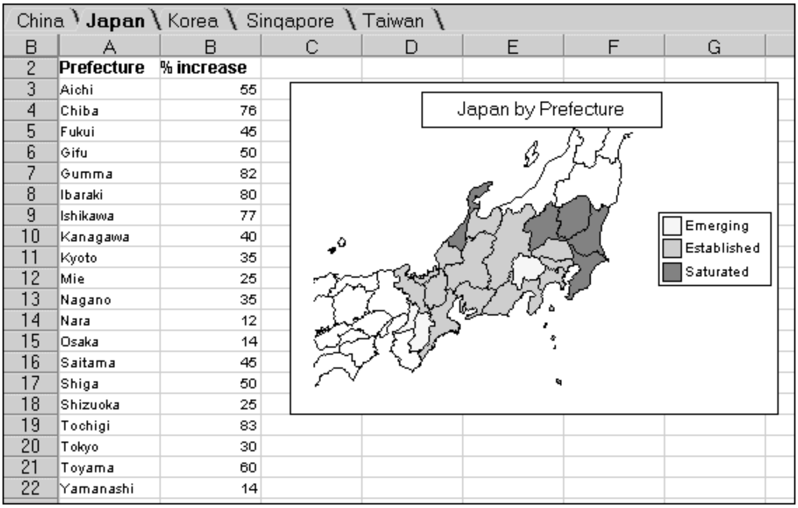
   Charts, types

3. Click the index entry you want, then click Display.

Viewing data geographically with maps

You use maps to display and analyze data geographically. In 1-2-3, you can easily create all kinds of maps. For example, you can show sales by country, population density by state, or average rainfall by province.

You create a map just as you do a chart — select the data, click the icon, and click the sheet to create the map.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Maps, creating

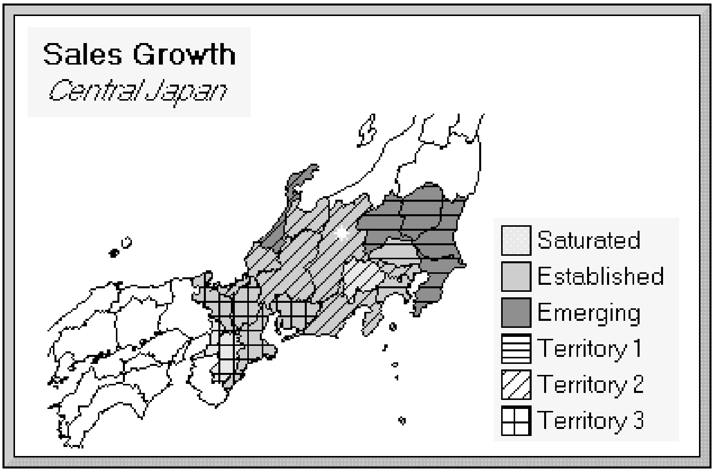
3. Click the index entry you want, then click Display.

Enhancing a map

Once you create a map, you can enhance it using the InfoBox and commands on the Map menu. For example, you can:

- Overlay other maps
- Change colors and patterns
- Zoom in and out
- Change the title and legend labels

You can easily add pin characters — symbols or labels that display in your map — just where you want. Use the right mouse button to paste the information for the pin character in your sheet, and include that information in the InfoBox for map ranges.



Cool tricks

Zoom in on any portion of a map by holding the **CTRL** key while you drag over the part of the map you want to show.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

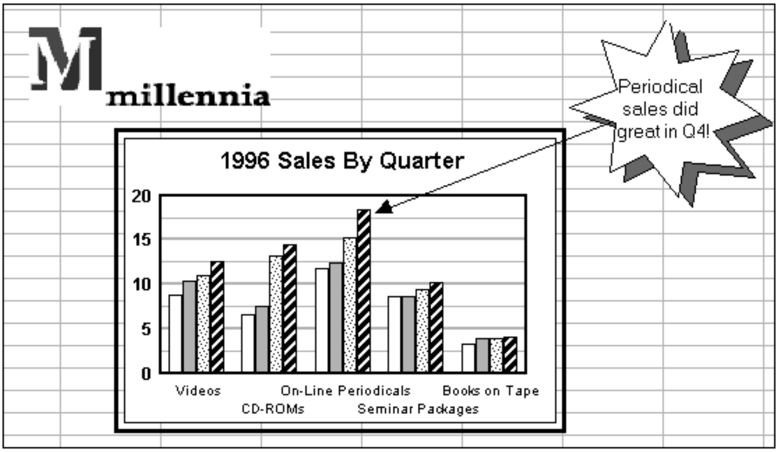
   Maps, changing
3. Click the index entry you want, then click Display.

Drawing easily

1-2-3 comes with a complete array of drawing tools that you can use to enhance your sheets. Using the drawing tools on the Create menu, you can add lines, rectangles, arcs, ellipses, and text blocks.

Once you've added drawings to your sheet, use the InfoBox to change the properties of the objects you've drawn: line style, arrowheads, colors, rotation, and fill patterns.

You can also easily import pictures created in other programs into your spreadsheets.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

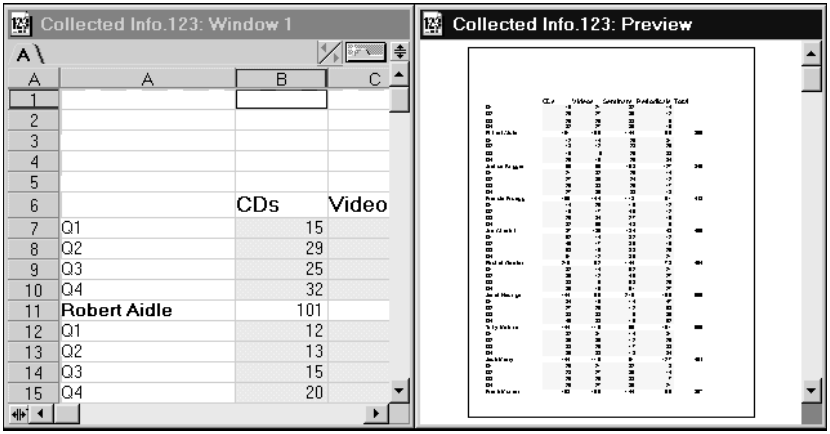
   Graphic objects, overview
3. Click the index entry you want, then click Display.

Chapter 15
Previewing and Printing Your Data

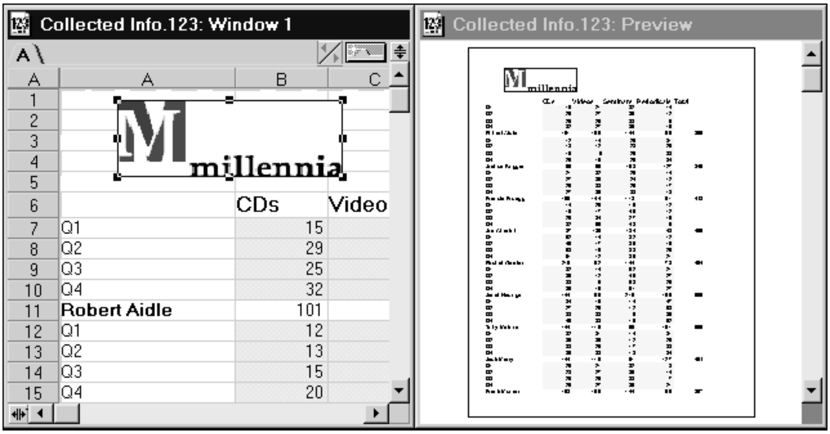
Use dynamic preview to view your work before printing, make adjustments, and see the results immediately.

Previewing changes instantly

With 1-2-3, you can view both your work and the preview at the same time. Just choose File - Preview & Page Setup, or click the icon.



If you make changes in the sheet, the preview changes dynamically.



Cool tricks

Add your own page breaks to your sheets. Select the cell where you want the new page, and then choose “Break page at row” or “Break page at column” from the Basics panel of the InfoBox for ranges.

For more information

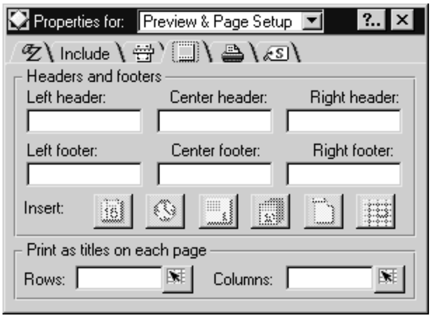
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Previewing

3. Click the index entry you want, then click Display.

Controlling printed output

You can use the InfoBox to make changes to your printout without changing your sheet. The InfoBox for print preview displays automatically when you preview your sheet.



For example, you can specify:

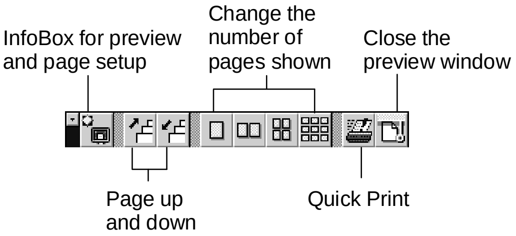
- The placement of margins
- Whether to print formulas along with formula results
- Which pages to print
- Which headers and footers to show
- Whether to print charts and maps
- Whether to print cell comments

Cool tricks

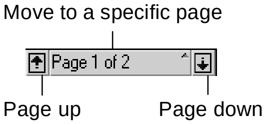
Create a named print style from your current print settings so you can reuse your settings the next time you print your work. Use the Named Style tab in the InfoBox for preview and page setup to name your settings.

Navigating in the preview window

When you preview your work, 1-2-3 displays SmartIcons for previewing.

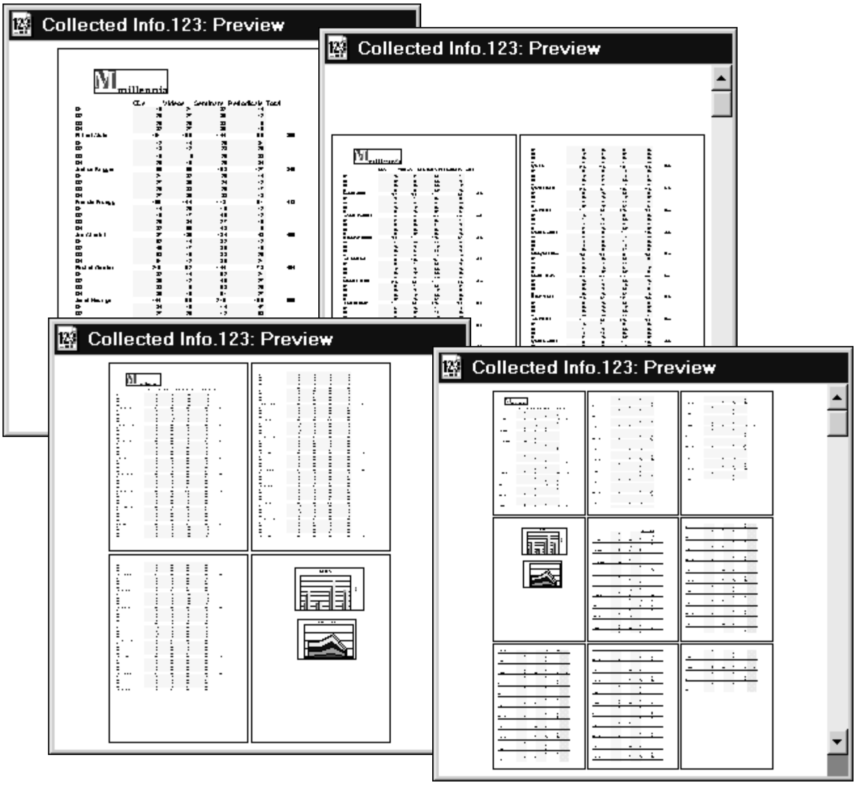


You can also click the controls on the status bar to move between pages.



Viewing multiple pages at once

You can view one sheet, two sheets, four, or nine. Choose the number of pages from the Preview menu, which appears when you preview your output, or click the SmartIcons.



Cool tricks

When previewing multiple pages, click any page to zoom in on that page.

Chapter 16
Easy Data Access

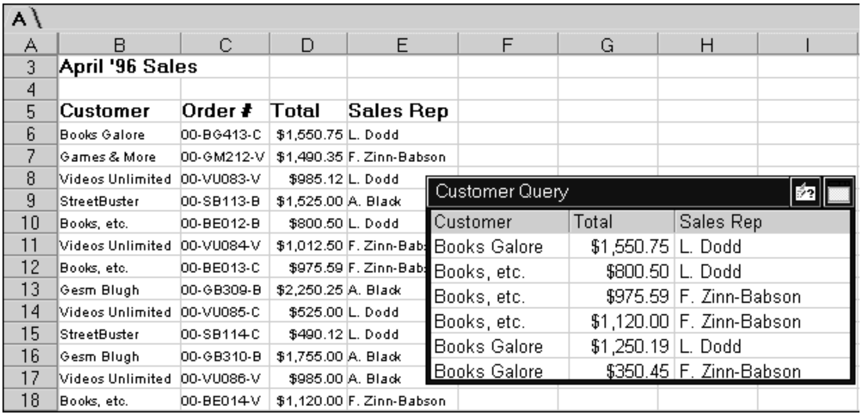
When working with large amounts of data, use the powerful data management tools in 1-2-3 to help you enter, organize, analyze, and present your data. 1-2-3 works in concert with Approach to provide traditional database functionality for 1-2-3 ranges.

1-2-3 installs Approach functionality by default so that you can automatically take advantage of the power of Approach when working in 1-2-3.

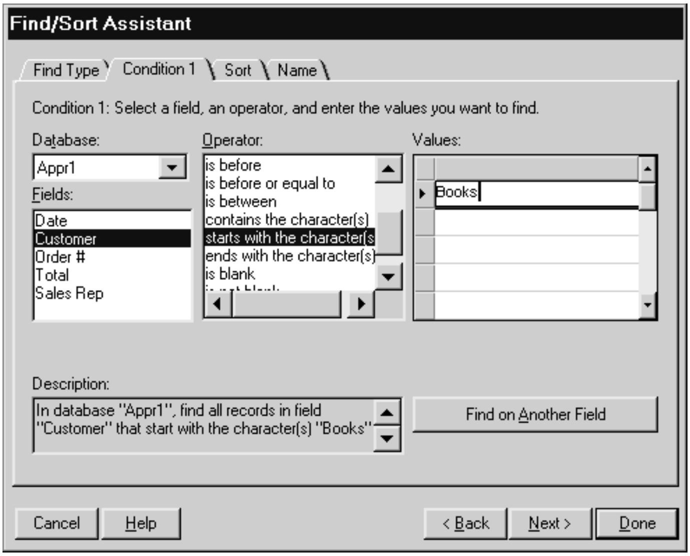
Examining data using criteria

You can perform queries on your 1-2-3 data or on data in an external database table using query tables. With query tables, you have access to the full Approach data editing and querying tools (such as finding and sorting data) without leaving 1-2-3.

To create a query table, choose Create - Database - Query Table.



To use Approach tools to view the query table, select the query table and choose Query Table - Edit. For example, you can use the Find Assistant, available from the Browse - Find menu or by clicking the Find Assistant button, to develop just the query you want.



You can optionally send the results of the query to a separate output table in 1-2-3, where you can analyze or chart the data using 1-2-3.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Query tables

3. Click the index entry you want, then click Display.

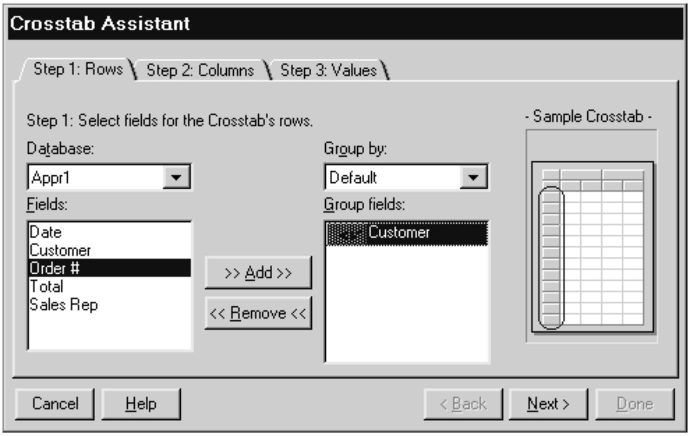
Analyzing complex data

If you have data with three or more variables, use a dynamic crosstab to "pivot" — that is, categorize and summarize — database records right in your 1-2-3 sheet. For example, you can create a crosstab to calculate the total purchases of your customers. Or summarize the purchases of each customer, categorized by sales representatives.

	Total
Books Galore	$3,151
Books, etc.	$2,896
Games & More	$3,016
Gesm Blugh	$4,005
StreetBuster	$2,015
Videos Unlimited	$4,460
Total	$19,544

	A. Black	F. Zinn-Babson	L. Dodd
	Total	Total	Total
Galore		$350	$2,801
etc.		$2,096	$801
& More	$1,525	$1,490	
Gesm Blugh	$4,005		
StreetBuster	$1,525		$490
Videos Unlimited	$985	$1,013	$2,462
Total	$8,041	$4,949	$6,554

To create a crosstab, choose Create - Database - Dynamic Crosstab. Then use the Crosstab Assistant to help you build your crosstab.



In addition to calculating totals, crosstabs can summarize data by average, count, minimum, maximum, standard deviation, and variance.

For more information

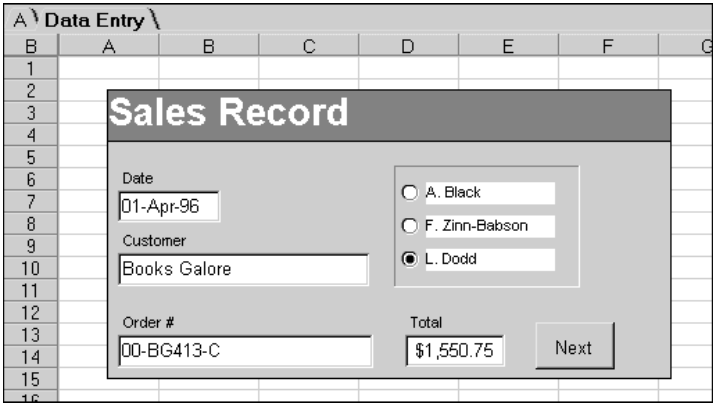
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Tables, cross-tabulation

3. Click the index entry you want, then click Display.

Creating forms

Use the Create - Database - Form command to create forms for viewing, entering, and editing data one record at a time. Data you change or enter is stored in the workbook itself.



Your forms can use many types of data entry devices, including buttons, check boxes, drop-down lists, and computed fields.

The forms appear right in the sheet. Create them on their own sheet for a clean separation between data entry and storage.

Cool tricks

Hide all sheets but the one containing the form so that people entering the data won't accidentally edit the wrong thing. To hide a sheet, click the sheet to hide and then choose Sheet - Hide.

For more information

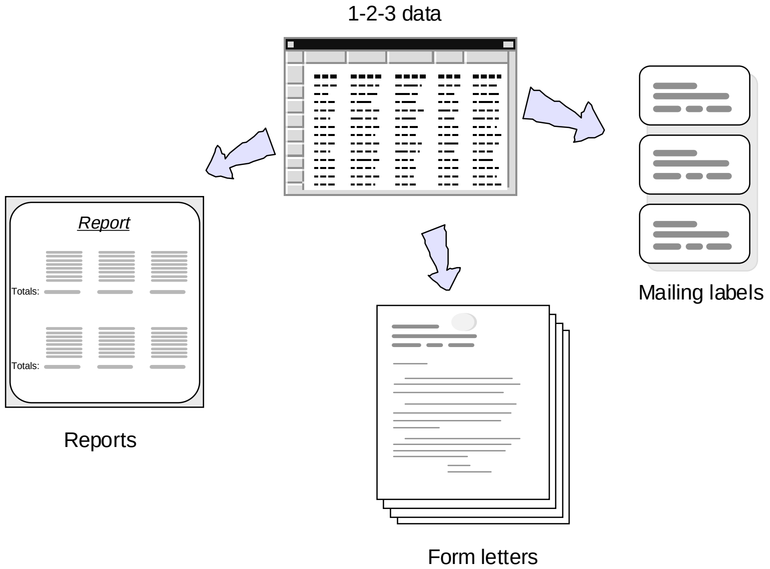
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Forms

3. Click the index entry you want, then click Display.

Creating mailing labels, form letters, and reports

You can create your own mailing labels and form letters from within 1-2-3, using the data in your 1-2-3 database tables. Or you can build a report to help you organize and present the data.



Use the commands on the Create - Database menu to create the different views. The views appear as icons in your 1-2-3 sheet.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Mailing labels

   Reports

   Form letters
3. Click the index entry you want, then click Display.

Chapter 17
Customizing 1-2-3

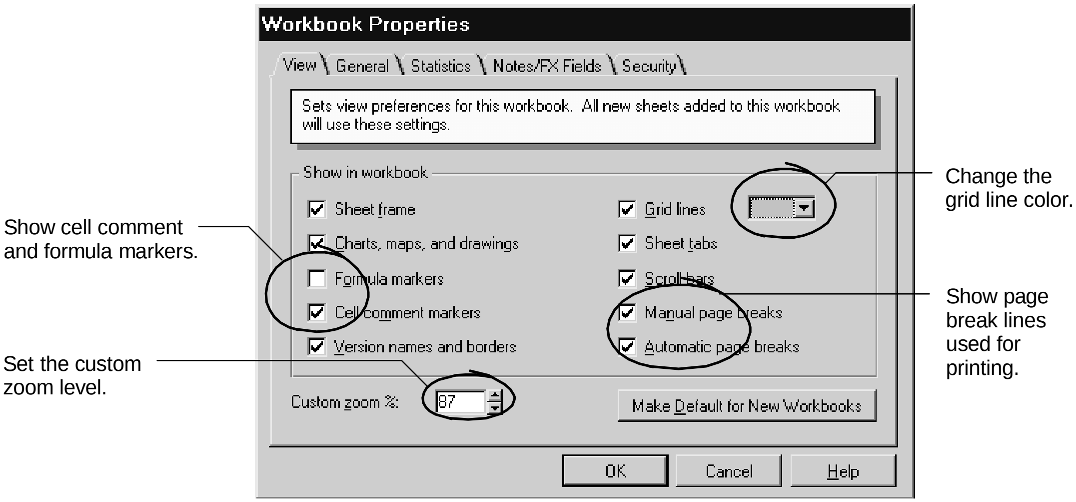
You can control your preferences for how 1-2-3 looks and acts. In addition to the customizations described in this chapter, be sure to check out the "Customize 1-2-3" section of Help, listed under "How Do I?" on the Contents tab of the Help Topics dialog box.

Customizing the display

You can easily change the way your workspace looks.

Use the View menu to change the zoom level; show or hide SmartIcons, Internet tools, the status bar, and the edit line; and split the document into multiple windows.

Use View - Set View Preferences to specify how you want the workbook to look.



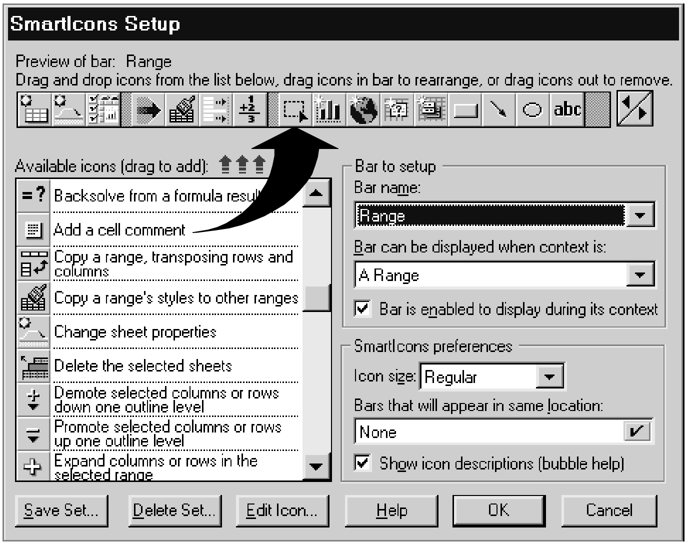
Cool tricks

Click "Make Default for New Workbooks" to make all new workbooks have the settings you specify in the dialog box.

Customizing icon palettes

You can decide which SmartIcons to display. Choose File - User Setup - SmartIcons Setup to control the contents of the standard icon bars and to build your own icon bars.

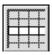
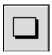
Drag an icon to add it to the current bar.

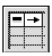


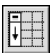
Handy SmartIcons

Here are some SmartIcons you may want to add to the icon bars. Be sure to look in the dialog box to see the complete list of available icons.

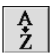
Create a plain new file   Zoom to custom level

Insert a row   Add a range border and drop shadow

Copy the leftmost column to a range   Show hidden sheets

Copy the topmost row to a range   Clear outlines

Arrange open windows side by side   Center text across columns

Sort in ascending order   Display values in Percent format

Sort in descending order   Add a comment to the current cell

For more information

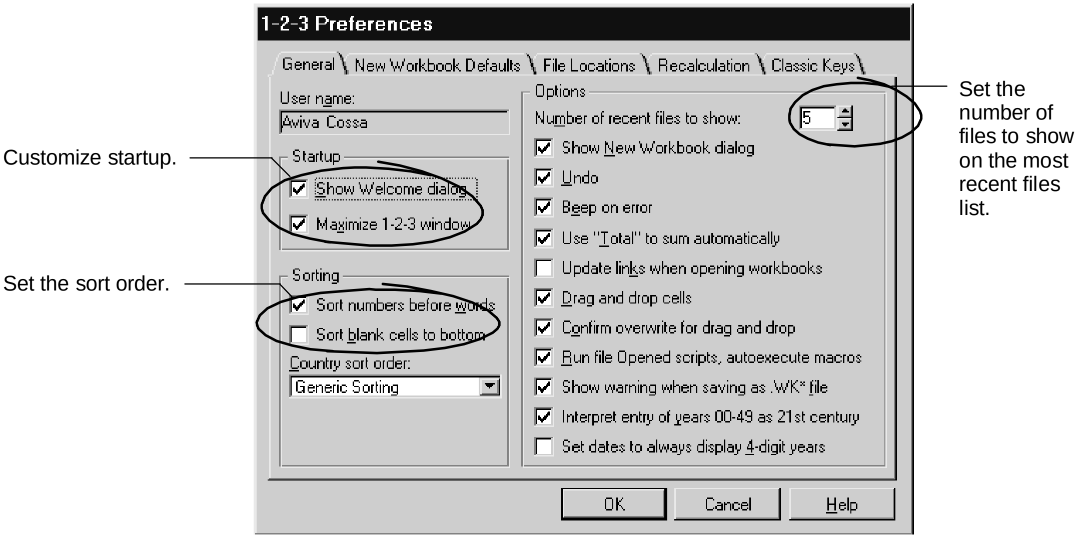
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   SmartIcons, selecting

3. Click the index entry you want, then click Display.

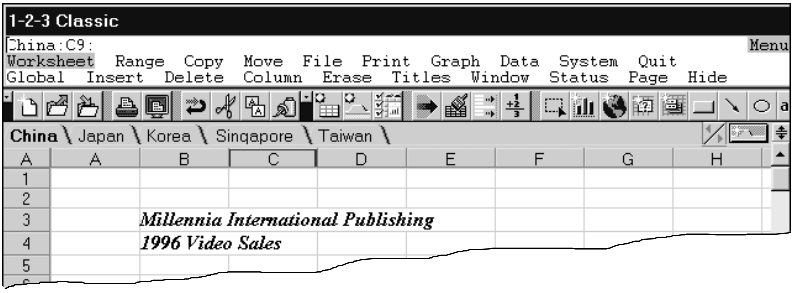
Changing 1-2-3 preferences

Choose File - User Setup - 1-2-3 Preferences to set options for your 1-2-3 sessions.

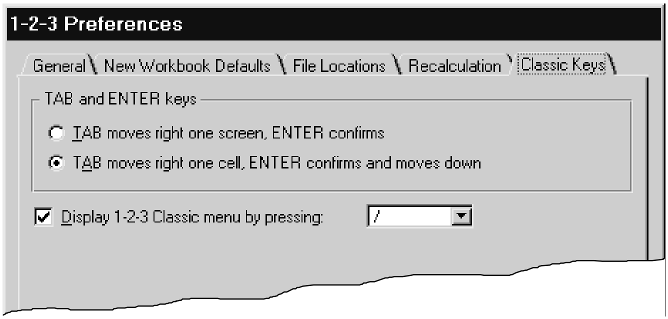


Displaying the 1-2-3 Classic menu

The 1-2-3 Classic menu is still available for users who prefer it. Enter / (slash) to see the menu.



You can also change the symbol used to display the Classic menu, by choosing File - User Setup - 1-2-3 Preferences and clicking the Classic Keys tab.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   1-2-3, Classic menu

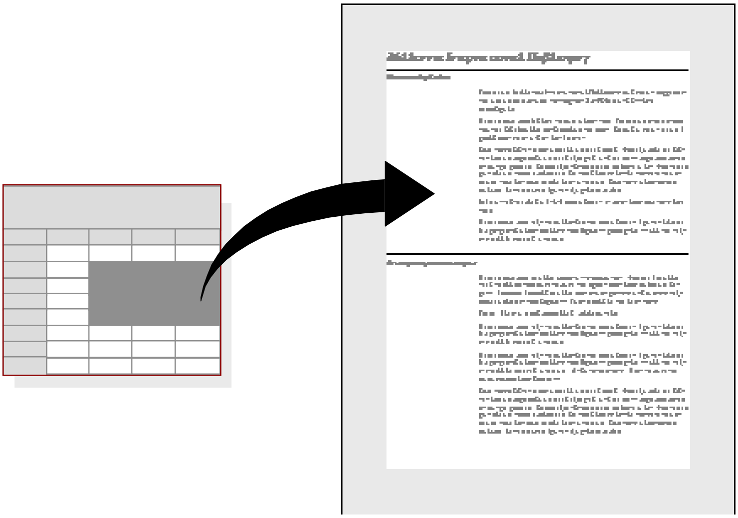
3. Click the index entry you want, then click Display.

Chapter 18
Working with Embedded Objects

Object Linking and Embedding (OLE) lets you share data between 1-2-3 and other applications that support OLE.

Creating embedded objects

Use the Create - Object command to embed an object in 1-2-3. To embed a 1-2-3 range in another type of document (such as a Word Pro document or Freelance Graphics presentation), use the equivalent command in that application.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Drag and drop

   Objects, embedding
3. Click the index entry you want, then click Display.

Editing embedded objects

The OLE support in 1-2-3 makes it easy to work with embedded objects. When you select an embedded object in 1-2-3, the object menu for the other application merges with the 1-2-3 menus.

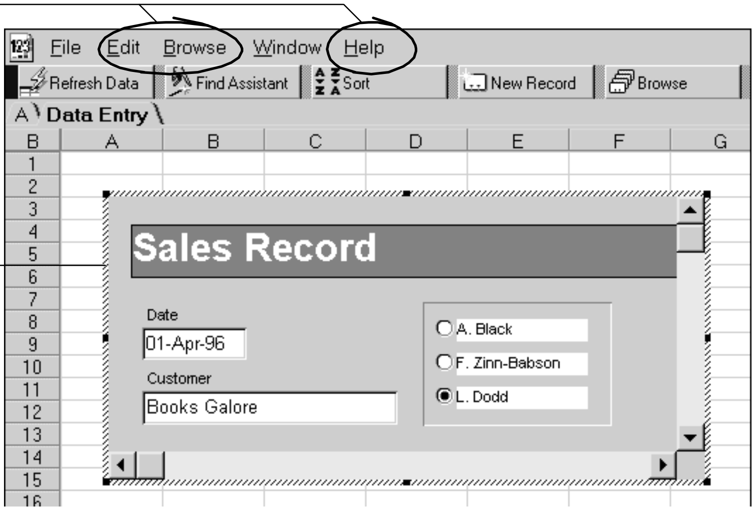
Menu for the selected object

Selected Approach form

You can also edit an object embedded in a workbook. Depending on the application the object came from, when you double-click the object, either the menus from the other application merge with the 1-2-3 menus or the application itself starts up. Either way, you have access to all the commands you need to edit the object.

Approach menus

Double-clicked Approach form



When you embed a 1-2-3 workbook in another application, you can modify the workbook without leaving the other application. For example, if you edit an embedded 1-2-3 workbook in Word Pro, you can choose 1-2-3 commands directly in Word Pro.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   OLE, overview
3. Click the index entry you want, then click Display.

Chapter 19
Automating 1-2-3 with LotusScript and Macros

1-2-3 provides two tools for automating your work: LotusScript and the 1-2-3 macro language.

LotusScript is a BASIC-compatible scripting language used by all Lotus desktop productivity and communication products, including all SmartSuite applications, Notes Release 4, and cc:Mail Release 7. With LotusScript, you can create scripts that automate redundant tasks and integrate data from other applications. You can use LotusScript for anything from a simple automation to a complete business solution.

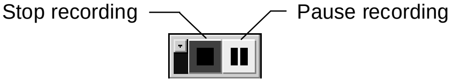
You can also continue to use the macro language provided in previous releases of 1-2-3.

Writing scripts

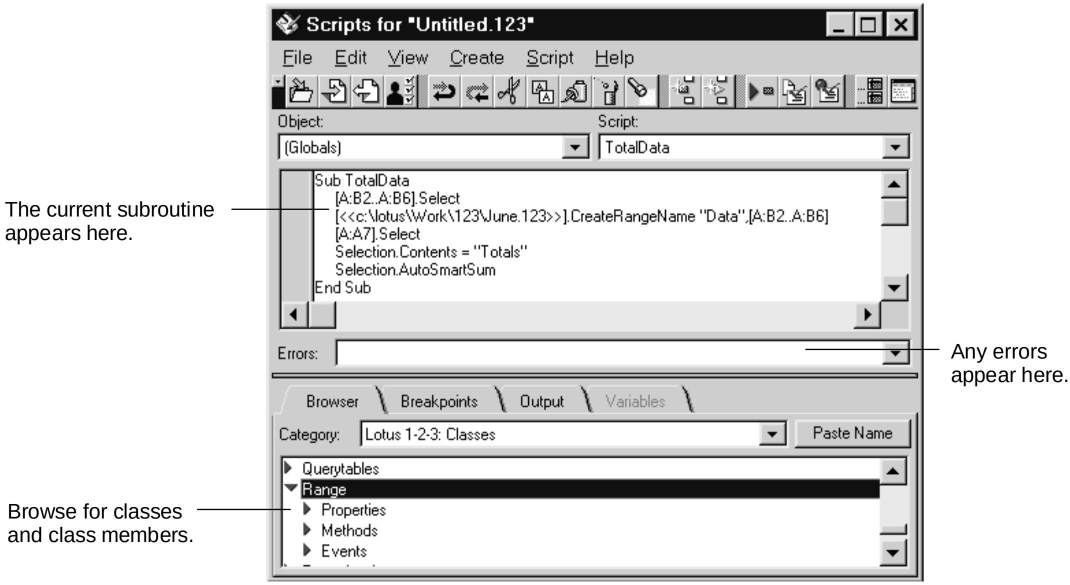
It’s easy to create a script using 1-2-3 — you simply record actions and use the Script Editor, a complete development environment for LotusScript, to tie the actions together.

Choose Edit - Scripts & Macros - Record Script to record your keystrokes.

1-2-3 displays the following two buttons to help you control recording as you work with 1-2-3.



When you stop recording, the Script Editor appears automatically.



You can also view the Script Editor by choosing Edit - Scripts & Macros - Show Script Editor. The Script Editor makes it easy to develop and debug your object-oriented LotusScript code.

Cool tricks

Create a button for running a script using Create - Button. When you finish drawing the button, the Script Editor appears. Enter your script into the Click subroutine, which is selected by default.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   IDE (LotusScript)

   Scripts, recording
3. Click the index entry you want, then click Display.

Writing macros

1-2-3 preserves your investment in macro-driven applications. While Lotus recommends that you do new development work in LotusScript, your existing macros will continue to run in 1-2-3 without costly translation.

In addition to the macro commands available in previous releases, the macro language includes extensions for calling LotusScript routines from your macros and calling macros from LotusScript routines, so your existing applications can grow to include new 1-2-3 functionality.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Macros

   Scripts, calling from macros
3. Click the index entry you want, then click Display.

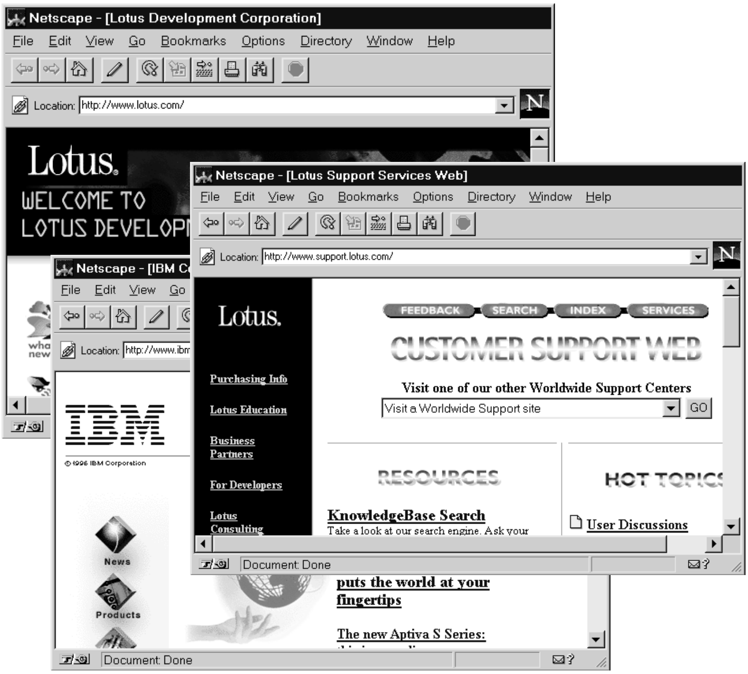
Chapter 20
1-2-3: The Internet Connection

1-2-3 provides state-of-the-art tools for finding, sharing, and publishing information to the Internet and the Web. With 1-2-3, you can:

- Quickly access Lotus home pages, other Web sites, and FTP sites
- Open and save files to the Web
- Publish Web pages from data in your workbooks
- Search the Web for selected text

Accessing Web and FTP sites from 1-2-3

You can connect to Lotus Web and FTP sites just by clicking one of the Internet icons. 1-2-3 launches your installed Web browser so you can view information without leaving 1-2-3.



You can also create your own buttons for accessing the Web. Just enter a URL in a cell and click the Create link icon.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

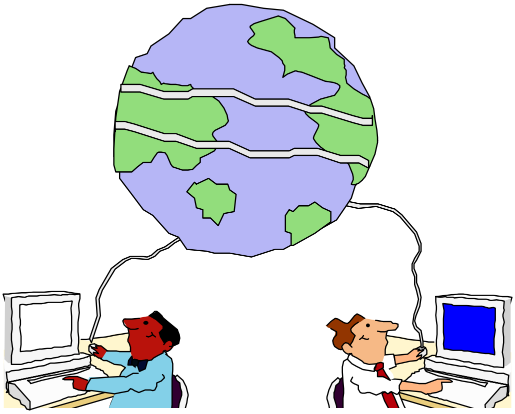
   Home page, Lotus

   FTP, Lotus site

   Internet, button links to
3. Click the index entry you want, then click Display.

Sharing data using the Internet

Use the regular File - Open and File - Save dialog boxes to open or save workbooks directly to and from Web and FTP sites.



For example, your salespeople can pull down the latest sales figures from the Web. Or post important data directly to your intranet, for access within your company.

For more information

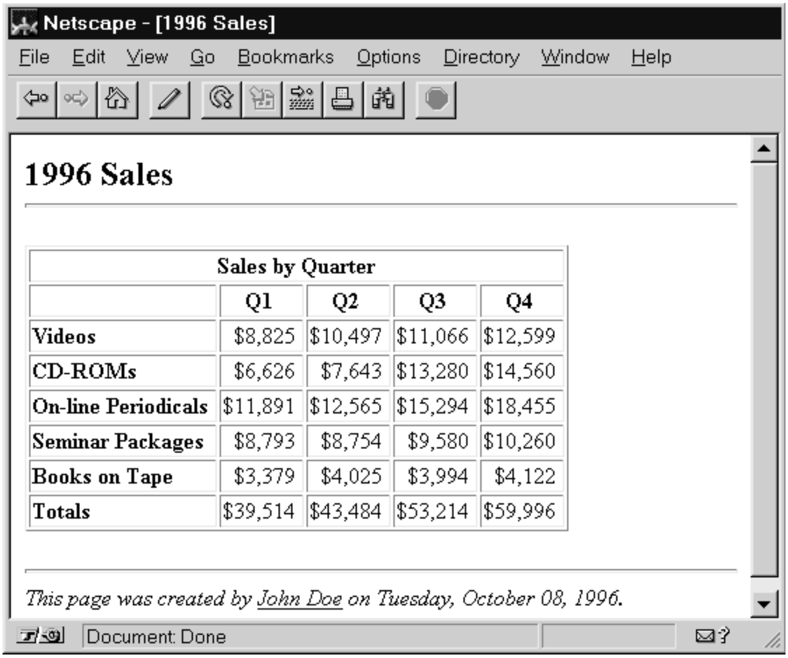
1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Internet, opening files from

   Internet, saving files to
3. Click the index entry you want, then click Display.

Publishing to the Web

You can publish any 1-2-3 range to a new Web page without learning HTML. Just select a range and click the Publish to Web icon (or choose File - Internet - Publish a Range to the Internet), and 1-2-3 steps you through the process.



1996 Sales

Sales by Quarter				
	Q1	Q2	Q3	Q4
Videos	$8,825	$10,497	$11,066	$12,599
CD-ROMs	$6,626	$7,643	$13,280	$14,560
On-line Periodicals	$11,891	$12,565	$15,294	$18,455
Seminar Packages	$8,793	$8,754	$9,580	$10,260
Books on Tape	$3,379	$4,025	$3,994	$4,122
Totals	$39,514	$43,484	$53,214	$59,996

This page was created by John Doe on Tuesday, October 08, 1996.

The range you select becomes an HTML table. You can specify the title for the table and the page, any descriptive text to appear under the table, and an e-mail address for users to respond to. 1-2-3 retains the formatting in the original range when creating the table.

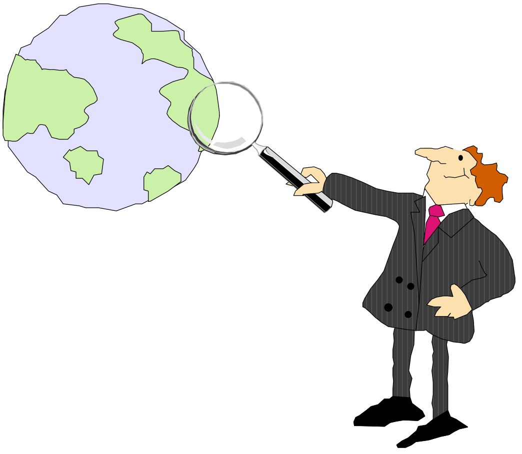
For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Internet, publishing ranges on
3. Click the index entry you want, then click Display.

Searching the Web

In two quick steps, you can perform a complete Web search. Just select a cell containing a word to search for, and click the Internet search icon.



When you perform a search, 1-2-3 launches your Web browser and runs a search using the Yahoo!™ site. From there, you can choose a different search engine, if you want.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

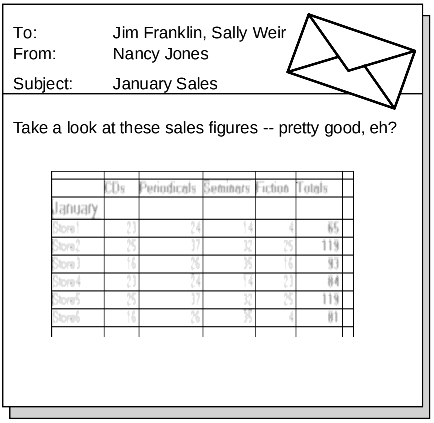
   World Wide Web, searching
3. Click the index entry you want, then click Display.

Chapter 21
Team Computing with 1-2-3

As with all SmartSuite products, 1-2-3 offers unique Team Computing tools to help your team work together.

Sending ranges and workbooks from within 1-2-3

Use the TeamMail™ feature to send a picture of a range or a whole workbook to your coworkers.



Or use TeamMail just to dash off an e-mail message without leaving 1-2-3.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

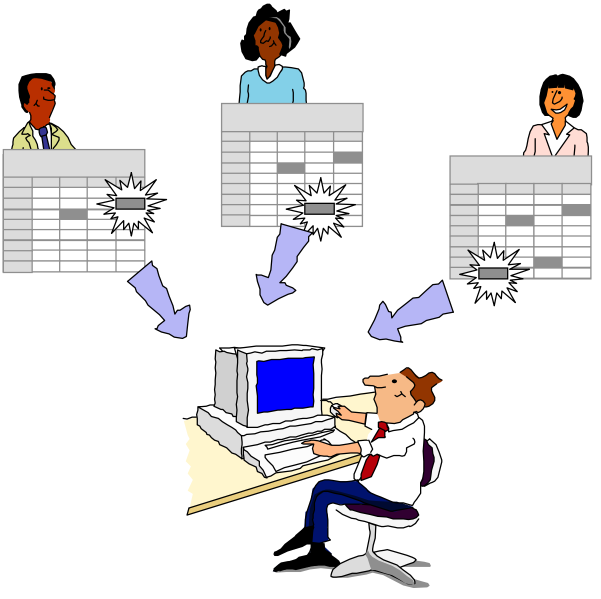
   TeamMail, overview

3. Click the index entry you want, then click Display.

Sending data for review

Use TeamReview to send a range of data to your coworkers for review. You can send the range to them all simultaneously, or route the data so that they see one another's comments.

Reviewers can modify the data, send comments about their changes, and even put notes in a "scratch" area of the workbook. Then, with just a click of a button, they send the data on to the next reviewer, or back to you. All comments come back to you automatically.



When you receive comments from coworkers, you can:

- Overwrite the existing data with the changed data
- Discard the changes
- Save the original and changed data as versions

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamReview

3. Click the index entry you want, then click Display.

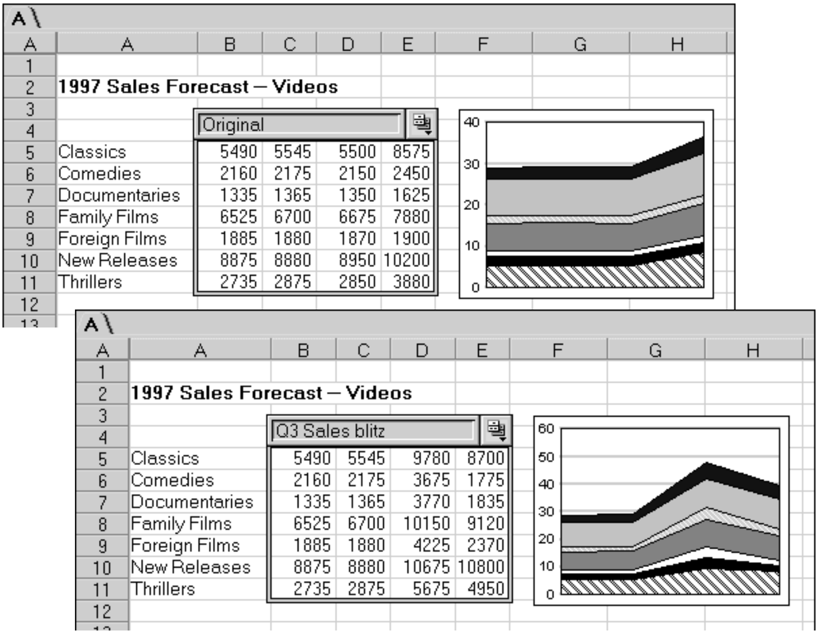
Managing versions

Versions are sets of different data for the same named range. You can create versions to track modifications to data or to establish different sets of data for what-if analysis. In addition, you can:

- Merge changes when you receive modifications from coworkers after sending a range out using TeamReview.
- Use TeamConsolidate to merge versioned data in separate workbooks into a single file. For example, you can merge versions added to workbooks you distribute using TeamMail.

You can perform calculations and create objects, such as charts and maps, based on the values in a versioned range. When you switch between versions, the calculations and objects update.

Two versions of the same range



Each version stores the date and time of creation and modification, as well as the name of the person who created or last modified the version.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

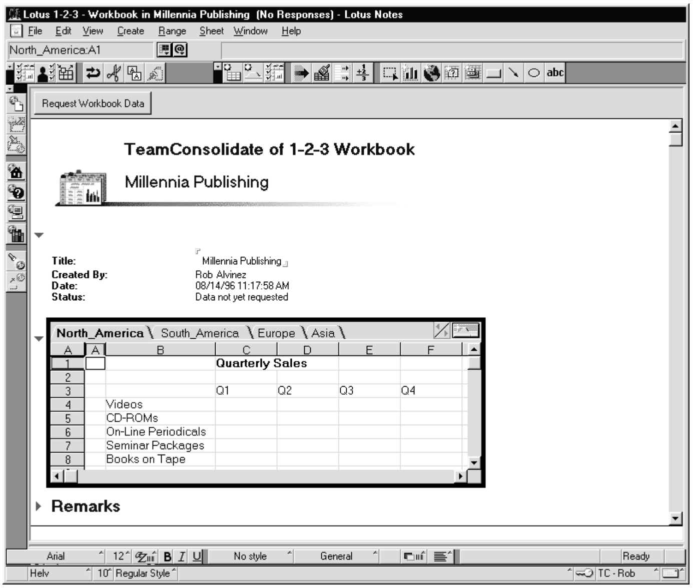
   Versions

   Versions, merging
3. Click the index entry you want, then click Display.

Distributing sheets using Notes

If you have Notes version 4.1 or higher, you can use the TeamConsolidate feature to distribute and consolidate spreadsheet data.

With TeamConsolidate, you embed sheets in a Notes database, where your coworkers can add or modify data. You can automatically notify people when sheets are updated or need review, and you can easily consolidate changes or additions into the original workbook.



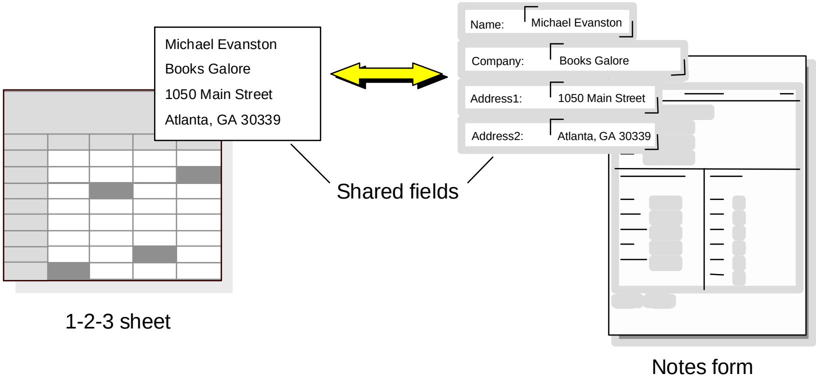
For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamConsolidate
3. Click the index entry you want, then click Display.

Exchanging data with Notes

Use Notes / FX™ to exchange data in a 1-2-3 range with a document in a Notes database. You can automatically transfer the values for workbook properties, such as the title or last revision date, to the Notes document. You can also define 1-2-3 ranges to exchange with a Notes field. If you change a value in either place, the other is updated automatically.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Notes/FX
3. Click the index entry you want, then click Display.

Chapter 22
Getting Started with Word Pro

What is Lotus Word Pro?

Lotus Word Pro is:

- A WYSIWYG (What You See Is What You Get) word processor — you see on the screen how a document will appear when it prints.
- A team word processor that lets you and your coworkers better share and collaborate on documents.
- A smart word processor that provides automated tools such as SmartMaster templates, SmartCorrect, Assistants, the InfoBox, and divider tabs.
- A word processor that is integrated with other products through LotusScript®, importing and exporting of files, the Internet, and OLE.

What’s new?

The new features available in Word Pro 97 are described below.

Cross References

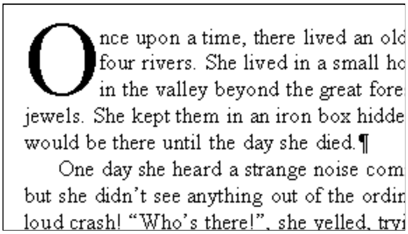
In Word Pro, you can reference a page number, section number, or title in your document from another location within that document. For example:

> For more information, see Chapter 15, “Organizing a Document” on page 56.

Word Pro fills in the chapter number, the page number, and even the title of the chapter for you. The numbering stays correct no matter how much editing you do.

Drop caps

You can insert a drop cap into your document to highlight a letter. For example, the classic drop cap is used in novels for “Once upon a time...” where the point size of the letter “O” is larger than the rest of the word.


Once upon a time, there lived an old
four rivers. She lived in a small ho
in the valley beyond the great fore
jewels. She kept them in an iron box hidde
would be there until the day she died.¶
One day she heard a strange noise com
but she didn’t see anything out of the ordir
loud crash! “Who’s there!”, she yelled, tryi

Internet

The updated Internet features in Word Pro include:

- Web authoring tools
- HTML SmartMaster templates
- Automated process for creating links
- Previewing HTML documents in a Browser
- Publishing HTML documents as Web pages
- Automated process for creating forms
- Setting import and export options
- Viewing source code

For more information about these features, see Chapter 26.

Linked frames

Using linked frames, you can create documents where text automatically flows from one frame to the next as you insert and delete text. You can create special effects, such as starting an article on page one, and continuing it on page four.

You can link together as many frames as you want, and the text will continue between the frames.

Open and Save to Lotus Notes

You can open and save files directly to Lotus Notes. You can open files that are attached to Lotus Notes documents without having to open Notes itself. You can also save any Word Pro file as an attachment to a Notes document.

Booklet Printing

You can use the booklet SmartMaster to set up a document that prints so you fold the pages in half and staple them.

For example, if you have a document with the page settings 8.5” × 5” and you choose File - Print, Word Pro first checks to see that the pages will fit on a landscape 8” × 11” page. It then prints the pages so that you can fold them to create a pocket-size book.

Watermarks

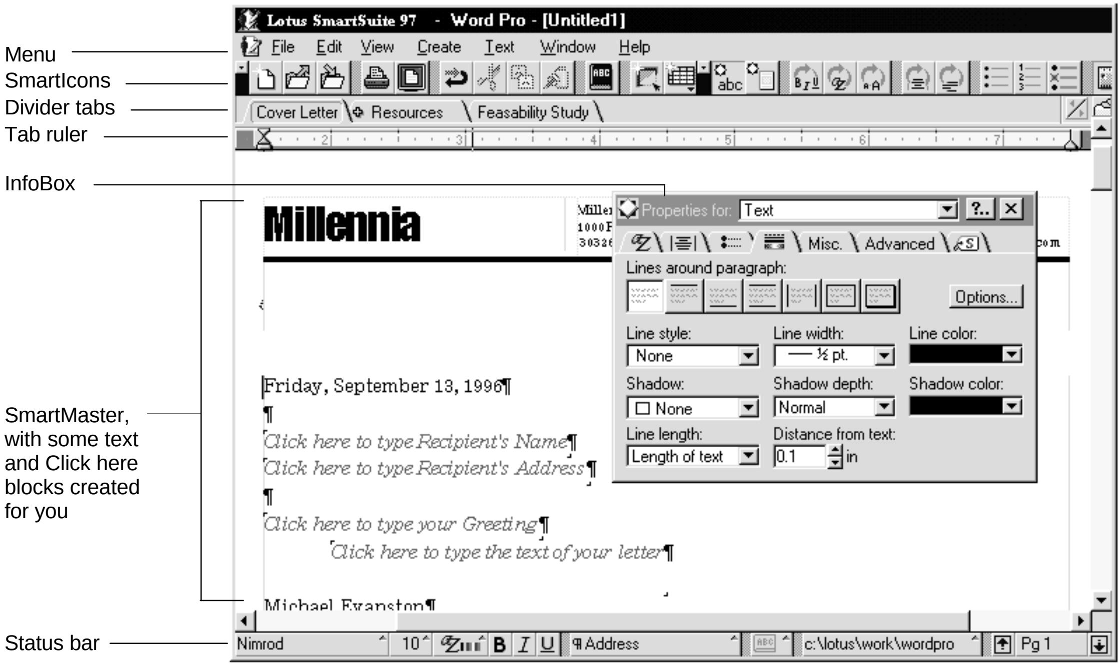
A watermark is a background graphic that you can apply to pages, tables, table cells, frames, headers, footers, and columns. For example, if you are working on sensitive government documents, you can display the “Confidential” watermark on every page to remind the reader to keep the information secure.

You can also import your own pictures as watermarks. For example, you can import a favorite vacation photo as a page watermark and create custom stationery. If you want to add a caption to a graphic, you can import a picture as a watermark and then type the caption in the same frame.

Chapter 23
Word Pro-Specific Tools

Becoming familiar with the Word Pro tools

Word Pro provides several tools to make creating and working with documents easier and more efficient. Below is a picture of the Word Pro desktop.



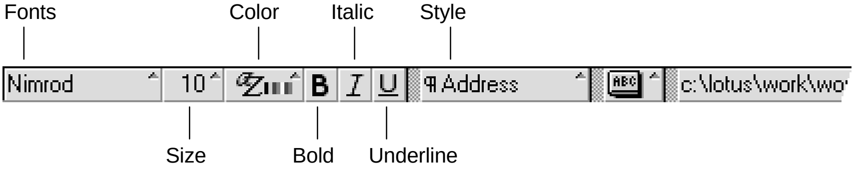
Some of these tools such as menus, SmartIcons, SmartMaster templates, the InfoBox, and the status bar are also found in other SmartSuite products. However, divider tabs, the tab ruler, and the features available from the status bar are unique to Word Pro. These unique tools are discussed on the following pages.

Status bar: for quick changes

The status bar always appears at the bottom of your Word Pro screen, providing you with current information on your documents and letting you quickly change settings such as text fonts, sizes, and attributes.

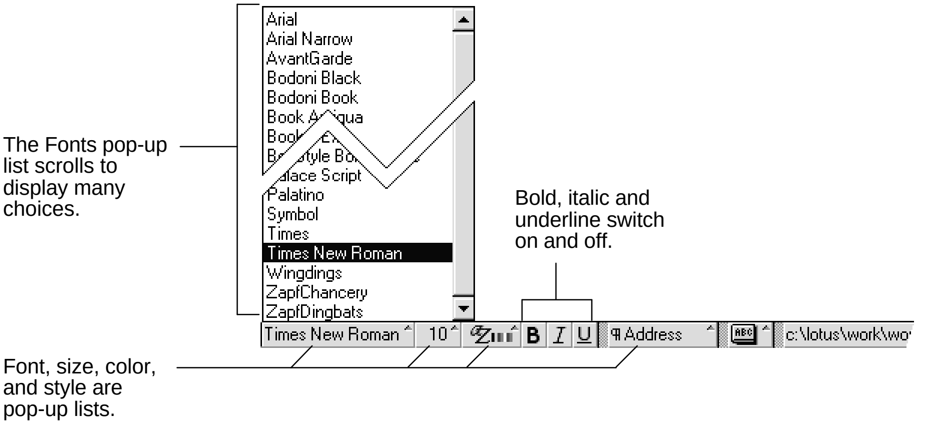
Text attribute options

You can change the following text characteristics using the status bar.



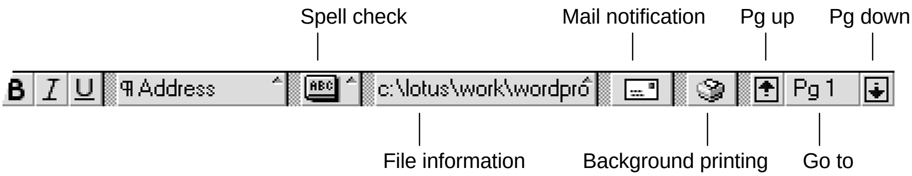
Making text format changes

To format text, select it and click one of the pop-up lists to select an option. Options that don’t display a pop-up list toggle between two types of information.



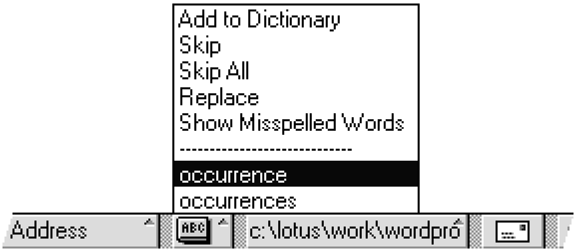
General document options

In addition to formatting the text in a document, you can also correct a misspelled word, view file information (such as the time, editor, document path), receive notification of mail, and go to specific pages in a document from the status bar.



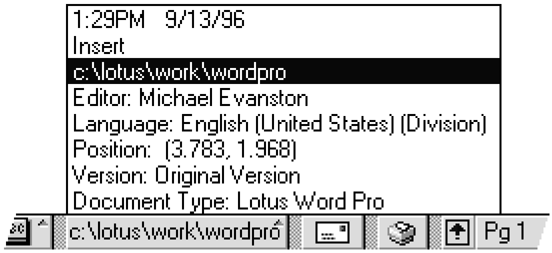
Correcting misspelled words

When Word Pro highlights a misspelled word, you can click the Spell Check button on the status bar and select an alternative word.



Viewing file information

You can display statistics for the current document, such as the path, system time and date, editing mode, the name of the editor, language, and the version.

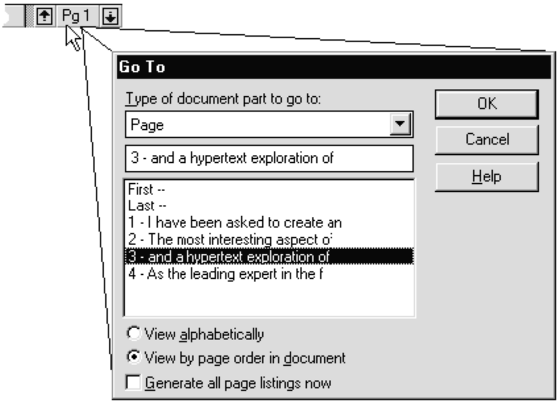


Background printing

When you send a document to a printer, you can view the progress of a print job by clicking the background icon on the status bar.

Navigating to a specific place in the document

Click the arrows to go forward or back one page.



Click the page number to go to any location in your document.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

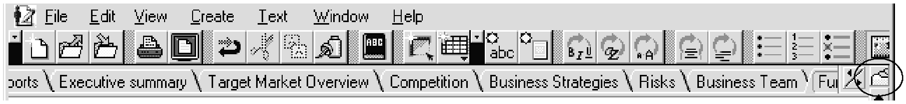
   Status bar, overview
3. Click the index entry you want, then click Display.

Tabs: for an organized desktop

Tabs help you navigate quickly and give you a clean desktop without eliminating a rich array of options. Here are two places you will see tabs in Word Pro.

Assistant tabs — lead you through the steps of a procedure.

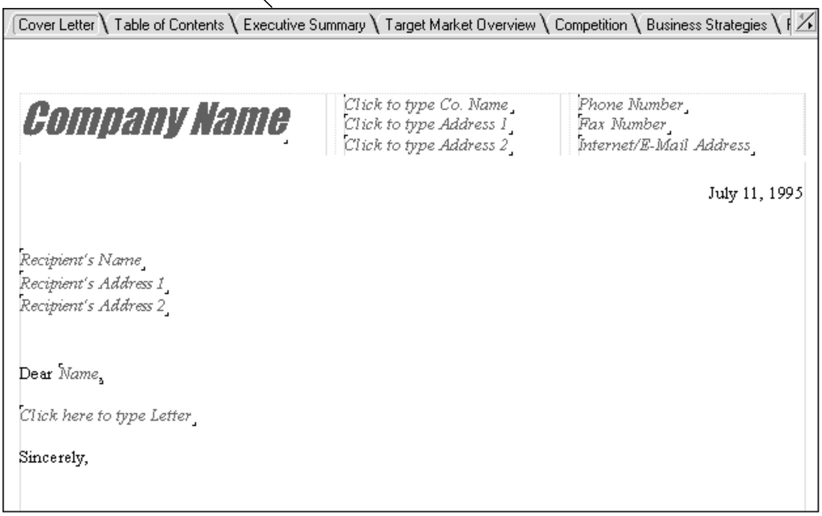
Divider tabs — let you keep all your related documents together.



In Word Pro 97, divider tabs do not display by default. You can click the  icon to display them.

Many Word Pro SmartMaster templates are already set up with divisions and sections, so you can display the divider tabs in a new document and quickly see how the SmartMaster is structured. For example, the SmartMaster below is a page of a business plan template in Full Page view.

Business plan tabs organize your information into sections.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Click Here Blocks, overview

   Divider tabs, overview

   Divisions, overview

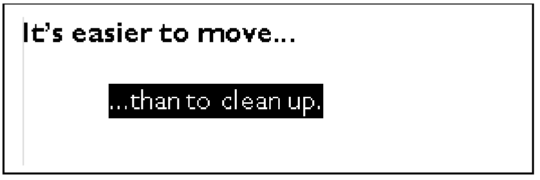
   Sections, overview

   SmartMaster, overview
3. Click the index entry you want, then click Display.

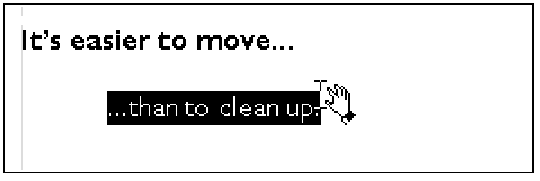
The drag & drop hand: for moving text

Moving is much more direct than cutting and pasting, and Word Pro gives you a special hand for doing it.

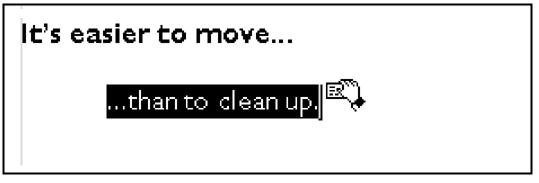
1. Select the text you want to move.



2. Let the cursor hover at the edge of the selected text. The cursor becomes a hand.



3. Press and hold down the mouse button as you move the cursor. The text does not move until you release the mouse button.

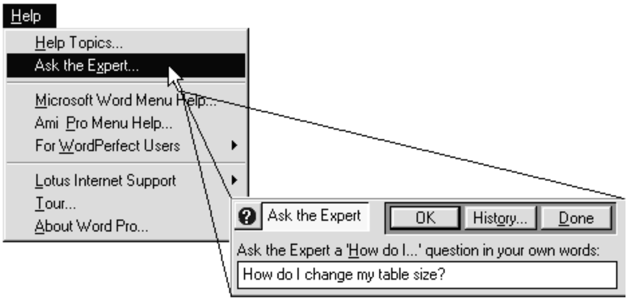


4. Release the mouse button to drop the text.

Ask the Expert: your own questions

The Expert is a tool that lets you ask questions in your own words about Word Pro functions and how to use them. You can “Ask the Expert” a question without worrying about using the right terminology. The Expert points you toward the right answer.

Choose Help and click Ask the Expert.

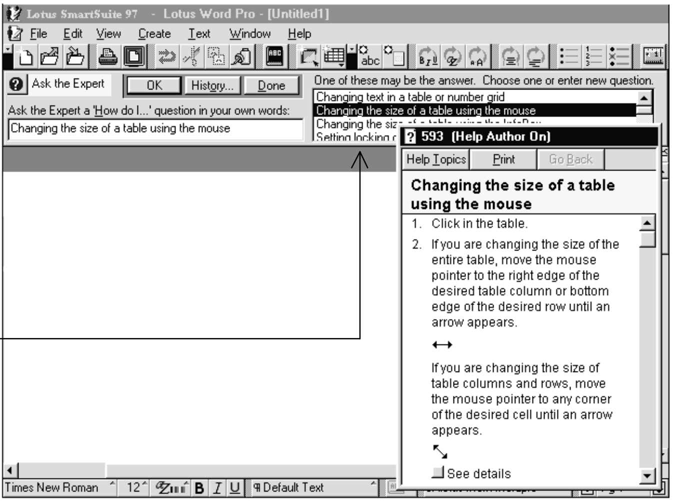


Then type your question and click OK.

When you click OK, you see Help on the topic you chose.

The Expert gives you the most apparent answer to your question...

and provides you with a list of backup topics.



WordPerfect Expert

If you are a former WordPerfect® user, you can use the WordPerfect Expert to help you make the transition to Word Pro. Word Pro provides assistance for WordPerfect 5.x DOS and 6.x Windows users. Using these assistants, you can:

- Ask a "How do I..." question or enter WordPerfect keystrokes or combinations such as **SHIFT+F7**. The Expert provides you with the answer to that question and the steps needed to perform that action/function in Word Pro. This assistant is provided for WordPerfect 5.1 for DOS users, as well as for WordPerfect 6.X for Windows users.
- Pick a WordPerfect 5.x for DOS help topic and get help on that same topic in Word Pro.
- Pick a WordPerfect 6.x for Windows menu item and find out how to perform that same action in Word Pro.

Note Ami Pro® and Word for Windows Menu Assistants are also available.

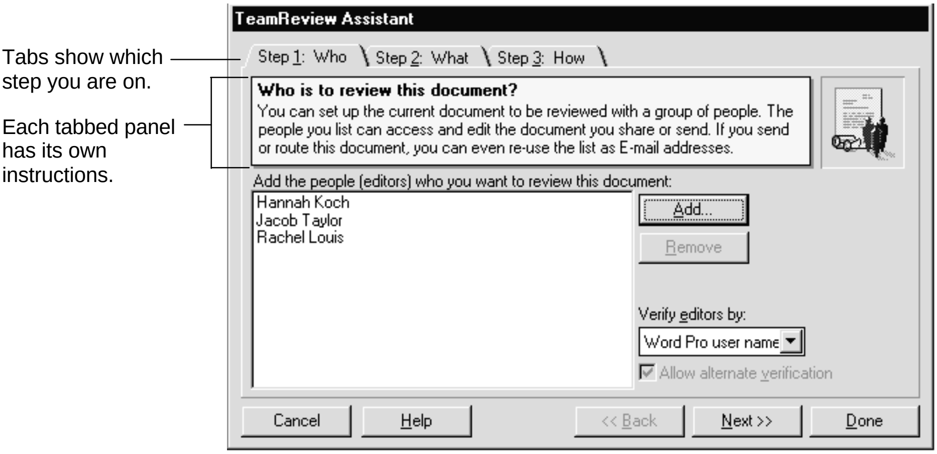
For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Expert
3. Click the index entry you want, then click Display.

Assistants: help with complex procedures

Word Pro assistants appear when you select commands that require you to complete complex procedures, such as merging mail, setting up a document review process (TeamReview), creating a table of contents, or creating an index.



You can move backward and forward in the tabs without losing track of where you are.

Modeless bars: for day-to-day tasks

You can use the **modeless bar** to perform tasks such as checking your spelling, merging a document, or inserting index entries.

A modeless bar is a tool that lets you go back and forth between a function (for example, Spell Check) and a document, without opening and closing a dialog box. The modeless bar contains the same components as a dialog box: list boxes, text boxes, command buttons, and so on, while appearing at the top of the workspace in bar form.

Unlike a dialog box, you can leave the modeless bar active and use it while you are working. Each bar has a set of command buttons that perform a specific Word Pro function when clicked.

For example, if you are checking spelling with the Spell Check bar displayed and want to edit text in the document, you can edit it, and then resume checking using the Spell Check command buttons. You don't have to close the Spell Check bar.

You can also display more than one modeless bar at a time. For example, you can have the Find & Replace and Mark Text bars open on the workspace at the same time. That way, you can use the Find & Replace bar to find the text you want to mark and the Mark Text bar to mark the entry.

You can also display the modeless bar in multiple windows. If you are working in two documents, you may want to run Spell Check on both at the same time. You can display the Spell Check bar in each window.

Note The exceptions to this type of display are the Web tools bar and Expert bar which span the top of the workspace but are not document-specific. Only one Web tools or Expert bar can display at a time.

Types of modeless bars

There are several modeless bars in Word Pro, each with its own set of command buttons. They are:

- **Envelope -** You can create and print an envelope from within any Word Pro document using the Envelope bar.
- **Find & Replace -** You can find information in a document quickly using the Find & Replace bar. You can also find and replace text, text properties, paragraph styles, or special characters.
- **Format Check -** You can edit a document quickly using the Format Check bar. Format Check scrolls through your document and, using common typing conventions, quickly finds and corrects basic errors, common typing mistakes, and inconsistency in presentation.
- **Grammar Check -** Grammar Check is a grammatical proofing tool that displays as a bar at the top of the workspace. Grammar Check analyzes your document for possible errors and offers suggestions for replacing them. It also shows examples of incorrect sentences.
- **Mark Text** (Index and Table of Contents) **-** The Mark Text bar is a Word Pro tool that lets you mark index and table of contents entries in a document. You must mark the entries before you can create the index or table of contents.

- **Merge -** When you are creating a merge document, the Merge bar allows you to insert the fields from your data file into your document. When you are viewing and printing a merge, the Merge bar allows you to view a document with the merge data before printing it.
- **Review** (Marked Edits) **-** In Word Pro, you or a number of reviewers can mark up edits. Editors make revisions to a document, and Word Pro marks these revisions as insertions or deletions for later review. You can use this bar to find and review the marked edits.
- **Spell Check -** Spell Check is a Word Pro proofreading tool that checks a document for misspelled words and highlights them for correction.
- **Web Tools -** Web tools let you create and edit Web pages easily. For information about Web tools, see Chapter 26.

Chapter 24
Working with Word Pro

You can use Word Pro tools to quickly create any document. First, you can select from several SmartMaster templates and choose one that fits the desired type of document. Every SmartMaster already contains a layout, format, and styles.

Once you choose a SmartMaster, you can edit the document, import graphics or other files into it, set attributes, create frames and tables, copy material, use grids, and do all types of formatting. You can even create your own SmartMaster templates so you always have your commonly-used layouts, formats, and styles readily available.

Writing a letter using Word Pro

Starting with a SmartMaster

Let's start by writing a letter, using a SmartMaster and other Word Pro tools.

1. Choose File - New Document.

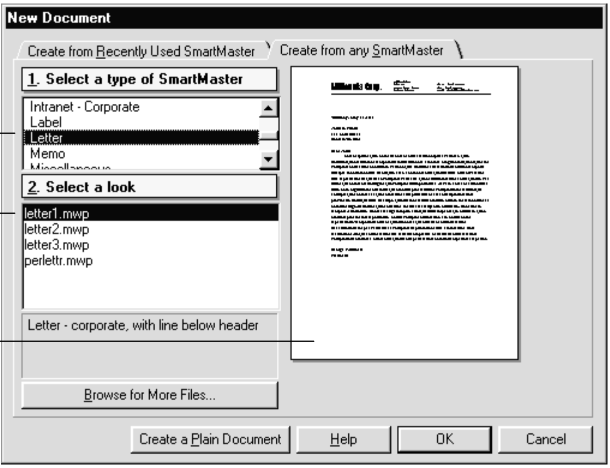
   Word Pro lets you select from a list of available SmartMaster templates.

2. Click the Create from any SmartMaster tab.

Select "Letter" as the type of SmartMaster.

Select a look, for example, the "letter1."

The thumbnail on the right shows the look you'll get.

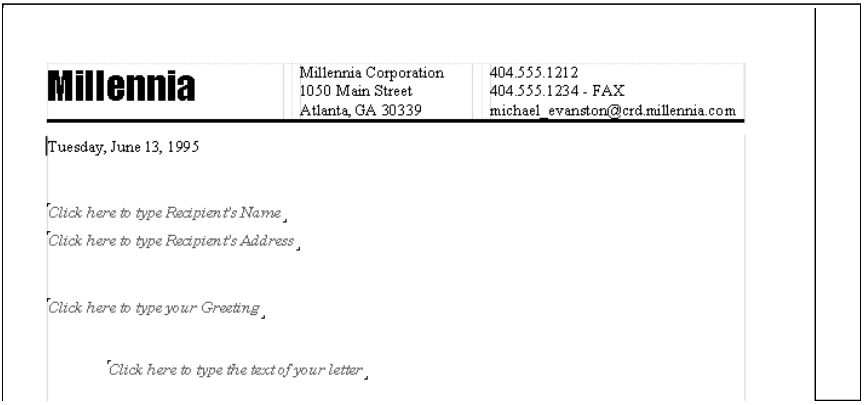


3. Click OK.

   A blank document appears in the letter format. Now you can start writing, using another Word Pro tool called Click here blocks.

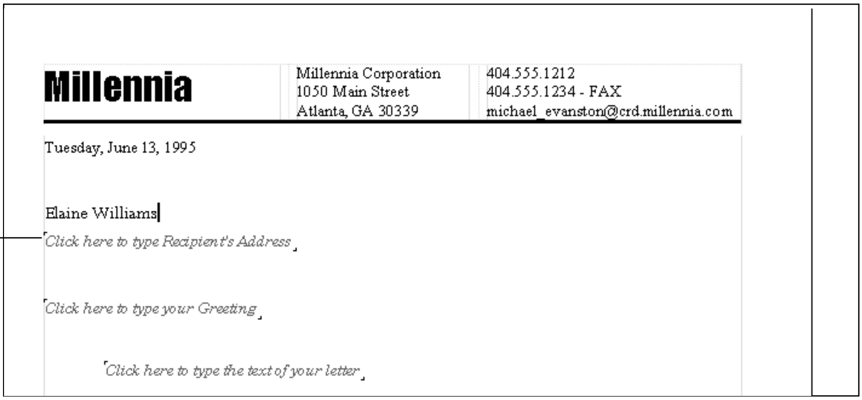
Using the Click here blocks

Click here blocks are placeholders that prompt you where to type information and what to enter.



1. Click inside the first Click here block and type the requested information.

   Tip You can press **TAB** to move from one Click here block to another, or click directly into the next block.



Click inside the blocks for the recipient's name and address and type the information.

2. Click and type the body of the letter where it says, "Click here to type letter."

3. Click in the last Click here blocks and type the requested information.

   Note If you don't fill in all the Click here blocks, don't worry. The prompt text will not appear when you print the letter unless you specifically select to print it.

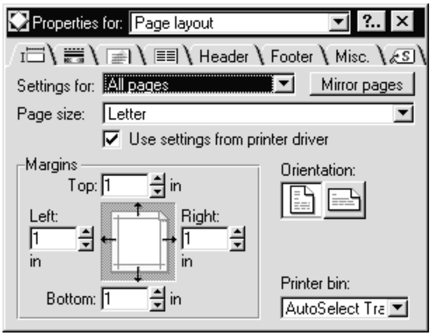
Editing the letter

As you reread your letter, you decide that you want to vary its look by highlighting one paragraph, changing a font size, and adding a table for statistics. You can do all of this using another SmartSuite tool, the InfoBox.

Making changes to the page layout

First, you decide to make changes in the page size.

1. Click the right mouse button anywhere on the page.
2. Choose Page Properties.



Tip Using the Page layout InfoBox, you can take advantage of the following features:

- Left, right, top, and bottom margin options
- Left, right, center, numeric, and leader tab options
- Page size and orientation (landscape or portrait)
- Placement and style of lines around a page and lines between columns
- Columns and varying space between columns (gutter width)
- Margins and page settings for headers and footers
- Tab settings, grid settings, alignment, and text direction on a page
- Page styles
- Watermarks

Each SmartMaster already contains a default page layout which determines the way the pages initially appear. You can modify the page layout for the entire document or for a specific area.

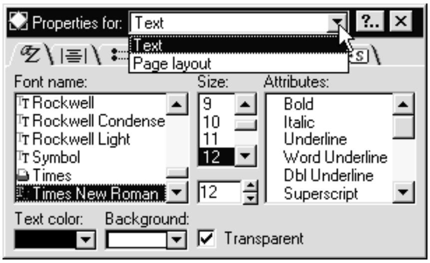
You can insert a new page layout anywhere in a document. If you insert a new page layout, Word Pro uses the new layout for the pages after the insertion.

Making changes to text

Next, you want to change the font size of the text.

Changing a font size

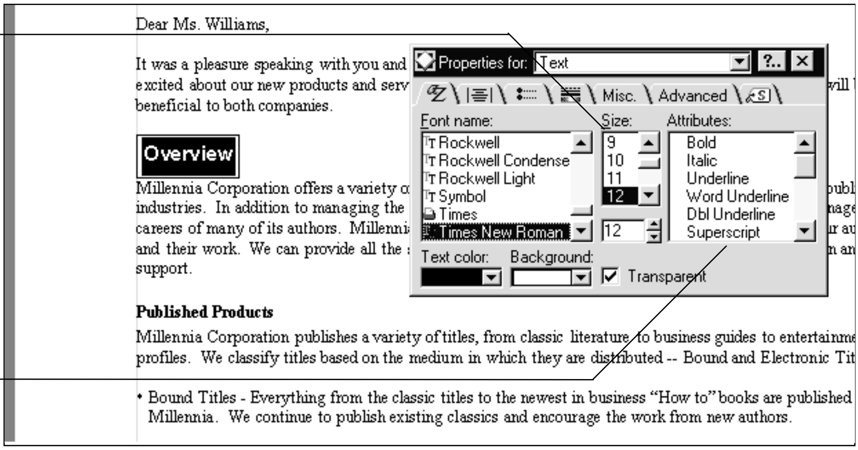
1. Select “Text” in the “Properties for” list at the top of the InfoBox.



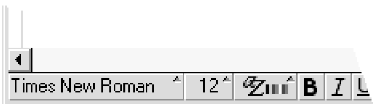
2. Click the Font tab on the Text InfoBox to bring the panel forward.
3. Select the text you want to change.

Select a font size from the “Size” box on the Font panel.

Select any other option such as bold in the “Attributes” box.



You can also change the font, font size, text color, and attributes of the selected text by clicking on the status bar at the bottom of the screen.



Emphasizing a paragraph

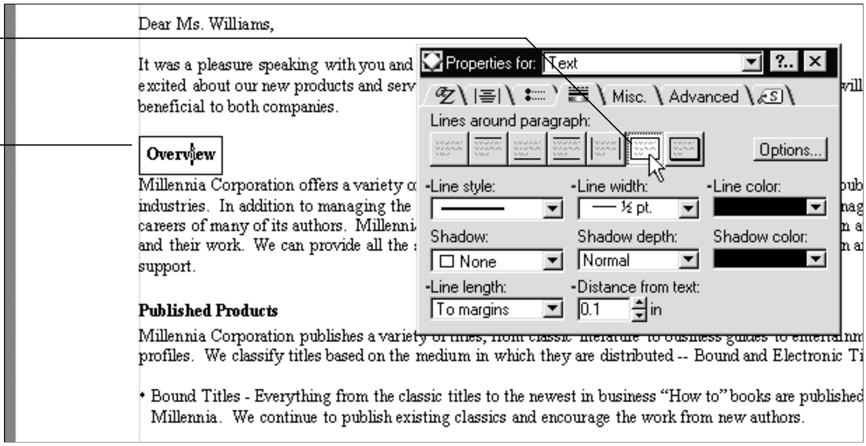
You can emphasize a paragraph by adding lines around text.

1. Click the Lines & Colors tab on the Text InfoBox to bring the panel forward.
2. Select the paragraph you want to emphasize.

   Note You can select the text in the letter while leaving the InfoBox up in the workspace.

Click a Lines around paragraph button.

The change happens instantly.



If you don’t like the result, click another Lines around paragraph button. You can also choose a different line style from the “Line style” box.

Tip To intensify the highlight, choose a shadow color that contrasts with the paragraph line color.

Using a table in the letter

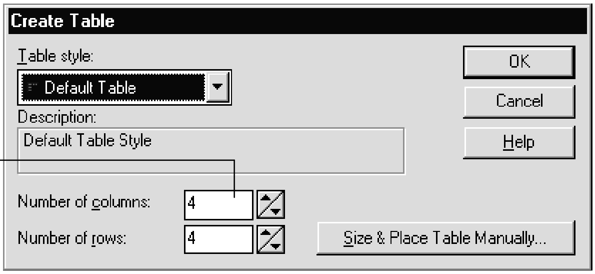
You can change the appearance of the letter by putting text in a table. You can also change the size and appearance of the table itself.

You can create a table in document text, in a frame, in columns, in headers and footers, and so on. Word Pro lets you adjust table size, depending on where you want the table to appear.

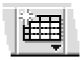
Let’s assume the letter you are writing contains material that is best presented in table form.

1. Place the insertion point in the letter where you want the table.
2. Choose Create - Table.

Select the number of columns and rows for the table.



Tip You can also use the Table Grid icon to create a table.



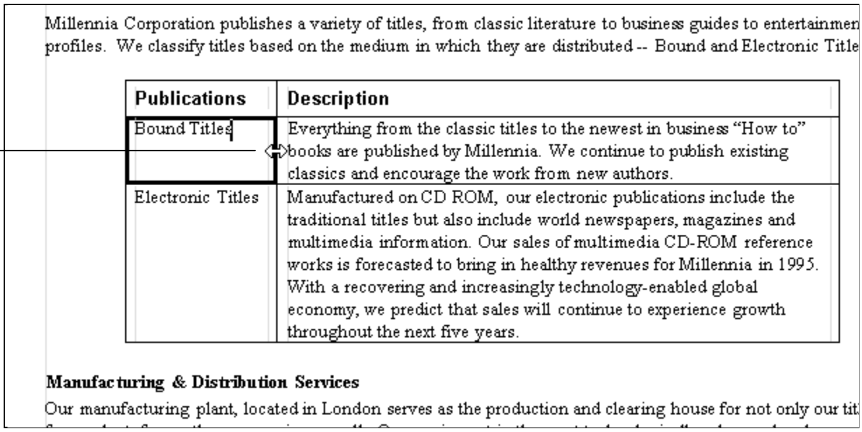
3. Click OK.

   Word Pro places the table at the location of the insertion point and anchors it to any text immediately above it.

   Tip You can also click Size & Place Table Manually and draw the table to the desired size.

4. Type the information in the table.

You can use the mouse to shrink, enlarge, or move the table cells to accommodate the information.

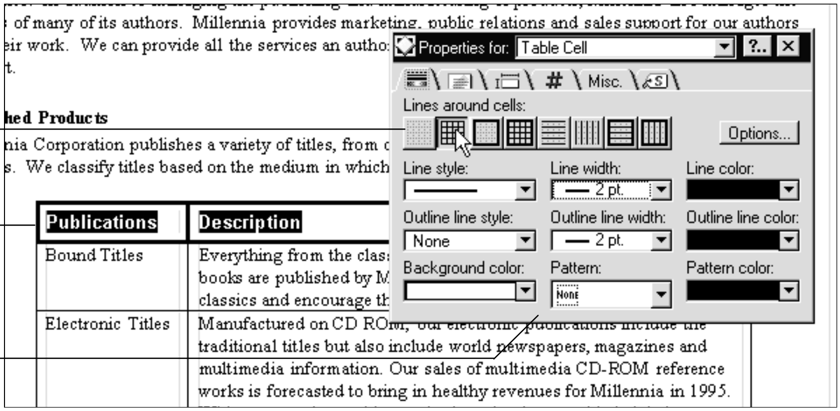


Emphasizing the table headings

You now decide that you want to put lines around the heading information at the top of the table.

1. Click the right mouse button inside one of the table cells.
2. Choose Cell Properties.

   Word Pro displays the Table Cell InfoBox.
3. Click the Lines & Colors tab on the Table Cell InfoBox to bring the panel options forward (if it does not display).
4. Select the table cells that you want to emphasize.

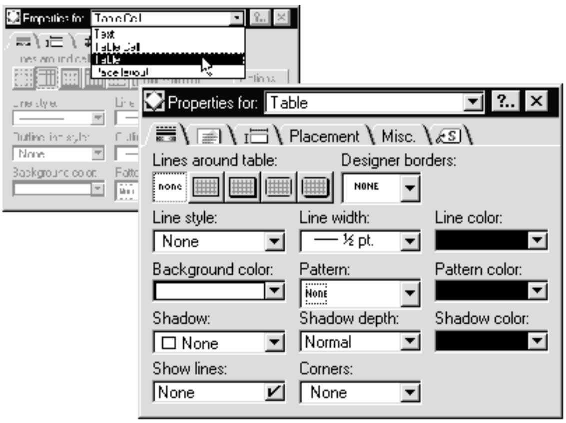


Click one of the Lines around cells buttons.

The change happens instantly.

You can select options for line style, width, and color; and background color, pattern, and pattern color.

You can also choose Table from the drop-down box at the top of the InfoBox to bring up the Table InfoBox where you can set options relating to the entire table, not just cells. For example, you can put a shadow around the entire table.



Proofing and editing the letter

When you finish adding information to the letter, you can check it for misspellings and errors.

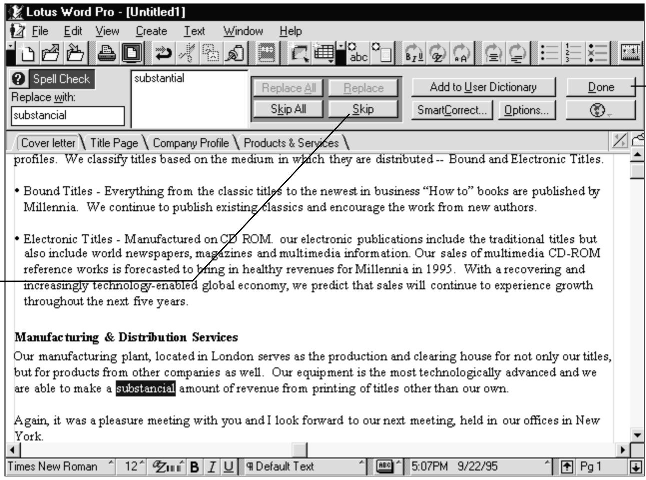
1. Choose Edit **-** Check Spelling.

The Spell Check bar appears over the document and, because it is modeless, lets you make corrections right in the letter during the Spell Check process.

Word Pro highlights all questionable words in the letter. You can skip over the highlighted words, replace errors using the Spell Check command buttons, or edit words right in the letter while leaving the bar active.

Review the misspellings in the "Replace with" box.

Click Replace, Replace All, Skip, or Skip All, as necessary.



Click Done to remove the Spell Check bar from the screen.

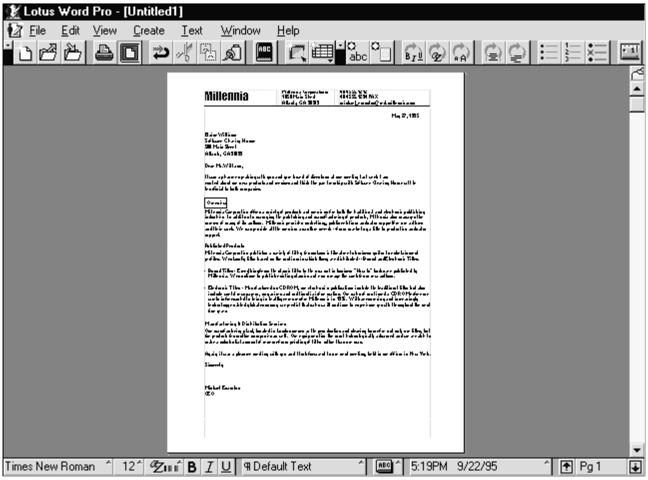
You can also correct words from the status bar. For more information, see Chapter 23.

Note If you want to add text to the letter (and SmartCorrect is turned on in File **-** User Setup **-** Word Pro Preferences), common typing errors are corrected as you type.

Viewing your letter

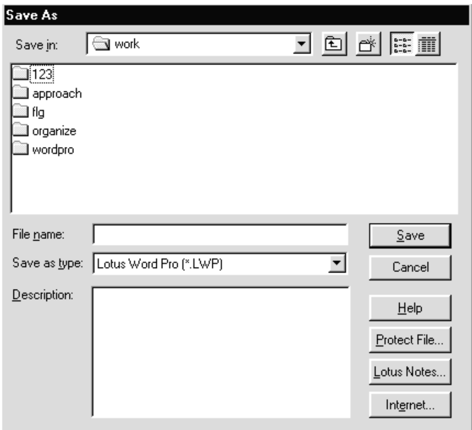
You can use different views to look at the letter before printing it. You can also edit in any Word Pro view.

For example, choose View - Zoom to Full Page.



Saving the letter

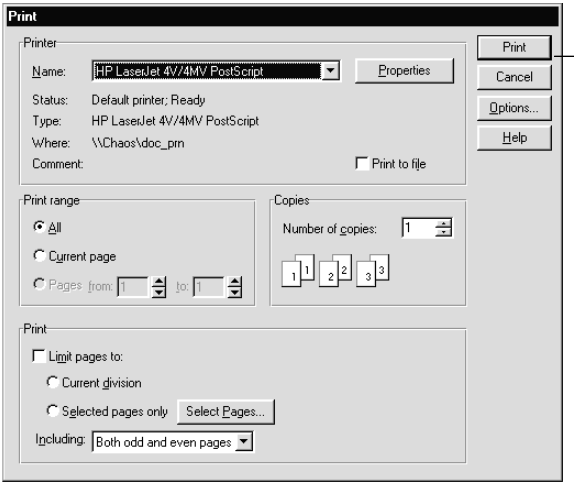
1. Choose File - Save As.



2. Type an easily identified name for the letter in the “File name” box. You can also add a description in the “Description” box.
3. Click Save to save the letter.

Printing the letter

Choose File - Print.



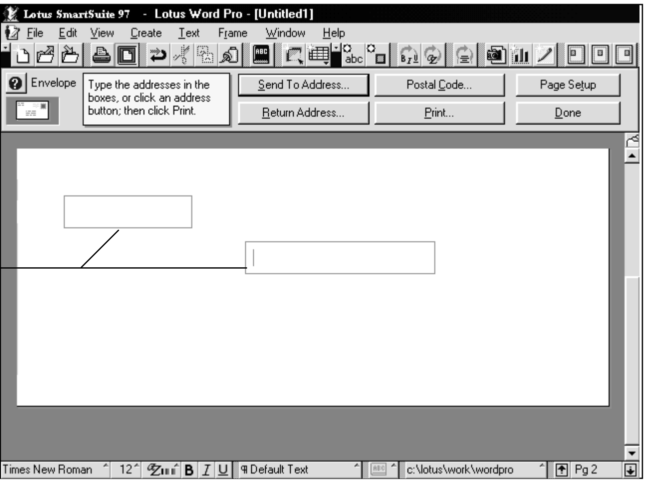
Select the print settings you want and click Print.

Creating an envelope

You can create an envelope inside the letter document. Word Pro places the envelope in a separate division with its own divider tab.

1. From inside the letter, choose Create - Envelope.

   Word Pro displays an envelope at the end of the letter in a new division.



The envelope contains two frames, one for the sender address and one for the recipient address.

2. Click Send to Address on the Envelope bar and type the name and address, or make any necessary corrections.

   If you already typed the recipient name and address in the letter, Word Pro displays them in the recipient frame.

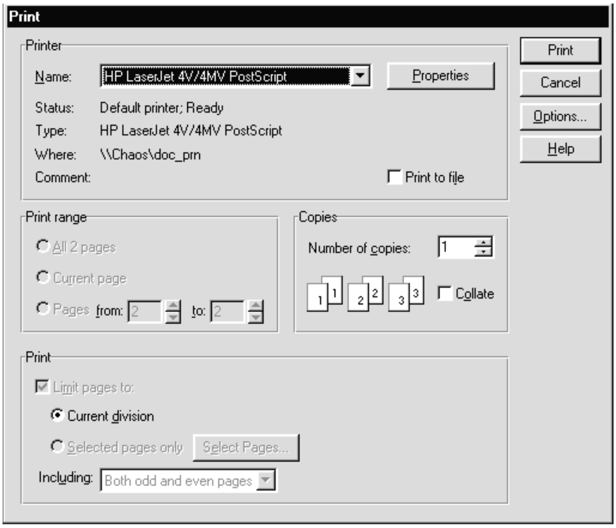
3. Click Return Address on the Envelope bar to type the sender's name and address.

   The name and address (if any) that is already in File - User Setup - Word Pro Preferences, appears in the sender frame. If it does not, or is in error, click the frame and make any necessary corrections.

4. Click Page Setup on the Envelope bar to specify an envelope size and paper source.

Printing the envelope

1. Click Print on the Envelope bar to display the Print dialog box.
2. Select the desired options.



3. Click Print.

   Tip When you print an envelope using the Envelope bar, you print only the envelope. To print other parts of the document, use the Print icon or the File menu.

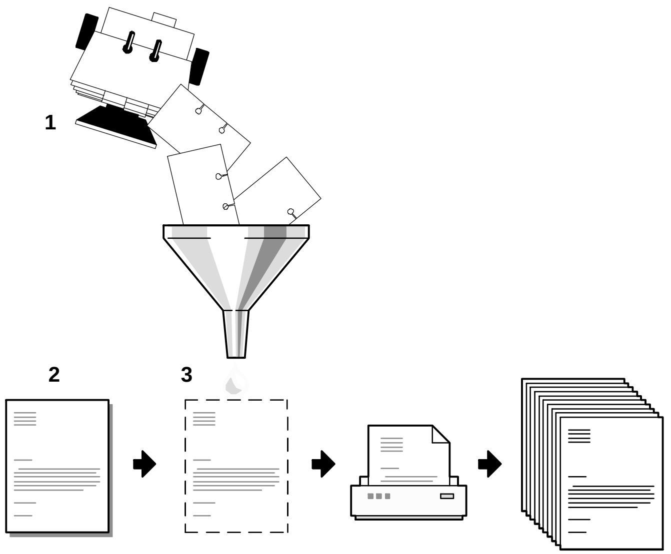
Merging files

If you want to send the same letter to many people, you can create a file containing the names and addresses of the people to whom you want to send the letter, and then you can merge your letter with the file to automatically produce a personalized copy of the letter for everyone in the name and address file (called the data file).

Word Pro's Merge feature lets you combine information in one file (such as names and addresses) with text in your letter file. Most preparation for a merge occurs prior to activating and using the Merge bar, since you must first set up a data file with field names and records. For more information, see Chapter 23.

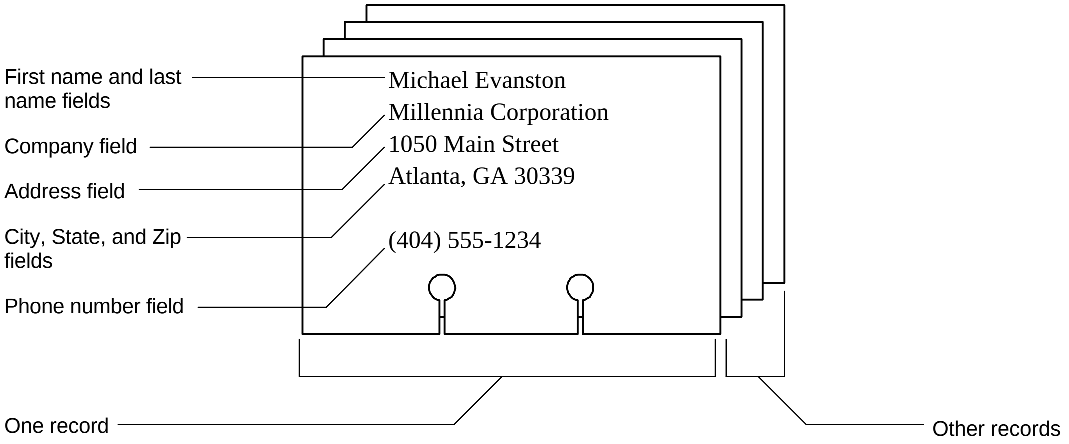
You can complete a merge using three steps:

1. Select or create a data file. This file will contain field names (such as first name and last name) and field data (such as specific first and last names).
2. Select a merge document or set up an envelope. This file contains data that stays the same (such as the body of a letter or the return address of an envelope).
3. Merge the data file and merge document.



Before you merge the letter or envelope and addresses, you must first create or select a data file that contains the addresses. You can create a data file in Word Pro format. You can also use data stored in another application as a data file, but you cannot edit the data in Word Pro.

The data in a data file is arranged into records. A record contains the complete data for a single item, subject, or person. A record is similar to one card in an index card file.

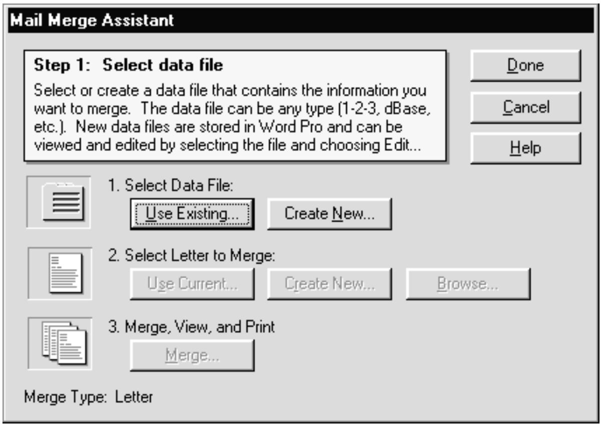


Each record is divided into fields. Each field contains one type of data corresponding to a field name. For example, if you specify company, first name, last name, and address as field names, each record contains company, first name, last name, and address data for one person.

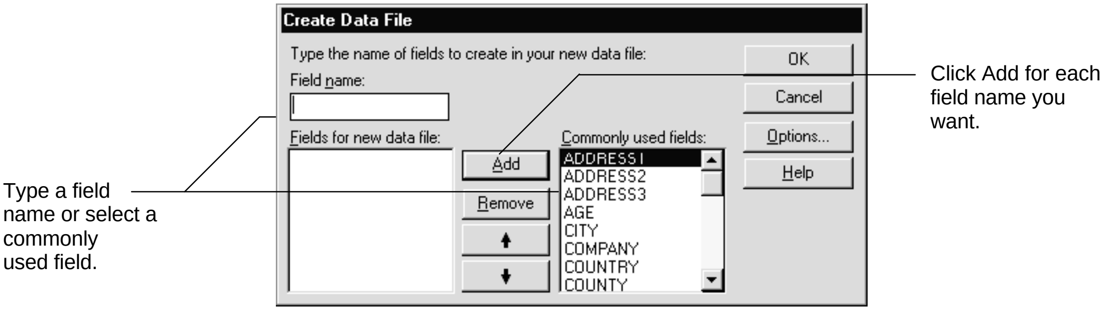
Selecting or creating a data file

First, use the Mail Merge Assistant dialog box to create the data file.

1. Choose Text - Merge.
2. Choose Letter.



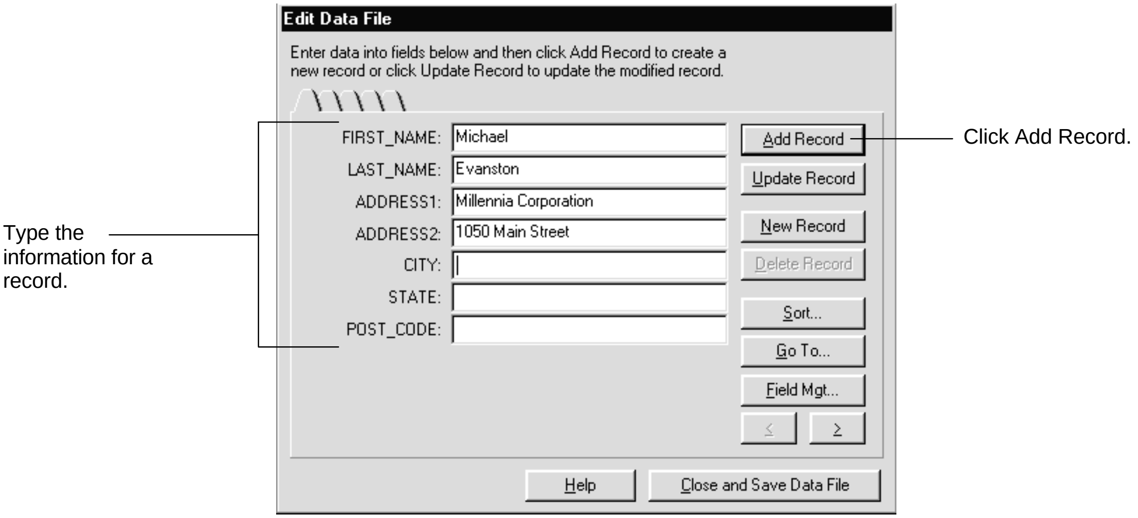
3. To create a data file, click Create New in “Step 1 - Select Data File.”



4. Click OK in the Create Data File dialog box.

   Word Pro displays the Edit Data File dialog box.

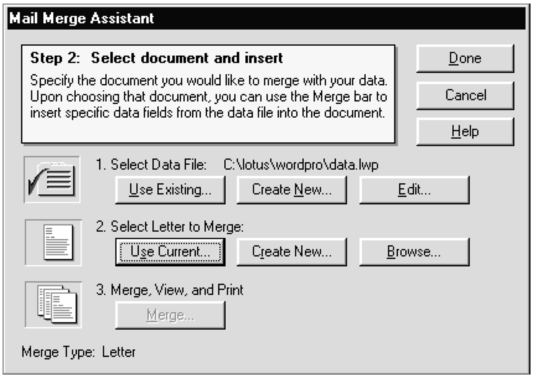
5. Type the information for each record that you want to add.



6. When you finish adding records, click Close and Save Data File.

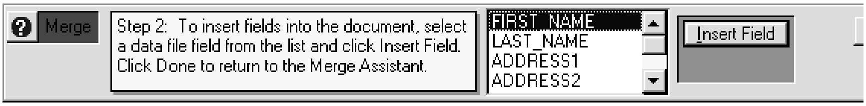
Selecting a merge document

1. To select a merge document, click Use Current in “Step 2 - Select Letter to Merge.”



The merge document is the document you want to merge with your data file (for example, the letter you created).

When you select a merge document, Word Pro displays the Merge bar. The Merge bar lets you insert the fields from your data file into your merge document.



For example, use the Merge bar to insert fields so that the beginning of your letter resembles the following:

<FIRST_NAME> <LAST_NAME>
<ADDRESS1>
<CITY>, <STATE> <ZIP>

Dear <FIRST_NAME>:

Tip You can delete the current specific name and address information in your letter, and then use the Merge bar to insert fields into the document that match the data file fields.

2. Place the insertion point at the desired location .
3. Select the desired field name in the list in the Merge bar.
4. Click Insert Field.

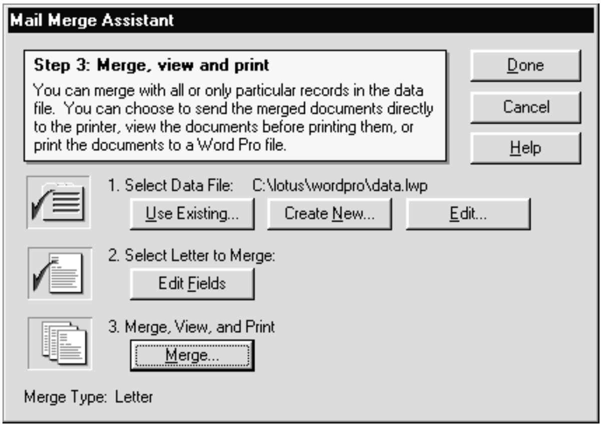
Note Word Pro does not recognize regular information typed into the document as merge information. For example, typing “<FIRST_NAME>” is not the same as inserting a merge field.

5. Repeat steps 2 – 4 for each field you want to insert.

   Note You can insert spaces and punctuation between field names and insert one or more field names on a line. For example, insert the City field name, type a comma and a space, and then insert the State field name. You can insert the same field name in more than one location.

Merging the data file and merge document

1. Click Done to remove the Merge bar.
2. To merge your document, click Merge in “Step 3 - Merge, View and Print.”

   You can include or exclude specific records in the data file by specifying conditions. For example, you can send a letter to people who live only in Georgia and exclude anyone who lives in other southern states from the mailing.

   You can merge all the records or only records that meet certain conditions. You can also select print options.

   You can use multiple sets of conditions to more precisely specify the records you want to merge.

3. After selecting print and view options, click OK to view and or print the finished documents.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Merge, documents

3. Click the index entry you want, then click Display.

Chapter 25
Organizing a Document

Divider tabs, similar to file tabs, let you organize a document into divisions and sections. You can instantly access a page, no matter how far down in the document. You can name, rearrange, move, and combine divider tabs, nest them within each other, and use them to structure your document.

Divisions: for structuring a document

The best way to understand and use divisions is to display their divider tabs. Divider tabs are an easy way to visually identify where divisions begin in a document.

Divider tabs represent divisions and sections in a document. They can be used to structure a document and reveal its organization at a glance. Similar to worksheet tabs in Lotus 1-2-3 for Windows, divider tabs can correspond to parts of a document, such as the Table of Contents, Chapter 1, Chapter 2, Index, and so on.

You can display or hide divider tabs by clicking  in the upper right corner of the workspace, right above the scroll up arrow.

Divisions are parts of a document and can contain:

- Text, frames, and tables
- Sections
- Other divisions having different properties from the original division (for example, formatting, styles, and layout)
- External files that are linked to the document
- OLE objects

Features such as page numbering, table of contents, and index can be specific to a division or span all divisions.

Naming or renaming divisions

You can name or rename a division's divider tab to help in organizing and partitioning the document.

When you create page numbering, numbered lists, and bookmarks, you can reference the division name where they reside.

Divisions and external files

When you import or reference an external file, that file becomes a division in the original document (with its own SmartMaster), and, if you are referencing an external file, the host document becomes a master document.

Word Pro automatically creates a division divider tab for the external file in the master document, on which the file name appears.

External document divider tab

You can change the name of this divider tab (or any other divider tab).

Creating a division using a divider tab

The simplest way to create a division is to click the right mouse button on an existing division divider tab and choose Quick Division.

Choose Quick Division.

Word Pro creates the new division immediately to the right of the division on which you clicked, with properties copied from the division on which you clicked.

Word Pro automatically creates a divider tab for the new division, with the default name, "Division."

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Documents, divisions

   Divider tabs, overview
3. Click the index entry you want, then click Display.

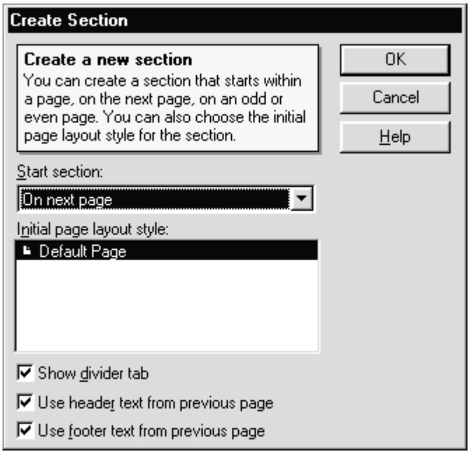
Sections: for more detail

Sections are areas of a document that reside within divisions. Sections can start anywhere in a document, even in the middle of a page.

Sections have their own divider tabs. You can use a section to restart page numbering, use new headers and footers, and build a table of contents.

Creating a section

You can create a section by choosing Create - Section to display the Create Section dialog box.



Unlike creating a division, you *must* use the Create menu when you first create a section.

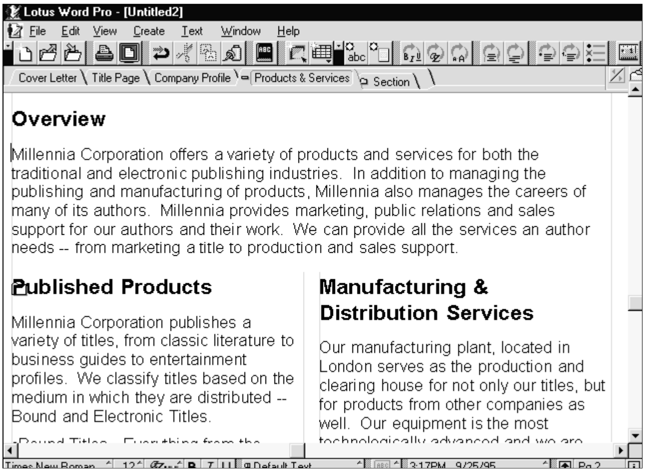
Once a section divider tab exists in the document, then you can click the right mouse button on it and choose Quick Section.

After you set the desired options and click OK, Word Pro inserts a section mark on the page (depending on the section placement option) and automatically creates a Section divider tab within the current division.

Section divider tab

You can always change the name of a section divider tab.

You can use sections to start a new page layout on the same page. For example, you can use two columns on a page and then return to a single column on the same page, or use a table in the upper half of a page and halfway down the page, begin columns.



When you create a section, a section mark displays in the document (if “Section marks” is selected in the “Show marks” box in the View Preferences dialog box).

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Sections, creating

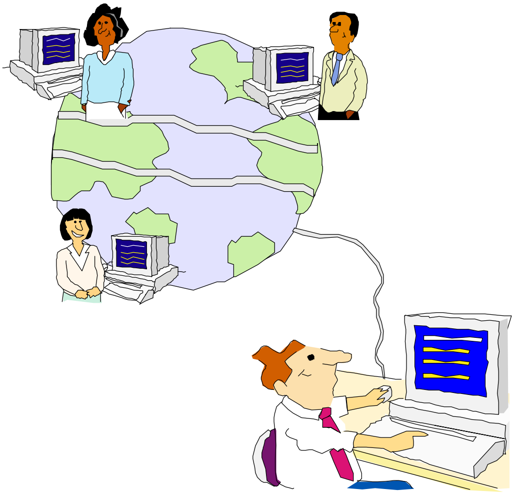
3. Click the index entry you want, then click Display.

Divisions or sections checklist

To	*Use*
Add to a long, complex document	Divisions because they can contain either internal text or use outside files. Each division retains its own properties.
Change SmartMaster templates for various large areas of text	Divisions because each division retains its own SmartMaster and operates as a self-contained unit.
Organize text into major areas	Divisions because they always start at a page break and truly divide a document.
Customize a SmartMaster for text or another external file	Divisions because they retain the customized SmartMaster for the specific division and do not carry over properties to other divisions.
Create a master document that links to other external files	Divisions because each external file becomes a division in the master document.
Group different areas of text on a page	Sections because you can use different page layouts on one page.
Identify a small area of text on a page for a different format	Sections because you can use a different page layout for a small area without affecting other areas in the document.
Use divider tabs primarily for navigation rather than reorganization	Sections because they are usually smaller than divisions and cannot be nested.
Have more than one section on a page	Sections because they do not require page breaks.
Change to a different page layout or reset paragraph numbering, either on the same page or in the same area	Sections because you can use different page layouts on one page.
Change the number of columns or page margins all on the same page	Sections because you can use different page layouts on one page.
Restart paragraph numbering, page numbering, and change headers and footers	Sections because you can use different page layouts on one page.

Chapter 26
Word Pro: The Internet Connection

Word Pro and the Internet



With Word Pro, you can quickly create your own Web pages and publish them to the World Wide Web. You can choose from a variety of personal and corporate HTML SmartMaster templates, or you can create a custom Web page.

Word Pro provides Web authoring tools, so you do not have to understand or be an expert in HTML to create Web pages. Word Pro automates the process of applying HTML tags, creating links, applying horizontal rules, and importing/exporting pictures. Word Pro also takes care of details such as exporting graphics as JPEG images for you.

Building a Web page

The following pages guide you through the entire process of building a sample Web page. You can see for yourself how easy it is.

Displaying the Web tools

You can toggle the Web authoring tools on and off by choosing File - Internet - Show / Hide Web Authoring tools.

Internet SmartIcons palette

Web Tools bar

When you turn on these tools, Word Pro enables Web authoring menu items and a modeless bar for creating links, previewing the document in a browser, and so on.

Selecting an HTML SmartMaster template

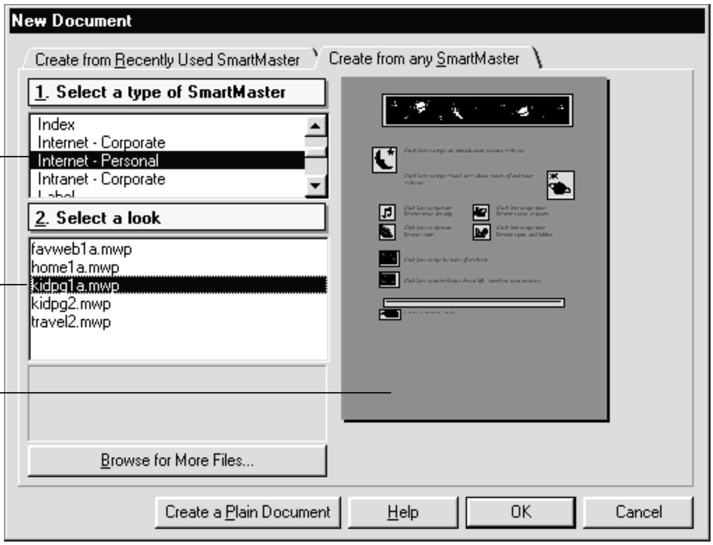
You can use HTML SmartMaster templates that are designed with graphics and Click here blocks to make creating links and importing graphics easy.

Choose File - New Document.

Select the type of SmartMaster you want to use.

Select the look of the SmartMaster.

You can preview the SmartMaster here.



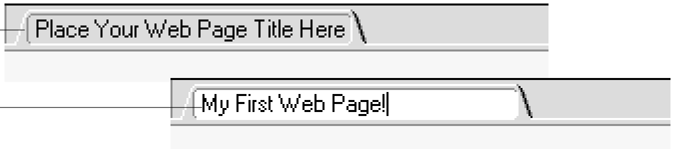
Naming your Web page

When a user displays a Web page you create, the name of the page (the name on the first division divider tab) displays at the top of the Internet browser and is the name used when a link is created to your Web page. You can also repeat this name at the top of the Web page itself.

To display the divider tabs, click the icon at the top of the vertical scroll bar.

Double-click the divider tab.

Type the new name.

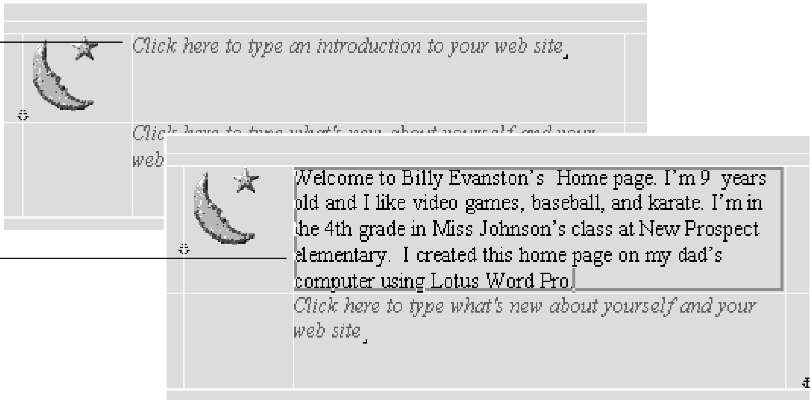


Typing and formatting the text of your Web page

If you are using an HTML SmartMaster, Word Pro uses Click here blocks to prompt you for the type of text and where to place the text. These prompts make it easy to “plug in” information for your Web page.

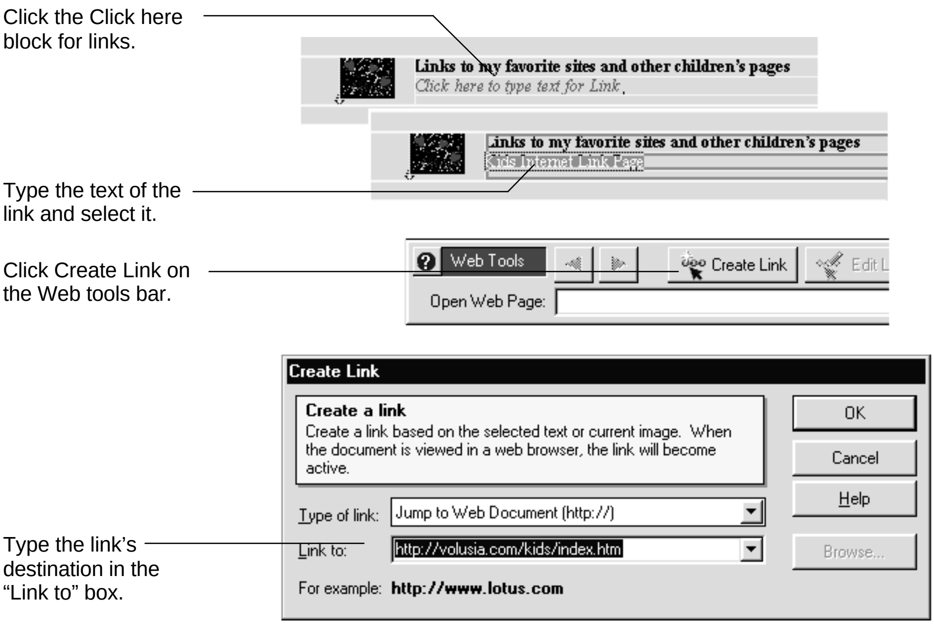
Click the Click here block.

Type your text.



Adding a link

You can create or edit links by using the Create Link or Edit Link buttons on the Web tools bar.

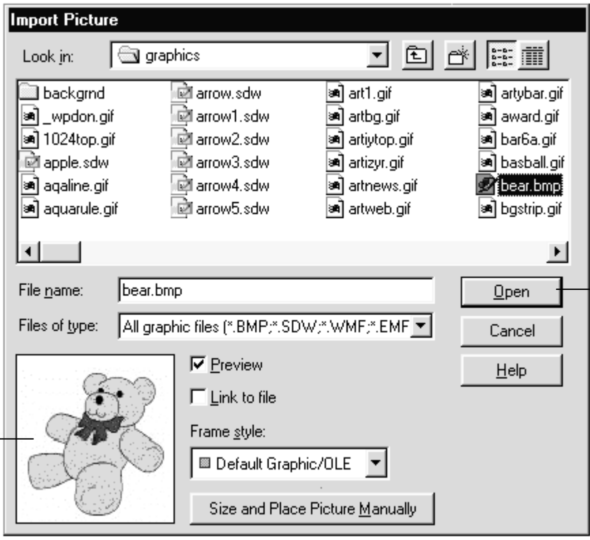


You can create links wherever you want by selecting text or graphics and choosing Create Link on the Web tools bar.

Importing a picture

When you install Word Pro, a graphics directory is created which contains a variety of graphics you can use.

Click the Click here block.



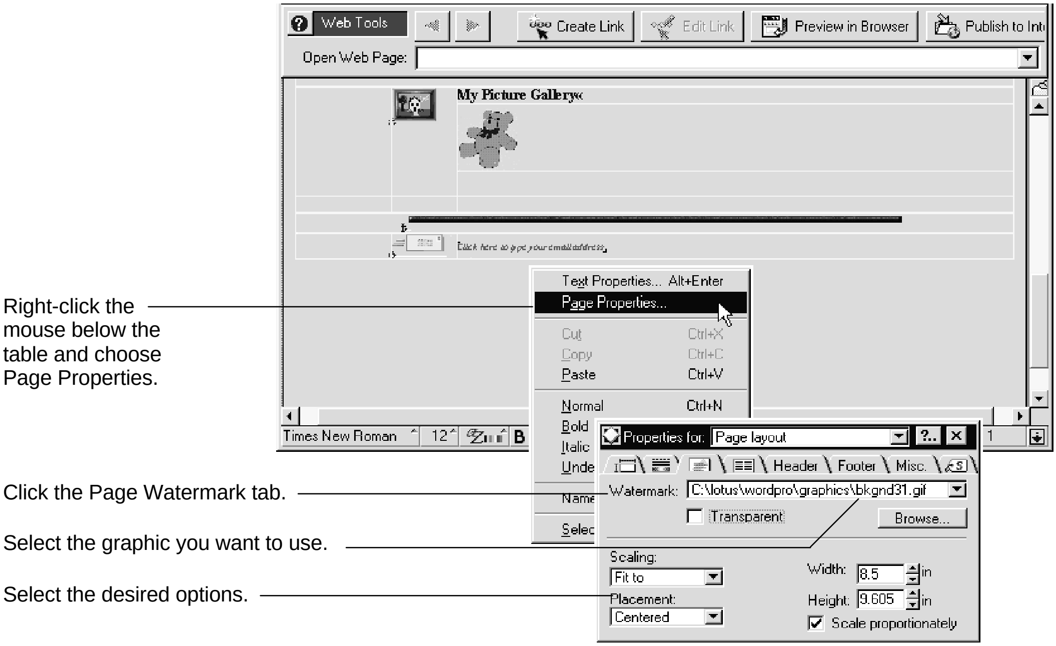
Select the desired graphic from the wordpro\graphics directory.

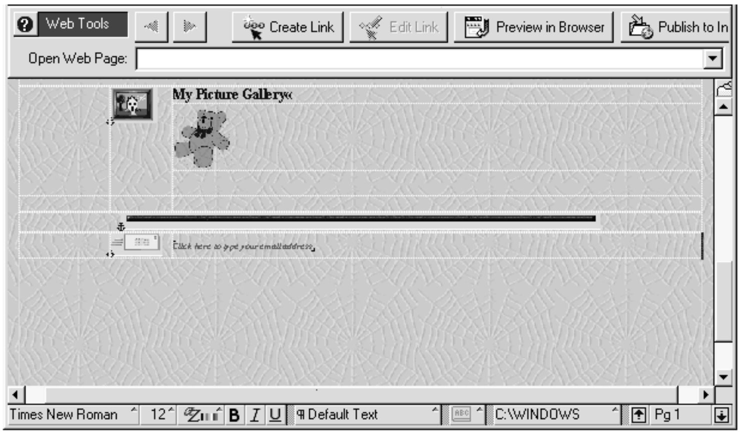
Click Open

You can preview the picture you want to import here.

Adding background wallpaper

You can add a background wallpaper to your Web page that will display when you publish your Web page to the Internet. For example, if you are creating a custom corporate Web page, you can use the company logo as the wallpaper.





Previewing your Web page in a browser

If you have an Internet browser installed at your workstation, you can click a button, and Word Pro displays your HTML document in the browser.

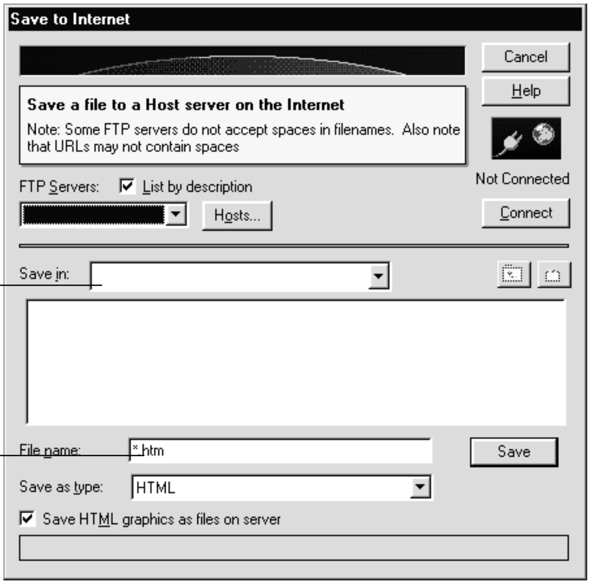
Click Preview in Browser.

Result

Publishing your Web page to the Internet

You can set up the desired Internet connection information and publish your HTML document to the Internet.

Click Publish to Internet on the Web tools bar.



Select where you want to save the file.

Specify a file name.

For more information

1. Choose Help **-** Help Topics and click the Index tab.
2. Type one of these phrases:

   Showing, Web tools

   Links, HTML

   Previewing, HTML documents

   Internet, publishing documents

   Forms, creating

   Importing, HTML documents

   Exporting, HTML documents

   HTML, viewing code
3. Click the index entry you want, then click Display.

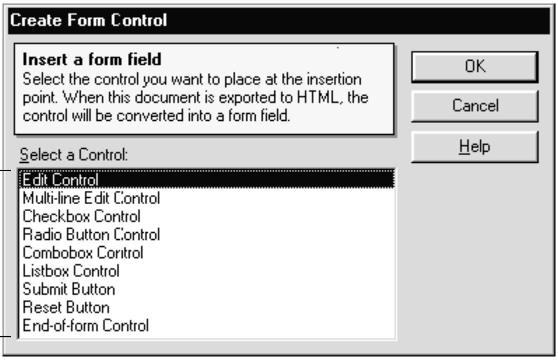
Adding forms to a Web page

Within your Web page, you can create forms that ask users to choose options from drop-down lists, click on-screen buttons, or type text in entry fields.

The following controls let your readers indicate the specific characteristics or nature of the information they want.

Inserting a form control

1. Choose Create - Form OCX Control.



Select the type of control you want to use.

You must consider carefully what information you want to request from a reader and what you want to do with it. When a reader clicks the Submit button, all the information on the form is consolidated and sent to the server.

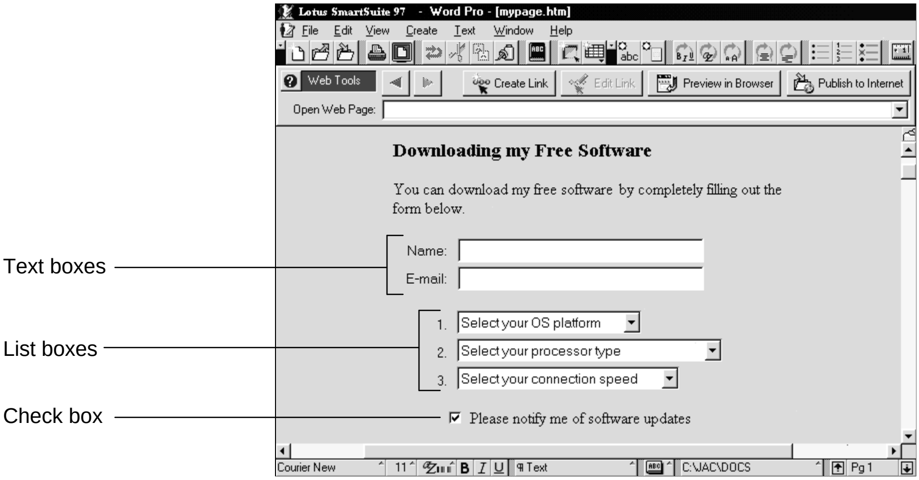
2. Click OK.

   A properties dialog box appears for the form control.

3. Specify the properties for the control and click OK.

4. Repeat steps 1 – 3 until you have added all the controls for the form.

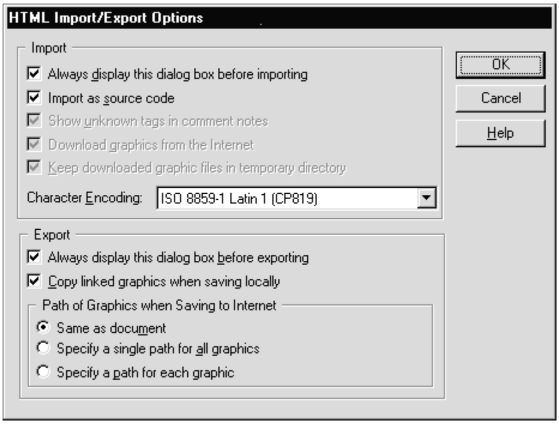
   Below is an example of a form you might find on a Web page.



Setting import/export options

Word Pro now provides import and export options that you can use to specify how you want to display and store information.

You can specify these options by choosing File - Internet - HTML Import/Export Options.



Import Options

- **Import as source code** - Word Pro displays HTML formatting commands.
- **Show unknown tags in comment notes** - Word Pro places non-HTML paragraph styles in comment notes.
- **Download graphics from the Internet** - Word Pro downloads graphics that the Web page references on the Internet.
- **Keep downloaded graphic files in temporary directory** - Word Pro stores (and links to) graphics you downloaded in a temporary directory instead of embedding the graphics inside the Word Pro document.
- **Character Encoding** - Word Pro displays the default character encoding for imported HTML files in this box.

Export Options

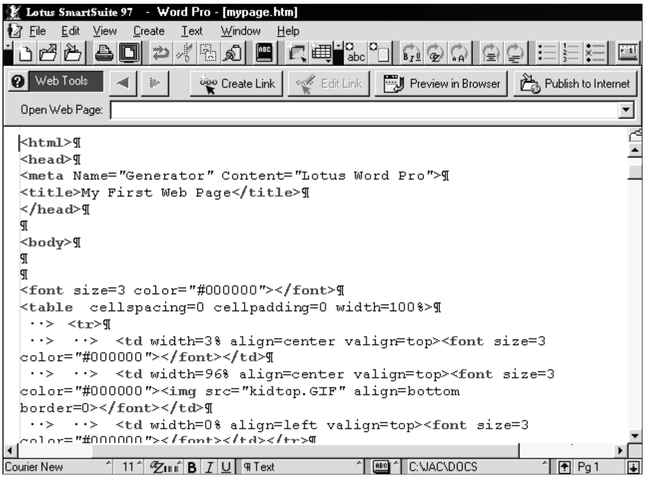
- **Copy linked graphics when saving locally** - Word Pro copies linked graphics to the same directory as the HTML document.
- **Path of Graphics when Saving to Internet** - You can select how Word Pro saves graphic files to the Internet. You can specify that graphics should be saved in the same directory as the document, to a single directory for all graphics, or to a different directory for each graphic.

Viewing a Web page as source code

You can view your Web page as source code.

1. Choose File - Internet - Choose Open from Internet.
2. Select “HTML” in the “List files of type” box.
3. Select the file you want to open and click OK.
4. In the HTML Import/Export Options dialog box, select “Import as source code” and click OK.

   Word Pro displays your Web page with HTML formatting commands.



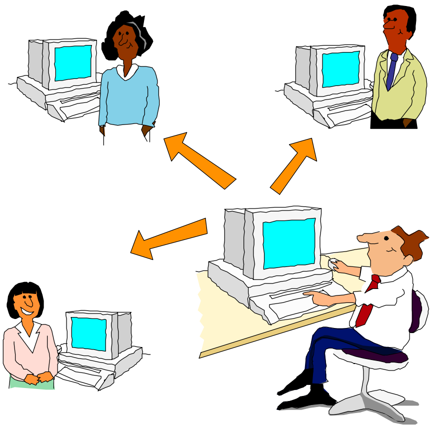
Chapter 27
Team Computing with Word Pro

Word Pro can help you with the document-sharing process. You can create, review, edit, and distribute collaborative documents using the Team Computing features:

- Versioning
- TeamReview
- TeamSecurity
- TeamConsolidate
- TeamMail
- Notes/FX™

Helping you with the shared document process

You have probably worked as part of a team or served on a committee where you were expected to write a report or some other type of document. However, working on a document as a group is not easy.



You most likely work on a document alone — writing and rewriting until you are ready to share it with your colleagues. You then make printed copies and pass them out to the other team members to review. However, reviewers don't always give back their comments in a timely manner, or they don't edit the document the way you would like. This process of writing, distributing, editing, and consolidating repeats until time runs out, or until everyone on the team is satisfied. There just hasn't been an easy and efficient way to produce a collaborative document.

Word Pro makes sharing documents easier. Each member of the team can contribute to the group effort without the hassle. You can work online with all the editing tools readily available.

Even if you don't work as part of a team, the team computing features in Word Pro can help you become more organized and more efficient.

How do editors fit into the shared document process?

Editors are authors and reviewers of Word Pro documents. Word Pro uses editors in every phase of the team computing process.

- As soon as you create a document, Word Pro recognizes you as an editor.
- If you give your document to someone else to review, you can quickly see his or her comments because they are clearly marked and attributed to him or her.
- You can assign editing and access rights to the editors of your document.
- If your team creates multiple versions of a document, each version includes the initials of the person who created that version, and the initials of all those who edited it.
- When you consolidate files, the comments of all the reviewers are tagged so you can incorporate their edits appropriately.

Knowing who an editor is and what changes he or she is making helps the team recognize the contributions of every team member.

You don't have to be on a network for Word Pro to identify the editor. As long as your computer is set up to use a unique Word Pro user name, Word Pro can identify who is opening and editing files. Word Pro can also identify the editor using an e-mail or Operating System login.

What are the benefits of using team computing?

The team computing features in Word Pro make it easier to share documents and gather comments by automating the process.

You can set editing rights for specific people

How you use it	*Example of benefit*	*Features used*
You can set up the rights the same way for all reviewers, or set up different rights for specific reviewers.	For example, set up the document so John can copy and save the document as a new file, but Carol cannot. You also want all the reviewers to make their edits in a new version of the document, not the current version.	TeamSecurity TeamReview

You can assign markup options for each reviewer

How you use it	*Example of benefit*	*Features used*
You can assign a specific color to each reviewer, so his or her edits are distinctive. The author can also set up the document so the reviewer's initials are included with his or her comments.	For example, five people are reviewing your document. You can assign each reviewer his or her own color — red for Bryan, blue for Kathleen, green for John, yellow for Dawn, and pink for Kelli. When you get back all of the edits and consolidate them into one file, you can quickly see who made which edit. If three reviewers rewrote one paragraph, each version of the paragraph displays in the consolidated document in the specific color assigned to each reviewer. One paragraph might be in green, one in pink, and one yellow.	TeamSecurity TeamReview TeamConsolidate

You can save the team computing information in a SmartMaster

How you use it	*Example of benefit*	*Features used*
You only need to set up the editing rights and options one time.	For example, as the lead writer, you know you will send drafts of a document to the same reviewers during each phase of a project. You setup the editing rights and options for the document once and then save the document as a SmartMaster. When you create a new document using that SmartMaster, Word Pro retains the information.	TeamSecurity TeamReview

You can display a greeting when a reviewer opens the document

How you use it	*Example of benefit*	*Features used*
You can let each reviewer know what his or her role is in the review process.	For example, you want your managers to check the data in some spreadsheets. You write the following greeting: "Please verify the expense figures for your department."	TeamReview

You can display the tools the reviewer needs when he or she opens the document

How you use it	*Example of benefit*	*Features used*
You can set up the document so the reviewer's edits are marked or the Review & Comment Tools display when a reviewer opens the document.	For example, you want John to make corrections or add suggestions directly in the document. You can set up the document so that when he opens it, Word Pro displays the Marked Edits bar. That way, he can begin the review process immediately. He doesn't have to figure out how to display the bar.	TeamSecurity TeamReview

You can send or route the document through the network

How you use it	*Example of benefit*	*Features used*
You can distribute a document through the company's e-mail system. You can either send the document to everyone at one time, or route it sequentially to a list of reviewers.	For example, you want to send out a proposal to 12 reviewers. You can route it so it goes to John, and then Carol, and so on. Word Pro prompts each reviewer to send it to the next person on the list.	TeamMail

You can track who made revisions and weigh the value of those contributions

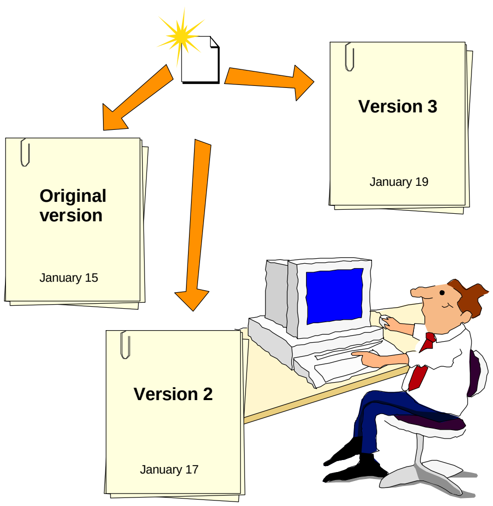
How you use it	*Example of benefit*	*Features used*
You can assign a specific color to each reviewer, so his or her edits are distinctive. You can also set up the document so the reviewer's initials are included with his or her comments.	For example, the edits of two reviewers conflict. One of the reviewers is a technical support representative and the other is the president of the company. You might weigh the technical support representative's comments more heavily because he or she deals directly with the customer. Or, you might weigh the president's comments more heavily because he or she signs your paycheck.	TeamReview TeamConsolidate

Versioning: tracking multiple drafts

Versioning lets you create several versions of a document without having to save multiple files.

How versioning works

You can create a single document that contains multiple versions. For example, LETTER.LWP can contain the Original Version, Version 2, Version 3, and so on.



For example, Tom is a branch manager at a local bank. The bank is instituting a new warranty program for NoName appliances. So, Tom writes a form letter to send to customers who own these appliances. Below is an example of the review process this letter may go through before it is final.

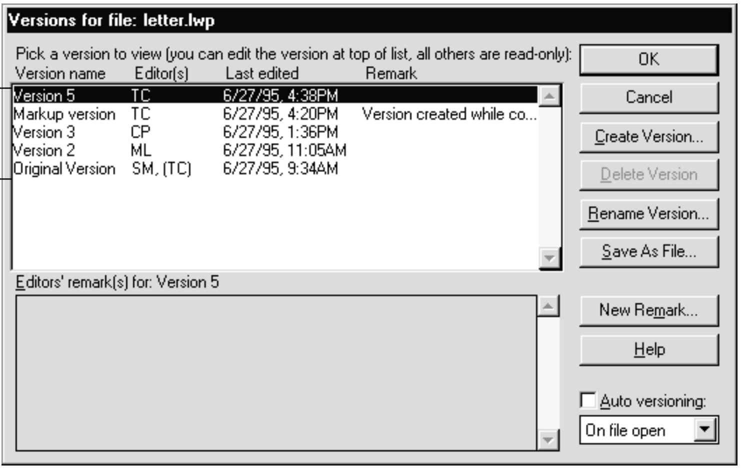
Task	*LETTER.LWP contains*
Tom creates a LETTER.LWP file. Tom forwards LETTER.LWP to Mary and asks for her input.	Original version
Mary creates a new version (Version 2) of LETTER.LWP and makes her edits in that version. Mary sends LETTER.LWP to Chris, who also must edit the document.	Original version Version 2
Chris creates a new version (Version 3) of the document. The version Chris creates contains Tom's original information, plus Mary's edits. Chris adds some new information to his new version and sends it to Tom.	Original version Version 2 Version 3
Tom reviews LETTER.LWP by viewing Chris and Mary's versions and saving them as separate files.	Original version Version 2 Version 3
Tom then uses TeamConsolidate to compare and consolidate the versions (separate files). Word Pro creates a new version (Markup version) of the document that contains the edits from Mary and Chris. Tom accepts or rejects their edits.	Original version Version 2 Version 3 Markup version
Tom creates a final version (Version 5) that incorporates the edits from Mary and Chris.	Original version Version 2 Version 3 Markup version Version 5

For information about comparing and consolidating documents, see "TeamConsolidate: collecting input from reviewers" later in this chapter.

Word Pro saves only the differences between versions of a document, not the entire document. For example, if Mary creates a new version of LETTER.LWP and changes the text in one paragraph and adds a frame, Word Pro only saves the new text and the frame in the new version.

Versioning lets you track the history of the document through the Versions for file dialog box. This dialog box displays the name of the version, the names of the people who edited the version, the date and time the version was last edited, and any remarks entered about the version, including the date and time each version was created.

Each version is saved within LETTER.LWP.



To display the Versions for file dialog box, choose File - Versions.

There are four main tasks you can perform from the Versions for file dialog box:

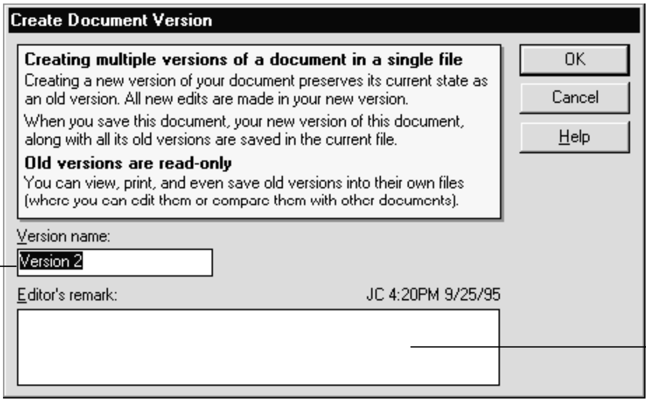
- Create a new version
- Delete a version
- Change a version's name
- Save a version as a separate file

Creating a new version

You can create a new version whenever you want to preserve the current document. For example, you can instruct reviewers to create a new version of the document before they make their edits. You can then compare the reviewer's versions to the original version.

You can also specify that Word Pro create a new version at specified intervals, such as every day or every week.

To create a new version, display the document for which you want to create a new version, choose File - Versions, and click Create Version.



Specify a name for the new version or use the default name Word Pro assigns to the version.

Add a remark describing the contents of the new version.

Word Pro preserves the current document in its current state and creates a new version. You can only edit in the new version. When you save the file, the new version, along with the old versions, are saved in the current file.

Deleting a version

You can delete a version that you no longer need to keep with the document. For example, the LETTER.LWP document contains a Markup version. You have already consolidated the edits in another version, so you can delete this one.

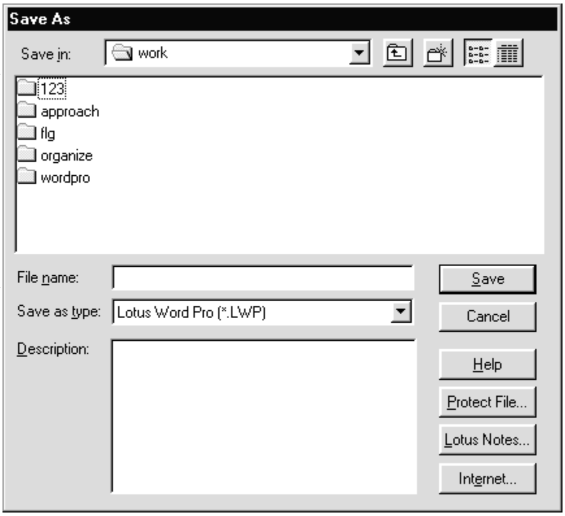
To delete a version, display the document containing the version you want to delete, choose File - Versions, select the version you want to delete, and click Delete Version.

Saving a version as a separate file

You can save a version as a separate file so you can use TeamConsolidate to compare and consolidate the versions of a document.

To save a version as a file, display the document containing the version you want to save, choose File - Versions, select the version you want to save, and click Save As File.

Specify a name and folder for the file.



When you click Save, Word Pro saves the version as a new file. All earlier versions are also copied to that file. For example, if you save Version 4 as a separate file, the original version and versions 2 and 3 are also saved as part of Version 4.

What are the benefits of versioning?

- Versioning tracks the lifecycle of a document.
- Versioning lets you easily manage and share documents because you store edited versions of a document in a single file, not in separate copies of the document.
- Versioning saves hard drive space by storing only the changes made to the document, not the entire document.
- Versioning protects the original document.
- Versioning saves paper because you don't have to print review copies.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Versions, overview
3. Click the index entry you want, then click Display.

TeamReview: getting feedback

TeamReview lets you set up a document for editing and distribute it to the reviewers.

How TeamReview works

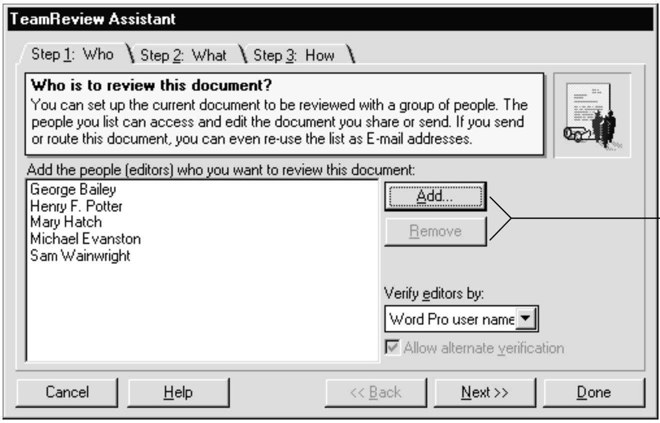
TeamReview provides a step-by-step method for assigning reviewers to a document, assigning editing rights to a reviewer, and distributing a document to reviewers.

There are three tabs in the TeamReview Assistant dialog box:

- Step 1: Who
- Step 2: What
- Step 3: How

Who panel

You can assign who you want to review the current document. For example, if several people worked together on a proposal to a client, you can send a copy of the proposal to each person who worked on it.

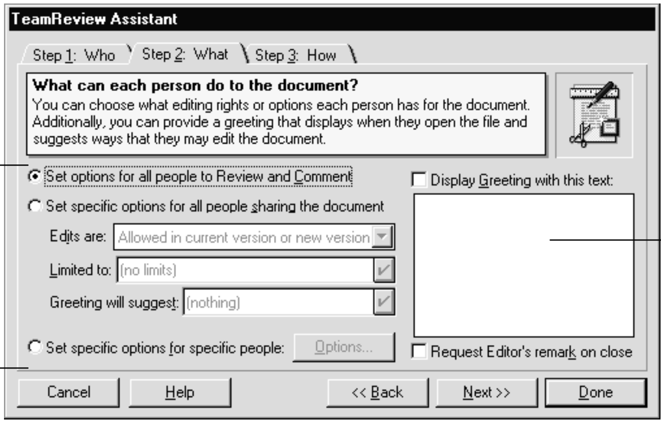


Add or remove the names of editors.

What panel

You can set up what an editor can and cannot do in a document. You can set options for the editing rights for each reviewer, such as whether or not a reviewer can edit in the current version or in a new version.

Select the editing options for all reviewers or for specific people.



If you want to display a greeting, type it here.

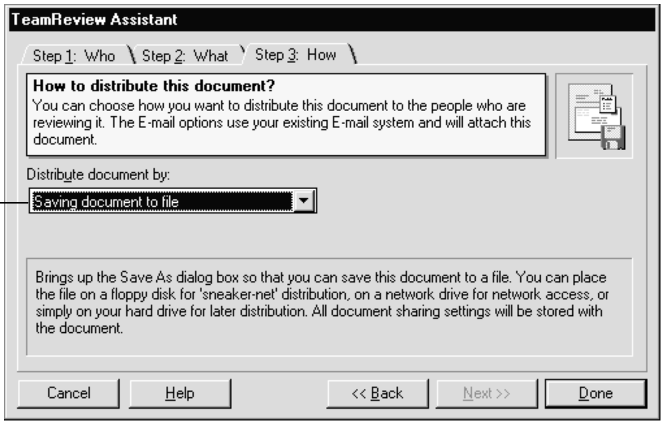
You can also type a greeting that Word Pro displays when the reviewer opens the shared document. The greeting can explain exactly what you want the reviewer to edit, for example, “Check the salary figures for your department.”

For more information about setting editing rights, see “TeamSecurity: restricting access” later in this chapter.

How panel

You can select how you want to distribute the document. You can save the document to a file, to an Internet file, or send it through e-mail.

Select the method for distributing this document.



If you distribute the document through e-mail, Word Pro displays the TeamMail dialog box. For more information, see "TeamMail: distributing documents" later in this chapter.

What are the benefits of TeamReview?

- TeamReview lets you set editing rights for an individual reviewer or the entire team.
- TeamReview lets you set up the document so it displays with a greeting. The greeting can suggest a specific editing method.
- TeamReview lets you distribute the document in a number of ways.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamReview, overview
3. Click the index entry you want, then click Display.

TeamSecurity: restricting access

TeamSecurity lets you share a single Word Pro file with coworkers, writers, and editors who can enter and save their edits in one file.

How TeamSecurity works

As a document author, you can assign document access, editing rights, password protection, and colors that show the editor's insertions and deletions. Private sections of a document can also be restricted and protected from edits.

There are three panels in the TeamSecurity dialog box:

- Access
- Editing Rights
- Other Protection

Access panel

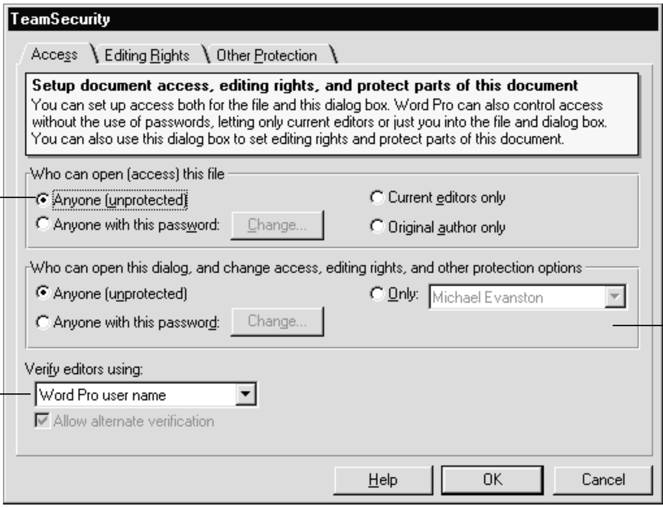
As an author, you can assign two types of access rights: access to the document itself and access to the TeamSecurity dialog box.

Access to the document provides a layer of security, in addition to security provided by your network or e-mail systems.

Access to the TeamSecurity dialog box allows control over which editors can alter the document protection settings.

Specify the settings for document access.

Select the method for verifying the editor's access.



Specify the settings for access to the TeamSecurity dialog box.

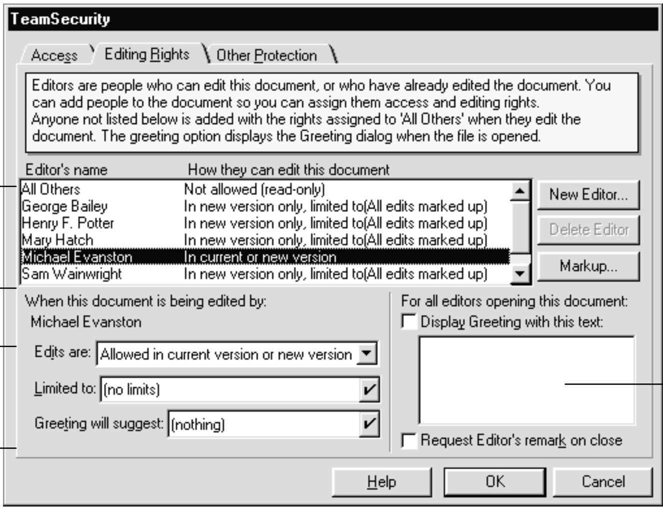
You can select one of three ways to verify the editor's identity: e-mail login, operating system login, or Word Pro user name.

Editing Rights panel

You can assign editing rights using the Editing Rights panel in the TeamSecurity dialog box.

Add or delete an editor.

Select the editing options for the selected editor.



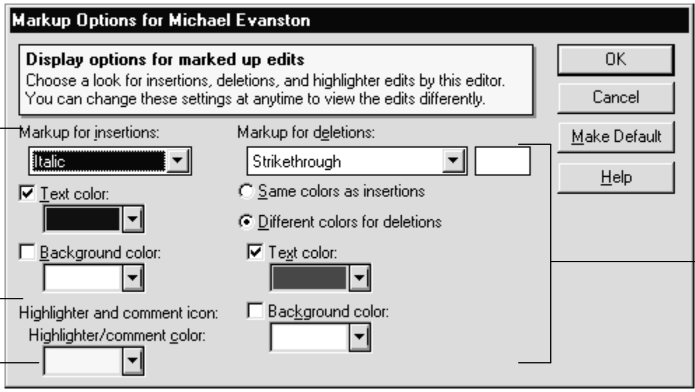
If you want to display a greeting, type it here.

You can specify where the editors are allowed to edit the document, the types of changes an editor can make, and what type of greeting appears every time the document is opened.

If you click Markup, you can also set markup options for an editor such as attributes for insertions and deletions, and a color for the highlighter and comment notes.

Select the markup options for insertions.

Select the highlighter and comment notes color.



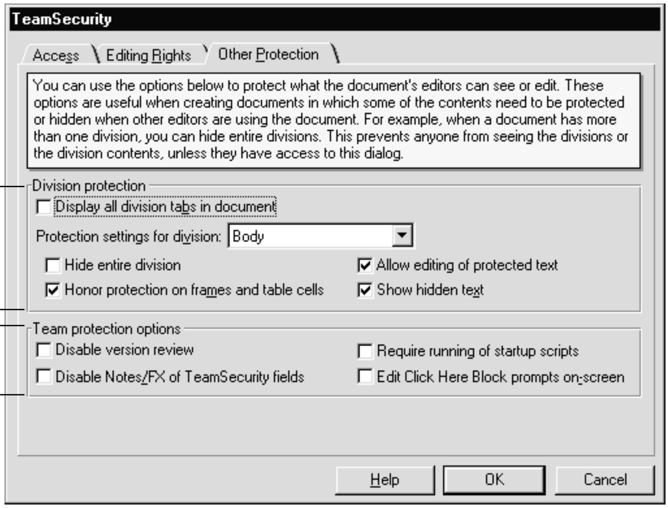
Select the markup options for deletions.

Other Protection panel

The TeamSecurity Other Protection panel lets you hide parts of the document from editors and protect parts of the document from edits.

Select the protection options for a division.

Select the protection options for team computing.



You can set protection options for a division, such as displaying *all* sections and divisions with divider tabs, hiding an entire division you don't want an editor to see, or preventing editors from making changes to certain Word Pro objects (protected frames and table cells).

You can also set protection options for a team, such as preventing editors from seeing any version other than the current one, or preventing Word Pro from exchanging data in TeamSecurity fields.

What are the benefits of TeamSecurity?

- TeamSecurity lets you control who has access to a document.
- TeamSecurity lets you control the editing rights for a document. You can specify where reviewers can make the edits and what type of edits they can make.
- TeamSecurity lets you set the markup options for an editor. For example, if several people are reviewing your document, you can assign different colors to each — red to one, blue to another, and so on. That way, when you consolidate the edits, you can see which edits belong to which editor.

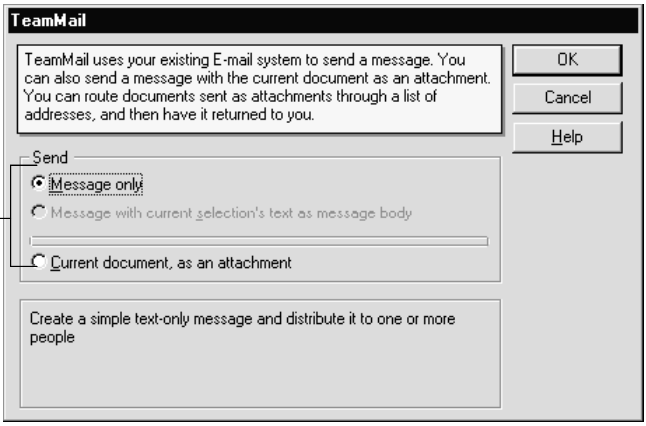
TeamMail: distributing documents

TeamMail lets you send a document to other team members or route it to a list of people.

How TeamMail works

You can use your company’s e-mail system to send mail. The recipients will see the messages in their e-mail inbox (not in Word Pro).

Select how you want to send a message.



You can create a simple text message and send it by itself or with part of a document to one person or a group of people. You can also attach the current document to a message and send it to all recipients at the same time (broadcast) or route it from one recipient to the next.

If you often route messages to a long list of the same people, you can save the information that you enter in the TeamMail Properties dialog box and later reuse it to quickly complete the dialog box fields.

There are two panels in the TeamMail properties dialog box:

- Basics
- Options

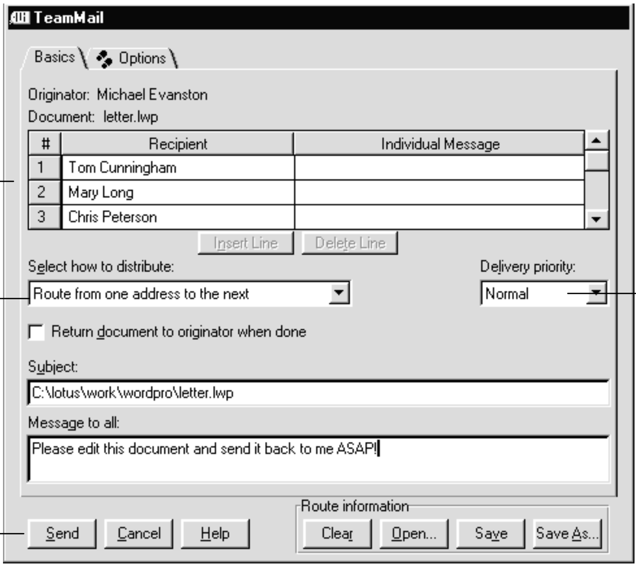
Basics panel

On this panel, you can specify the recipients of the document and how to distribute the document.

Specify at least one name.

Select how you want to distribute the document.

Send the message.



Select the desired mail message priority.

You can send a **routed** or **broadcast** message. When you send a routed message, Word Pro sends the message from one recipient to the next. When you send a broadcast message, Word Pro sends the message to all the recipients at the same time.

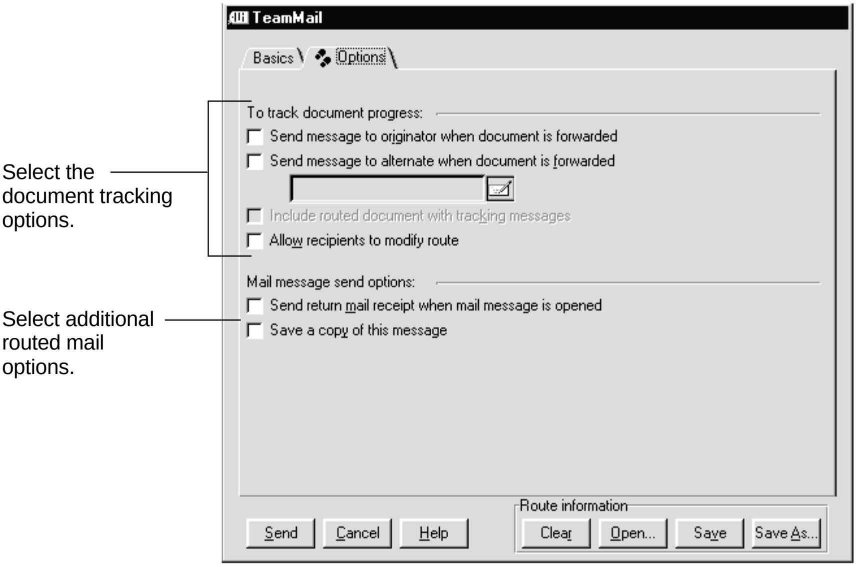
You can type an individual message for each recipient of the document. For example, if you want Mary to review the budget figures and Joe to review the job descriptions, you can type unique messages beside their names.

You can also include a message for all the recipients of your document. For example, "Please make your edits and send this document back to me ASAP."

If you are using TeamReview to distribute a document, some of the fields on the Basics panel are filled in for you. For example, all of the reviewers you list in the TeamReview dialog box display in the Recipient column. If you type a greeting in the TeamReview dialog box, Word Pro displays that message in the "Message to all" box.

Options panel

On this panel, you can choose a method for tracking the progress of your document, whether you want the document returned and whether you want to allow recipients to modify the route.



You can let your mail system notify you (or another team member) each time a recipient forwards the document. For example, if you are routing a list to 12 people, your e-mail system will notify you as the document moves from one person on the list to the next.

You can also let your e-mail system notify you when a recipient opens the forwarded mail message with the attached document.

You can specify that the document be returned to you after all the recipients have reviewed it. This is an easy way for the last recipient to return the document without logging into the e-mail system.

You can also let recipients add, delete, or modify names for succeeding stops on a route. This lets you account for the unexpected situations that occur in a group environment. For example, you send a document to 12 people. Mary is the third person in the route. She knows that the next recipient, John, is out sick. If this option is selected, she can send the document to Chris instead of John so the progress of the document is not held up until John returns to the office.

What are the benefits of TeamMail?

- TeamMail distributes information quickly.
- TeamMail works with your current electronic e-mail system to allow you to send mail messages from within Word Pro.
- TeamMail lets you route a document to a list of reviewers and prompt each reviewer to send it to the next person on the list.
- TeamMail tracks the progress of a routed message by having a mail message sent to you each time a recipient forwards your document to the next recipient.
- TeamMail used in tandem with TeamReview lets you distribute an entire document to members of a workgroup.
- TeamMail lets you save a distribution route and use it to quickly send messages to commonly used names and addresses.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamMail, overview
3. Click the index entry you want, then click Display.

TeamConsolidate: collecting input from reviewers

TeamConsolidate lets you combine the input from multiple reviewers into one file.

How TeamConsolidate works

There are three steps to consolidating a document:

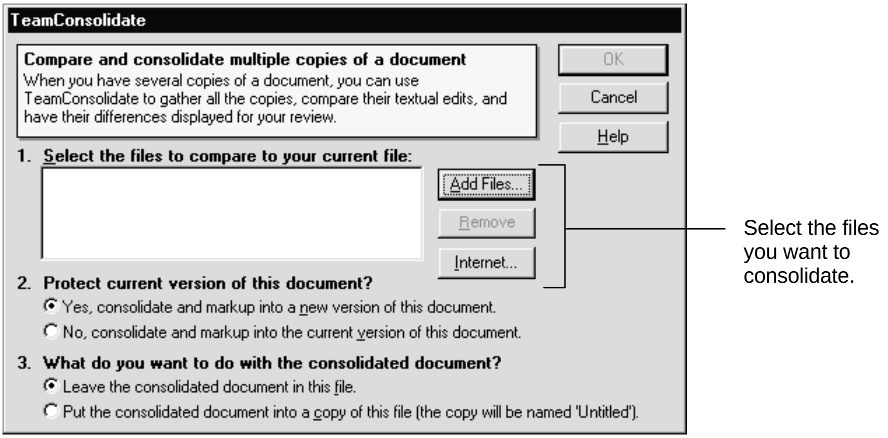
- Combining the files
- Reviewing the edits
- Creating the final document

Combining the files

TeamConsolidate combines several files into one markup file.

You can only consolidate separate files, not multiple versions within a single file. If you create multiple versions of a document, you must first save each version as a separate file.

You can then use TeamConsolidate to compare the versions.



To consolidate the files, display the file (the original) to which you want to compare the other files. Then select the files you want to compare to the displayed file. (If you select a file from the Internet, Word Pro copies the file to a local temporary file.)

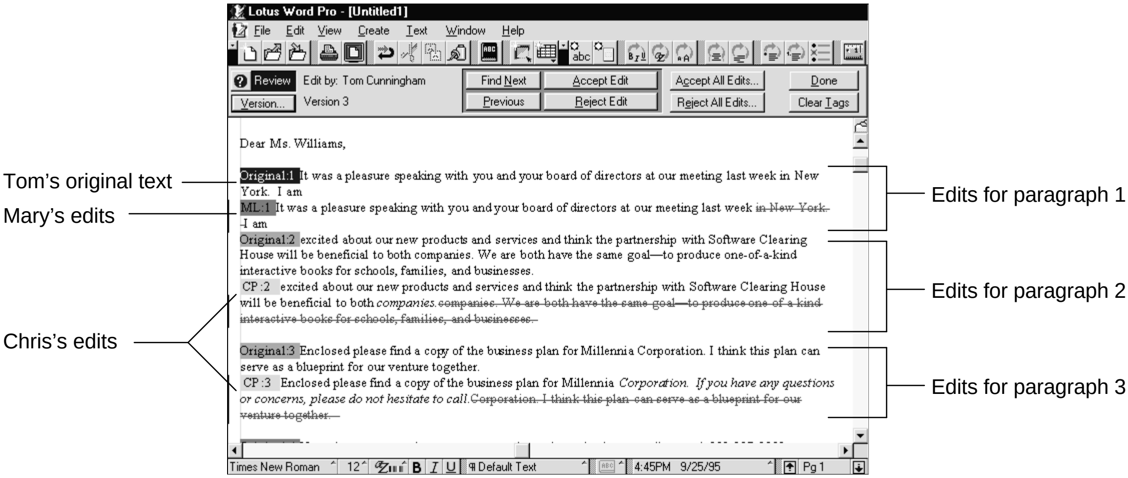
You can select whether or not you want to consolidate and mark up the files in the current version of the displayed document or in a new version. You can also select whether to leave the consolidated document in the displayed file or copy it to a new file.

Reviewing the edits

You can edit a markup file. A markup file combines all text edits from all files used in the TeamConsolidate process. The markup document is the result of comparing and consolidating the files.

When you compare more than two copies of a document, the paragraphs that contain edits from different editors are copied and display below the original paragraph. (See the picture on the following page.) The paragraphs are identified by **paragraph tags** which contain initials that identify who made the edits in each paragraph.

For example:



This tag Original:1 means this is the original paragraph with which the other revisions are compared.

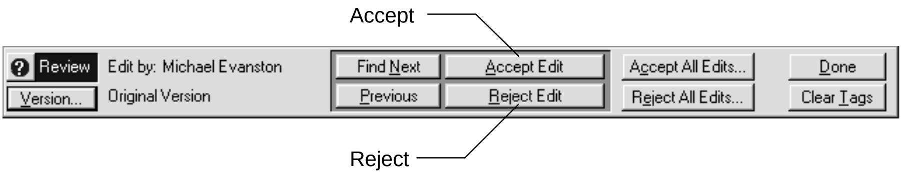
This tag CP :2 represents the initials of the person who made the first edits to the paragraph.

Other insertions or deletions *San Francisco.* ~~Los Angeles.~~ in the paragraph might belong to other editors whose names display in the Marked Edits review bar. The way the edits appear are determined through markup options in TeamSecurity.

Note Paragraph tags do not appear when you compare only one copy to its original.

Creating the final document

You can use the Review bar to consolidate the marked edits. You can accept or reject edits individually or all at once. If you accept them all at once, Word Pro can also delete the duplicate paragraphs.



You can also hide the Review bar and manually edit a file. A markup file is a normal text file that can be changed and saved, just as any other Word Pro document. If you decide to edit the file at a later time, you can then open the file and make any edits to the document.

After you review all the edits, you can save the document as a new file or overwrite the current file.

What are the benefits of TeamConsolidate?

- TeamConsolidate marks differences in the compared documents so you can see what changed from the original document.
- TeamConsolidate eliminates paper trails and the errors commonly made when deciphering handwritten edits.
- TeamConsolidate lets you view all the edits on one screen instead of opening multiple documents.
- TeamConsolidate shortens the editing time of collaborative documents.

Notes/FX: sharing data with Notes

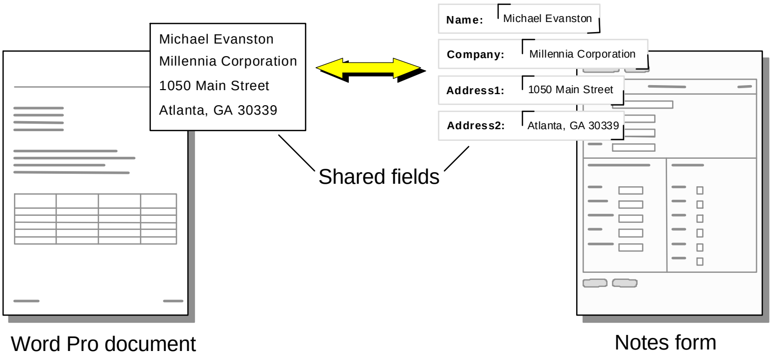
When a Word Pro document is embedded into a Notes document, Notes Field Exchange (Notes/FX) lets you share data between Notes and Word Pro.

To use Notes/FX with Word Pro, you:

- Define fields to exchange
- Embed a Word Pro object in a Notes document
- Create new Notes documents that exchange data with embedded Word Pro objects
- Update fields in a Notes document from Word Pro
- Update information in Word Pro from a Notes document

How Notes/FX works

You can export data fields such as text (bookmarks), document fields, Doc Info fields, Click here blocks, and Word Pro named objects (characters, paragraphs, pages, frames, tables, and table cells) to Notes documents. You can also import data from a Notes document into a Word Pro document.



For example, you can create a Notes form for contract agreements and embed a Word Pro document object in the form. When you compose a new contract, Notes inserts the contract information in the Word Pro document.

When you complete the contract and close Word Pro, you can update the document object embedded in the Notes form. Information from the contract agreement document, such as the name and address of the company, now appears in the Notes document or in the Notes view. The contract agreement is centrally stored in a Notes database with other contract agreements.

What are the benefits of Notes/FX?

- Notes/FX lets you embed fields in Word Pro documents that are exported to Notes forms.
- You can combine Notes/FX with LotusScript to develop powerful business applications. For example, you can create business forms and status reports in Notes that launch Word Pro documents.
- You can easily remember where to complete custom tasks because the NotesFlow menu (Actions) is the menu for custom tasks in both Notes and Word Pro.
- NotesFlow lets you customize items on the Actions menu in Notes and Word Pro. For example, you could create a menu item called “Get data from 1-2-3 spreadsheet.”

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Notes/FX
3. Click the index entry you want, then click Display.

Chapter 28
Getting Started with Approach

What is Approach?

Approach is a relational database application. In Approach, you can work with data from a variety of database format types, you can create your own databases, and you can present the data in attractive and efficient forms, meaningful reports, and other types of views.

Approach is flexible

Approach keeps your data and the views used to display that data in separate files, so they are easier to manage and update. You can change the look of a view at any time without affecting the integrity of the data. You can also change the data at any time, and because you are directly accessing the database, your changes take effect immediately, without having to save the data.

As you plan the structure of your data, consider building separate databases for different kinds of data. Approach makes it easy to join databases. Then, as you become familiar with Approach and make maximum use of its finds, reports, crosstabs, and so on, you'll find that storing data in joined databases increases the flexibility with which you can manipulate the data.

Entering data into a database is easy with Approach. For example, if a field should accept one of a limited set of possible entries, such as names of products or departments, you can format the field as a list from which users must select an item. Not only does this make data entry easy for your users, but it also greatly decreases the number of misspellings and other errors in the records of your database.

Approach offers many formats for displaying data. Each field in a database can appear in a format appropriate to the type of information contained in the field. For example, if the field contains dates you can choose from a variety of date formats, such as 4/5/58, April 5th, 1958, or Saturday, April 5, 1958.

You can quickly browse through individual records, look at several records at once, find a set of records that have something in common, and even sort records in any order and on any field.

What's new in Approach 97?

Approach 97 has some new features to help you use Approach productively and better manage your data.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   What's new in Approach
3. Click the index entry and then click Display.

Internet

- Saving Approach .APT files on the Internet: Upload Approach .APT files to an FTP server.
- Opening Approach .APT files on the Internet: Download and open Approach .APT files from an FTP or World Wide Web server.
- Saving Approach views as .HTM files: Save an Approach view in HTML format. Upload the HTML files to your Web server so other users can view your information.
- Publishing Approach views to the Internet: Publish the current view to an Internet site with a single mouse click.

Usability

- LotusScript® support: Automate tasks in Approach using LotusScript, an object-oriented programming tool. Approach 97 extends the power and flexibility of LotusScript with the Find and Sort class and enhanced Help. The book *Developing SmartSuite Applications Using LotusScript* describes the Approach object model and classes, and provides examples of many common LotusScript tasks. The book is available online as an Adobe Acrobat® Reader file and is copied to your system during installation. You can also use the order form in your package to send for a free print version.

- Recording macros and scripts: Record, name, and save operations in Approach as either scripts or macros.
- Send Key: A new macro command lets you compose sequences of keystrokes to include in your macros.
- Lotus Internet support: Access the Lotus Home Page, Customer Support, and FTP sites.
- Saving Approach views to other file formats: Save an Approach view to .RTF format to use Approach forms and reports in other applications that support Rich Text Format. Also save Approach forms and reports in a plain text file (.TXT).
- Named styles: The InfoBox, which lets you modify the style of the current selection, now also gives you fast access to your named styles so you can apply, create, redefine, and manage them. You can also create a new style based on an existing object’s properties.
- International Standards Organization (ISO) and system date identification: Easily identify and select ISO and system date formats.
- Copying RTF text: Copy formatted, styled text (Rich Text Format) from Approach, and paste it into other applications without losing character and paragraph formatting.
- Duplicating and deleting views: The Duplicate and Delete view commands are now available on the appropriate context menus.

Integration

- IBM® QMF™ support: Display the results of QMF Queries and Procedures in Approach forms and worksheets. Import QMF Forms to create an Approach report.
- Drag and drop OLE objects: Drag an Approach object to any another application that supports OLE.
- Enhanced SQL support: Significantly improved speed and flexibility when accessing and analyzing SQL data.
- DB2 Binary Large Object (BLOB) support: Store and retrieve pictures, sounds, and OLE objects in DB2® databases.

Chapter 29
Approach SmartMasters

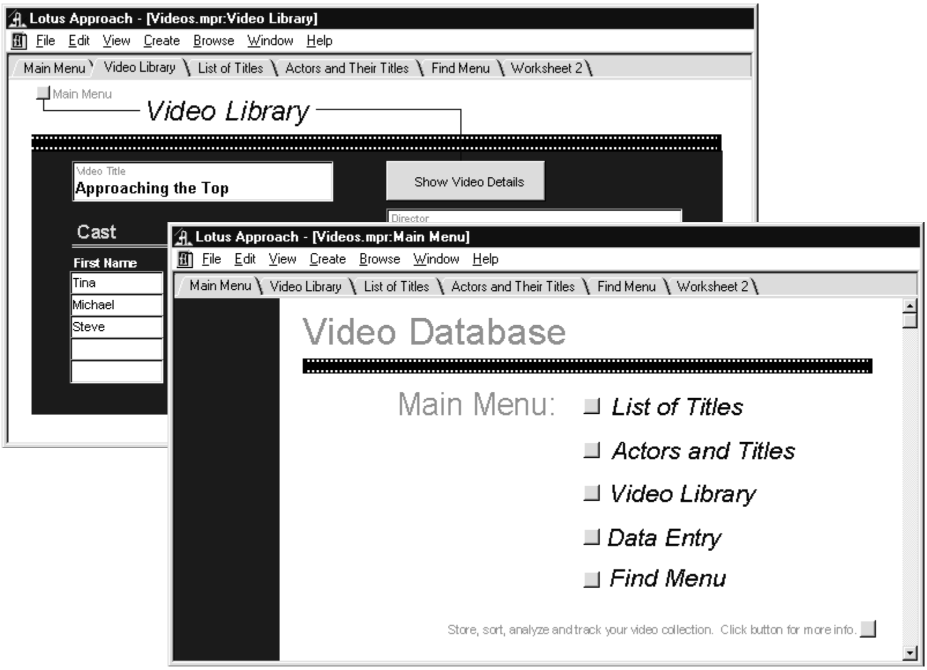
The SmartMaster: ready-made database applications and templates

A SmartMaster is a professionally designed application or template that lets you skip right to entering data into a database. A SmartMaster application contains forms, worksheets, and standard reports — all ready for data entry and reporting. Choose from many applications, including a video library, a survey-result manager, an order-tracking system, a contact manager, and a donations manager.

SmartMaster applications

SmartMaster applications are complete database applications with forms, reports, and other views for entering data and presenting results.

A main menu guides you to the right view for each task.

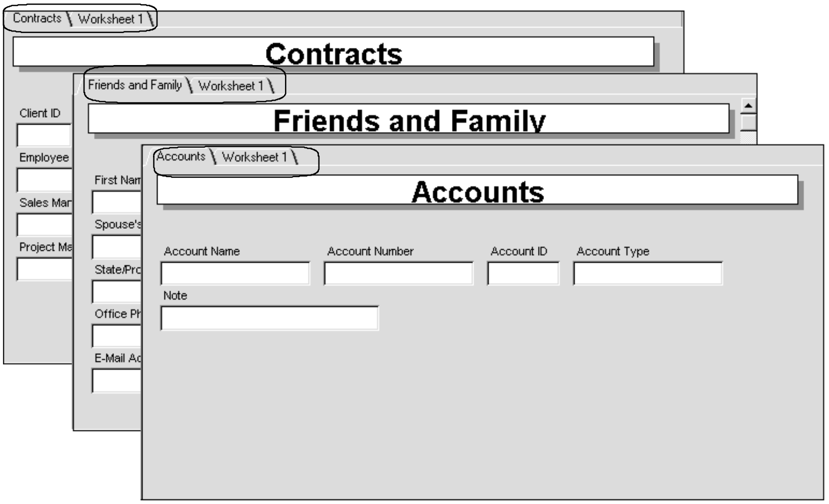


SmartMaster templates

A SmartMaster template is a set of predefined fields for a database. You can enhance a file based on a template by creating new fields and views and by changing the look of your views. Approach features over 50 SmartMaster templates for common business and personal uses, such as recording customer information, tracking orders, and keeping personnel records.

SmartMaster templates have fields already created for you.

The default form and worksheet show all of the fields.

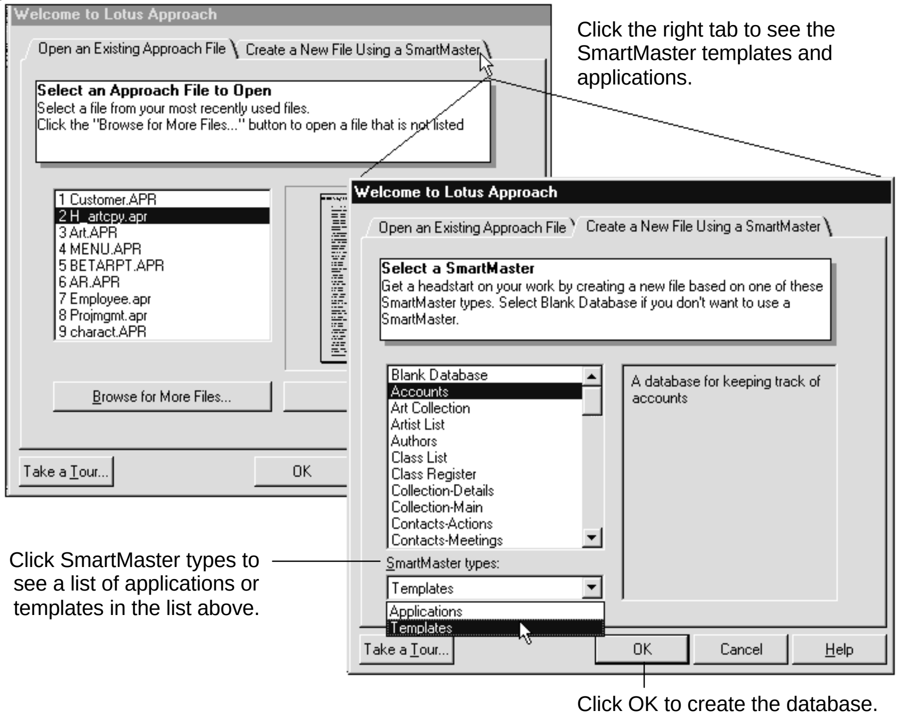


You are now ready to:

- Go to Browse to enter data into the database
- Go to Design to modify the look of your views

Selecting a SmartMaster

When you start Approach, the Welcome dialog box asks whether you want to open an existing database or to create a new database from a SmartMaster. Here's how you select a SmartMaster for a new database.



Approach creates a ready-to-use form and worksheet using the fields in the template you choose.

To modify a SmartMaster

You can modify the database, the forms, and the fields by clicking Design in the action bar and making the changes you want.

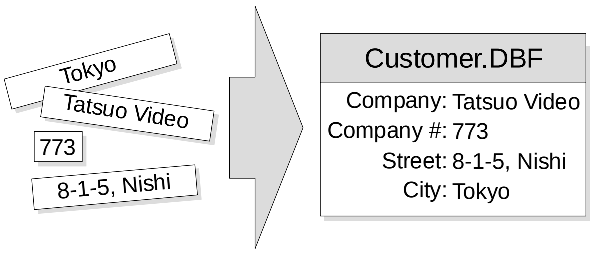
Chapter 30
Learning Approach

Approach is a relational database application that is not only powerful and versatile, but also easy to use. In Approach, you can work with data from a variety of databases (and database format types), you can create your own databases, and you can present the data in attractive and efficient forms, meaningful reports, and other views.

You need no special knowledge of computers or programming to do any of this, nor do you have to have any other database application.

All you need is Approach, the information provided by this book and the online Help system, and a basic understanding of how to use a graphical user interface (clicking and dragging with a mouse, using dialog boxes, and so on).

A **database** is an organized collection of data.* Like other database applications, Approach lets you manage data in sets called **records**. For example, everything about one customer is a record. The data in records is divided into **fields** such as company name, street address, and city.



*You may also see the word “table” used to describe a collection of data. Approach uses the term “database” to include both databases and tables.

Approach separates display from content

Approach handles data in a particularly flexible way: Data (content) is stored separately from its presentation (display). This separation has many advantages:

- Approach can open databases in almost any format.

  You are instantly connected with any of your data sources.
  Try it: File - Open.

- Approach leaves the data in its original database format.

  When you enter or modify data, there are no conversions or copies needed. Your data goes directly and immediately into the database.

- Approach gives you complete control of how you see the data.
- Approach can read many different data sources simultaneously.

  For example, use your company dBASE® records to see which customers order which products, and also access a Lotus Notes® database of customer visits to create sales reports.

When you work in Approach, remember the separation of content and display. Approach has two environments that reflect that separation: Browse and Design. (Approach has four environments in all, and you'll learn about the other two later.)

You select an environment depending on the kind of work you want to do. Switching between Browse and Design requires nothing more than clicking a button in the action bar.

- **For content:** Work in the Browse environment. In this environment, you take care of data: you add new records to the database, or edit the records already in the database. You create find requests or use the Find Assistant to extract the data you want from the database.

- **For display:** Work in the Design environment. In this environment, you modify views of your data, add fields, click and drag graphical objects and fields, format field data, pick fonts and colors, add lines — in short, you take care of the presentation of your data.

Approach files and database files

The separation of content and display is reflected in the two most important kinds of files Approach uses:

- **For content:** One or more databases store your data. Approach does not require its own database file type; rather, it lets you create databases or use existing databases in many of the most popular database file types.

  You don't need to own another database application to use Approach. You can create new databases, or if you or your company uses another database format, such as IBM DB2, Paradox®, or dBASE IV®, you can see the data stored in those databases from inside an Approach file. You can work with that data in Approach, and you can create views of that data in Approach.
- **For display:** An Approach file (.APR) stores the presentations of your data, but not the data itself. The various kinds of presentations — such as forms, reports, and worksheets — are called views. You do all your work in Approach in the views you create.

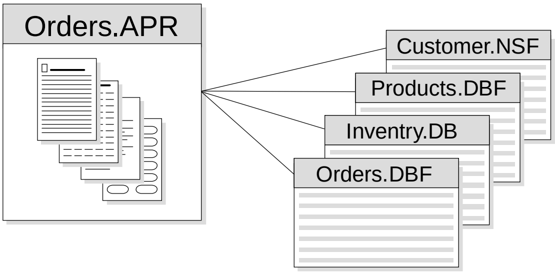
Finally, the content / display separation affects how you save your work.

- **For content:** Approach automatically saves any work you do with data. Any edits you make to records; any new data you enter, whether in new records or ones that already exist — Approach saves immediately. You don't have to do anything to save data.
- **For display:** You must save any work you do that affects the display of the Approach file. So any work you do while in Design; any views you generate using the Create menu; any changes you make to field definitions — you must save by choosing File **-** Save Approach File.

Joins between databases

Even if you don’t have a lot of data or complexity to begin with, data and complexity have a tendency to grow over time. A database design that groups data wisely from the start can help you avoid problems later. It’s usually most efficient to split up data into separate, manageable databases — such as one for orders, one for inventory records, one for individual customer data, and another for product specifications.

Because Approach is a relational database application, you can bring together data from different database files and use it as if the data were all stored in one place. To do this, you **join** the databases within an Approach file.



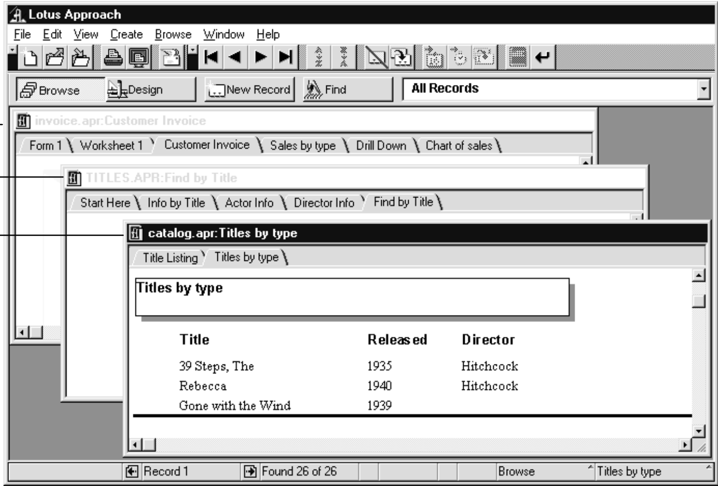
As you work with the data, the underlying joined databases and the relationships among them are completely transparent. The databases can even be of completely different file types; for example, a Paradox 4.0 file and multiple dBASE IV files can be joined together.

For information about how to create a system of related databases, see Chapter 31.

The Approach work area

Each Approach file you open appears in its own window inside the work area. You can enlarge the Approach file windows to fill the entire work area and manipulate windows in other ways. For information about window commands, see your operating system documentation.

Each open Approach file is a separate window inside the work area.



Environments in Approach

You can work in four different environments in Approach: Design, Browse, Find, and Print Preview. The work area changes in several ways depending on the environment.

Change between Approach environments in one of these ways:

- Click an action bar button

- Select the environment from the status bar

Design

In Design, you edit the layout of views. You can see your data and arrange it as you like, but you cannot enter or edit data.

In Design, you can:

- Add and edit fields
- Draw lines, rectangles, ellipses, and other graphic items
- Resize objects including fields, columns, and panels
- Write text on the background of a view
- Import graphics
- Link or embed OLE objects into the view

In Design, nearly everything in a view is an object that you can modify. You can work with all objects in many of the same ways: you can move and resize them, group and align them, and change their colors.

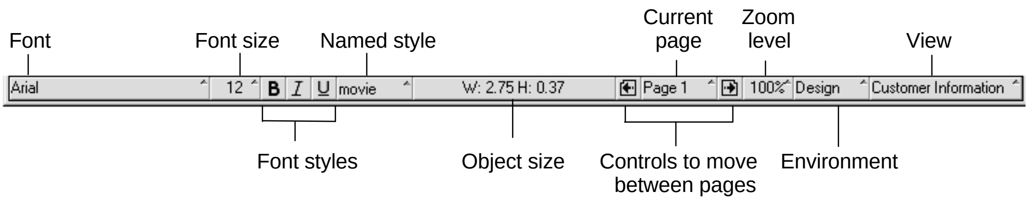
Each object in a view has a set of properties, such as size, text attributes, line and fill colors, and attached macros. The properties for an object are set in the InfoBox. You can keep the InfoBox open as you work and use it to edit objects.

You can save a set of InfoBox properties in a named style and then apply the style to other objects.

When you're in Design, you can show data in fields as it appears in Browse, or you can show the names of fields. If you show data, you see data from the first record (in a form or form letter) or all records (in other views). Return to Browse to enter or edit your data.

Approach provides default icon bars for Design and a floating Tools palette that has icons for drawing objects and adding fields. The Tools palette opens automatically when you go to Design; you can drag the palette by its title bar to move it around in the work area.

In Design, the status bar shows buttons for formatting selected text and the location of the insertion point or the selected object.



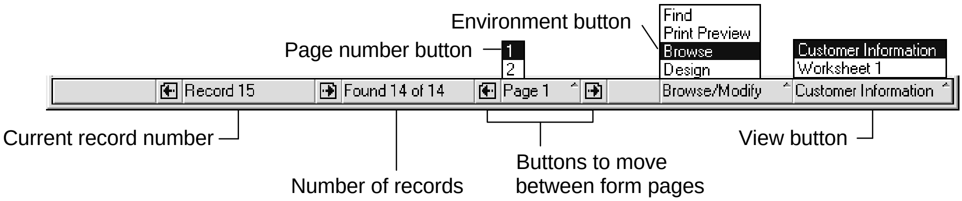
Browse

In Browse, you work with the data in a database. You can enter and edit data here, find and sort records, and print views. You can also create views. Return to Design to customize your new views.

You work in Browse most of the time. When you first create or open an Approach file, you see a view in Browse.

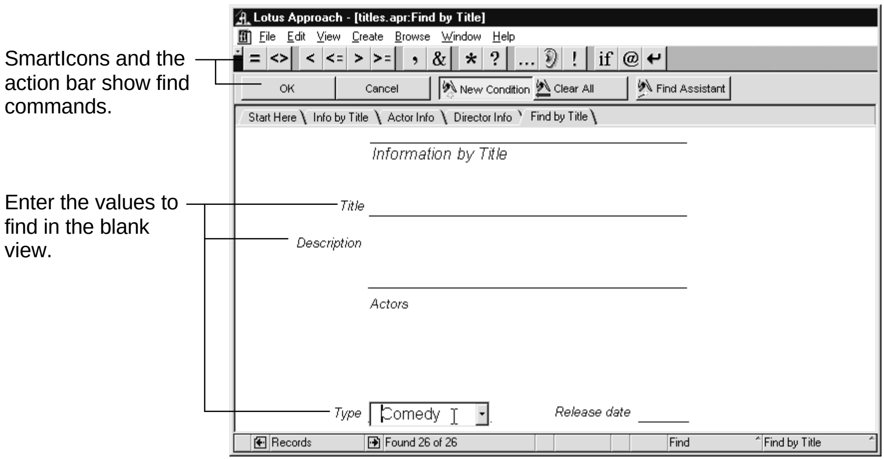
The default icon bar in Browse has icons for entering and editing data, moving from one record to another, finding and sorting records, adding and deleting records, spell checking, and printing.

In Browse, the status bar shows the position of the current record in the found set, the number of records in the found set, and the number of records in the entire database. It also has arrow buttons for moving to another record or another page of a view with more than one page.



Find

In Find, you fill out a find request to search for records that meet certain conditions. A find request is a blank copy of the view you're currently using.



For example, to find all the movies in your library that are comedies using the find request above, you would select Comedy in the Type drop-down box and click OK.

When you finish filling out a find request, Approach returns you to Browse and displays only the records that match the conditions you specified. This subset of records is called the found set.

In Find, the SmartIcons and action bar show some common Find commands. You can also open the Find Assistant from this environment.

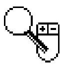
Use the icons on the default icon bar to insert operators (**>** for greater than, **=** for equal to, **&** for and, and so on) into the fields on your view to create custom finds. The status bar in Find is the same as it is in Browse.

Print Preview

The Print Preview environment shows what the current view will look like when you print it. This gives you a chance to correct errors or make design changes before committing a view to paper.

All of the data from Browse also appears in Print Preview. You can move through records in Print Preview just as you can in Browse. Return to Browse if you want to edit your data.

If a view has any fields that summarize data from multiple records, Approach calculates the summary and shows the results in Print Preview. If a view has fields or other objects that slide up or left, the fields slide into position in Print Preview.



When you first go to Print Preview, you see the current view reduced to 85 percent of its normal size. You can change to other zoom settings. The mouse pointer changes to a mouse and magnifying glass. Zoom in by clicking the left mouse button. Zoom out by clicking the right mouse button.

The default icon bar in Print Preview has icons for moving through records, finding and sorting records, and printing. The status bar in Print Preview is the same as it is in Browse, except that it has a button for changing the zoom setting.

Opening and building databases

These sections summarize tasks you will probably perform to open or create a database in Approach. For more information, see Chapter 31.

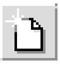
Using existing data

When you already have data, open the existing database or databases in Approach. Choose File - Open, and then choose the type and name of the file. Opening files this way does not convert them from their existing data format; Approach reads the data in its original format.

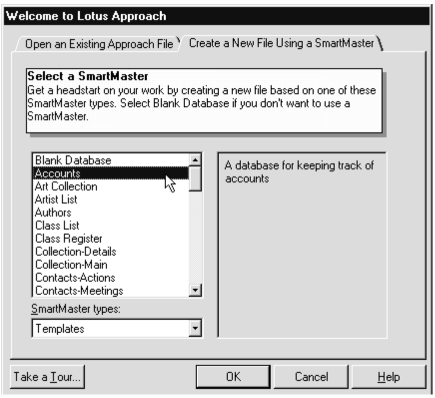
With Approach's PowerKey™ technology, you can read and write to databases in a variety of formats: Lotus Notes, dBASE III+ and dBASE IV, IBM DB2, Paradox 3.5 and Paradox 4.0 (including Paradox for Windows), FoxPro® 2.1, Oracle SQL, Microsoft / Sybase SQL Server. And if you have other database applications that use an ODBC™ driver, you can work with those databases in Approach.

You can also open Lotus 1-2-3® spreadsheets, other spreadsheets, and text files and save them as database files.

Creating new data



When you haven't entered data yet, you can easily build a database from scratch, or open a SmartMaster application or SmartMaster template that most closely fits your database needs. Select from the list of SmartMaster applications and templates from the Welcome dialog box that appears when you first open Approach, or by using File - New.



SmartMaster applications and templates are completely customizable. Just click Design and adapt the SmartMaster to your needs.

You can also choose Blank in the SmartMaster template or application list to define your own fields for a new database.

For more information about choosing a SmartMaster or building a completely new database from scratch, see Chapter 31.

Defining fields

Whether you start from a SmartMaster or open an existing database, you can easily add fields to the database. Choose Create - Field Definition to create and modify database fields.

Create a new field when you discover that you have new information to track that is related to the main idea of your database. When you define a field, specifying its name and type, you can specify a default value or a validation condition for the field. Default values and validation conditions can help ensure the quality and accuracy of data entered in the database.

Later, if necessary, you can modify field names or increase the length of a field.

Calculated fields

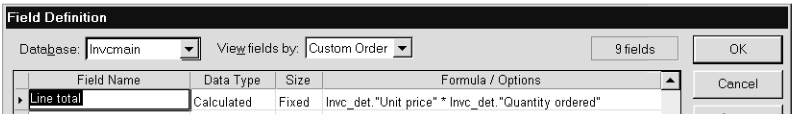
Approach supports special fields that hold the result of a formula. These calculated fields are part of the Approach file instead of the database file, but you can use the result stored in the field just as you would any other field value.

Use calculated fields anywhere you want to show values that are made up of other field values or constants, either in one record or across many records. For example, use a calculated field to show an extended price on an order form where the price is calculated from the individual price of a product multiplied by the quantity ordered:

```
Item_Price * Quantity
```

It is better to have Approach calculate the Extended_Price values than to store another field value for every record in the database.

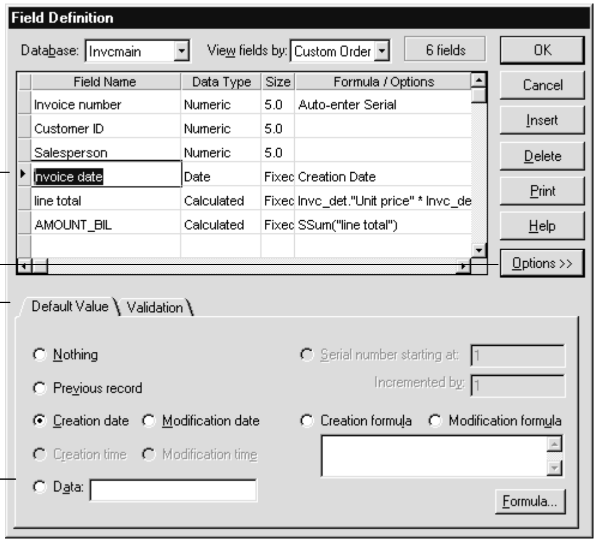
Create calculated fields just like other fields using Create - Field Definition. Select the Calculated data type, and then write the formula used to determine the field value.



Default field values

You can have Approach put a value into a field automatically when a new record is created. Use default field values when you

- Expect field data to often have the same value
- Want to insert the current date or the next number in a sequence
- Use check boxes or radio buttons for data entry, and want to have the choices preset



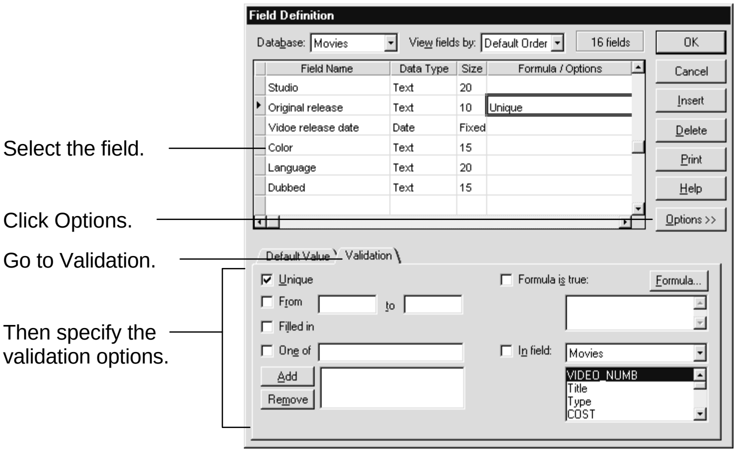
Select the field.

Click Options.

Then specify the default value.

Validating field values

You can also control what is entered in a field by identifying acceptable data as part of the field definitions. For example, you can ensure that the date entered in a field is unique. Then, in Browse, if you try to enter a duplicate date into the field, Approach alerts you that the date is not acceptable.



Fields in a database and fields in a view

The first time you open a database in Approach or after you create a new database, Approach automatically builds a form and a worksheet view that include all the fields that are currently defined in the database. After that, if you define a field, Approach adds it to the database structure. After creating fields, you may add the new fields to any of your Approach views.

You can delete fields from a view just as you delete other kinds of objects. Deleting a field from an Approach view merely changes your presentation of the data, not the database structure. To add or delete fields from the database itself, choose Create - Field Definition.

Changes in a database and changes in a view

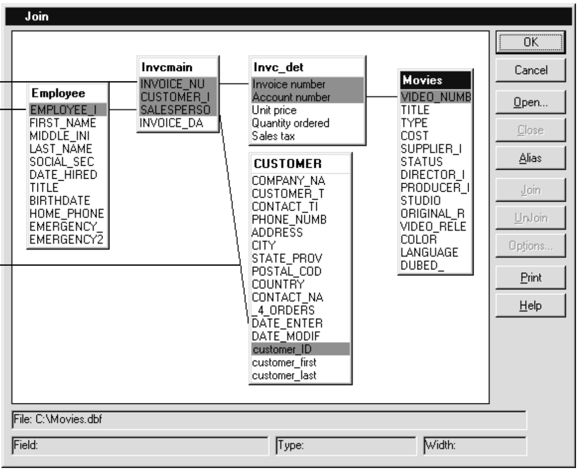
When you make changes to the database structure, such as creating or deleting a field, the changes happen immediately. When you enter data into a record, it’s the same thing: You are entering data directly into the database, and the data is saved automatically.

When you make changes to an Approach file, such as placing a field on a view, you must save the changes. Choose File - Save Approach File.

Joins

After you create your databases, you may create relationships between databases. These connections between two databases (called joins) make the data from both databases available in Approach views. For example, if you have a customer database and an orders database, when the databases are joined you can show a customer's shipping address (from the Customer database) and outstanding orders (from the Orders database) in the same view.

Join databases using Create - Join. Join the databases on a field or fields that the databases have in common.



Join fields are highlighted.

Lines between them show the join relationships.

For more information about joins and join fields, see Chapter 31.

Creating and modifying views

These sections summarize creating views. For more information, see Chapter 32.

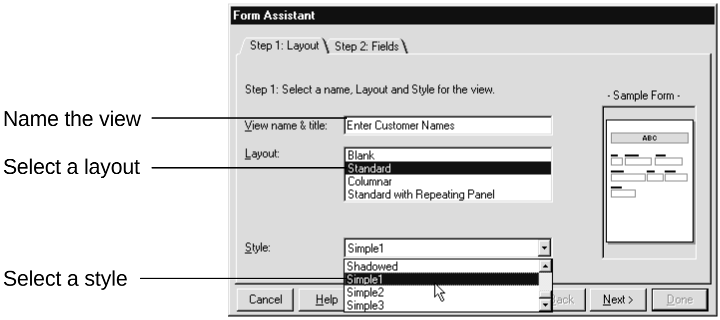
Creating views using assistants

With only a few steps, you can create a view that suits a particular way you use your data.

You create a view in an assistant. All of the view assistants — Form, Report, Worksheet, Crosstab, Form Letter, Mailing Label, Envelope, and Chart — are available from the Create menu.

Assistants let you choose how the view will look, which fields appear in the view, which fields are used in summaries, and how the summaries are calculated.

For example, use the Form Assistant to create a form for entering data, adding fields from left to right or top to bottom and choosing from many color and line styles.

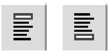


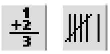
Or use the Report Assistant to create a report to group records and show totals for the groups.

Creating reports using PowerClick reporting

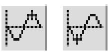
SmartIcons available in Design produce instant summaries in reports. You can group records, show a sum, and calculate an average, a standard deviation, a minimum or a maximum with a single click. This means that you can experiment with how you want to present your data without losing productivity.

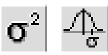
To use PowerClick reporting, create a columnar report using the Report Assistant, select the field to summarize or group by, and click one of the PowerClick SmartIcons.


Leading and trailing summary


Sum and Count


Average


Maximum and minimum


Variance and standard deviation

Modifying views in Design

When you make changes to a view, such as moving fields or changing colors, you work in Design.

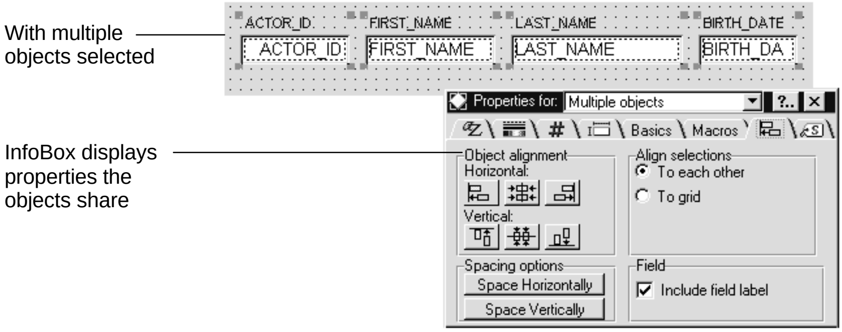
Save changes you make in Design using File - Save Approach File.

In Design, everything in a view is an object you can modify. The view itself is also an object, and can be selected and modified, too.

InfoBox

The properties of objects are available through the InfoBox. To open the InfoBox in Design, double-click an object, or choose the properties command on the context menu.

Changes you make in the InfoBox immediately affect the selected object. When you click another object in the view, the InfoBox changes to show the properties for that object. You can also change the common properties of a group of objects all at once from the InfoBox.



Fast Format

Use Fast Format from the context menu in Design to apply the properties of one object to other objects in the same view. Fast Format transfers the line, color, and text properties of the object.

Adding pictures

You can add clip art, drawings, movies, or any OLE object to the background of a view. Approach offers two powerful ways to work with OLE objects:

- Embed an OLE object on the background of a view so that it appears on the view, no matter what data is displayed.

  For example, a company logo embedded on a form appears on the form for every record.
- Add a PicturePlus™ field to a database and store a different OLE object for each record.

To paste a picture or other OLE object on the background of a view, choose Edit - Picture - Import.

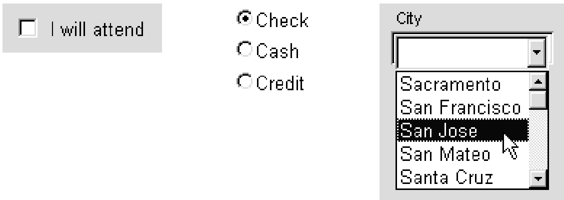
To draw design elements in the view, click drawing tools from the Tools palette.

Adding data-entry controls

When you create a view for data entry, you can add data-entry controls that display a choice of field values that help you enter data consistently.

Display possible field values as a list, or as one or more check boxes or radio buttons. These controls limit the values that users can enter in a field, and also make entering data much easier and more accurate.

Check box Radio buttons Value list



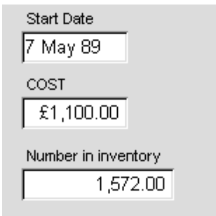
To use a data-entry control for a field, select the data-entry type on the Basics tab of the InfoBox for that field.

Data-entry controls are available for forms, reports, worksheets, and repeating panels.

Formatting field values

Approach provides formats for displaying and printing date, time, numeric, and text data in a field.

When you enter data in a field, enter only the data itself. If the field is formatted, Approach automatically adds the format, such as currency signs or thousands separators.



In Design, set field formats using the Format tab of the InfoBox.

Entering data

This section describes adding data to records. These operations occur directly in your database and are saved automatically. For more information, see Chapter 33.

Remember that you can go into Design from Browse at any time to change how fields are organized, or to add controls for data-entry.

Creating a new record

When you want to add a new record to your database, click New Record in the action bar. When you **TAB** out of the last field of a new record, Approach automatically creates another new record.

Entering data in the first field

After you create a new record, your insertion point shows up in the first field in the record. The flashing vertical bar marks where your data goes. To enter data in that field, type the data. If you make a typing mistake, backspace to correct the error.

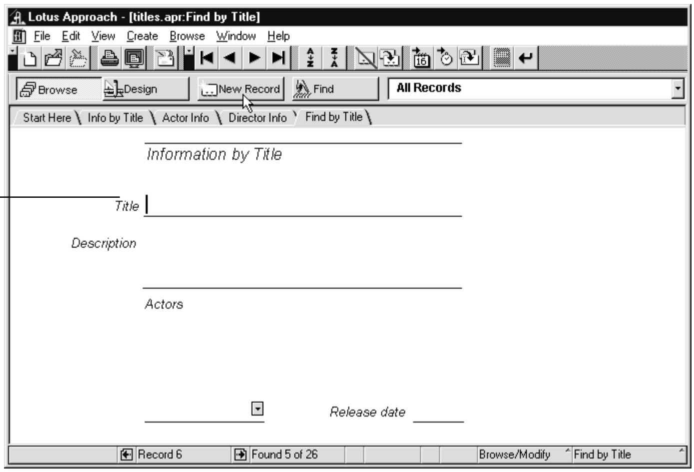
Tabbing to move the insertion point to the next field

Press **TAB** to move the insertion point to the next field.

The flashing vertical bar appears in the first field.

Enter data.

Then press TAB to move to the next field.



Selecting data from lists, check boxes, and radio buttons

When you tab to a field that appears as a set of radio buttons, check boxes, or as a list of selections, you can use several keyboard shortcuts, or use the mouse to make the selection.

If the field uses	*To select a value*
Lists	Use the first letter of an option or the ↑ or ↓ keys.
Check boxes	**TAB** through check boxes, press the **SPACEBAR** to select a check box.
Radio buttons	**TAB** through a group of radio buttons, press the **SPACEBAR** to select a radio button.

Entering the record

Approach saves the data you enter when you:

- Move to another record
- Change to another view

- Click the Enter icon
- Press **ENTER**

You do not need to save data yourself.

Moving between records

You can move forward or backward through a view one record at a time by pressing **PAGE UP** or **PAGE DOWN**.

You can move to the first or last record in the current found set by pressing **CTRL+HOME** or **CTRL+END**.

There are also SmartIcons and status bar buttons for moving between records:

SmartIcons

Status bar

Adding pictures into fields

If you have a PicturePlus field defined in your database and placed in a view, you can enter pictures or other OLE objects in the field. Select the field, and then choose Edit - Picture - Insert to paste an object from a file. To paste the contents of the Clipboard, choose Edit - Paste.

Drawing in fields

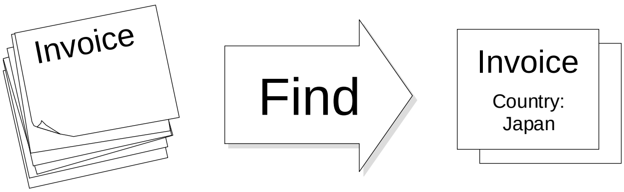
If you want to show annotations or add sketches to an object in a PicturePlus field, you can draw on top of objects you add to the field. If the field is set to allow drawing from the InfoBox in Design, your cursor turns into a pen inside a selected PicturePlus field. You can change the color and line width of the pen using the InfoBox.

Finding and sorting records

This section describes the important concepts of finding records, sorting records, and working with a found set of records. For more information, see Chapter 34.

Finding records

If you had a stack of paper invoices and wanted to work only with those for customers in Japan, you would have to search through the stack and select each of the invoices for customers in Japan manually. Create a find in Approach to do the same task much faster.



Find Assistant

Approach provides an assistant to help you identify the records that you want to find. In the Find Assistant, you choose the kind of find you want to do, and then select the fields you want Approach to search.

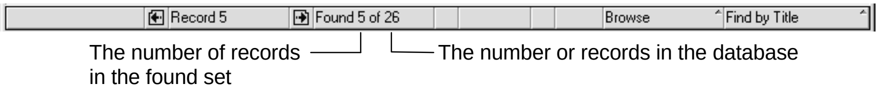
Find request

Another way to find records is by making a find request. Click Find in the action bar in any view and a find request for that view appears. The find request is a blank version of the view that you can fill with find conditions identifying the records you want to find.

Choose which view you want to find from. Some views may be better than others, depending on the kind of data you are searching for.

Found set

The result of a find is a found set of records. You can tell the number of records found by the numbers in the status bar. You can now use this set of records in any other Approach operation.

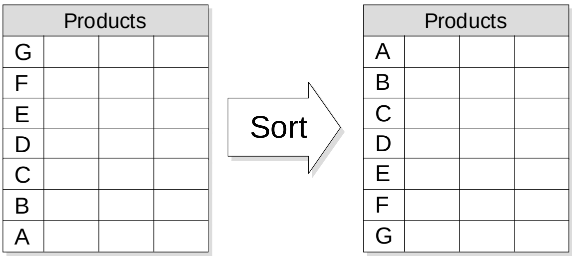


To return to working with the full database of records, choose All Records in the named find box in the action bar.

If you perform another find, Approach searches the entire database again.

Sorting records

When you sort database records, you reorder the entire database or found set.



Use the sort SmartIcons to sort the database on the selected field or fields. You can also define more complex sorts using one or more fields using Sort - Define from the Browse context menu.

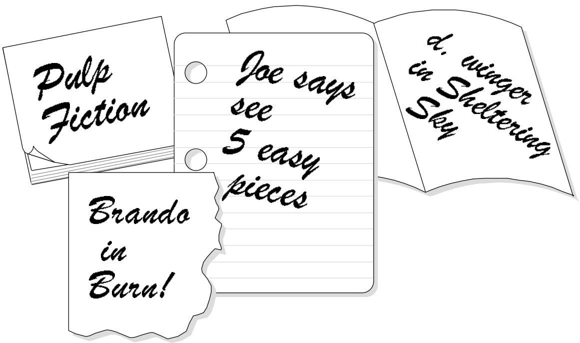
Return the database to its original order by choosing All Records in the named find box in the action bar.

Chapter 31
Creating Databases

Why build a database?

Suppose you're a movie fan who wants to keep track of movies you hear about and want to see. You scan the new arrivals at the video store and read the reviews in the paper. At first, you accumulate a bunch of notes to yourself about the movies you want to see, and you keep the notes in a folder in your desk.

Eventually, the folder becomes a disorganized collection of odd scraps of paper, napkins, and newspaper clippings. You continue to gather data, but because trying to find anything in the folder is frustrating, you're losing track of your information.



You decide to put all the information in a list. You fire up the computer, start Word Pro®, and start typing. You notice that you have more than one note about some movies, but you type in everything because you want to preserve the data you've gathered. Word Pro can even put the list in alphabetical order. (You never realized how many movie titles began with "The.") You get about a third of the way through the folder before you get tired. At least it's a start.

One night, you want to rent a comedy. You leaf through the folder, and scan the list. Alphabetical order doesn't help you find comedies. Nothing is categorized. Some movies you remembered to label; others not. You wish that instead of typing one long list, you had created many lists: one for comedies, one for dramas, one for action movies...

The more you think about it, the more lists you wish you had: one for Hitchcock movies, one for movies released after 1960, one for foreign-language movies, one for musicals. But you'd have to put *The Trouble with Harry* on both the list of comedies and the list of Hitchcock movies. That's too much typing, you think.

You say to yourself: I wish I had a list with movable entries. I wish I could press a key and the entries would organize themselves the way I want to see them — or better yet, I'd press a key and I'd see a list of just the movies that fit my mood.

You want dynamic data. You want certain pieces of data pulled out of a large mass and organized into meaningful information. You've just discovered why you need a database. You choose Approach. Good choice!

What will a database do for you?

You don't want to keep all this data in your head, and you now know that keeping it in a static list doesn't help much either. You want the database to track all the pieces of data. That's easy; databases you create in Approach can accommodate lots of data.

So you want the database to be your memory for all this movie data. The amount of data a database has to store won't be a problem, and you'll only have to enter the data once.

But more important, you want to be able to get information — meaningful data ("just the movies that fit my mood") — out. You want to be able to ask a specific question and get a concise answer. The really challenging part is organizing the data so that you can combine it in different ways to answer your questions.

Approach can deliver answers to your questions in seconds. But in order for a database to answer intelligently, you must build some of your own intelligence into the database: Train it to speak your language so that it can respond to the questions you ask.

Organization and planning are key. If you expend the effort in planning now, Approach will do the all the heavy lifting later. Some time spent planning before you create an Approach file pays off in the speed, flexibility, and responsiveness of the database when you start using the information in it.

Designing the database system

What questions will you ask the database?

The example developed through these topics is a simple one based on a personal hobby, but the thought processes are the same that a database administrator would go through to build the databases that store data for a large company.

You can apply what you learn here to any database you design. When you finish reading this series of topics, you'll be ready to plan your database. Once you've got a plan on paper, you'll be ready to create an Approach file (.APR) based on your plan, and then enter the data you want the database to store.

It's likely that the more you use your Approach database, the more demands you'll make of it. Approach will be able to meet these demands. Rely on the user assistance provided in this book and in the online Help to reveal the many tasks you can accomplish in Approach.

Back to the example...

Let's say you've built a database. The first task you attempt — or in database parlance, the first find you do — is to look for all of the information on the movie *Strangers on a Train*.

That's easy. If that's the only way you approach movies, you'll be fine with a database containing two units of data (called fields):

- Field: Movie title
- Field: All other data about the movie

Done.

But what about all those other, more complex questions you were asking earlier? What would your two-field database do for you when you ask questions like

- Which of Hitchcock's movies are available on video?

That's a two-part question. You are asking Approach to search every record in the database and present a list of movies that satisfy these two conditions: Hitchcock is in the Director field, and Yes is in the field called Available on video.

If you don't have a field that contains only the director's name and you don't have a field that identifies whether a movie is available on video, you can't ask this question.

You've gone from a two-field database to a four-field database:

- Field: Movie title
- Field: Director
- Field: Available on video
- Field: All other data about the movie

See how it works? You're pulling specific pieces of data out of the mass of movie data and creating individual fields to store those small pieces of data.

If you spend some time thinking about the questions you'll ask — the kind of finds you'll do — you'll discover a lot about the fields you'll need to create.

What kind of data?

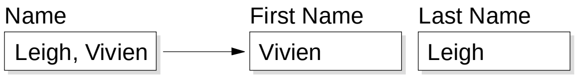
Fields: Think of them as building blocks of data, from which you construct meaningful information. Fields are the smallest unit of data in a database, and in general, the smaller the better.

Don't worry about the number of fields in a database, but do think carefully about how to break up data into fields. Approach looks at fields to find the answers to your questions, and while Approach can search easily and quickly across dozens, even hundreds, of fields to find an answer, it is much more difficult to look deeply into a single field and pull out the one piece of data you want.

Spread your data out into many fields so it's easier to find.

Names in fields

For example, it’s common to think of a person’s name as a single unit, like the person. Analyzed into its components, however, a name often comprises two or three units; First name, Middle name, Last name. If you’re tracking people, it’s a good idea to break the idea of Name down into its component parts; therefore, you’ll need at least two fields, First Name and Last Name.

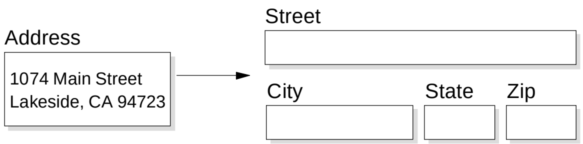


Addresses in fields

Same with addresses. Besides the name of the person living at the address, an address often comprises at least four or five pieces of data: street, city, state, postal code, and country.

If you put all that data into a single field, that may be OK, so long as the only question you ask is: What’s John Smith’s address? But will you ever ask the question: Who are all the people in my database who live in the 94114 postal code? If so, your single field won’t be the best solution.

If you divide the address into its logical, usable components, you can ask all kinds of questions, and get answers back quickly and easily.

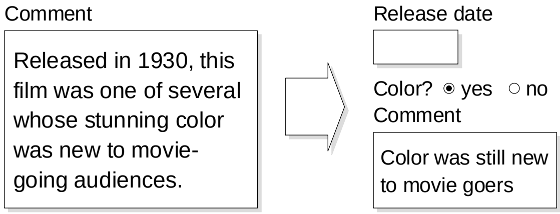


The key to defining fields is to separate each piece of information that you might use to search through the data, to calculate other values, or to categorize your data.

Comment field trap

Beware of “comment” or “note” fields, like that “All other data about the movie” field mentioned earlier. Such fields are great for collecting information that doesn’t quite fit neatly into fields; for example, a synopsis of a movie plot. If there is specific information that you need to record, however, you can make the information easier to find later by using smaller, specific fields.

Comment fields can work well for elaborating other specified details or recording a log of changes or additions to a record.



More fields for the movie database

You've been thinking of more questions:

- What movies did Orson Welles direct?
- I remember that Mom had recommended a movie. Which one was that?
- When did *20,000 Leagues Under the Sea* come out?
- Which color movies were produced when color was first popular, say before 1944?
- What Charlie Chaplin movies are available on video?

The list of fields is taking shape. You continue to pull more and more specific pieces of data out of that single giant comment field you started with. Note that these fields are not yet in any particular order.

Title	Release date
Actors (first, last name)	Type of film
Color?	Description
Available on video?	Language
Director (first, last name)	Recommended by?
Producer (first, last name)	Video release date

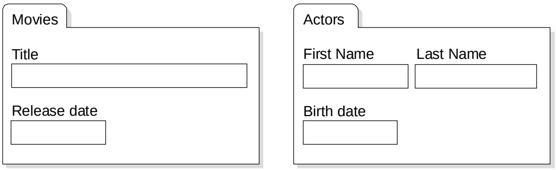
Identify main ideas and group fields under them

Records

The database you design collects related fields into groups called records. “Related” is the important word here.

For example, you have fields that describe the different characteristics of a movie, like the director, the title, and so on. All of the fields for one movie appear in the same record.

The fields with actor information, though, like the actor's birth date, hometown, and real name, would not go into a record about a movie. Collect these fields into a record that describes a particular actor.

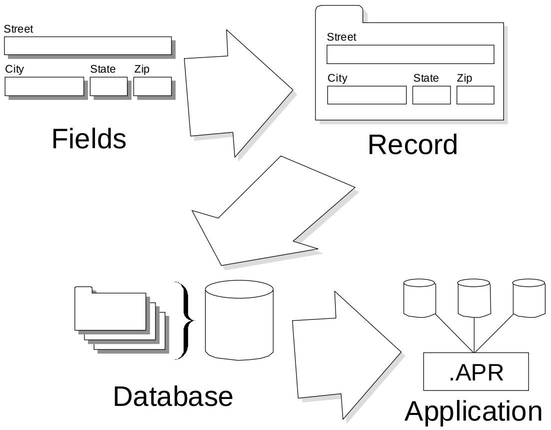


If you collect all of the movie records together, you have a database. If you collect all of the actor records together, you have another database.

Databases

Just what is a database anyway? A **database** is a collection of *related* records. Again, that crucial word related. If you have records that each describe a movie, when you collect all of the records about movies together, you have a database.

You may end up with a lot of small fields, records, and databases that are built up on very narrow relationships among the data. These databases together form a system, or **application**, to help you use the information in the easiest way possible.



Main ideas for movies

Now that you have all of these fields, the next step is to gather them into meaningful groups.

What makes a meaningful group depends on how you are going to use the information. Database design keeps coming back to "what are you going to do with the data?"

Look back at the questions you asked earlier, like "What movies did Orson Welles direct?" These questions refer to the movie title, and data about the movie such as release date, color, and who recommended it to you. They also refer to other information that isn't so dependent on one movie: information about directors, actors, and producers.

For the movie list, the main ideas are best represented by these categories:

- Movie
- Director
- Producer
- Actors

Here's another example of choosing main ideas. If you are setting up a database to track your small business's paperwork, such as invoices and orders, your list of main ideas might look like this:

- Orders
- Customers
- Products
- Suppliers

Records for movies

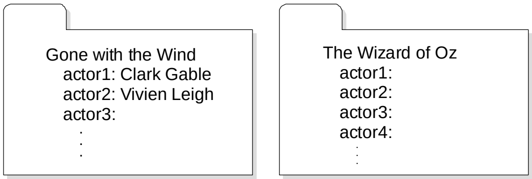
In this process you group fields to build records. All of the fields in a record must relate to each other in the same way. That is, if your main idea for the group revolves around the field Title, all of the fields in the record must further describe the movie with that title. You wouldn't put an actor's birth date in such a record, but you would include the date the movie was released.

You are working towards a clear one-to-one correspondence between each of the fields in a single record. A more complicated relationship between a field and the main idea of the record indicates that the field belongs in another, separate database.

At this point, you need to identify fields that need to contain more than one piece of data, or need to appear more than one time.

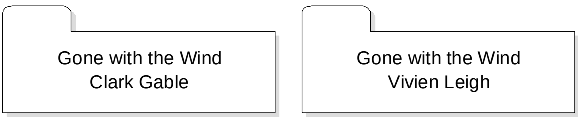
If you have sequentially numbered fields, or more than one piece of information in a field, group these fields under another main idea.

You discover such a field: Actors. Movies typically have more than one actor. But don't add all of the names to a single Actors field. And don't make a separate field for each actor in the movie. The following records show you the kind of repeated fields you want to *avoid*.



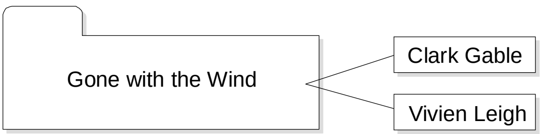
Because you don't know in advance how many actors each movie has, this method may leave many fields blank. Also, if you search for an actor, you have to look in all of the actor fields, because you won't remember — and you shouldn't have to! — if you put Vivien Leigh in the actor1 or actor2 field.

Another way to handle more than one actor is to make another record in the same database and repeat the movie information in the second record. These are repeated records and you want to avoid this, too, to save disk space and assure accuracy of the information.



When you design a database system for a relational database manager like Approach, fields numbered in sequence tell you that you need to pull those fields out into their own database.

In this case, that's what you will do for actors: Make Actor a main idea, build records around that main idea, and build another database to store those records. Later, you can join the two databases so that you can perform finds on them together.



Your plan now calls for four groups of fields:

Movies	*Actors*	*Directors*	*Producers*
Title	Actor Last Name	Director Last Name	Producer Last Name
Release date	Actor First Name	Director First Name	Producer First Name
Type of film	Birth date	Birth date	Birth date
Description	Nationality	Nationality	Nationality
Available on video?	Hometown		
Color?			
Language			
Recommended by?			

Make connections between the groups

A group of related records forms a database. Each group you created around Movie, Actor, Director, and Producer becomes the basis for records in four separate databases.

Approach makes it easy to see the data in one database from inside another database. You can get to the data in both databases. In this way, Approach really helps you cut down on tedious data entry because you don't have to duplicate all of the data needed by all groups.

Now it's time to create the connections between the databases so that the information can be shared between them. Note, however, that you're still working on paper. Later, in Approach, you can make these same connections with a few clicks of the mouse.

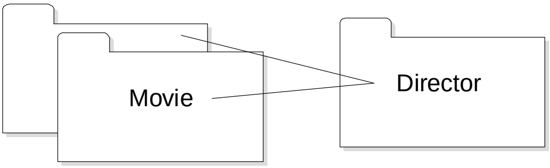
Join fields and joined databases

Approach connects databases using joins between fields common to both databases. The join establishes the relationship between the two databases. For example, the join tells which director needs to be put with which movies.

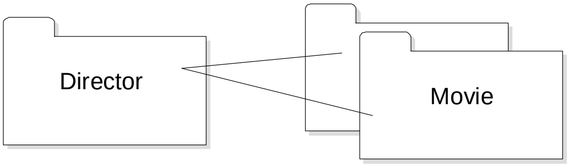
Databases can be related in four ways:

- **One-to-many:** The main idea in one database can be connected to more than one record in another database. At first you think that the Movie database and the Actor database are related this way because one movie can have more than one actor. This relationship, however, ignores that one actor could be in many movies. A better example is the relationship between a customer database and an orders database. One customer can have many orders.

- **One-to-one:** The main idea in one database is connected to only one main idea in the other database. You don't normally use one-to-one relationships in Approach, because you can put all of the fields in a single database.
- **Many-to-one:** Many of the records in a database can be connected to only one idea in another database. The Movie database is related to the Director database this way: many movies have one director.

  Approach treats this relationship as the reverse of the one-to-many relationship. You don't have to do anything special to make a distinction between the two types. For example, the Movie and Director databases are also related one-to-many if you express the relationship like this: One director can direct many movies.

- **Many-to-many:** The main idea in a database can be connected many times to many of the records in another database. This is the best way to describe the relationship between the Movie and Actor databases. One actor can be in many movies, and one movie can have many actors.

If you look at your database system, you see three relationships:

- Movie to director (many-to-one)
- Movie to producer (many-to-one)
- Movie to actors (many-to-many)

To make the connections between these databases, you need to identify a field that each pair of databases has in common. That field will be the **join field**.

Identify the join field

So far, there isn't a duplicated field between the databases. You have to create a field to be the join field.

It's usually best to define one field in each database specifically to be a join field and then enter a unique value, like a serial number or an ID, in that field in the records. Define the field in the "one" database.

For the relationships between movies and their directors, the Director database is the "one" database (one director directs many movies). If you put a "Director Last Name" field in the movie database, you have a field that joins the databases. However, several directors may have the same last name, so this join doesn't identify unique director records. There are ways you can make a better connection.

The join field or fields must uniquely identify a record in one of the databases — the Director database, in this case. If it doesn't, here are some things you can do to make the join field unique:

- Generate another field that is unique for each record; an ID field, for example, an order number or a part number.

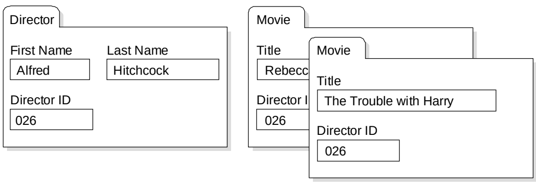
  For example, generate a Director ID just in case two directors in the list have the same name. (This is true for movies, too. Remember *King Kong*? There's one version starring Fay Wray, and another starring Jessica Lange.)

  When you build your database in Approach, you can have Approach automatically fill a field with a unique ID number for every record.

- Use more than one field in the join.

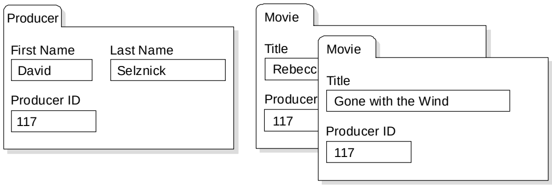
  You could use First and Last Name fields to make sure you have specified a single director. (For the movie, you can use Title and Release Date. The original *King Kong* was released in 1933. The remake appeared in 1976.)

To apply this idea to the Movie and Director databases:



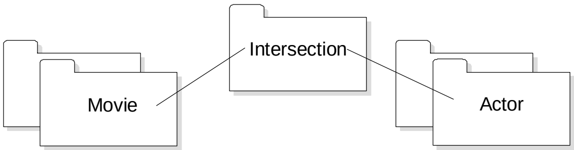
Both the director Alfred Hitchcock and the movies share the Director ID of 026. This value serves as the connection between the two databases.

The same arrangement works for the relationship between the Producer and Movie databases: create the join field in the “one” database (Producer) and add that field to the “many” database (Movie).

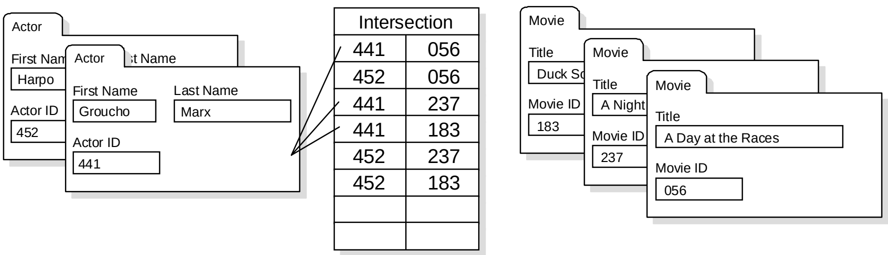


Building a many-to-many relationship

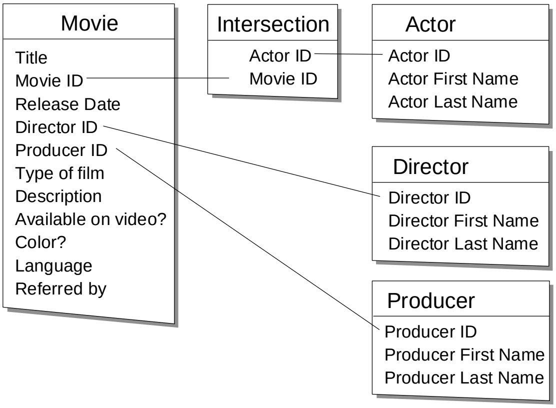
The Movie and Actor databases have a many-to-many relationship. The nuts and bolts for creating this join in Approach are described in “Joining databases,” later in this chapter. This relationship uses a third database (Intersection) to act as the “one” database between two “many” databases. The new “one” database contains two join fields: One for the one-to-many with movies and the other for the one-to-many with actors.



The Intersection database must meet the same requirements that the other databases meet: each field in the database must describe the main idea of the database and must appear only one time to describe that main idea. There is a record in the Intersection database for each actor and movie combination, each “filming event” for that actor. For example, Groucho Marx appears in three movies on your list: *A Day at the Races*, *A Night at the Opera*, and *Duck Soup*. So there are three records for Groucho in the Intersection database, one for each movie. Each of these records stores only the Movie ID and Groucho’s Actor ID.



Looking at the your database system, you now have five databases and four joins between them:



Check for redundant information

This final pass through the fields you listed for your database application is a clean-up step that makes the databases as small and fast to search as possible.

Duplicated fields

In most cases, if two databases have more than the join field or fields in common, figure out which database is a better fit for the duplicated fields and remove them from the other database. You may want to go back over your main ideas for each database to help decide where the data belongs.

No field other than a join field should appear more than one time in the entire set of information.

The exception to this rule is a case where you want one copy of the data to stay the same even if you change the original. For example, in your database for your business, you have only one field for the price of a product, and you refer to that price field on an order. Later, if you change the price in the product database (for example, a sale price at the year's end), the old orders automatically update to use the new price.

In this case, you would keep the duplicate price fields to allow for a current price that can change, and a price history that stays the same. Approach makes it easy for you to look up the value in a field, like the current price for a product, when you fill in another field, like the price on an order.

Unnecessary fields

If any fields can be produced from other data or existing information, remove these fields from your lists. Approach can make calculations using database information, current time and date, and constants, so that you do not need to store values that can be generated.

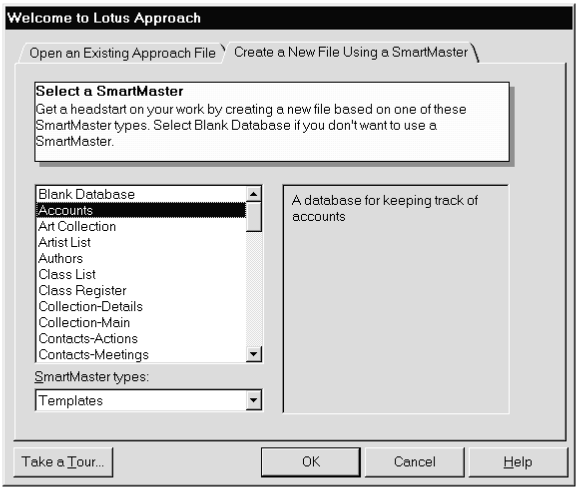
For example, if you record the quantity and price of an item ordered, you can define a formula to describe the "Extended Price" as equal to price * quantity.

Building the database in Approach

After you walk through this process to create an outline of fields and databases, you are ready to create the database application in Approach.

Using SmartMaster applications or templates

The planning process is crucial. Once you design your database system, however, check to see if Approach has already built a database template or application like the one you planned. Approach provides lots of SmartMaster templates and applications that are ready to use. Templates provide the basic structure for creating your own set of joined databases. SmartMaster applications provide complete, pre-built solutions for common database systems. You can use the templates and applications as they are, or customize them to suit your needs.



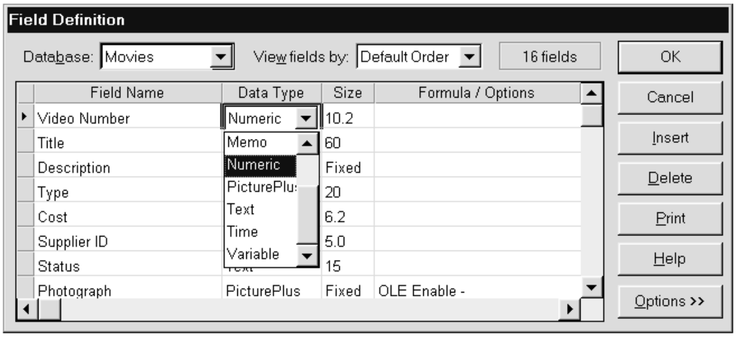
Choose the SmartMaster template or application that is the best match for your needs.

Defining fields: field name

If you choose to start with a blank database, the next step is to define the fields you need for your data. When you define a field, you must give the field a name. A field name should be easy to recognize later. It must also comply with restrictions on the length of field names imposed by the database file type.

Defining fields: data type

When you define a field, you specify the type of data the field can store.



The data type affects how you can use the field when you do finds, sorts, and calculations. It also determines whether you can apply specific formatting characteristics to the field.

The possible data types are text, numeric, memo, Boolean, date, time, PicturePlus, calculated, and variable.

Text fields

A **text field** can store any characters you can type — letters, numbers, and symbols — up to a maximum of 254 characters. Search on a text field using any character in the field. A sort on a text field is alphabetical in either ascending order (0 to 9, then A to Z) or descending order (Z to A, then 9 to 0). When you define a text field, specify the maximum number of characters you want the field to store for each record.

If you want to sort on a numeral, a date, or a time, use a numeric, date, or time data type instead.

Numeric fields

A **numeric field** stores numeric data that you need to use in calculations or to find or sort arithmetically. You can sort records using a numeric field in either ascending order (smallest to largest) or descending order (largest to smallest).

Although numeric fields are limited to numbers, Approach provides format properties for fields to display non-numeric characters. These characters are stored as part of the Approach file and are not stored in the database. For example, if you are displaying numbers ranging into thousands, you can format the numbers with a thousands separator, such as a comma or a period. Numbers in the field appear with the separator, but are stored in the database without a separator.

Memo fields

Like text fields, a **memo field** can store any characters you can type. However, memo fields can store many more characters than text fields. You can perform a search on a memo field. Memo fields are not used in sorts or formulas.

Boolean fields

A **Boolean field** can store a value of Yes, Y, or 1; or No, N, or 0.

Define a Boolean field to store yes-or-no responses, such as whether a payment has been received. A Boolean field often appears as a check box in a view, to make data entry easier.

Date fields

A **date field** stores a single date. You can find and sort records on a date field, and you can use a date field in calculations. A sort on a date field is in either ascending order (earliest to latest) or descending order (latest to earliest).

Time fields

A **time field** stores a single time. You can find and sort records on a time field, and you can use a time field in calculations. A sort on a time field is in either ascending order (earliest to latest) or descending order (latest to earliest).

PicturePlus fields

A **PicturePlus field** can store a graphic or an object that comes from another application that supports OLE (Object Linking and Embedding). Some common OLE objects are pictures, sound files, and data ranges. You paste or import the graphic or object into the field in a record. You can specify a default type of OLE object when you define the field.

Calculated fields

A **calculated field** stores the result of a formula. You write the formula when you define the field; then Approach calculates the result for each record and enters it in the field. The result can be a text string, a number, a date or time, or a Boolean value. At any time, you can return to the field definition dialog box to modify your calculated field formula.

Variable fields

A **variable field** is a temporary storage area. Specify the data type and, optionally, a default value for the field. Any data in a variable field is stored in memory, not on disk. A variable field is accessible whenever the Approach file in which it's defined is open.

Variable fields differ from other types of fields in that the value in a variable field is the same for every record in a database. They are like other fields, though, in that they can be displayed, formatted, and used in calculations and macros.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Fields, types of
3. Click the index entry you want, then click Display.

Creating fields for a database, adding fields to a view

If you create a database from scratch, the Field Definition dialog box appears automatically so you can create fields for the database. You can also open the Field Definition dialog box at any time to create new fields or modify existing fields for a database.

With the exception of the first time you open a database in Approach, fields do not automatically appear in views. Add fields to views by dragging them from the Add Field dialog box or by drawing them with the Field tool on the Tools palette.

To create new fields for a database, choose Create - Field Definition. You can create fields for any of the databases associated with the Approach file.

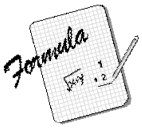
Writing a formula for a calculated field

To add a calculated field to a database, add a new field with the data type Calculated, and write a formula for the field.

For example, you can use a simple calculated field to determine an amount due for each line item in an order. (Each line item is a record.) Your formula might look like this:

```
Item_Price * Quantity
```

Approach can also calculate a formula that evaluates values in more than one record. For example, to determine the total amount due for all the line items in an order, use the function SSum(Amount). This adds up the values in the Amount fields for all the records in the order.



More about formulas for calculated fields

Your formula may be a simple number or reference to another field, or may be built from symbols and Approach functions.

Write a formula in the Define Formula tab. The result appears in the field in each record.

Use values from other fields in a record: For example, define the field Line Total with a formula to calculate the cost of one line in an invoice:

    “Product Price” * Quantity

Double quotation marks tell Approach to treat Product Price as a field name. Use double quotation marks when the field name contains a space. The result of this expression appears in the Line Total field of every invoice record.

Summarize values across records: For example, define the field SubTotal with a formula to calculate the total across all of the lines in an invoice:

    SSum(“Line Total”)

Specify that this formula applies to all line item records in the invoice by selecting “Summary of all records in Invoice_details” in the Define Summary tab.

Include other calculated values: Another calculated field could use the SubTotal result to calculate invoice total including tax. The value for Invoice Total would be calculated using this formula:

    SubTotal * “Tax Rate”

where Tax Rate is a field containing the current local tax rate.

For more information, see Formulas, overview in Help.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Fields, adding to views

   Fields, adding to repeating panels

   Formulas, in calculated fields
3. Click the index entry you want, then click Display.

Editing fields in a database

You can edit the name, type, length, or formula of fields. The change applies to the field throughout the database, even if the field already has data in any of the records.

If you change the field	*Then Approach*
Name	Automatically uses the new name wherever the old name appeared, such as field references in formulas and in macros.
Data type	Converts the data to the new type. If you specify a new data type which is incompatible with the original data, Approach warns you.
Size to be shorter	Cuts off the data to the new length.
Formula	Recalculates the formula in all records. If the result is used in formulas in other fields, those formulas are also recalculated automatically.

Customizing a field for data entry

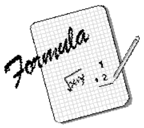
Approach provides several ways to customize the entry of data in fields:

- For a text, numeric, date, time, or Boolean field, you can have Approach enter data automatically or check the accuracy of data when it is entered.
- For a PicturePlus field, you can specify whether it uses an OLE object and which application is its default OLE server.
- For a variable field, you can specify the type of data allowed and set an initial value.

Entering data automatically

Entering data automatically makes filling out records quick, easy, and accurate. For example, have Approach date revisions or number invoices for you, rather than entering this information yourself.

For example, when you define a field for invoice numbers, have Approach fill in the next invoice number in sequence when you create a new invoice record. Choose Create - Field Definition, define the invoice number field, and click Options. In the Default Value tab, select “Serial number starting at,” and enter the first number Approach should use to number the invoices.



Formulas for entering data automatically

Your formula may be a simple number or reference to another field, or may be built from symbols and Approach functions.

Write a formula in the formula box under the Default Value tab in the Field Definition dialog box. The result appears in the field when you create a new record.

Set one field equal to the value in another: You can set the Billing Address field equal to the Shipping Address field until the value is deliberately changed:

“Shipping Address”

Double quotation marks tell Approach to treat Shipping Address as a field name.

Set a future date for a field: You can set the Payment Due Date value for a record using today’s date:

Today()+30

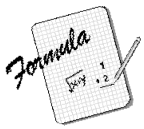
The function Today() produces today’s date.

For more information, see Formulas, overview in Help.

Verifying the accuracy of entered data

Have Approach verify that the data in a field is valid for that field. For example, Approach can check to see that a customer name in the current record is unique in the database, or that a numeric value falls within a certain range.

Approach verifies the accuracy of data as you enter it. If you try to enter data that is invalid according to your validation options, an alert appears describing the problem. Before you can move to another field, you must enter a value that satisfies the validation conditions.



Formulas for verifying the accuracy of entered data

Your formula may be a simple number or reference to another field, or may be built from symbols and Approach functions.

Write a formula in the formula box in the Validation tab in the Field Definition dialog box. The result determines if data entered into the field is acceptable.

Control the number of characters entered in a field: For example, to require that data entered into a postal code field be 5 or 9 digits, create this validation formula as part of the field definition:

Length(“Postal Code”) = 5 or Length(“Postal Code”) = 9

The function Length determines the number of characters in the value in the Postal Code field. If true, Approach lets you to enter more data in the record. If that value is not 5 or 9, an error message appears when you try to enter the value into the database.

For more information, see Formulas, overview in Help.

Setting OLE options for a PicturePlus field

An OLE object is an object created in another application that you can link or embed in a PicturePlus field in Approach. OLE objects let you include a variety of different kinds of information in your database — including graphics, video, sounds, and text ranges.

You can set these options for PicturePlus fields:

- Embed or link the object in the field.

  When you embed an OLE object, the object is stored in the field and has no live connection to any file in the server application.

  When you link an OLE object, the object is not stored in the field, but a copy of the object appears there. The original object remains in its source file, and if the original object changes, the display of the object in the PicturePlus field is updated to match it.

- Specify a default OLE type.

  Even if you have a default application, you can still store objects from other applications in the PicturePlus field.

Setting data options for a variable field

You can specify what type of data to allow in a variable field. If you try to store an incompatible type of data, Approach alerts you so that you can change it.

You can also set an initial value for a variable field.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Defaults, values entered automatically in fields

   Data, verifying upon entry

   PicturePlus fields, OLE options

3. Click the index entry you want, then click Display.

Joining databases

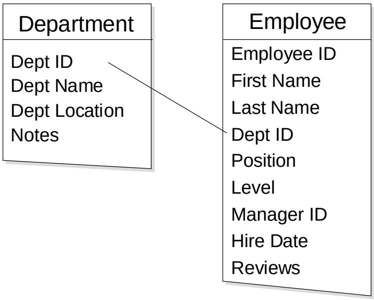
As described earlier in this chapter, to design a set of joined databases, divide the fields for the data into logical groups. Each group becomes a separate database. Your goal should be to minimize data entry — thus decreasing the chances of error — by making data entered in one database available for use with other, related databases.

After creating the databases, you establish a relationship between two or more databases using one or more fields that the databases have in common. These are the **join fields**. It's usually best to define one field in each database specifically to be a join field and then enter an ID value in that field in the records.

If you do not have a specific field you can use as a join field, you can join databases on other fields they have in common. The fields must together uniquely identify records in one of the databases, such as first name, last name, and phone number.

For example, suppose you want to compile a list of all the employees in each department in your company. Rather than putting all the data in one database, divide the data into two smaller database files: one for departments and one for employees. In addition to the department and employee information, the databases have at least one join field with ID values that identify each department.

The department and employee databases use a join field called Dept ID:



When a record in one database has the same join value as a record in a joined database, the two records are "related" and can be used together in views. In the department and employee databases, records with a matching value in Dept ID are related.

Department	
Dept ID	Dept Name
178	Marketing
245	Product Development
332	Cost Accounting
290	Customer Support

Employee		
Dept ID	First Name	Last Name
245	Indira	Kumar
332	Joann	Willis
290	Leo	Pavlovich
332	Keng	Wu
332	Jean-Pierre	Renault
178	Barbara	Taylor
332	Maria	Lopez y Garcia
245	Jose	Morales
332	James	Maclane
178	Yasunari	Murasaki

Approach protects the joins you create by preventing you from deleting the join fields. If you need to delete a join field, first unjoin the databases, or join them on a different field.

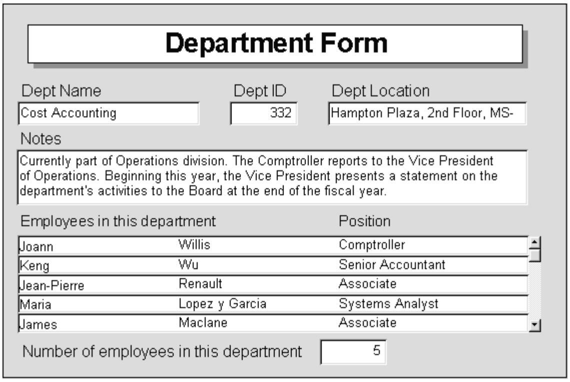
If the join field is a calculated field, you cannot delete any fields referred to in the formula, until you unjoin the databases.

To make the join in Approach, choose Create - Join, and then open the other database and select the join fields.

How joined data appears in views

After you join databases in an Approach file, you can design views that use related data from the databases joined in that file. As you work in a form, report, or other view in Browse, Approach looks up a matching value in join fields. If it finds a match, it displays data from each record that has the matching value.

In a form that displays one department record, you can see all the employees that have the same value in the department ID field as the current department.



If you're in Design and are showing field names rather than data, each field in a view shows both the name of the joined database and the name of the field.

Main and detail databases in a view

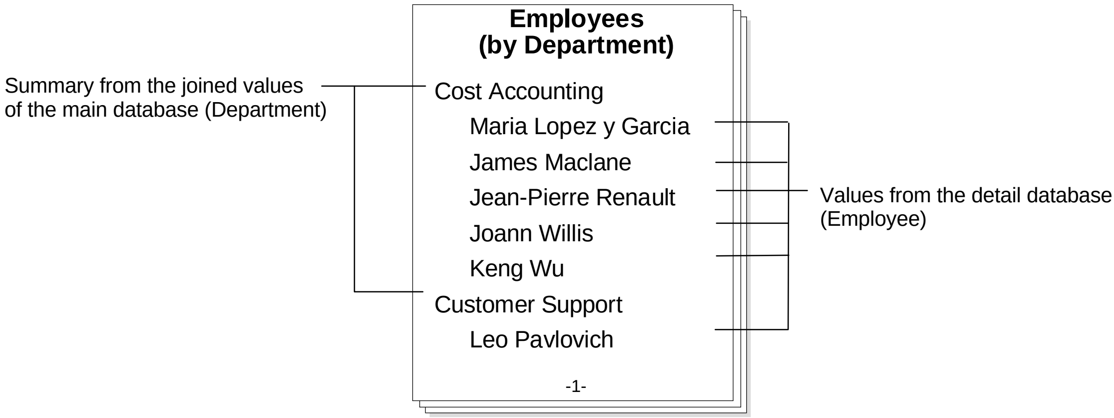
Each form, report, or other view that uses joined databases has one main database and one or more detail databases. The **main database** provides the basic information for that view. Each record from the main database can appear in that view. The other joined databases act as **detail databases**, providing additional, related information to display in the view.

Each view in an Approach file can have a different main database.

A form displays one record from the main database. For example, the department form is based on the Department database. The Employee database is a detail database of this form.

A **repeating panel** in a form is always based on one of the form's detail databases. The panel shows all the records from the detail database that match the value in the main database's join field or fields.

In a report, you see all the records from the main database as line items in the report body. For example, if you want to list all the employees in your company and group them by department, you design a report based on the Employee database and then use summary panels for the department groupings.



When you design a report that uses joined data, it's important to base the report on the database from which you want to display *all* the records. In the Employees report above, you want to see all the records from the Employee database. Therefore, you make the Employee database the main database of the report. If you were to base the report on the Department database rather than on the Employee database, you would see all the departments, but only *one* employee for each department.

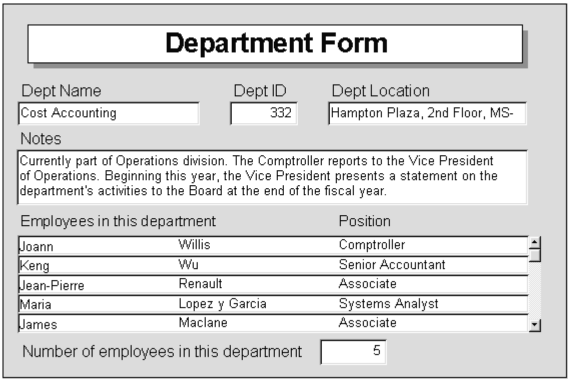
You specify which database is the main one for a view when you create the view. You can change to another main database later using the InfoBox.

Join relationships

The relationship between records in any two joined databases can be one-to-many, many-to-one, one-to-one, or many-to-many.

In a **one-to-many** relationship, a record in one database is related to one or more records in the other database. For example, one department can have many employees; in other words, one record in the Department database has the same Department ID as several records in the Employee database.

To show a one-to-many relationship, add a repeating panel to a form that is based on the “one” database. The repeating panel is based on the “many” database, and each line in the panel is a record in that database.



In a **one-to-one** relationship, a record in one database is related to only one record in the other database. For example, a vehicle number in one database might be related to a license number for that vehicle in a joined database.

You don’t normally need to create joins that are one-to-one relationships in Approach. Instead, store data related in this way — such as everything about one vehicle — in a single database.

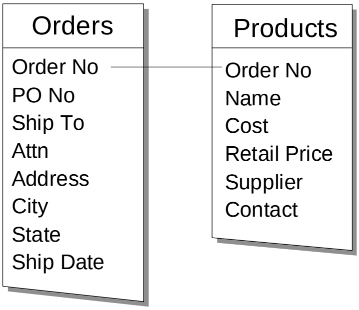
A **many-to-one** relationship is the reverse of a one-to-many relationship. This relationship is often used when “looking up” joined data. Create a many-to-one join the same way you create a one-to-many.

To show a many-to-one relationship, add fields from the “one” database to a view based on the “many” database. When you enter data into the join field, the fields from the “one” database are automatically filled with the data matching the join value.

For example, one department record in the Department database can be related to many employee records in the Employee database. The join between the two databases is a value representing the department, Dept ID. When you enter a value in Dept ID in an employee record, it makes a connection between that record and the corresponding record in the Department database. To automatically look up department information in an employee view, place fields from the Department database on a view based on the Employee database.

In a **many-to-many** relationship, many records in one database are related to many records in the other database. A set of orders for products is a common application of a many-to-many relationship. Each order can include many products, *and* each product can appear on many orders. A many-to-many relationship is a one-to-many relationship in both directions.

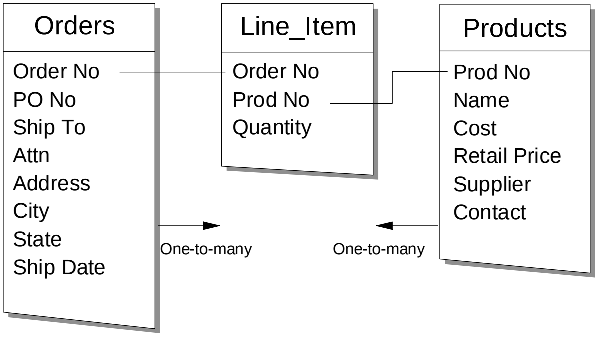
You cannot set up a many-to-many relationship directly between two databases. For example, if you join the Orders database and the Products database directly on an order number, each product can appear on only one order (because the order number becomes part of the product record).



Similarly, if you join the two databases on a product number, each order can have only one product (because the product number becomes part of the order record).

To set up a many-to-many relationship between two databases, you need to add an intermediate, or intersection, database. Each database has a one-to-many relationship with this intersection database.

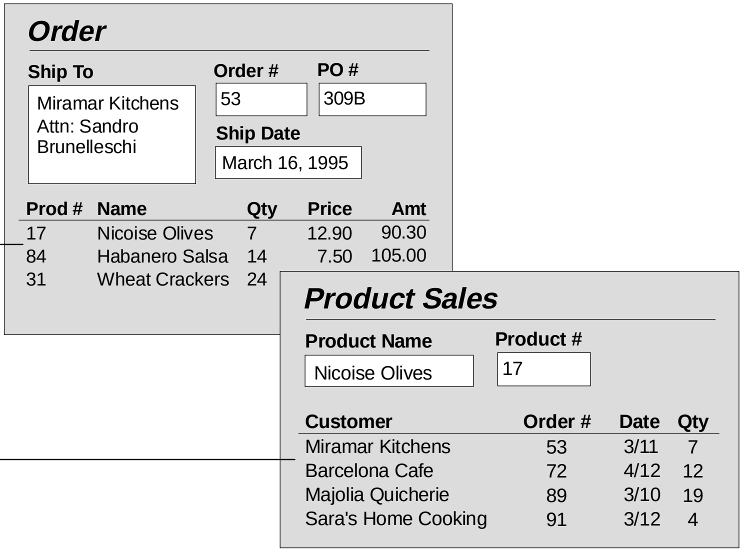
For the Orders and Products databases, you might use a third database that stores the product information from each item in the order; call the new database Line_item. Then show the records from this Line_item database in a repeating panel on a form based on the Orders database. This keeps the orders data out of the Products database and the products data out of the Orders database.



Now each order can have many products, and each product can be on many orders. You can display one-to-many data both on order views and on product views.

Record for an order contains data for many products

Record for a product contains data for many orders



Alias joins

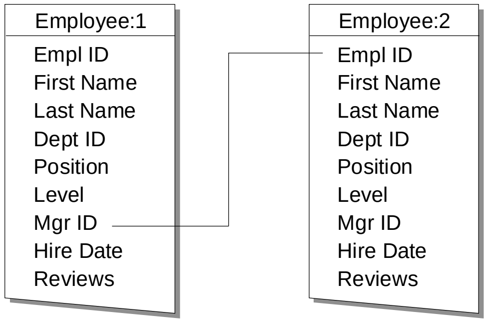
It’s sometimes useful to join a database to itself. For example, suppose you want to keep track of which employees in your company are managers and who reports to them. The Employee database can have employee IDs to uniquely identify each employee and manager IDs to identify each person’s manager by employee ID.

Employees			
Empl ID	First Name	Last Name	Mgr ID
25	Indira	Kumar	81
74	Joann	Willis	97
95	Leo	Pavlovich	35
29	Keng	Wu	74
33	Jean-Pierre	Renault	74
49	Barbara	Taylor	43
85	Maria	Lopez y Garcia	74
35	Jose	Morales	28
63	James	Macleane	74
12	Yasunari	Murasaki	20

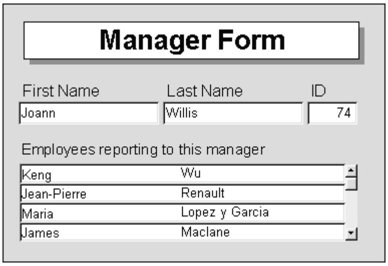
This can be an efficient way to use data because you don’t need to duplicate the manager records in a separate database. But you do need a second database to express the join relationships properly.

To join a database to itself, you create a virtual copy of the database in the Join dialog box. By virtual, we mean the copy is not an actual duplicate of the database, but just another listing of it called an **alias**. After you create the alias database, you can set up a join between the database and its alias as you would between any two databases.

For example, you can join the manager ID in an Employee database to the employee ID in a Manager database, that is a virtual copy of the Employee database.



The alias Manager database has a one-to-many relationship with the employee database. You can display the results of this self-join using a repeating panel on a form based on the Manager database.



If you create more than one alias copy of a database, you can join one alias to another and even join an alias to a different database.

When you create an alias for a database, Approach adds 1 to the name of the database, and names the alias with the same name as the database, plus a 2 (or a 3 and so on); for example, EMPLOYEE:1 and EMPLOYEE:2. These names appear only in the Approach file with the joins, and they do not affect the name of the database file itself or the name of the database in any other Approach file.

Joining and unjoining

The forms, reports, and other views in an Approach file can use data from any of the databases joined in that file.

For each join, you can specify whether you want Approach to automatically insert or delete related records from a joined database when entering or editing data in a view based on a different database.

After you create joins across databases, remember to save the changes to your Approach file.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Main database for a view

   Alias joins

   Joins, options
3. Click the index entry you want, then click Display.

What's next: creating views

Now that you have designed your database system, you are ready to build views to enter, analyze, and present your data. For all of your database operations, use views. Depending on how often you perform a task, you may want to specialize a view so it's easy to use, and does what you need each time.

Chapter 32
Designing and Modifying Views

This chapter describes ways you can build and customize Approach views to enhance how you enter and present your data. The tasks discussed in this chapter affect views and objects stored in the Approach file (.APR). Perform these tasks in the Design environment.

Choose File - Save Approach File periodically to save the changes you make in Design.

Design environment

In Design, you create forms, reports, worksheets, form letters, envelopes, mailing labels, crosstabs, and charts to view and work with your data. You can add, edit, and delete these views at any time.

To go to Design, do one of the following:

- Click the Design button in the action bar.
- Click the environment button in the status bar and select Design.
- Choose View - Design.

As you work in Design, remember to save the changes you make to views. For information about customizing your Design work area, see Chapter 35.

Design SmartIcons

Approach provides sets of SmartIcons for manipulating objects, editing text, and changing the Design work area.

- To work with an icon, click it.
- To find out what an icon does, rest the mouse pointer on the icon. A short description of what the icon does appears.
- Click the button in the top left corner of a SmartIcon bar to select icon bar commands, such as “Hide this bar of SmartIcons,” and to display related icon bars.

For more information about controlling which sets of SmartIcons are available when, see Chapter 4.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   SmartIcons, overviews

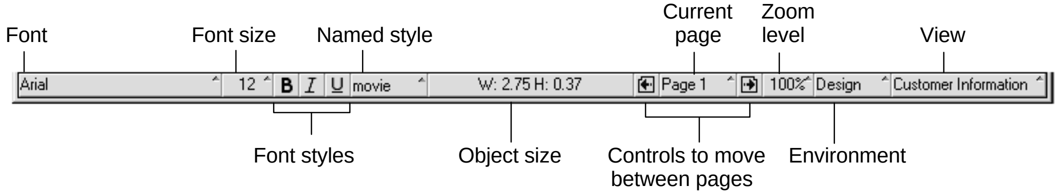
   SmartIcons, displaying
3. Click the index entry you want, then click Display.

Menu bar and status bar in Design

In Design, the menu bar includes a **context menu** that changes depending on the current view or the current selection. If you have no current selection, this menu is called whatever the current type of view is: Form, Report, Letter, Envelope, Mailing Label, Worksheet, Crosstab, or Chart.

The context menu provides commands for working with the current type of view. If an object is selected or if you've clicked in text, a repeating panel, or a summary panel, the menu changes to Object, Text, Column, or Panel, and has commands for working with that type of element.

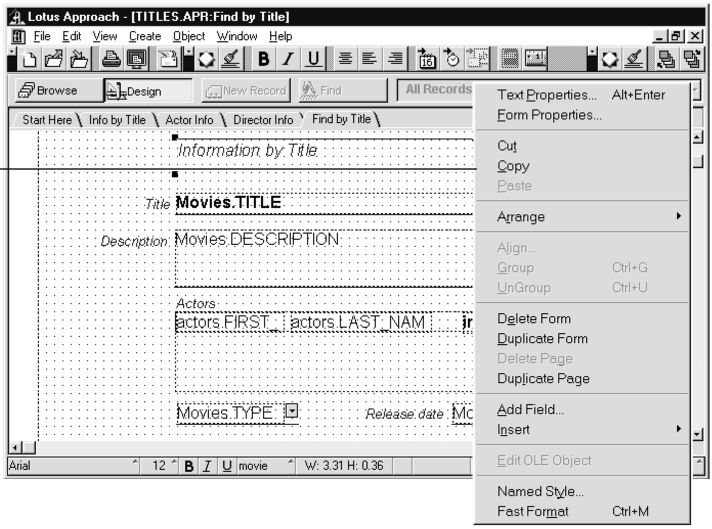
In Design, the status bar gives information about the current view and the text and objects in it. Most parts of the status bar are buttons you can click to change the selection or work area.



Shortcut menus

When you’re in Design, you can open a shortcut menu listing the most commonly used Design commands for the selected object. These commands are a subset of the ones in the main menu.

Shortcut menu appears with right mouse click.



- To choose a command from the shortcut menu, click an object or the page margin of a view with the right mouse button. When the menu opens, click the command you want.

The shortcut menu closes after you choose a command. To close the menu without selecting a command, click anywhere outside the menu.

InfoBox

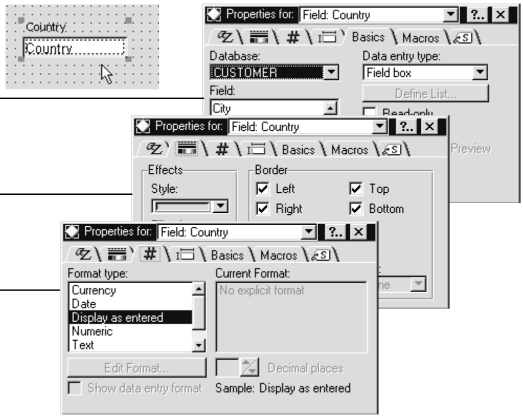
The design properties for objects are all set in the InfoBox.

The InfoBox has tabs containing the properties for the currently selected object. If no object is selected, the InfoBox shows settings for the current view. Click a tab at the top of the InfoBox to go to another set of properties for the object.

With a field selected, the InfoBox shows Basic properties.

Click on the Lines and Colors tab for border and fill options.

Click on the Format tab to show data in uppercase, phone number formats, or date and time separators.



When you click another object or click in the background of a view, the InfoBox changes to show the settings for that object or view.

You can save a set of InfoBox properties together in a **named style**. If you want to change the properties of a particular object, you can use the InfoBox to apply a named style to it or change properties manually. You can also make one named style the default for views.

Tools palette

Use the Tools palette for drawing objects and adding fields to a view.

- Click an icon to work with it.
- Double-click the icon to draw more than one object of that type.

After you create radio buttons, field boxes, and check boxes using icons from the Tools palette, Approach displays a dialog box in which you connect the new objects to a database field. If you draw a button, the InfoBox appears, open to the Macros tab.

Select options in this tab to

- Select the user action that activates the macro
- Specify the name of the macro to attach to the button

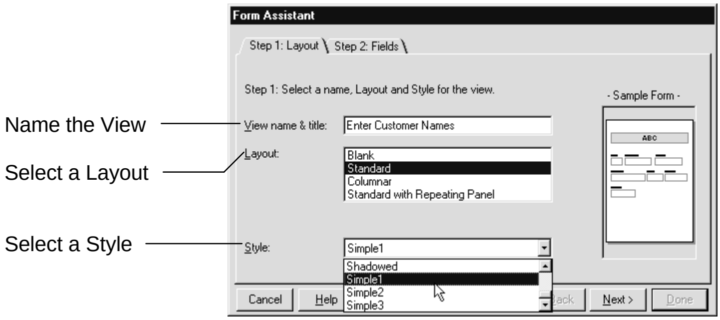
Assistants

With only a few steps, you can create a view that suits a particular way you use your data.

You create a view in an assistant. All of the view assistants — Form, Report, Worksheet, Crosstab, Form Letter, Mailing Label, Envelope, and Chart — are available from the Create menu.

Assistants let you choose which fields appear in the view, which fields are used in summaries, and how the summaries are calculated.

For example, use the Form Assistant to create a form for entering data, adding fields from left to right, or top to bottom, and choosing from many color and line styles.



Or use the Report Assistant to create a report to group records and show totals for the groups.

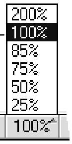
Approach provides a number of predesigned layouts and styles for views; select one layout and one style from the assistant to determine the basic appearance of the view. You can customize a view after you create it.

Zooming in and out

As you work in Design, you can **Zoom in** for a closer look at your view or **Zoom out** for the big picture. The possible zoom settings are 25, 50, 75, 85, 100, and 200 percent.

Zoom settings affect only how a view appears on the screen, and not how it is printed. Approach always prints at 100 percent.

Choose a zoom setting from the status bar.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Zooming, views
3. Click the index entry you want, then click Display.

Working with objects in Design

In Design, everything in a view is an object that you can modify. You can select and manipulate objects in many of the same ways, including resizing the objects and applying line and color properties to them.

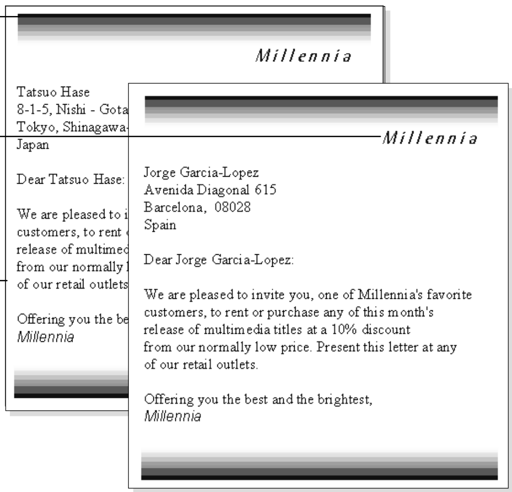
You can add objects to the background of a view. In Browse, these objects stay the same for every record. (By contrast, text and pictures in fields change from record to record in Browse.)

Paste pictures from a graphics application, like this shading, or

add text objects, like this logo, in Design.

When you draw geometric objects, like a border,

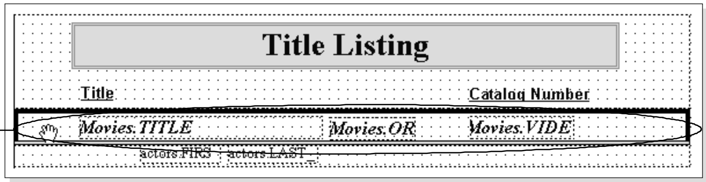
they appear on every record, as they do on these two form letters.



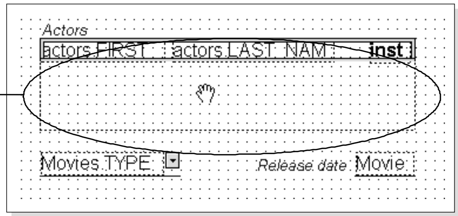
Field objects display data from records in a database. By default, a field object is a box that you type data into in Browse, but it can also be a set of radio buttons, a set of check boxes that you use for selecting data, or one of several different kinds of lists.

Some views can have panels that contain fields or other objects. For example, a form can display a repeating panel, and a report can include a summary panel.

A report panel can hold many fields.



A repeating panel on a form can also hold many fields.



A view itself is also an object. It can be edited in some of the same ways as other objects. It provides the background on which to display the other objects.

Showing field names or actual data

You can show either field names or actual data in field objects in Design.

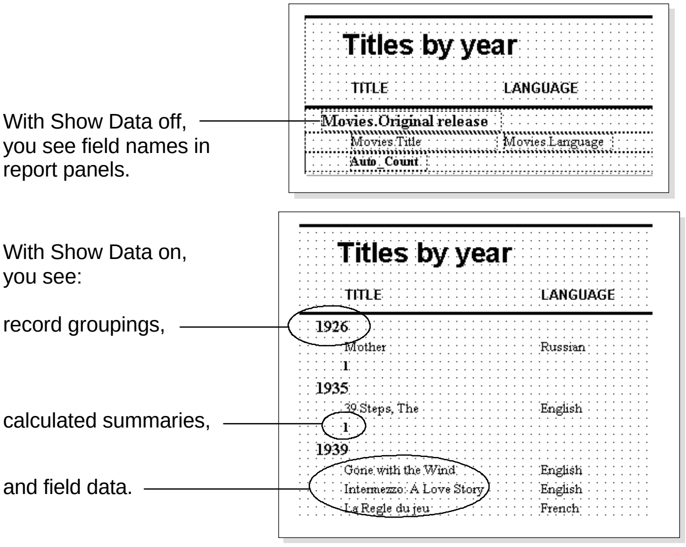
When you show field names in Design, the object borders also appear in the work area. If the Approach file has joined databases, the database names appear along with the field names (for example, EMPLOYEE.Address).

If you look at a report showing field names, you can see how fields and other objects are placed in the report panels.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Showing, field names in Design
3. Click the index entry you want, then click Display.



When you show actual data in Design, you see field data as it prints:

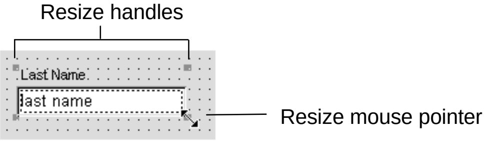
- Fields set to slide when printing appear as they would print.
- Objects set not to print do not appear in the view.

You can switch between these ways of seeing objects in Design.

- To show data in Design, choose View - Show Data.
- To show field names, choose Show Data again.

Selecting objects

A selected object has handles around it. Drag one of these handles to resize the object.



If you select more than one object, you can change the properties of all of the objects at one time. The InfoBox displays options common to all selected objects.

- To select an object, click inside the object or on its border.
- To select more than one object, **SHIFT**+click the objects. Or click an empty part of the view, and drag diagonally to draw a selection rectangle around the objects.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Objects, selecting

3. Click the index entry you want, then click Display.

Selecting text

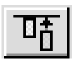
You need to select a text object or text before applying text attributes (such as italics or bold) to it.

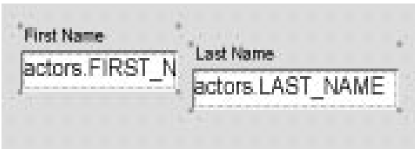
If you select an entire text object, any attribute you use applies to all text in the object. You can select particular text in a text object; text is highlighted when it is selected.

Aligning and distributing objects

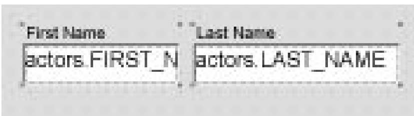
Approach lets you align objects vertically, horizontally, or both. You can specify alignment along the top, bottom, side, or center of the object boundaries. The objects can align to the position of one object or to the nearest point on the grid.

Align the objects:





to each other, or



to the grid.

You can also distribute objects vertically, horizontally, or both. This places an equal amount of space between the objects.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Objects, aligning

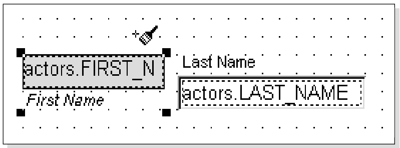
3. Click the index entry you want, then click Display.

Fast Format

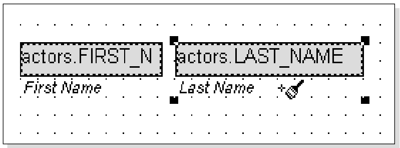
You can copy the line and color properties and the text attributes of one object and apply them to another object with a click of the mouse.

Each object you click takes the line and color properties and the text attributes of the selected object.

Select the first object and choose Fast Format.



Then select the objects to change.



Named styles

A named style is a set of object properties that you define and save. You can apply a named style to any object, and you can define one style to be the default for any new views.

Named styles allow you to apply consistent formatting to objects within an Approach file.

A named style can include these properties:

- Text attributes for field data and for text in text objects
- Line and color properties for all objects, and border and baseline properties for fields
- Text attributes for field labels
- Picture properties, such as cropping and shrinking, for PicturePlus fields
- Border and color properties for the background of views and panels

The properties in a named style are the same as they are in the InfoBox, but by saving properties in a style you can easily apply them to more than one object. If you change any properties of a named style, all objects that use the style are updated to match the changes automatically. If you have an object that contains all the properties you want to apply to other objects, you can create a named style based on the object.

When you create a view using an assistant, you can apply your current default style to the view or apply one of the predefined styles. Approach uses the properties in a style for the background of the view and for all objects you add to the view.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Named styles, applying

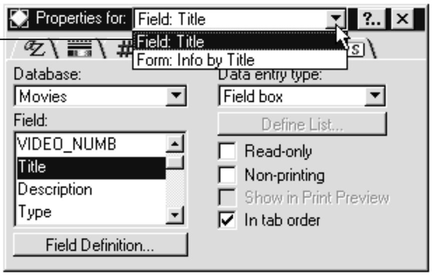
3. Click the index entry you want, then click Display.

Views

In addition to editing individual objects in a view, you can make changes that affect the view as a whole. Just like other objects, the properties of a view are available through the InfoBox.

When you select a view or click the background of a view in Design, the InfoBox changes to show the properties for the view. To make sure you are changing the properties for a view, look for the name of the view in the title of the InfoBox.

The InfoBox title bar shows the object currently selected.



To create a view that is similar to one you already have, choose Duplicate [View] from the context menu and then modify the copy.

When you duplicate a view, Approach gives the duplicate a name such as Form 2 or Report 2. Rename the view in the Basics tab of the InfoBox.

To delete a view, choose Delete [View] from the context menu.

Field properties in Design

Add a field to a form, report, envelope, or mailing label using either the Add Field dialog box or using any of the icons for creating field objects on the Tools palette. You can also use Add Field in a worksheet or crosstab. The Add Field dialog box lets you drag existing fields on to any of your views; click Field Definition in the dialog box to create new fields.

When you add a field to a form or report, the field appears as a **field box** for entering and editing data in Browse. A field box in a view is a connection to the underlying database field. You can make any number of connections to the same database field — from a single view, or from many views.

Approach gives the field box the border width, text attributes, and other properties of the named style for the current view.

You can delete fields from a view just as you can delete other kinds of objects. Deleting a field from an Approach view merely changes your view of the data, not the database structure. To add or delete fields from the database itself, choose Create - Field Definition.

Field labels

A field label is the descriptive title for a field that you see in Browse. A label is initially set to have the same wording as the field name, but you can edit the label to use any text you want.

A label can appear above or below the field object, or to the left or right of it. You can also hide the field label.

The field label can appear:

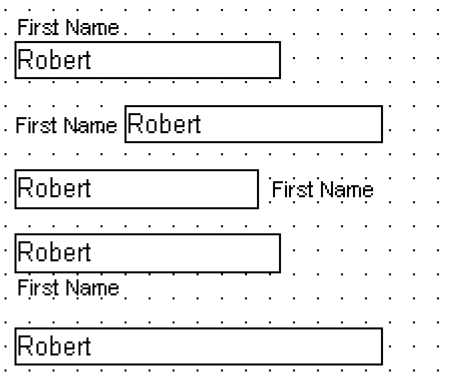
Above the field box

To the left

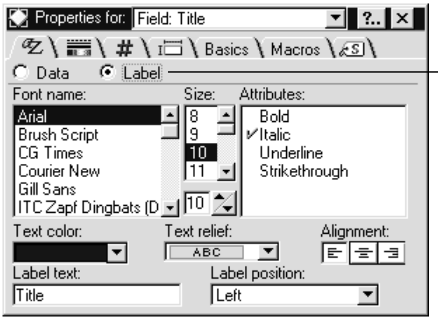
To the right

Below

Or not at all



Change the text properties, label text, or position of a label in the Text format tab of the InfoBox. Select Label to modify the label properties.



Click Label to see the field label properties.

Displaying values for a field

Besides displaying a field as a simple box for entering data, you can also display it as:

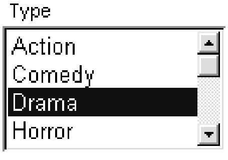
- One of several kinds of scrolling lists (drop-down box, field box and list, or list box)
- One or more check boxes
- One or more radio buttons

Use one of these controls to make entering data much easier and more accurate.

Displaying a field as a list of values

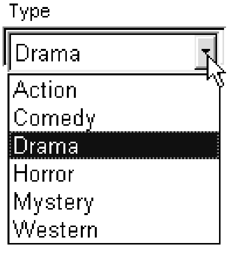
You can have a field appear in Browse as a list that doesn't close (list box), a drop-down box, or as a combination of a drop-down box and a field box.

List Box



Select from the list

Drop-down box



Drop-down and select from the list

Field box & list

Select from the list or enter a new value

To display a field as a list, start with a field already in the view. Only memo fields and PicturePlus fields cannot be displayed as a list.

You can specify which values are available in the list in several ways:

- Enter custom values you want to appear in the list.
- Use existing values from a database field.
- Use the values from another field as a description of the value that is added to the field.

  For example, suppose a field with a list stores an employee ID. To make it easier to enter the employee IDs, display the employees' last names in the list rather than their IDs. Then, when you select a name in the list in Browse, the ID corresponding to that name is entered into the field.
- Filter the list of values using a field value already entered into the record.

  For example, suppose that not all your company's products are available in other countries. To see only the products that are available in any given country, add a Country field to the Product and Order databases. Then limit the list to products that have the same value in the Country field (in the Product database) as the Country field in the current record (in the Order database).

When you have joined databases, you also can use fields from the joined databases to describe or filter the values in a field list.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Descriptive values, displaying in scrolling lists

   Fields, displaying as list boxes

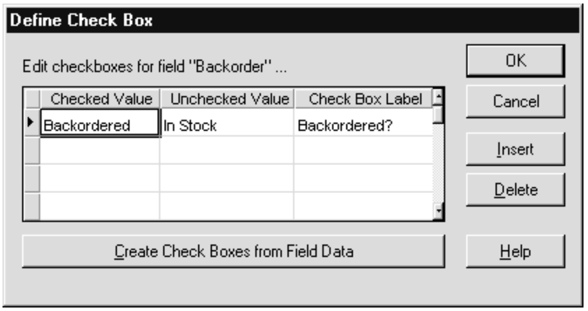
   Fields, displaying as drop-down boxes

   Fields, displaying as field boxes and lists
3. Click the index entry you want, then click Display.

Displaying a field as a check box

You can display a field as one or more check boxes. A **check box** has these values: a Checked value, which is entered in the field if the check box is on, an Unchecked value, which is entered if the check box is off, and Null, if the check box hasn't been selected. Click a check box in Browse to turn it on or off. Any type of field can be displayed as a check box, except for memo or PicturePlus fields.

For example, you might use a check box to identify a product as backordered. The Checked value would be Backordered, and its Unchecked value would be In Stock.



Because each check box has only two values, you should typically set up one check box for a field. When you click the check box, you go back and forth between its two values.

If a field has more than one check box, only one check box can be on at a time (but it is also possible for no check box to be on). When you turn on a check box, any box already on in the set is turned off. Turn off a check box to enter its Unchecked value in the field.

You can add a field to a view as check boxes, or display a field already in a view as check boxes. You can provide check box values, or use values from the current field data.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Fields, displaying as check boxes
3. Click the index entry you want, then click Display.

Displaying a field as a set of radio buttons

You can display a field as a set of radio buttons. Each radio button provides a Clicked value. Click a radio button in Browse to enter its value in the field. Any type of field can be displayed as radio buttons, except memo and PicturePlus fields.

For example, you might use radio buttons to list the possible status levels for customers.

Because each radio button has only one value, you should normally use a set of two or more radio buttons for a single field. In a set of radio buttons, only one button can be on at a time. When you turn on a radio button, any button that is currently on in the set is turned off.

You can add a field to a view as radio buttons, or display a field already in a view as radio buttons. Radio buttons can have custom values that you provide or values from the current database field.

For more information

1. Choose Help **-** Help Topics and click the Index tab.
2. Type this phrase:

   Fields, displaying as radio buttons

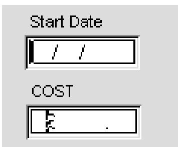
3. Click the index entry you want, then click Display.

Formatting data in fields

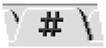
Approach provides predefined formats for displaying and printing date, time, numeric, and text data in a field.

Whenever you enter data in a field, you enter only the data itself, whether or not the field is formatted. Approach automatically formats the character you enter, such as currency signs or thousands separators. You see the data in its format when you move out of the field.

If you turn on "Show data entry format" for a date, time, or numeric field, characters appear in the field when you click it to enter data, and underlines show the maximum number of characters.



If you turn on "Show data entry format" for a text field, you see the data in the format you chose in Design (such as ALL CAPITALIZED or Lead capitalized) as you enter the data.



A field’s formatting information is set in the Format tab of the InfoBox. When you select a format type, the tab shows the options for that type. The available formats depend on the data type of the field.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Fields, formatting dates

   Fields, formatting numbers

   Fields, formatting times
3. Click the index entry you want, then click Display.

Working with PicturePlus fields

You can add a PicturePlus field to a form, report, worksheet, form letter, envelope, or mailing label to hold a picture, an OLE object, or an image you draw with the mouse in Browse. The graphic appears only in the PicturePlus field in that record. It is part of the record, not part of the design of a view.

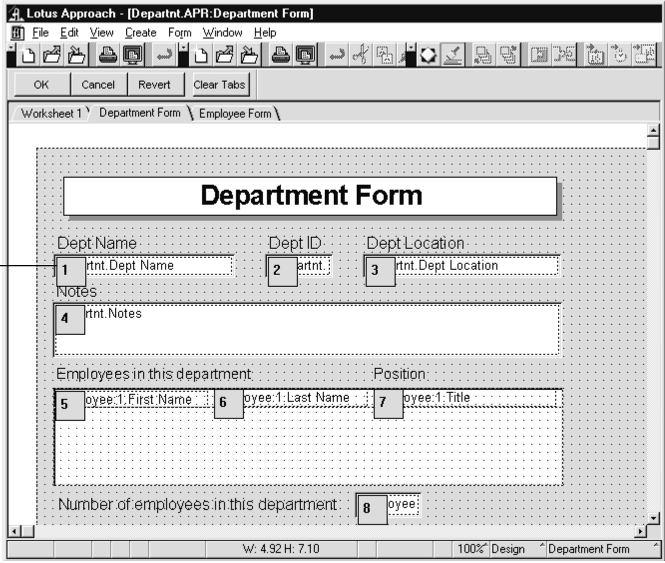
You can change the width, color, and frame properties of a PicturePlus field, and move, resize, cut, copy, paste, and delete the field as you can other types of objects.

Changing the tab order for fields

When you enter data in Browse, you can press **TAB** to move through the fields of a record. (You can also press **ENTER** to tab through fields if your Preferences are set this way.) The order in which you move through fields is the tab order.

Radio buttons and check boxes each have a separate position in the tab order. Text blocks, macro buttons, and graphic objects can be included in the order. Include an object in the tab order by selecting “In Tab Order” on the Basics tab of the InfoBox for that object.

View - Show Tab Order shows the order and allows you to edit the order numbers.



Approach initially sets the tab order to the order in which fields (and objects) were added to a view, but you can change the order whenever you want. You can change the order of a few items or reorder all the items by editing the tab order numbers.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Tab order, adding objects to

   Tab order, changing

   Tab order, removing objects

3. Click the index entry you want, then click Display.

Views

The following sections describe the eight kinds of views available in Approach. Although views can show much of the same field data, each one is tuned to different tasks.

The main database for a view

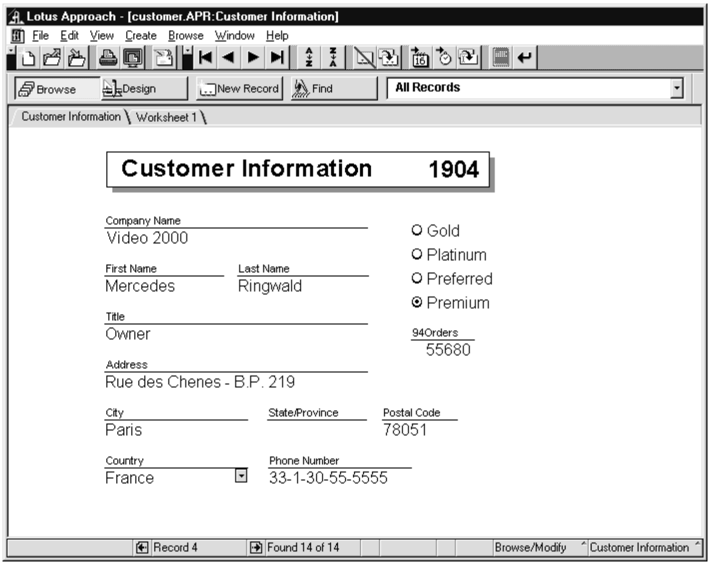
If you have joined databases in an Approach file, Approach identifies a main database for each view. The number of records you can see using the view depends on the number of records in the main database.

The other joined databases are the detail databases of the view. You can add fields from the detail databases to the view.

For more information about main and detail databases, see “Joining databases,” in Chapter 31.

Forms

A form is a type of view that focuses on a single record. You use the same form to see every record in a database, but the form shows you only one record at a time. For example, for a database of customers, create a form to enter and display information about a single customer.



Forms and records aren’t the same

Like any other view in an Approach file, the form is a way to look at data from records in a database. A record, on the other hand, is a storage unit in a database. This split between forms and records is useful. For example, when you create a form, select only the fields from the database that store the data you want to show on the form.

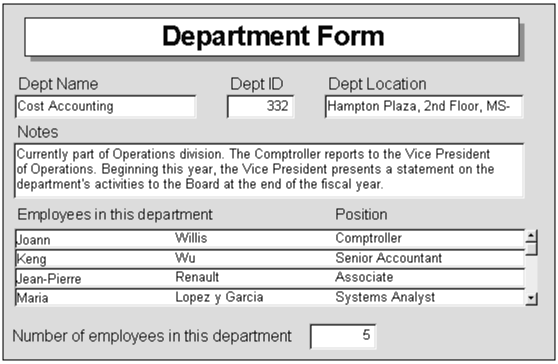
Repeating panels in forms

If the records of the main database are in a one-to-many relationship with records from a detail database, you can add a repeating panel to a form. The repeating panel shows the many records from the detail database that are related to each record in the main database of the form.

For example, a department and its employees have a one-to-many relationship. One department can have many employees. To list the employees for each department, join a Department database to an Employee database on a Department ID field.

Then set up a form that has the Department database as its main database. Give the form a repeating panel for the employees. The panel lists all the employees that have the same department ID as the current department.

Each employee in this repeating panel has 332 in their Department ID field, the same ID the department has in the Department database.



When to use forms

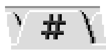
- To enter data while displaying one record at a time
- To do finds, especially when you want to find a check box, radio button, or a list selection

Create and modify forms

To	*Choose*
Create a new form	Create - Form
Copy an existing form in the same Approach file and modify the copy	Form - Duplicate Form, in Design
Import views from another Approach file, then customize them	File - Import Approach File, in Design

What you can do with forms

Consider these tips on defining fields and designing forms to improve data entry on your forms. For more information, press **F1** to open Help.

To	*Do this*
Filter the values that you can select to enter in a field	Select the field, open the InfoBox, choose a list data-entry type on the Basics tab (Drop-down list, Field box & list, or List box). In the dialog box that opens, define the list values, click Options, and then define the filter values.
Define ranges within which field data should fall	Choose Create - Field Definition. In the dialog box that opens, select the field and click Options. Define the range in the Validation tab.
Use field formats to help indicate how information should be entered into a field	Select the field, open the InfoBox, click the Format tab. Select an existing format or define your own. 
Set a tab order for the objects and fields in the form	Choose View - Show Tab Order, in Design. Change the tab sequence by editing the numbered boxes.
Add macro buttons to guide someone entering data to the correct views	Choose Create - Control - Button, in Design and drag a button in the view. In the dialog box that opens, define and attach a macro to the button.
Add pages to the form if you have many fields to show	Choose Form - Add Page, in Design.
Add graphics or embedded objects to help distinguish the form from other forms	Choose Edit - Picture - Import, in Design.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Forms, creating

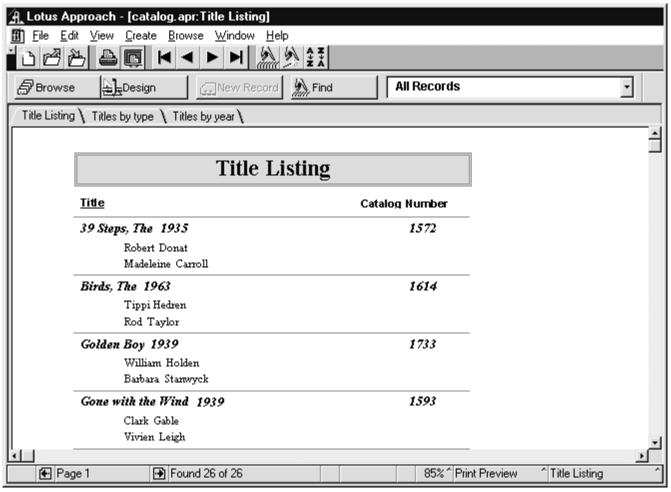
   Forms, pages in

   Macros, buttons to run

   Pasting, graphics as part of the view background
3. Click the index entry you want, then click Display.

Reports

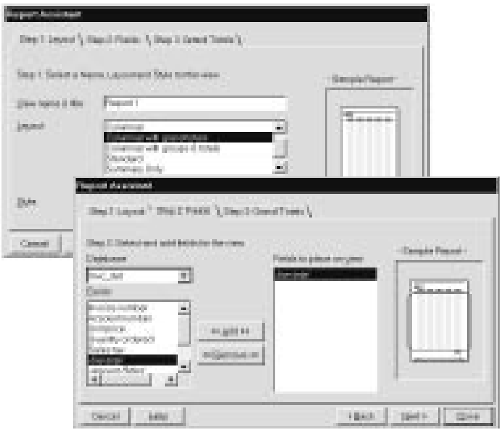
Reports organize and present data from records in powerful ways. Select the fields that appear on the report, group the records by field values, and calculate summary information for groups and the entire report.



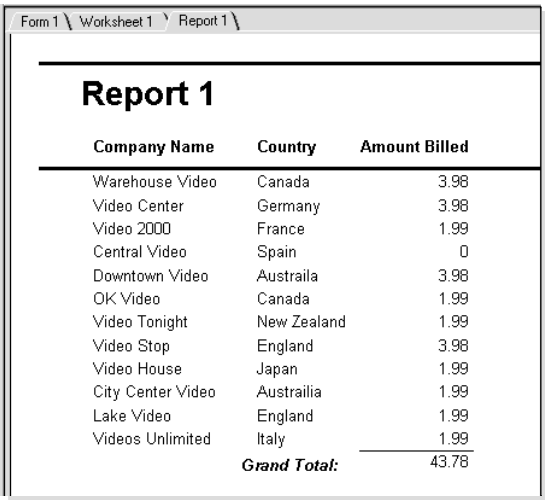
When you build a report with the Report Assistant, you can easily total the data from any field. Approach calculates the total over all of the records in the report.

Select the Layout "Columnar with grand totals"...

choose the field to total...



to create this report.



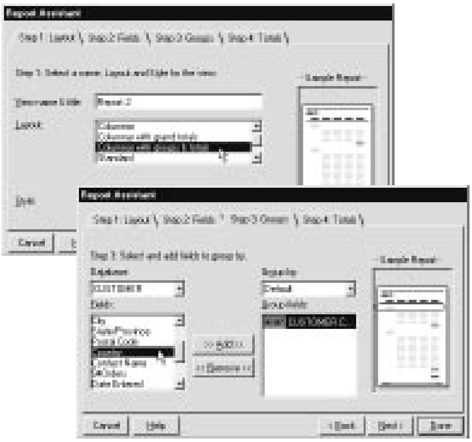
Report 1

Company Name	Country	Amount Billed
Warehouse Video	Canada	3.98
Video Center	Germany	3.98
Video 2000	France	1.99
Central Video	Spain	0
Downtown Video	Austraila	3.98
OK Video	Canada	1.99
Video Tonight	New Zealand	1.99
Video Stop	England	3.98
Video House	Japan	1.99
City Center Video	Austrailia	1.99
Lake Video	England	1.99
Videos Unlimited	Italy	1.99
	Grand Total:	43.78

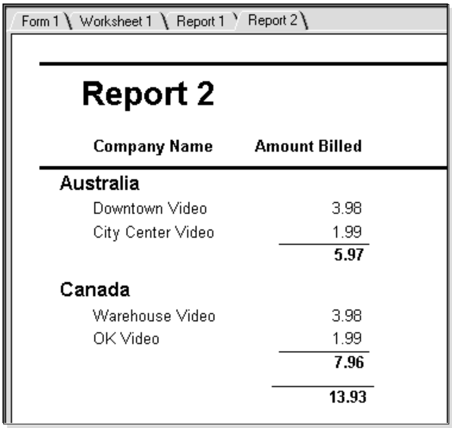
Reports can present data in groups, also. You can easily add subtotals for each group.

Select the Layout “Columnar with groups and totals”...

choose the fields to group by...



to get this report.



When you find records, the report displays only the records in the found set. The totals are recalculated using only the found set of records, and the groups that appear are the groups represented in the found set.

Turn on Show Data to design reports with “live data” for fields and summaries.

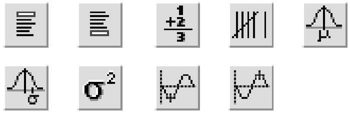
For information about including data from joined databases in reports, and about the database on which to base the report, see “Joining databases” in Chapter 31.

For information about saving the report in HTML format for display on the Internet, see Chapter 38.

When to use reports

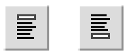
- To organize and summarize data.
- To enter and edit data while displaying more than one record at a time.
- To display or print more than one record on the same page.

Create and modify reports

To	*Choose*
Create a new report	Create - Report
Use PowerClick reporting	A PowerClick icon with a field selected: 
Copy an existing report in the same Approach file and modify the copy	Report - Duplicate Report, in Design
Import an Approach file and modify the imported report	File - Import Approach File, in Design

What you can do with reports

Consider these tips on how to improve the organization and presentation of records in reports. For more information, press **F1** to open Help.

To	*Do this*
Add totals, counts, averages, and other summary calculations to reports	Select the field to summarize, then click one of the following PowerClick icons, Total, Count, or Average: 
Create summary groupings for the report data	Select the field to group on, then click one of the following PowerClick icons, Leading summary or Trailing summary: 
Create a special header or footer for the first page of the report	Choose Report - Add Title Page, in Design. Then modify the header or footer in the title page.

Continued

To	*Do this*
Create headers and footers for the report	Choose Report - Add Header or Report - Add Footer, in Design.
Add graphics or drawings to report headers or footers	Select the header or footer, choose Edit - Picture - Import.
Fit more columns on a report page	Select the report, open the InfoBox, click the Basics tab. Specify the new number of report columns.
Expand or reduce sections of the report to show all of the data when printing	Select the report panel, choose Panel - Panel Properties, click the Basics tab. Select “When printing” options.
Set page breaks to fall where appropriate for your data	Select the report panel, choose Panel - Panel Properties, click the Basics tab. Select “When printing, Insert page break.”
Summarize groups of records on a report using a chart	Expand the summary panel, choose Create - Control - Chart, and drag an area for the chart. Create the chart using the Chart Assistant, which opens automatically.
Display reports in Print Preview automatically	Choose File - User Setup - Approach Preferences, click the Display tab, and then select “Show Report summaries.”
Add graphics or embedded objects to help distinguish the form from other forms	Choose Edit - Picture - Import, in Design.
Set the tab order if you are using a report in Browse for data entry	Choose View - Show Tab Order, in Design. Change the tab sequence by editing the numbered boxes.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Pages, in reports

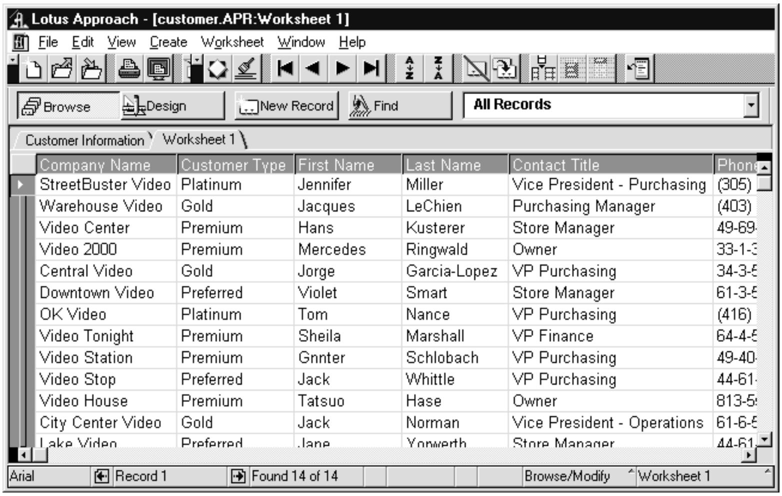
   PowerClick reporting

   Reports, creating

   Summaries, report
3. Click the index entry you want, then click Display.

Worksheets

Worksheets present database records in a grid of columns and rows. The columns are database fields, and the rows are individual records.



When to use worksheets

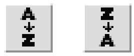
- To enter and edit data
- To find records
- To sort records
- To browse through many fields for many records
- To display and compare data from many records

Create and modify worksheets

To	*Choose*
Create a new worksheet	Create - Worksheet
Copy an existing worksheet in the same Approach file and modify the copy	Worksheet - Duplicate Worksheet, in Design
Change the order of columns	The column heading and drag it to the new location
Add a formula column	The location of the new column, position the mouse pointer between and at the top of two column headers, and click when the wedge-shaped mouse pointer appears

What you can do with worksheets

Consider these tips for displaying columns in worksheets. For more information, press **F1** to open Help.

To	*Do this*
Modify column heading text	Select the column heading, click in the heading, and then edit the text.
Change the order of columns	Select the column heading and drag it to the new location.
Add a formula column	Position the mouse pointer between and at the top of two column headers, and click when the wedge-shaped mouse pointer appears.
Add color to worksheet text or background	Select the text or cells to change, choose Worksheet - Worksheet Properties. In the InfoBox, click the Lines and Colors tab, and then select the new color.
Perform a find	Choose Find in the action bar, and then enter the find conditions.
Perform a sort	Select the field to sort, and then choose Worksheet - Sort - Ascending or Descending. 
Insert values determined by a formula	Select the field to the left of where you want the new column, and then choose Worksheet - Add Column. Enter a formula in the Formula dialog box, which opens automatically.
Show two or four sections of a worksheet	Move the mouse pointer over the black rectangle at the bottom left or top right corner of the worksheet. Drag the rectangle toward the center of the screen.
Convert a worksheet into a crosstab	Select a column heading and drag it to the left edge of the worksheet.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Worksheets, creating

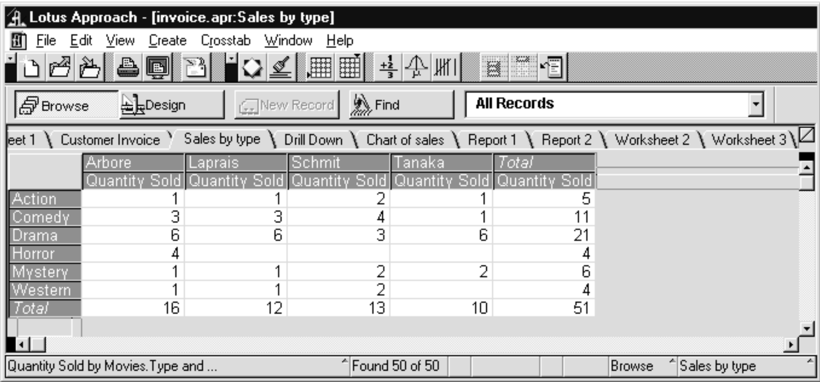
   Columns, adding

   Worksheets, formulas in
3. Click the index entry you want, then click Display.

Crosstabs

A cross-tabulation worksheet, or crosstab, categorizes and summarizes database records. A worksheet has rows containing individual records, but a crosstab shows cells that summarize data from the underlying records.

A crosstab is especially useful for analyzing data with three or more variables. For example, use a crosstab to present products by type, by quantity sold, and by sales representative.



When to use crosstabs

Use crosstabs to analyze data that depends on more than two variables or categories.

Create and modify crosstabs

To	*Choose*
Create a new crosstab	Create - Crosstab
Copy an existing crosstab in the same Approach file, and modify the copy	Crosstab - Duplicate Crosstab, in Design

What you can do with crosstabs

Consider these tips for producing the best crosstab data summaries. For more information, press **F1** to open Help.

To	*Do this*
Change the calculation used in a summary column or in all crosstab cells	Select the a summary heading or any column heading. Choose Crosstab - Crosstab Properties, click the Formula tab, and select a new formula.
Convert an existing worksheet into a crosstab	Select a column heading and drag it to the top or left edge of the worksheet.
Add a Summary column	Move the mouse pointer to the outside edge of the last column or row heading, and click when the wedge-shaped mouse pointer appears.
Show two or four sections of a crosstab	Move the mouse pointer over the black rectangle at the bottom left or top right corner of the crosstab. Drag the rectangle toward the center of the screen.
Create a chart from crosstab values	Choose Crosstab - Chart this Crosstab.
Show the records that contribute to values summarized by the crosstab	Select a column, row, or cell of the crosstab, and then choose Crosstab - Drill Down to Data.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Crosstabs, summaries in

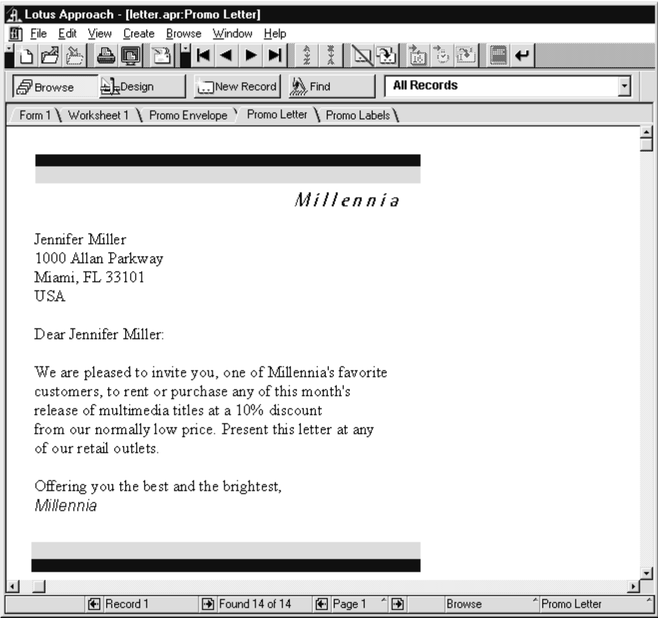
   Charts, creating

   Drill down, in crosstabs
3. Click the index entry you want, then click Display.

Form letters

A form letter displays a combination of field data and text you enter in a letter format. Approach displays a copy of the letter for each record in the found set, adding the name and address information from the records to the standard text you provide.

Besides the body of the letter, a typical form letter consists of a salutation, a closing, and a return address. You can use all of these elements, or select the ones that are appropriate to your mailing. The Form Letter Assistant also lets you create envelopes to match the inside address of your letter.



Approach automatically adjusts the spacing around fields to create a smooth flow between typed text and field data. You see the adjusted spacing when you go to Browse, Print Preview, and Design (if View - Show Data is on).

When to use form letters

Use form letters to display a combination of data and text formatted as a letter or block of text.

Create and modify form letters

To	*Choose*
Create a new form letter	Create - Form Letter
Add field data to a form letter	Letter - Insert - Field Value, in Design
Select Properties from the InfoBox	Letter - Form Letter Properties, in Design

What you can do with form letters

Consider these tips for enhancing your form letters. For more information, press **F1** to open Help.

To	*Do this*
Exclude extra records with the same names or addresses from the letters you print	Choose Browse - Find - Find Assistant, in Browse. In the Find Assistant, select "Find distinct or unique records."
Add graphics or drawings to the background of the form letter	Choose Edit - Picture - Import, in Design.
Modify the colors or fonts used in the form letter	Select the text you want to change in Design, and then choose Object - Object Properties. In the InfoBox, click the Text Format tab, and change the text properties. 

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Form letters, creating

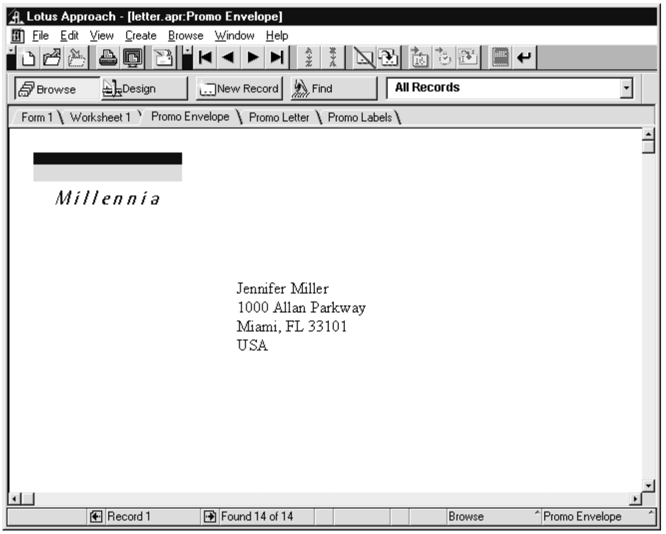
   Distinct records, finding

   Importing, graphics
3. Click the index entry you want, then click Display.

Envelopes

An envelope displays a combination of field data and text you type into the return address. Approach displays a copy of the envelope for each record in the found set, using the name and address information from the records.

You can also select layout, style, and print properties for the envelope.



Approach automatically adjusts the spacing around fields to create a smooth flow between typed text and field data. You see the adjusted spacing when you go to Browse, Print Preview, and Design (if View - Show Data is on).

When to use envelopes

Use envelopes to print directly on an envelope with or without a return address.

Create and modify envelopes

To	*Choose*
Create a new envelope	Create - Envelope
Create an envelope matching a form letter	Create - Form Letter. In the Form Letter assistant, select “Create envelopes to match the inside address” in Step 6
Add field data to an envelope	Text - Insert - Field Value, in Design
Select properties in the InfoBox	Envelope - Envelope Properties, in Design

What you can do with envelopes

Consider these tips for enhancing your envelope. For more information, press **F1** to open Help.

To	*Choose*
Exclude extra records with the same names or addresses from the letters you print	Choose Browse - Find - Find Assistant, in Browse. In the Find Assistant, select "Find distinct or unique records."
Add graphics or drawings to the background of the envelope	Choose Edit - Picture - Import, in Design.
Modify the colors or fonts used in the envelope	Select the text you want to change in Design, and then choose Object - Object Properties. In the InfoBox, click the Text Format tab, and change the text properties. 
Print an envelope for each form letter	Select the envelope view tab, and then File - Print. Do this with the same found set you used to print the form letter.

For more information

1. Choose Help **-** Help Topics and click the Index tab.
2. Type one of these phrases:

   Envelopes, creating

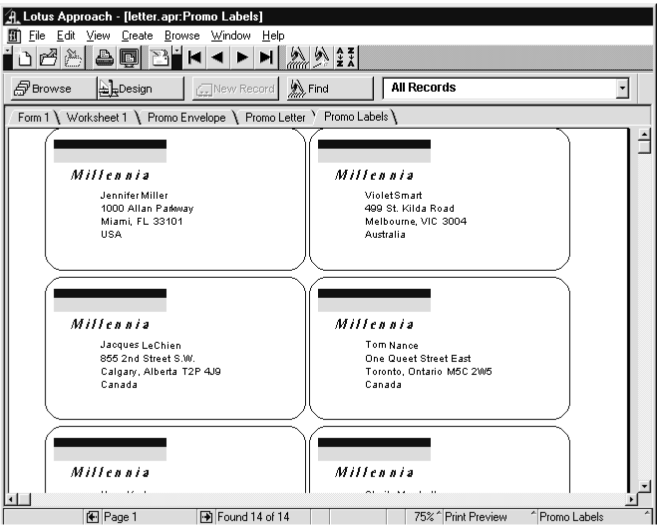
   Distinct records, finding

   Importing, graphics
3. Click the index entry you want, then click Display.

Mailing labels

A mailing label view displays field data and text in a mailing address format. The field data for each mailing address comes from one record.

Many mailing labels fit on a page. The number of mailing labels you see on a page depends on the label size and page layout you select when you create the labels. Choose from more than 50 standard Avery® label formats, or create other formats of your own.



Approach automatically adjusts the spacing around fields to create a smooth flow between typed text and field data. You see the adjusted spacing when you go to Browse, Print Preview, and Design (if View - Show Data is on).

You can add graphics or change fonts and colors to create special labels.

When to use mailing labels

Use mailing labels to create address labels and other labels such as file folder labels, product SKU labels, or disk labels.

Create and modify mailing labels

To	*Choose*
Create a new mailing label	Create - Mailing Label
Add field data to a mailing label	Text - Insert - Field Value, in Design
Select properties in the InfoBox	Mailing Label - Mailing Label Properties, in Design

What you can do with mailing labels

Consider these tips for enhancing your mailing labels. For more information, press **F1** to open Help.

To	*Do this*
Exclude extra records with the same names or addresses from the letters you print	Choose Browse - Find - Find Assistant, in Browse. In the Find Assistant, select “Find distinct or unique records.”
Add graphics or drawings to the background of the mailing label	Choose Edit - Picture - Import, in Design.
Modify the colors or fonts used in the mailing label	Select the text you want to change in Design, and then choose Object - Object Properties. In the InfoBox, click the Text Format tab, and change the text properties. 

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

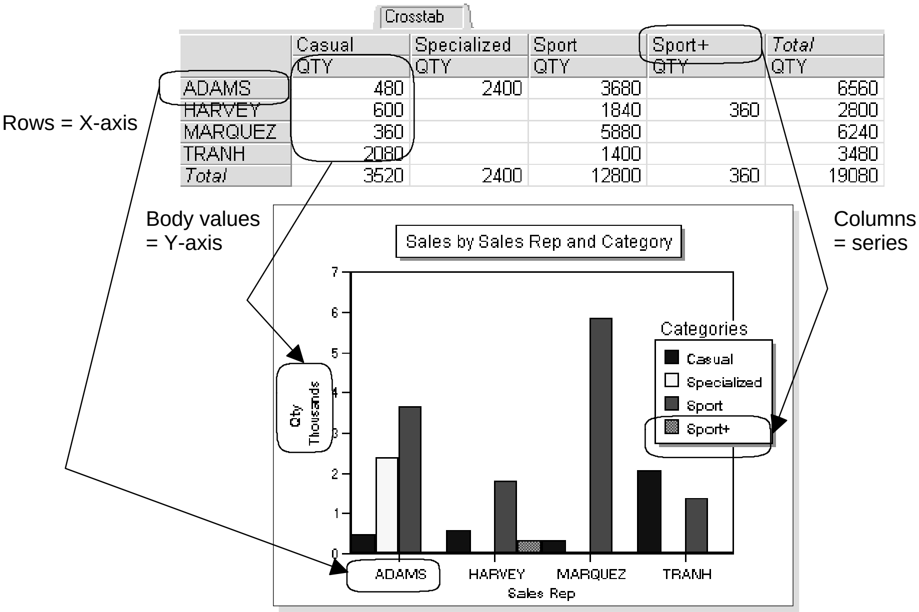
   Mailing labels, creating

   Importing, graphics
3. Click the index entry you want, then click Display.

Charts

Charts represent data graphically. A chart can reveal the significance of data and often make complex data easier to understand, or make trends and relationships easier to identify.

In Approach, charts are closely related to crosstabs. The x-axis in a chart shows values like the rows in a crosstab. The y-axis shows values like the body values in a crosstab. Finally, the series values in a chart are like the columns in a crosstab.



	Casual	Specialized	Sport	Sport+	*Total*
	QTY	QTY	QTY	QTY	QTY
ADAMS	480	2400	3680		6560
HARVEY	600		1840	360	2800
MARQUEZ	360		5880		6240
TRANH	2080		1400		3480
Total	3520	2400	12800	360	19080

Charts are dynamic in Approach: if you change the data that the chart is based on, whether by modifying field data or by creating a found set, the chart updates automatically.

You can create charts in two or three dimensions and in color. After you create a chart, you can easily change the chart type using the InfoBox, enhance it by working with its components, or add text and graphics to it.

When to use charts

Create charts to show relationships between data. Choose which kind of chart to use based on the type of relationship you want to show:

- For items that change over time, create bar, line, stacked bar or area charts.
- For items at a specific point in time, create horizontal bar or horizontal stacked bar charts.
- For parts of the whole, create 100% pie, horizontal stacked bar, or 100% area charts.
- To show a series as it relates to the whole, use stacked bar charts.

- To show frequency distributions, create bar charts.
- To show relationships between variables, create bar or scatter (XY) charts.
- To show ranges of data, create bar charts.

Create and modify charts

To	*Choose*
Create a new chart	Create - Chart
Create a chart using the same values as a crosstab	Choose Crosstab - Chart this Crosstab, in the crosstab view
Create the same chart with a new source of data	Chart - Chart Data Source
Select properties in the InfoBox	Chart - Chart Properties

What you can do with charts

Consider these tips for getting more from your chart view. For more information, press **F1** to open Help.

To	*Do this*
Show the records that contribute to the values summarized by the chart	Select an element of the chart, and then choose Chart - Drill Down to Data.
Create 3D charts	Choose Create - Chart, and select 3D Charts in the Style box in the Chart Assistant.
Show the records that contribute to values summarized by the crosstab	Select a column, row, or cell of the crosstab, and then choose Crosstab - Drill Down to Data.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Charts, creating

   Drill down, in charts

   3D charts, creating
3. Click the index entry you want, then click Display.

Chapter 33
Entering Data

After you create a database and define fields for it, you're ready to enter information for the specific records.

This chapter describes how to add and duplicate records, move to other records and fields, enter data in different types of fields, check the spelling in a database, find and replace specific text in records, and hide and delete records.

When you enter or modify data in a database, you don't have to save your work; Approach saves the data in the database file the moment you enter a record.

Browse environment

In Browse, you work with the information in a database rather than with the design of views. You can enter and edit data, add and delete entire records, find and sort records, and see your data in different ways.

As soon as you finish defining fields for a new database, Approach automatically takes you to a standard single-record form in Browse so that you can begin entering data.

You can also switch to Browse from another environment at any time. To go to Browse, do one of the following:

- Click the Browse button in the action bar.
- Click the Environment button in the status bar and select Browse.
- Choose View - Browse & Data Entry.

Browse SmartIcons

Approach provides sets of SmartIcons for moving between records, finding, sorting, filling fields, and checking spelling.

- To work with an icon, click it.
- To find out what an icon does, rest the mouse pointer on the icon. A short description of what the icon does appears.

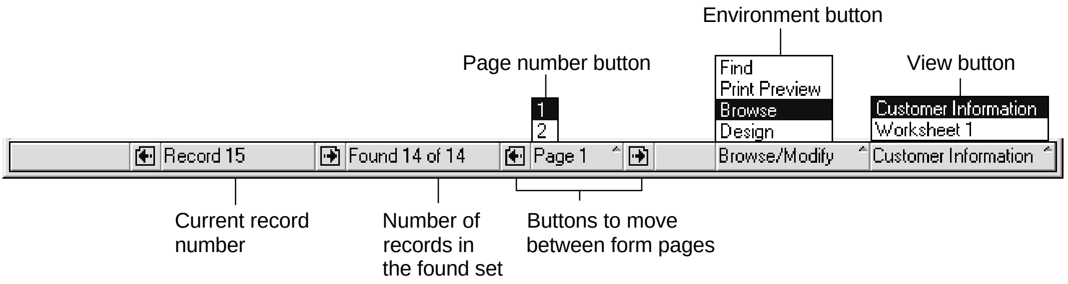
- Click the button in the top left corner of a set of SmartIcons to select icon bar commands, such as “Hide this bar of SmartIcons,” and to select related icon bars for display.

For more information about displaying different sets of SmartIcons, see Chapter 4.

Menu bar and status bar in Browse

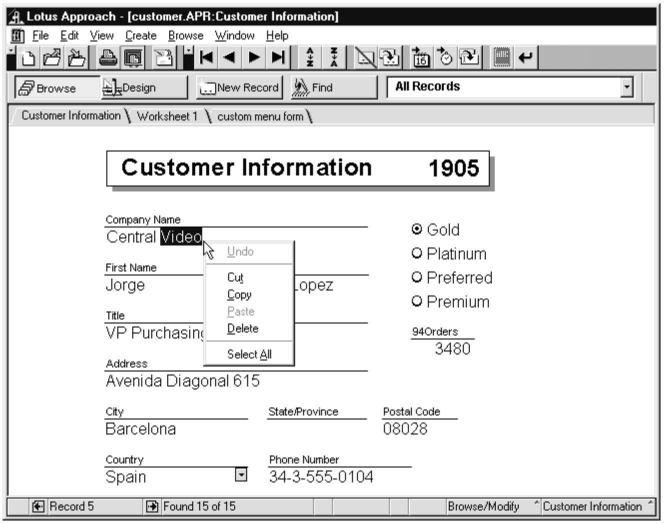
In Browse, the menu bar includes a **context menu** that changes depending on the current view or the current selection. If you have no current selection, this menu is called Browse, Worksheet, or Crosstab and provides commands for working with the current records. If you select a PicturePlus field, the menu changes to PicturePlus and includes a command for opening the InfoBox for the PicturePlus field, in addition to other Browse commands.

In Browse, the status bar gives information about the current view and the current set of records. Most parts of the status bar are buttons you can click to change the selection or work area.



Shortcut menus

When you're in Browse, you can open a shortcut menu listing text-editing commands. These commands are a subset of the ones in the Edit menu.



To choose a command from the shortcut menu, click a field box with the right mouse button. When the menu opens, click the command you want.

The shortcut menu closes after you choose a command. To close the menu without selecting a command, click anywhere outside the menu.

InfoBox

There are only a few places where the InfoBox contains options for objects in Browse. Worksheet, Crosstab, and PicturePlus context menus give you access to the InfoBox.

Choosing a view for data entry

Approach is flexible in how it lets you work with data. You can enter and edit data in a variety of views — forms, reports, worksheets, form letters, envelopes, and mailing labels. The type of view you use depends on how many records you want to see at a time and how you want their fields to be organized.

Forms are often the best type of view for entering data. A form shows one record at a time, so you can see many fields for each record. Design forms with data entry in mind, using a graphical, easy-to-understand format.

On other occasions, you may want to see more than one record at a time, perhaps to enter data quickly or with fewer details for each record. In these cases, you can use a columnar or standard report or a worksheet for entering data. Reports and worksheets can show many records on a single page. Design the report or worksheet to show the fields you want. Collapse worksheet columns or rearrange them to make entering data more convenient.

Filling in a record

Go to Browse to enter and edit data in the fields of a record.

You do not need to save data yourself. Approach saves the data you enter or edit as soon as you

- Move to another record
- Change to another view

- Click the Enter icon
- Press **ENTER**

Approach may enter data automatically in a field because of how the field was defined. For example, a date or serial number is often entered this way. You can edit data that was entered automatically (unless the field is read-only or the Approach file has a password).

In a form, report, worksheet, or other view with specified field boundaries, you see only as much data as fits in a field’s boundaries, even though the field may contain more data than is visible. Use the mouse pointer or → and ← keys to see the entire entry.

Selecting in Browse

Select a field to begin to enter or edit data in it. In a report or mailing label, a border appears to indicate the current record. Select a field in one of these ways:

- Click a field.

  Clicking places the insertion point in the field. Data you enter is added to the data already there.

- Press **TAB** to go to the next field in the tab order.

  Tabbing selects the entire contents of a field. Data you enter replaces everything that’s already there.

Entering text

In most respects, you can enter and edit data in field boxes as you do in a word processing application. You can type letters, numbers, symbols, spaces, punctuation. Approach alerts you if you try to type more characters in a field than the field allows.

You can change the length of a field in the Field Definition dialog box. Choose Create - Field Definition.

Entering numbers, dates, times, and Boolean values

When you define fields to hold specific types of data, such as numbers, dates, or times, Approach alerts you if you try to enter other values in those fields.

Indicate to your users what the appropriate values are by creating descriptive field labels, adding instructions in the view, or by displaying a format for the field value.

Numbers

Enter only numbers in a numeric field. Approach helps you ensure that only numbers are saved in a numeric field by automatically removing text or non-numeric characters (such as , and ") in a numeric field.

Dates

You can type up to eight characters in a date field to represent one date.

If a field has a date format and “Show data entry format” is on, slashes appear in the field as separators and underlines show the maximum number of characters. Enter a date in the order set in your operating system settings (for example, month first, then day, then year), even though the date may be formatted to display in a different order. For example, if your operating system settings specify dates as month first, then day, then year (12/19/95), enter dates in that order. You can then display the date in a different order (19 December 95) using the format tab in the InfoBox.

Tip You can press **SPACEBAR** to enter the current day, month, or year.

Times

You can type up to eight characters in a time field to represent one time.

If a field has a time format and “Show data entry format” is on, colons appear in the field as separators and underlines show the maximum number of characters. You can press **SPACEBAR** to enter the current hour, minute, or second and move past the next colon.

Your system may require a different time separator than the colon for entering times. Use whatever separator is specified in your operating system settings.

Boolean values

A Boolean field holds a value of yes or no. If you refer to a Boolean field in a formula, Approach uses 1 for a yes value and 0 for a no value to calculate the result.

To enter a value in a Boolean field, type Yes, Y, yes, y, or 1 for yes. Type No, N, no, n, or 0 for no.

When you move out of the field, the value appears in the field as Yes or No.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Dates, fields

   Time, fields

   Numeric fields, entering values in

   Boolean fields, entering values in

3. Click the index entry you want, then click Display.

Duplicating values from the previous record

Duplicate a record when it contains much of the same data you want to appear in other records. Then just change data in fields that differ.

Choose Insert - Previous Value from the context menu to enter the value from the same field in the last record you modified in your current session with Approach. This is especially helpful when you are entering business card information, for example. If you have many individuals from the same company, just press **CTRL+SHIFT+P** (the keyboard shortcut for Previous Value) in a common field to have Approach automatically duplicate the value you entered in the previous record.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Values, duplicating

3. Click the index entry you want, then click Display.

Filling a field in all records

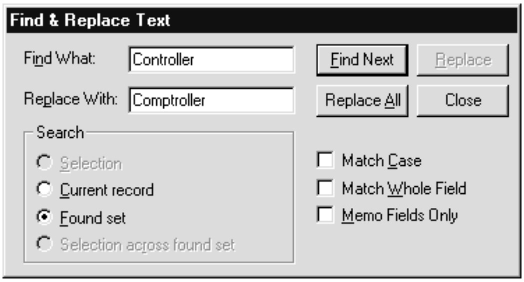
You can enter a value in all of the fields in a found set or in a database using the Fill Field command from the context menu. This command lets you specify a value or a formula to calculate a value to enter in a given field in all records in the current found set.

Use this command to update a set of records with new information. For example, if you record when you send catalogs to customers, you can find the customers who received the catalog in the most recent mailing, and fill the Catalog Sent field to the date of the mailing.

Find and replace text

To search for specific occurrences of text in your data, choose Edit - Find & Replace Text. Use this command to enter global changes in your data, or to correct text errors.

For example, to change the name of one of your sales representatives, use Find & Replace Text to change references to the name wherever the name appears in the data, such as memo fields containing telephone contact logs.



Selecting values from lists, check boxes, and radio buttons

In a form or report, a field can have a list of values, a set of radio buttons, or a check box. On a worksheet, a field can have a list of values. You enter a value into the field by choosing from the list or by turning on a radio button or check box.

Set up these data-entry controls in Design from the InfoBox for the field.

Selecting from a list

A field box and list, a drop-down box, or a list box show the possible values for a field. When the list is combined with a field box, you can either select from the list or type a value. To select from a list, do one of the following:

- Click the value you want.
- Begin typing the value.
- Press the ↑ or ↓ key until the value is selected.

Then press **TAB** or **ENTER**.

Selecting radio buttons or check boxes

To select a radio button or check box, click it. You can also tab to the radio button or the check box and then press **SPACEBAR**.

Note After you have selected a radio button, you may deselect it by selecting another button in the set, or by changing the field value from another field box or view.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Selecting, from drop-down boxes

   Selecting, radio buttons

   Selecting, check boxes
3. Click the index entry you want, then click Display.

Adding pictures or drawings

A graphic added to a PicturePlus field appears only in the PicturePlus field in the current record. It is part of the record's data, not part of the design of a view.

Note Be sure to work in Browse when you want to make a graphic part of a record. If you are in Design, you add the picture to a view rather than to a field in a record.

When a pasted picture is too large for a field, the picture may be either cropped or reduced, according to the option you set for the field in the InfoBox.

The following types of graphic files can be pasted in a record:

Extension	*File type*
.BMP	Windows bitmap
.EPS	Encapsulated PostScript
.GIF	Graphics interchange
.JPG	JPEG (Joint Photographic Experts Group)
.PCX	Windows Paintbrush
.TGA	Targa
.TIF	TIFF (Tagged Image File Format)
.WMF	Windows metafile

You can also paste a picture that you copy to the Clipboard from its source application.

If you define a PicturePlus field to allow drawing, you can draw freehand lines in it. These lines appear on top of any picture that you have pasted in the field. Use the mouse pointer to make annotations to the picture, or to highlight parts of it.

Selecting pen colors and line widths

When you select a PicturePlus field, the Browse menu changes to the PicturePlus menu. If you want to change the pen color or line width for your freehand lines, choose PicturePlus Properties from the PicturePlus menu, and then select the color or width in the InfoBox. The color or width is applied to any lines you draw until you choose a different color or width.

For more information

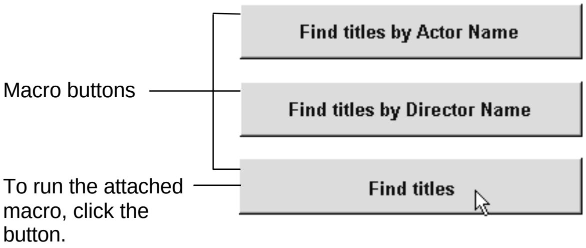
1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Pictures, as part of a record

   Pictures, as part of the view background
3. Click the index entry you want, then click Display.

Pressing buttons to activate macros or scripts

You can add buttons to a view in Design that trigger macros or scripts when they are selected in Browse. To select a button, click the button, or if the button is in the view's tab order, tab to the button and press **SPACEBAR**.



Working with records

When entering and editing data, you work with one record at a time, the **current** record.

- In a form, form letter, or envelope, the current record is the one showing.
- In a report or mailing label, the current record is the one with a solid border.
- In a worksheet, the current record is the row with the pointer on the left edge of the worksheet.

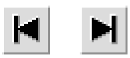
When you move between views, the same field and record is selected in each view.

Moving between records

Use SmartIcons, keys, or status bar buttons to move between records:

- Move one record forward or back, same as **PAGE UP** and **PAGE DOWN**

- Move to the first or last record, same as **CTRL+HOME** and **CTRL+END**



Each record has a number in the current order of records in an Approach file. The numbering always starts at one and continues unbroken to the total number of records in the found set or in the whole database.

To go to a specific record, in Browse, click the record number in the status bar and enter the record number in the Go to Record dialog box.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Records, moving between

3. Click the index entry you want, then click Display.

Multipage forms

A form shows one record at a time. However, a form can use more than one page to show all the fields associated with a record. When your form contains more than one page, make sure that you are on the correct page of the form and in the correct record.

Move between pages of a form using the page buttons in the status bar.

Click this button to choose a page from a list.

Click one of these buttons to move to the previous or next page of the form.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Pages, in forms

3. Click the index entry you want, then click Display.

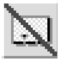
Hiding and showing records

You can hide records from view to make them unavailable. This does not delete the records from the database, but just temporarily hides them from the group of records you're browsing.

A hidden record is not included in sorts or calculations. It cannot be printed or deleted while it is hidden.

- Choose Hide Record from the Browse, PicturePlus, or Worksheet menu to hide the current record or records.
- Show hidden records by choosing Find - Find All from the context menu, or by choosing a find from the named find box in the action bar.

Deleting records



You can delete individual records or a set of records from a database. The records are permanently removed from the database, not just from the Approach file you're browsing.

Deleted records cannot be retrieved.

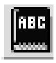
If you want to delete records that all match the same condition, fill out a find request that specifies the find condition. To delete all records in a database, find all the records using an asterisk (*) in a field as the find condition. Then choose Delete Found Set from the context menu. Use this feature carefully, as it cannot be undone.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Records, deleting
3. Click the index entry you want, then click Display.

Checking spelling



Approach can check the spelling of text in your databases and Approach files. The text it checks depends on which environment you're in:

- In Browse, Approach checks the spelling of data in records, including text in memo fields.
- In Design, Approach checks the spelling of text in field labels and text objects, including text in the body of form letters.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Spelling, checking
3. Click the index entry you want, then click Display.

Importing data

You can create or update records in a database with existing data by importing the data from another file. For more information, see Chapter 36.

Chapter 34
Finding and Sorting Data

Finding data and sorting data help you present information in meaningful ways:

- Finding isolates and displays a set of records that match conditions that you specify.

  The result of a find, called the found set, is an equal or smaller number of records than the total number of records you were working with. The found set contains only records that fulfill the conditions you set during the find.

- Sorting reorganizes a set of records in an order you specify.

  After you do a sort, you are working with the same number of records as before the sort. The same number of records have been shuffled into a new order. These records can be an entire database or a found set of records.

Example 1: Using part of your data

Suppose your small company has international customers. Your Customer database, in which you keep the addresses of your customers, contains a field called Country. You have a hundred customers.

There is a delay in a shipment of goods to all your customers in Austria. The shipments to other countries are on schedule.

You know you have 15 customers in Austria. You decide to create a form letter to inform them of the delay. Before you create the form letter, which task do you do?

- **Sort?** Your sort would reorganize the whole Customer database by Country. The 15 records with Austria in the Country field would be grouped together; the 20 records with Japan in that field would be grouped together; and so on.

  If you sort by Country, create the form letter, and then print the form letter — one for each customer — how many form letters will you print?

- **Find?** Your find condition would tell Approach to search the Customer database and display only the records that have Austria in the Country field. These records would make up the found set.

  If you do the find, create the form letter, and print it — one for each customer in the found set — how many form letters will you print?

Clearly, you want to begin by doing a find in this case because you want to create only 15 letters, for your 15 customers in Austria. By doing a find, you save yourself 85 sheets of your company’s expensive letterhead stationery.

Example 2: Adding order to your results

You are preparing to send out a catalog to all your customers. You want to create a mailing label for each customer. Before you create the mailing labels, which task do you do?

- **Sort?** Your sort would reorganize the whole Customer database by Country: The 15 Austrian records would be grouped together; the 12 French records; the 20 Japanese records; the 20 United States records; and so on, reorganizing all 100 records.
- **Find?** You would have to specify a find condition for each country. Each find would create a different found set: One for Austria, one for France, one for Japan, one for the United States, and so on.
- **Do nothing?** The order of your mailing labels would be the same as the order of the records in the database. This generally is the order in which you entered the records into the database.

In this case, a find is probably not the best preparation for creating mailing labels, because you want all of the customers in the database.

Doing nothing always sounds easy, but it may mean extra work later. The order of records in a database is for all intents and purposes arbitrary. Wouldn’t it be easier to address, choose postage for, and mail the catalogs if all the labels for each country were printed together?

You decide that sorting the Customer database is the best way to prepare for creating the mailing labels.

Preparing for finding records

One of the important things a database can do for you is make your information easy to reach. It does this by quickly retrieving specific records that answer questions you ask about the data.

Two qualities make this process of asking questions and retrieving answers work smoothly:

- The database uses a good relational design.
- Your questions are clear and specific.

To create a good relational database application, use the suggestions from Chapter 31.

Approach has two tools that help you ask clear and specific questions: the Find Assistant and the find request.

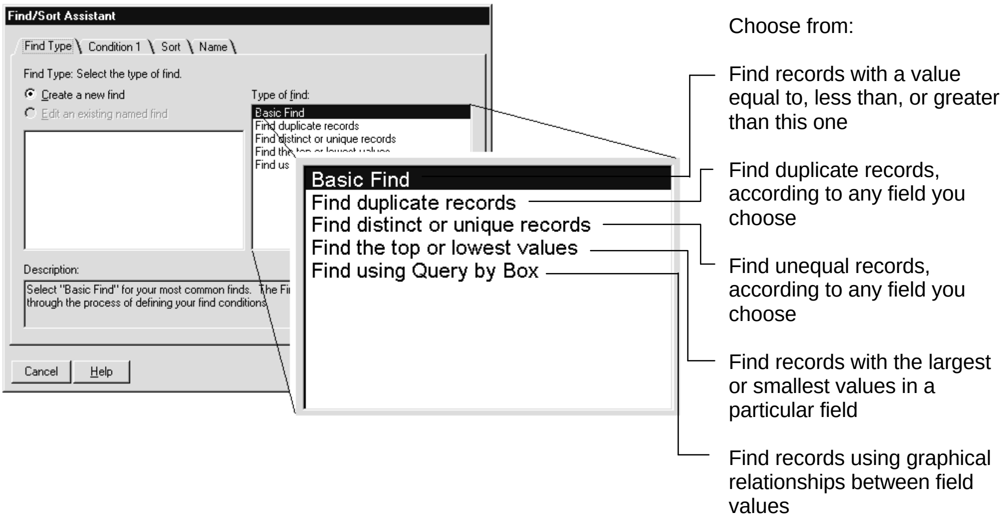
- The Find Assistant lets you adapt predefined questions to your data.
- The find request employs your views to help you build specific database questions.

Both tools help you turn your questions into a find condition that Approach can understand.

Find Assistant

The Find Assistant guides you through the process of finding a set of records that answer your database questions. Choose Find - Find Assistant from the context menu in Browse to open the Find Assistant.

With the Find Assistant, you select a type of find:



and then specify a **find condition**. Find conditions express your questions so that Approach can understand which records you want to find. The condition tab changes depending on the type of find you select.

The assistant then takes you through steps to

- Sort the results of the find.
- Give the find conditions a name so you can repeat the find without recreating the find conditions.

Other tabs become available as you need them to define your find question. These tabs include controls for creating a find by building a graphical representation of the find conditions, called Query by Box.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Assistants, Find

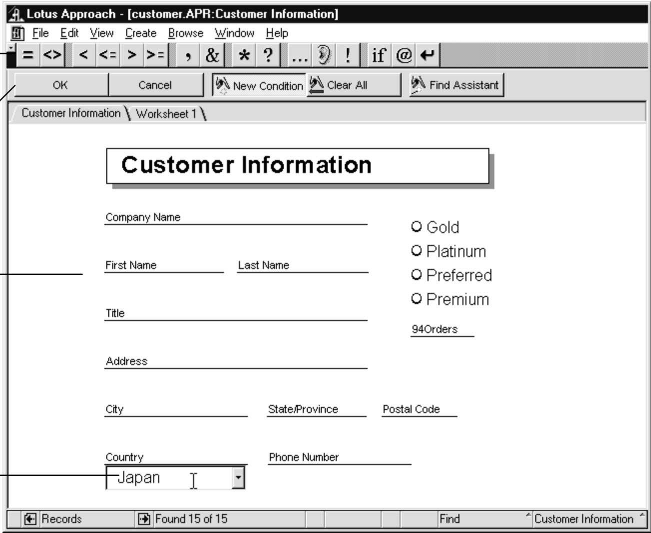
   Finds, Find Assistant
3. Click the index entry you want, then click Display.

Find request

Another tool to translate your questions into find conditions is a find request. To create a find request, select the view you want to work with and then click Find in the action bar.

A find request is a blank copy of the current view. You enter find conditions in the fields of the blank view, just as you would enter data in a regular form or report. If the view contains check boxes, lists, or other data-entry controls, you can use these controls in the find request as well.

Use a find request to perform a simple find very quickly. For example, to find the records for your customers in Japan, create a find request in a customer form and choose Japan in the Country field.



The Find Assistant helps you through creating complex finds, but as you learn more of the operators Approach uses to build a find, the find request can be a shortcut to producing all types of finds.

After you find records using a find request, you can name the find by entering a name in the named find box in the action bar. For more information, see “Naming a find to use again” later in this chapter.

Creating find conditions in a find request

Wildcards are one of several ways to indicate find conditions besides entering field values. The wildcards are symbols you can enter in the find request by typing or clicking SmartIcons.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Find conditions

3. Click the index entry you want, then click Display.

Finding records that satisfy multiple conditions (AND)

When you enter a condition in more than one field in a find request, Approach finds the records that match all the conditions. This is known as an AND find. For example, if you enter Paris in the city field and France in the country field, the find condition finds all records where both conditions are true.

Finding records that satisfy at least one of several conditions (OR)

You can specify several conditions and have Approach find the records that match at least one of the conditions. This is known as an OR find.

If the OR find involves data in only one field, you can separate the conditions with a comma (,) in that field of the find request. For example, the find text France,Spain finds records that contain either France or Spain in the field. Potentially this find condition returns more records than the AND find with the same condition text.

To find records with OR conditions in more than one field, create a separate page of the find request for each condition by clicking New Condition in the action bar and entering the next condition in the new page of the request.

Move between pages of the find request using the same icons or buttons that you would normally use to move between records.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   AND conditions

   OR conditions

3. Click the index entry you want, then click Display.

Finding text

In a text field, Approach can find text that matches a string of characters, a word, or a phrase. To find text, type the characters in a text or memo field. Be careful not to type any extra spaces in the field.

You can also qualify the text with wildcards:

- Asterisk (*)

  The asterisk matches any number of characters in the field, including no characters.

This condition	*Finds records that contain*
past	The text past anywhere in the field. This is the best way to find text in a memo field, because it finds text beyond the first word in the field.
san*	San Francisco and Santa Rosa.
r	Red and Green, but not Blue. Blue has no r.
*o	solo and trio but not dot. dot does not end in o.
g*s	grants and goods, but not green. green starts with g but does not end in s.

- Question mark (?)

  The question mark matches any single character.

This condition	*Finds records that contain*
to?	toy and Tom but not today. today has more than one letter after to.
?an	ran and pan but not plan. plan has more than one letter before an.
to??y	today and Tommy but not toy and Tom. toy and Tom start with to but they don't have two letters and a y.
?o?	Tom and son but not today and Troy. today has more than one letter after the o, and Troy has more than one letter before the o.

- Equals sign (=)

  Precede the text with an equals sign to find exact matches.

This condition	*Finds records that contain*
June	June, June 14, 1995, and June Q2.
=June	June. The other records with June in the field contain other characters, so only the record with June alone is found.

- Ampersand (**&**)

  Include an ampersand (**&**) in a find condition to look for a string that contains two text values.

This condition	*Finds records that contain*
France&Spain	Both France and Spain anywhere in the single field

- Exclamation point (**!**)

  Precede the text with an exclamation point to limit a find to be case-sensitive.

This condition	*Finds records that contain*
Madrid	Text that begins with Madrid, madrid, and any other combination of uppercase and lowercase letters in the condition.
!Madrid	Text that begins with Madrid, with an uppercase M and lowercase adrid.

Note You cannot use the equal sign and the exclamation point together.

- Tilde (**~**)

  Precede the condition with a tilde to find a word that sounds like another.

This condition	*Finds records that contain*
~Philip	Philip, Filip, Philippe, and similar-sounding words

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Finds, operators for find requests

   Find conditions, wildcards
3. Click the index entry you want, then click Display.

Finding numbers, Boolean values, dates, and times

You can find a value in a numeric, Boolean, date, or time field or in a calculated field that returns a number, Boolean value, date, or time.

If you have a number, date, or time as a find condition, the match must be exact, so you don't need to precede the condition with an equal sign. But you may want to use the operator **< >**, **<**, **<=**, **>=**, or **>** with the condition. For example, >200 finds numbers that are greater than 200, and <>8:30 finds times that are not 8:30 AM.

- To find a number, enter the number in a numeric or calculated field.

  Do not enter other characters, such as currency symbols or commas, with the number.
- To find a Boolean value, type 0 or 1 in a Boolean or calculated field.
- To find a date, enter the date as numbers in a date or calculated field. Separate the numbers with non-numeric characters such as slashes (/).

  You can enter a single number to find a date for the current month and year.

  Enter one, two, three, or four digits for the year. One-digit and two-digit years are assumed to mean the twentieth century. If you don't type a year, Approach assumes the current year (based on your system settings) and enters it for you.
- To find a time, enter the time as numbers in a time or calculated field. Separate the numbers with colons.

  You can enter a single number to enter an hour only.

  You can use either a 12-hour or a 24-hour format. If you enter an hour less than 12 without a suffix of AM or PM, Approach assumes AM.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

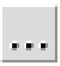
   Numbers, finding

   Dates, finding

   Time, finding
3. Click the index entry you want, then click Display.

Finding values in a range

Approach can look for values that fall within an inclusive range in a text, numeric, date, or time field, or in a calculated field that returns a number, date, or time.



To find values in a range, enter an ellipsis (...) between the beginning value and the ending value of the range. For example

- H...JZZZ in a text field finds all text strings that begin with H, I, or J.
- 7...9 in a numeric field finds the values 7, 8, and 9.
- 5/1/96...5/31/96 in a date field finds all dates in May 1996.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Ranges, finding values within

3. Click the index entry you want, then click Display.

Finding radio button and check box settings

You can look for all records that have a particular combination of radio button and check box settings.

To find radio button and check box settings, turn on the radio buttons and check boxes in the find request to specify the combination you want to find.

Note If you want to specify a No value for a check box, such as payment not received, click the check box to turn it on, and then click it again to turn it off. A check box is Null (that is, neither on nor off) until it is clicked at least one time.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Radio buttons, in find requests

   Check boxes, in find requests

3. Click the index entry you want, then click Display.

Finding blank or nonblank values

Approach can isolate records with blank values in a particular field. This can help you identify errors in data entry or find records that don't have complete information. A field is blank if it has a Null value or no value.

Approach can also find fields that are not blank.

To find blank values, enter an equal sign (=) by itself in a field. To find nonblank values, enter a not-equal sign (< >) by itself in a field.

Using an If statement to find data

An If statement is a concise and powerful tool for comparing data in two or more fields. You can use an If statement in a find request to build complex find conditions.

When you use an If statement in a find condition, Approach finds records for which the find condition returns Yes. You must write the If statement so that its result is Yes or No.

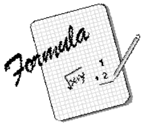
To use an If statement to find data, type an If statement in any unused field in a find request.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   If statements, in find requests

3. Click the index entry you want, then click Display.



Constructing a formula for finding records

Your formula may be a simple number or reference to a field, or may be built from symbols and Approach functions.

Compare values. For example, this statement finds records that have a higher value in the ActualCost field than in the Budget field:

```
If(ActualCost>Budget)
```

You can also combine expressions in an If statement with the AND and OR operators. For example,

```
If((Department='Finance')AND(City='San Francisco'))

If((Amount>200)OR(Date<'4/30/94'))

If((Today()-InvoiceDate<=90)AND(BalanceDue>0))
```

Find dates and date ranges. For example, these statements find records with yesterday's date, dates in this month, or dates already past in this year, respectively:

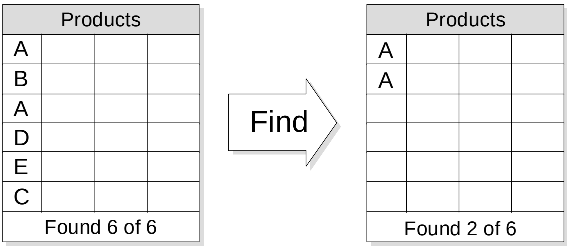
```
If ("Date field" = Today() - 1)

If ((Month("Date Field") = (Month(Today()))AND(Year("Date Field") = Year(Today()))

If (("Date Field" >= "01/01/1995")AND("Date Field" <= Today())
```

The Today() function produces the current date.

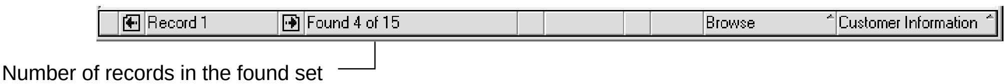
For more information, see Formulas, overview in Help.

Using the found set

The group of records that Approach selects to match your find conditions is a **found set**. Now that these records are isolated from the rest of the database, you can browse through them, modify their data, delete them one at a time or delete the whole set, print views presenting the found set, or export only these records to another application. In effect you have a temporary mini-database with all of the functions of the original database.



The status bar shows the number of records in the current found set and the number of records in the entire database.



The other database records haven't disappeared; they are simply hidden until you indicate that you want to work with them again.

Approach works with the current found set until you do another find or select All Records in the named find box in the action bar. Choosing All Records shows all the records in the database and returns the records to their original sort order.

Repeating a find

Approach keeps track of your most recent find so that you can easily repeat it, as long as you are still in a view based on the same database and you have not used the Find All command. Choose Find - Find Again on the Browse context menu.

Naming a find to use again

If you've created a find request that you would like to save for future use, save that find by giving it a name. Finds that you name are listed in the named find box in the action bar.

To save a find, do one of the following:

- Click the named find box on the action bar, replace the text with the new name of the find, and then press **ENTER**.

- Name the find when you create it in the Find Assistant.
- Choose Create - Named Find / Sort to name the current find, edit a find, or to create a new one.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

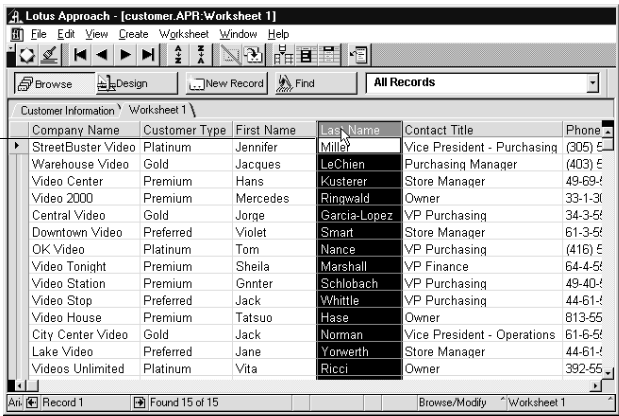
   Named finds

3. Click the index entry you want, then click Display.

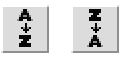
Sorting records

Approach displays records either in the order in which you add them to the database or according to an order that you specify in Approach Preferences. If neither of these is the order you want for viewing or for working with the records, sort records according to data in one or more fields.

Select the field to sort.



Click a sort icon.



Sorting only temporarily changes the order of records. You can re-sort records a different way or go back to the original order at any time. Approach also keeps track of the last sort you did so that you can perform the same sort again. Find All in the named find box on the action bar returns records to their original order.

Defining sorts

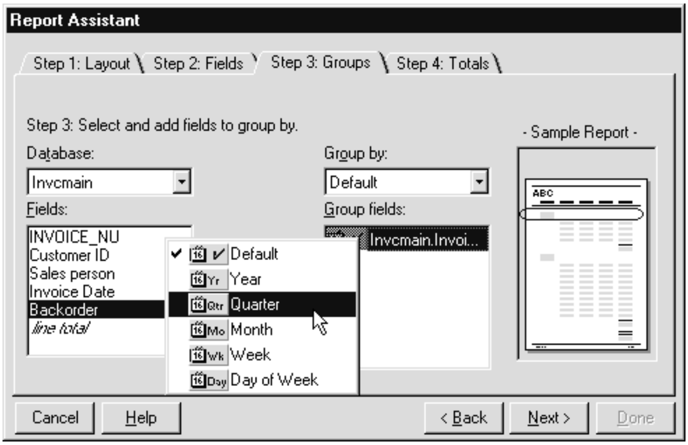
To specify more than one field to use for the sort choose Sort - Define on the context menu in Browse. The Sort dialog box allows you to choose multiple fields and whether to sort in ascending or descending order.

Setting sort defaults

You can specify a default sort order in the Order tab of the Approach Preferences dialog box. When you first open the Approach file, or choose Find All, the records are displayed in this default order.

Sorting and grouping in reports

In addition to sorting the records in the database in a specific order, the Report Assistant provides some powerful options to group the sorted records. For example, if you want to display sales by date on a report, the sort shows you the sales records chronologically. The Report Assistant allows you to then group the dates into months or quarters so you can display the records in meaningful ways.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Records, sorting

   Sort, named

   Reports, grouping records
3. Click the index entry you want, then click Display.

Chapter 35
Customizing and Automating Approach

As you work in Approach, you probably will notice that there are some tasks you do more than others, and some tasks take more planning and new input than others. Approach provides several tools to allow you to spend your time improving and using your data, and less time changing Approach.

One way to move towards this productivity goal is to decide how to set up Approach so that the tools you need are at hand when and where you need them. Do this by customizing Approach: set display preferences, customize menus and icon bars, and otherwise change Approach's behavior to suit the way you work.

Another way to improve your productivity is to automate the tasks you perform most often. For example, naming a find so it is always available is a quick way to focus your attention on the data, and spend less time searching for the data you want. Approach macros go a step further: a macro is a single command that completes a sequence of tasks.

When many people are using a database system or one person is doing the work of many, LotusScript provides another method for making every move count. LotusScript allows you to integrate Lotus applications with other Windows applications, paving the way for the right data to flow to the right tool.

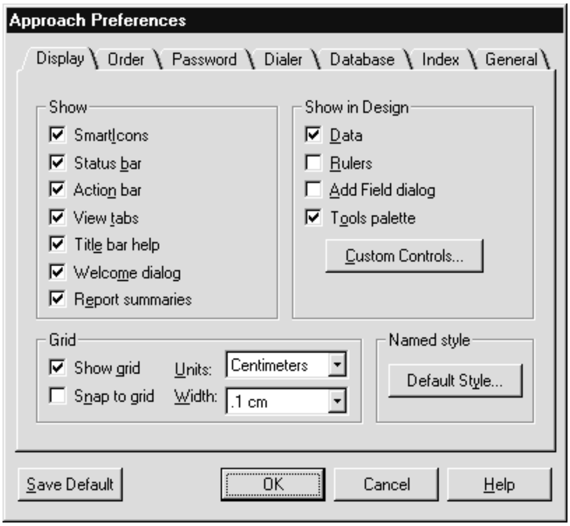
Customizing Approach

You can customize Approach at three levels:

- Set Approach preferences that affect the Approach file and its connection to your databases.
- Configure sets of SmartIcons.
- Create special menus for views that show commands for a specific database application.

Preferences

Choose File - User Setup - Approach Preferences to open a tabbed dialog box containing preference options. When you change these options, the changes take effect in your current Approach session immediately. If you want the new preference settings every time you open Approach, click Save Default.



Preference settings are broken up into the categories described here:

Tab	*Description*	*Go to this tab to control*
Display	Control window components	Elements of Approach that are visible, such as SmartIcons, action bar, view tabs; tools in Design that are visible, such as the Tools palette; grid size and snap; default named style definition available through view assistants.
Order	Database record sort order	The fields used to determine the default record order for each database. Select All Records in the named find box in the action bar to return the current database to the order you specify here.
Password	Database passwords	Passwords for accessing your dBASE or FoxPro database files. Gives you access to TeamSecurity options where you set Approach file passwords and define password privileges for individual users or groups.

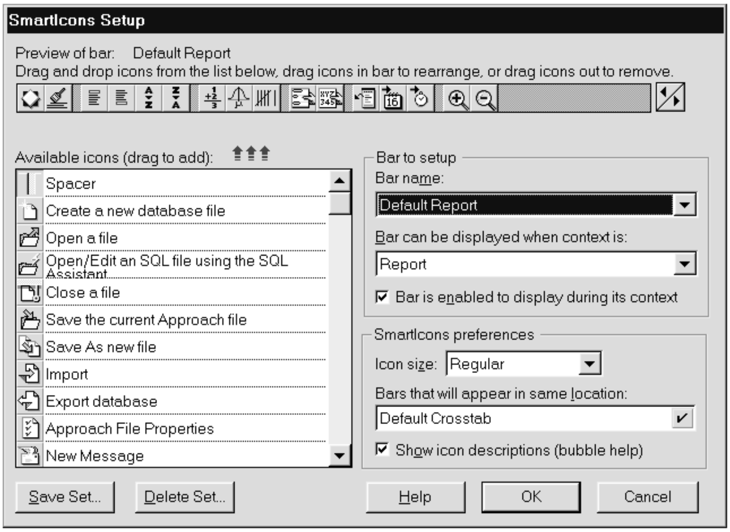
Continued

Tab	*Description*	*Go to this tab to control*
Dialer	Modem connection and dialing requirements	The baud rate, modem port, and dialing prefixes, suffixes, and codes.
Database	Database-specific controls	Database compression, read or write status, character set preference.
Index	Database-specific index controls	Index options for each database, based on the database type.
General	Approach behavior	Calculated fields for joins, behavior of Add Field and Cancel Macro dialog boxes, keys used for field navigation and field value selection, and network operation preferences.

SmartIcons

Choose File - User Setup - SmartIcons Setup to open a dialog box for configuring your sets of SmartIcons. When you make changes to these options, the changes appear immediately in your current Approach session.

Use the SmartIcon Setup dialog box to choose which SmartIcons to group together in a set and then choose when that set is available.



For more information about SmartIcons and their context-specific nature, see Chapter 4.

Custom menus

Approach allows you to define the commands that appear on specific menus. The menus are associated with a particular view. Use custom menus when you want to emphasize specific commands that are appropriate for the tasks that your database application performs.

For example, if you have a data-entry form for entering customers' information, you might want to remove all of the Approach menus that contain commands for designing new views or for changing to Design. Replace these commands with macros that you write to offer specific instructions. A new menu might read "How to Enter Customer Data" in which the commands Addresses, Customer Type, and so on, open message boxes with instructions for entering customer information.

To create custom menus, first create the view to which you'll attach the custom menu. Then in Design, choose Create - Custom Menu. After you create the menu, attach the menu to the view on the Basics tab of the InfoBox for that view. The custom menu is available when you go to the view in Browse.

The Custom menu dialog box lists a predefined short menu that you can use when you want other users to be able to enter data in the view, but not change its design. The **short menus** are a subset of the default menus; they do not include commands for modifying the file. For example, the short menus do not have the Create - Form command.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Preferences, setting

   SmartIcons, creating new sets

   Menus, creating
3. Click the index entry you want, then click Display.

Automating Approach

Approach provides tools for automating tasks — from small tasks like finding records, to larger tasks like generating end-of-the-quarter financial reports.

Named finds and sorts

When you find a category of records that you often use, you can save the find conditions. (Give the find a name that distinguishes these conditions from other conditions of records you might use for a find.)

Name a find when you create it in the Find Assistant. You can also name the find last performed by selecting the named find box in the action bar and entering a name for it. Make sure to press **ENTER** after you enter the new name.

For more information about creating a find, see Chapter 34.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Named finds, editing

   Named sorts
3. Click the index entry you want, then click Display.

Macros

A macro is a single command that executes a series of instructions. You can name the macro, define the series of commands, and assign it a location from which it can be run.

Macros can simplify your work by automating repetitive tasks. You can also link macros to each other to automate a sophisticated series of tasks. Macros can

- Automate procedures you often use.
- Perform complex tasks and programming procedures, such as loops and if-then-else statements.
- Guide users who are unfamiliar with Approach through tasks and applications that you create and control.

What's the first step in creating a macro?

Thoroughly understand the task you want to accomplish with the macro. If it's a complex task, write down all the steps you would take in order to complete the task, for example:

- Open an Approach file.
- Switch to Design.
- Create a chart.

Once you understand what's involved in doing the task, you're ready to create the macro.

The easiest way to create the macro is to record the operations as you do them. Use Edit - Record Transcript. When you finish recording the operations, the macro is completed.

For more information about creating macros, see "Recording macros and scripts" later in this chapter.

Combining macros with LotusScript

Using LotusScript, you can run macros in Approach that perform sophisticated tasks, potentially incorporating functionality from other Lotus applications. You may want to include a LotusScript program in a macro, or conversely, incorporate a macro into a script.

Running macros

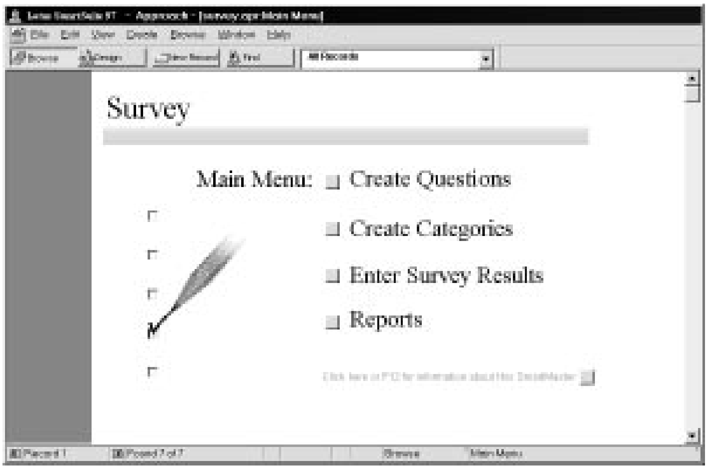
Run a macro manually, or trigger the macro when something happens in the Approach window.

Choose Edit - Run Macro to run a macro that you have already created.

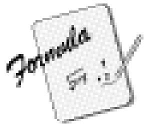
To trigger a macro from an event in Approach, attach the macro to an object in a view or a menu. You can attach a macro to a view, a button, a field, or any object. Select what action starts the macro in the Macro tab of the InfoBox for that object.

For example, to click a button to change from one view to another, create the macro using the View macro command, create the button, attach the macro to the button with the option "On clicked." When you go to Browse and click the button, Approach runs the macro, switching the view. Use this method to help a database application user know which view is used for which database task.

Use macro buttons to guide a user to appropriate views.



You can use a macro to perform a simple task, such as switching from a form to a report, or multiple tasks, such as finding all unpaid invoices, sorting them by date in ascending order, switching to a past-due notice form letter, and printing individual past-due notices.



Control when to run a macro using a formula

Your formula may be a simple number or field reference, or may be built from symbols and Approach functions.

Run a macro under a condition. You can use the Run macro command to perform a conditional macro.
For example, you have a macro that prints domestic mailing labels for the found set of customer records. This macro has a formula in a Run command to decide whether the customer record has a domestic address or not:

```
If (Country = 'USA')
```

If true, the macro calls another macro to change views and print the labels. If false, the macro continues, perhaps hiding this record, and then moving to check the next record.

Simplify common tasks. In another example, you have a macro attached to a button that reads “Print Overdue Notices.” This macro has a Run command to calculate which invoices have not been paid in time:

```
If ("Invoice Date"<(Today()-30)AND(Paid<>'Yes')
```

If true, the macro calls another macro to print a Late Payment form letter. If false, the macro continues, checking the next record.

For more information, see Formulas, overview in Help.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

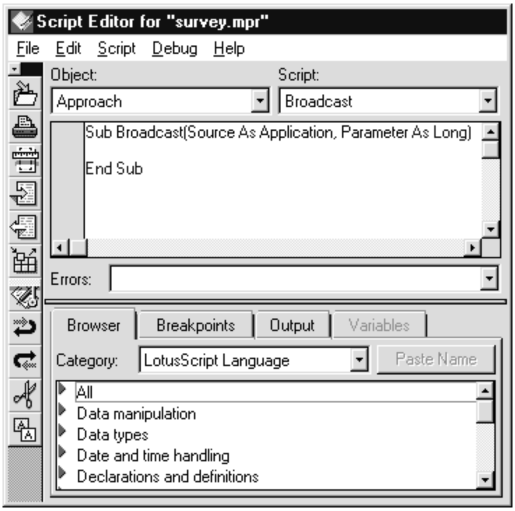
   Macros, creating

   Macros, running
3. Click the index entry you want, then click Display.

LotusScript

Use LotusScript programming language for sophisticated programming tasks. LotusScript is a version of BASIC that offers not only the standard capabilities of structured programming languages like Pascal and C, but a powerful set of language extensions that enable object-oriented application development. LotusScript gives you a programming connection to commands for all of your Lotus applications; you can write scripts that use the functionality of many applications, including other Windows applications.

To create a script using LotusScript in Approach, choose Edit - Show Script Editor to open the integrated development environment (IDE). This window provides a list of the objects available in the current Approach file, LotusScript language elements, and classes specific to Approach.



For more information about creating scripts, see "Recording macros and scripts" later in this chapter.

For information about programming in Approach using LotusScript, see *Developing SmartSuite Applications Using LotusScript*.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Scripts, recording

   LotusScript
3. Click the index entry you want, then click Display.

Recording macros and scripts

You can create a macro or LotusScript sub in Approach by recording your actions as you perform a task.

Choose Edit - Record Transcript and decide whether to save the recorded operations as a macro or a script. Execute the operations in Approach needed to perform the task. Approach records the operations you perform by transcribing them into the macro or script language.

You can name the newly recorded macro or script, edit it, or incorporate it into another macro or script.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Recording, macros and scripts
3. Click the index entry you want, then click Display.

Chapter 36
Exchanging Data with Other Applications

With Approach, you don't have to convert your files into some special Approach format in order to use them. And, you don't have to convert them back into their original format to update the data source or distribute the new reports and records you created. The answer to most of your questions about exchanging data is this: use File - Open inside Approach to read and write data in its existing format.

If you want to create a batch file with file names stored in a field or if you have a customer who insists upon using an application different from the SQL server that your company uses or, if you find that you need to convert the data to another format or into another application, Approach has several tools to help you accomplish these tasks.

Working together with Lotus applications

The easiest and fastest data exchange happens with other Lotus applications. This section suggests some of the ways you can use other Lotus applications to enhance Approach's functionality, and ways Approach can add to theirs.

Working together with Notes

Approach can extend Notes from a document management and replication tool to a reporting and analysis tool as well.

Using Approach with Notes data

When you use Approach with Notes data, you have access to powerful data entry, reporting, and analysis tools.

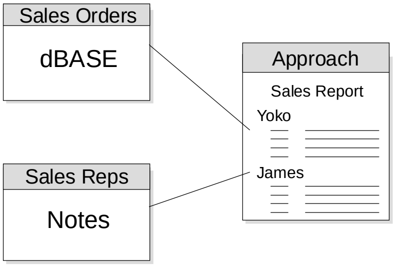
- You can develop Approach forms containing drop-down boxes, radio buttons, repeating panels, default value formulas, and data validation to view or enter data into Notes documents.
- You can use Approach's PowerClick reporting tools and Report Assistants to create advanced grouped reports with summary calculations from data supplied by Notes forms or views.
- You can create Approach mailing labels and form letters using Notes data.

Open the Notes database in Approach, and then use Approach to build reports, forms, worksheets, charts, form letters, or mailing labels.

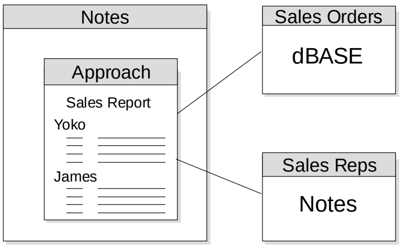
Using Approach to integrate Notes with other data sources

Approach can connect Notes databases to any other data source for comparison and analysis. You can easily link Notes data with data from other sources by joining databases, by embedding Approach applications in Notes documents, or by importing or exporting Notes data.

- Joining databases lets you create a relational link between a Notes form or view and any other database table. For example, you can link a database that contains the names of sales representatives to a second database that contains sales order information. You can then create an Approach form or report that shows the sales orders for each sales rep.



- Notes/FX™, an OLE enhancement, allows you to embed an Approach application in a Notes form and exchange data between the Notes form and the Approach application. For example, you can create an Approach application that queries a different Notes, dBASE, or SQL database that contains sales information, and then displays the resulting information in a sales report.



- Approach's SmartImport features make it easy to move data between any two databases. For example, you can quickly enter a data set into Notes, or move Notes data to another database, whether it is a DB2, Oracle, SQL Server, dBASE, Paradox or even another Notes database.
- The Approach Save As command gives you another way to integrate Notes with other data sources by allowing you to create a new form in an existing Notes database and fill it from the data you are working with.

Using Notes to distribute Approach applications

By including Approach applications in a Notes document, you can use the file-sharing and replication capabilities of Notes to distribute those applications throughout your organization. You can also use Approach's own mail features, in conjunction with a VIM- or MAPI-compliant mail system, to send Approach views or applications.

When you mail from Approach, you have great flexibility in deciding what information to send. Approach lets you send either a snapshot of the current view, the entire Approach file, or both. If you send the entire Approach file, you can attach all databases that it refers to, you can send blank databases (with field names, but without data), or you can send the blank Approach file so the recipient can use it to enter data.

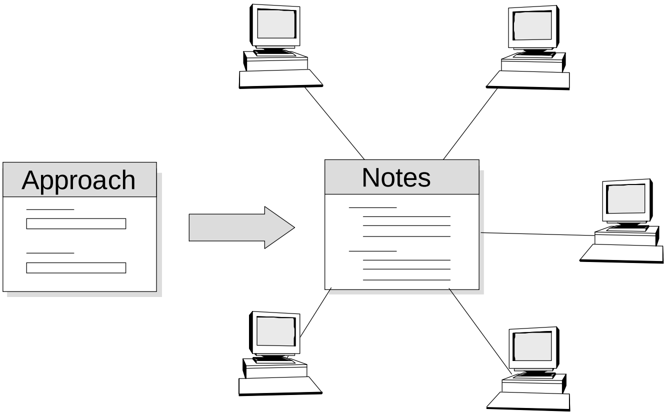
For more information about distributing Approach applications using Notes, see Chapter 36.

Notes operation

Open a Lotus Notes view or form from a Notes database stored on your local drive, on a server, or directly from your Notes workspace. The data from the view or form displays as an Approach view.

You can also replicate a Notes database to create a new copy of an existing database on your local hard disk. Replicating a Notes database with a server updates both your replica and the server's replica with changes made to either one.

By replicating a Notes database to your hard drive, you can add new information and make any necessary changes to the database without being hooked up to a network. This would be useful if you needed to take your laptop to a remote field site and update your database but did not have access to a network. You could then replicate the database back to the Notes database on the server with the new changes included.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

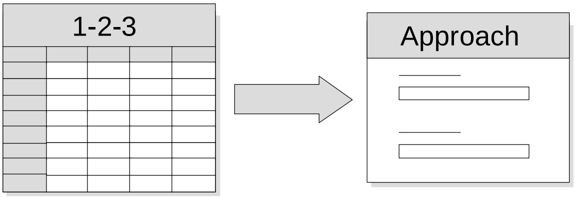
   Notes databases, opening in Approach

   Notes databases, replicating

   Notes/FX, enabling variable fields
3. Click the index entry you want, then click Display.

Working together with 1-2-3

1-2-3 and Approach are closely linked. You can use the familiar 1-2-3 interface to enter and manipulate your data, and use the power of a relational database to view and present the data in meaningful ways.



From Approach, you can open a “live” named range from a 1-2-3 sheet and view or edit the range in an Approach file, using the full range of Approach features.

Using the 1-2-3 Create - Database menu, you can create Approach forms, crosstabs, form letters, mailing labels, and reports from 1-2-3 data. The Approach views appear right in your 1-2-3 sheet. To edit the views, just double-click them.

In 1-2-3, you can also create query tables using data that is either stored in 1-2-3 or stored externally. With query tables, you have access to the full Approach data editing and querying tools (such as finding and sorting data) without leaving 1-2-3. You can optionally send the results of the query to a separate output range in 1-2-3, where you can analyze the data using the analysis tool in 1-2-3.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   1-2-3, opening spreadsheets as databases
3. Click the index entry you want, then click Display.

Working together with Word Pro

Use Word Pro to enhance the text formatting capabilities of Approach. For example, if you would like to use text formatting in a memo field, replace the memo field with a PicturePlus field set to use Word Pro as the OLE server.

You can also use Approach to analyze and organize data and insert the resulting view in a Word Pro document. Use Edit - Copy View to copy the current view or all views to the Clipboard. When you paste the views into Word Pro, use Edit - Paste Special and choose the format that you want the information imported in. If you choose RTF, Word Pro keeps the text formatting the same as in the Approach view.

Working together with Freelance Graphics

Freelance Graphics provides a long list of SmartMaster sets for presentations. You can use any of these professional images in Approach views. To do so, export a Freelance Graphics file as a Windows metafile and paste it in the background of an Approach view, or choose Create - Object and select the Freelance Graphics presentation file.

You can also use Approach to analyze and organize data and insert the resulting view in a Freelance Graphics presentation. Use Edit - Copy View to copy the current view or all views to the Clipboard. When you paste the views into Freelance Graphics, use Edit - Paste Special and choose the format that you want the information imported in. If you choose RTF, Freelance Graphics keeps the text formatting the same as in the Approach view.

Opening database files

One of the most powerful ways Approach can help you exchange data from one source to another is by allowing you to open almost any database and join that database with any other database. In most situations, use File - Open to reach data files rather than importing the data.

PowerKey data access

Directly access, update, manipulate and report on all of your data sources regardless of the file format. With PowerKey data access, you can have native database speed and functionality in Approach. PowerKeys support dBASE, Lotus Notes, DB2, Paradox, and FoxPro formats. Approach reads and writes dBASE, Paradox, and FoxPro files directly, so there's no need for the native application.

SQL tables

Approach can access SQL data sources with a particularly flexible and fast connection. Using an assistant, you can retrieve only the records you need from the SQL server. You save processing time by not opening the entire database and retrieving all of the records. You can name these queries so that they are easy to reuse in your next Approach session.

The SQL Assistant helps you build a SELECT statement and then sends the statement to your SQL server. You don't need to know SQL syntax or language to use the assistant. Instead, you select the databases and fields to use and create a find like you would in Approach's Find Assistant. Approach takes your input and constructs the SELECT statement.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   PowerKey

   SQL, overview
3. Click the index entry you want, then click Display.

Importing data

In Browse, you can import data into an existing database file. In Design, you can transfer the views from one Approach file to another.

- Importing data allows you to add to or update the records in your database without changing the appearance of any of the views in your Approach file.
- Importing views lets you add the views from another Approach file without affecting your data.

When you import data, Approach can update existing records and add imported records to the existing database, matching fields according to the relationships you define (this is called field mapping). If fields in the imported database have the same names as fields in the Approach database file, Approach automatically maps them. If the names don't match, you can indicate how the fields correspond to each other.

You can't import data into a calculated field. The values in a calculated field must come from the Approach formula for the field. However, you can export the value in a calculated field when you want to create a new database or transfer data between applications.

When you import views from one Approach file to another, you also map the relationships between the fields referenced in the imported Approach file and those used in the current Approach file.

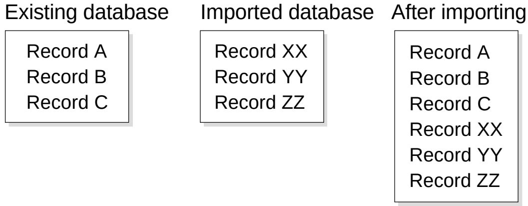
When you import into a database, Approach can

- Update existing records with the data that you're importing.
- Add the data from the import file in new records at the end of the current database file.
- Do a combination of the two: update existing records and import new ones.

Because you're adding data to a database file, you must be in Browse. If you're working with a found set rather than the entire database, Approach updates only the found set.

Adding records by importing data

Adding records places all of the records in the imported file at the end of the existing database (unless you have a custom default sort order). For example, if the existing database starts with 30 records and you import 20 records, the existing database will contain 50 records after importing.

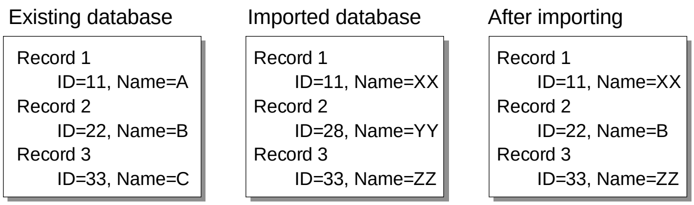


Updating records with imported data

As an alternative to adding the records in the imported database to the existing database, Approach lets you use selected data in the imported database to update records in the existing database. A third option combines the first two, allowing you to update records that have matching data and add new records for data that doesn't match.

When you update records by importing data, Approach checks the data in match fields that you specify, looking for any records in the existing database that contain a value that matches a record in the imported database. When Approach finds a match, it uses imported data to update only the fields you specify in the matching records.

This powerful feature lets you update only the records you want, using only the fields you specify. For example, you can update the customer names only in the records where the customer IDs match. In the illustration below, Approach looks for ID numbers and then updates just the name field when the ID numbers match.



Notice that the ID in the imported Record 2 doesn't match any IDs in the existing database, so Record 2 is not updated. However, the IDs for Records 1 and 3 do match, so Approach has updated the Name fields.

Adding and updating by importing data

The third import alternative combines the actions of the first two. Approach looks for records that have matching values and updates them as appropriate. Any records in the imported database that don't match the existing database are added at the end of the existing database.

In this example, the IDs in Records 1 and 3 match, so Approach updates the existing records with the imported data. Record 2 in the imported database doesn't match any records in the existing database, so Approach adds it to the end of the existing database as a new record: Record 4.

Existing database	Imported database	After importing
Record 1 ID=11, Name=A Record 2 ID=22, Name=B Record 3 ID=33, Name=C	Record 1 ID=11, Name=XX Record 2 ID=22, Name=YY Record 3 ID=33, Name=ZZ	Record 1 ID=11, Name=XX Record 2 ID=22, Name=B Record 3 ID=33, Name=ZZ Record 4 ID=99, Name=YY

For more information

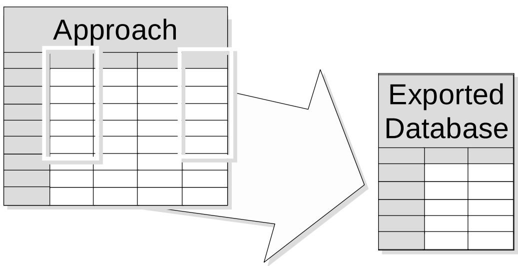
1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Data, importing

   Mapping, fields
3. Click the index entry you want, then click Display.

Exporting data

When you export an Approach database file, you take selected data and save it in a format that can be used by other applications. You can export all the records in a database or use Find to select a subset to export. You can also export all of the fields in a record or just some of them.

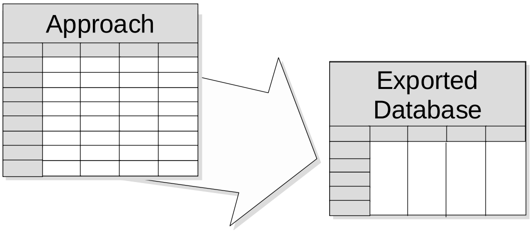


A calculated or variable field is part of an Approach file. Approach converts it to a database field in the export file during export.

Exporting creates a new database file that can include all types of fields except calculated fields that perform a summary function. You can export other calculated fields, but their values are converted to a set text, numeric, date, or time value before exporting. If you export a variable field, Approach creates a database field with the same value for each record.

PicturePlus fields can be exported, but only another Approach database file can read them.

If you want to reuse an existing Approach file, complete with calculated and PicturePlus fields, you don't need to export it. Just choose File - Save As and use the "New data" option to save a copy of the complete Approach file with a blank database. Your calculated, variable, and PicturePlus fields remain part of the Approach file. Then you can enter or import data into the new file.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Data, exporting

   Mapping, fields

3. Click the index entry you want, then click Display.

Copying and pasting data

Insert Approach views into graphics, presentation, or word processing applications using the Clipboard. Approach can copy the current view or all of the views in the Approach file. Choose from the current record, the found set, or all of the records in the databases to copy.

In the other Windows application, paste the contents of the Clipboard as a bitmap, Windows metafile, text, or RTF. Choose Edit - Paste Special and select a format.

Using OLE objects

Approach supports OLE (Object Linking and Embedding) as a communication channel to dynamically share data between two applications. OLE objects can be placed in an Approach file in two ways:

- Create an active link between the two applications.
- Embed the object in Approach.

You can also use OLE to link or embed an Approach object in another application.

Embedded objects

What is an embedded object?

An OLE embedded object is a piece of data stored in a file in one application (the client) that you create and edit using another application (the server).

With an embedded object, you can use the features of the server application to manipulate data in the client application. For example, you can embed a Lotus Word Pro Document object in an Approach file. You use Word Pro to create and edit the data of the embedded object, but that data is stored in either the Approach file or a database associated with the file.

What does an embedded object look like?

In Approach, you can make an embedded object part of the records of a database or part of the layout of a view. To make the embedded object

- Part of the records of a database, define a PicturePlus field to contain the object and add the field to a view. Then in Browse, double-click the field to work with the embedded object.
- Part of the layout of a view, in Design, use Create - Object to create the object and add it to the view. Then in Design, select the object to work with it.

What can you do with an OLE embedded object?

After you create an embedded object, you can move the object, copy it, or delete it just as you would any field or drawn object.

Just as with a link, you can double-click an embedded object to activate the server application so that you can edit the object. You can use all the features of the server application to change the object's data or appearance. For example, you can use Lotus Word Pro to format text in a Word Pro Document object so that it appears in two-column format when embedded in Approach.

When should you use OLE embedded objects?

Use OLE embedded objects when

- You need to use information in one application that you can only create or format in another application
- You don't need to share the information

For example, if you want to place two-column text on a page of an Approach form, and you don't need to use the data in any other application except Approach, you can embed a Word Pro Document object in a PicturePlus field or as part of the layout of the form.

Example: Why embed an object in a PicturePlus field?

Suppose you have a database in which you keep the specifications of all your products. You decide it would be helpful if you also showed a picture of the product as part of its record.

You have all your products photographed, and then you have these photographs converted into electronic images, in a format that supports OLE as a server and that is supported by Approach. It's a simple matter now to define a PicturePlus field, enable it for the OLE object supported by the bitmap software, and then add the new field to a view of the database.

Next, in Browse, you go to the PicturePlus field and double-click it to start the server application. Choose Create - Object and select Create from file. Then specify the file that contains the image you want to add to this record.

Example: Why embed an object as part of the layout of a view?

Suppose you want the background of an Approach form to be a professionally designed piece of artwork, but you don't have the resources to create such a background yourself. You can use any of the SmartMaster backgrounds available in Freelance Graphics as the background for a form simply by embedding it as an OLE object on the form.

Approach as an OLE server

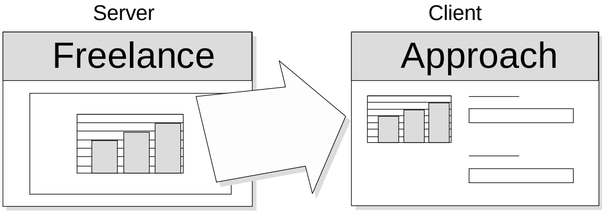
When you embed an Approach object into a file in another application, the Approach object is stored in the other application's file, but you use Approach to create and edit the object from inside the other application.

To create an Approach object based on an Approach file that already exists, in Approach go to Browse and choose Edit - Copy View. Then use Edit - Paste Special in the other application, selecting the appropriate Approach object Clipboard format to embed the object in the other application's file.

Links

What is a link?

A link is a connection between data in one application (the server) and another application (the container application). With an automatic link, the data in the client automatically changes when you change the original data in the server.



What does a link look like?

In Approach, you can make a link part of the records of a database or part of the layout of a view. To make the link

- Part of the records of a database, define a PicturePlus field to contain the link and add the field to a view. Then in Browse, double-click the field to work with the link.
- Part of the layout of a view, in Design, use Create - Object to create the link and add the link to the view. Then in Design, select the link to work with it.

What can you do with a link?

After you create a link, you can do anything with it that you can do with other objects in Approach. For example, you can move the link, copy it, or delete it just as you would a field or drawn object.

There are also operations that you can perform only with links:

- Double-click a link to activate the server application so that you can change the original data for the link.
- Using Edit - Manage Links, you can display and change information about a link. For example, you can edit a link so that it refers to a different piece of data in the server application or change a link from automatic to manual.

When should you use links?

Use links when *all* of the following are true:

- You need to share data between applications.
- You expect the shared data to change.
- You need to update the shared data when the original data changes.

For example, if you keep sales and promotional information for your products in Lotus Word Pro documents and you want to make this information part of the records in your products database, you can create a link in a PicturePlus field to the Word Pro documents. In this example, Approach is the client and Word Pro is the server.

When not to use links

Do not use links when **any one** of the following is true:

- You need to use the data in only one application.

  Instead, create an OLE embedded object.
- You do not expect the data to change.

  Instead, use the Clipboard to move a static snapshot of the data to Approach.
- You do not need to update the shared data when the original data changes.

  Again, use the Clipboard to move the data into Approach.

For example, if you use Freelance Graphics to create your company logo, and you want to use the logo on Approach forms and in Word Pro documents, you would not use links, since the logo is not likely to change. Instead, you could simply copy the logo in Freelance Graphics and paste it into Approach and Word Pro.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   PicturePlus fields, OLE options

   OLE, embedded objects

   OLE, links
3. Click the index entry you want, then click Display.

Chapter 37
Team Computing with Approach

The team computing features in Approach give your workgroup the data you need, when you need it. Use file-sharing controls to keep your data and applications secure and yet available. Approach works across your network, allowing you to avoid storing and maintaining multiple copies of your data. TeamMail allows you to circulate specific data through the workgroup for reporting and data revision.

File-sharing

Approach supports file-sharing features that let you use data simultaneously with other members of your workgroup.

TeamSecurity

When many people use an Approach application, often one person is in charge of designing the application and modifying how the workgroup uses the data. Others in the group often spend most of their time entering data or creating reports based on data. With Approach's TeamSecurity options, you can easily configure the application to provide different levels of access to different levels of users.

For example, if your workgroup is using an Approach application to track orders and produce invoices, many of the group only need to open the application in Browse and Print Preview. They have access to all the application views and enter new records and modify existing ones. They wouldn't modify the appearance of the application itself in Design. All of these users would have the same security levels, so they would all use the password to open the Approach application. This password would be associated with a group name in TeamSecurity. For example, these users would be Team A.

Potentially this same application is used at the front desk for visitors to register and to have name tags printed out. These "users" or visitors to the office would read information, but not add data. They wouldn't have access to all of the views: you wouldn't want your customer list available to casual office visitors, but you would want to expose a form for entering potential customer or vendor information. Again, the visitors couldn't modify the application itself in Design, because you wouldn't grant Design privileges to the Visitor group that you define.

Choose File - TeamSecurity to set or edit security controls. When you edit privileges for users, you can change the default privilege settings or create your own category of user.

Groups of users

You don't have to keep a log of users for Approach's TeamSecurity. Instead, a security group consists of the individuals who use the same password to access an Approach file.

For example, if you wanted to have a group called Team A, enter Team A as the group name, enter the password, and set the privileges you want everyone in the group to have. Then inform everyone belonging to Team A to use a particular password to open the Approach file.

Single-password access

After you set your password, a user has only to enter a single password to have access to the Approach file (.APR) file. Even if the database is joined to other database files, the user only has to enter the password once when opening the joined files.

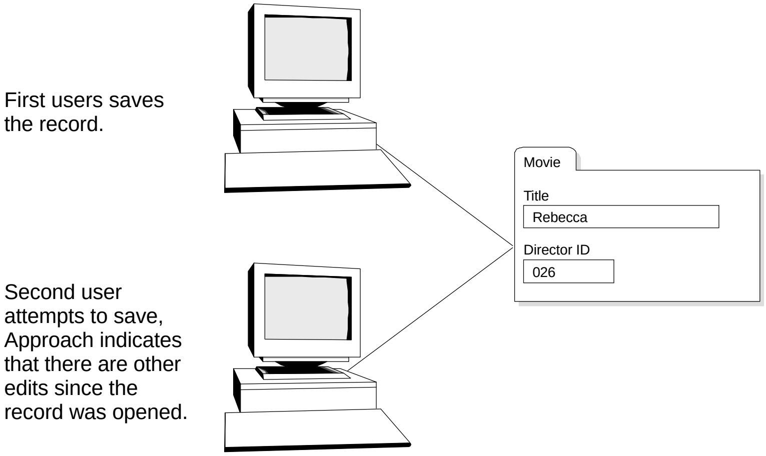
Say that the Employee database is joined to the Manager, Salary, and Region databases and that all four databases have different passwords assigned in the Preferences dialog box. Use TeamSecurity to assign the same password to all four databases at the Approach file level. Once you open an Approach file and enter your password once, you have access to the Employee, Manager, Salary, and Region databases joined in the Approach file without being prompted for additional passwords. In addition, individual passwords for these databases are not circulated. To update passwords, you need only change the Approach file passwords.

The only exception would be server-based databases in Oracle, Notes, DB2, SQL Server, or Sybase where Approach supports the profile-based security of the server. In these cases, Approach prompts the user for the appropriate passwords as needed.

Record locking

It's usually possible for more than one network user to edit a record at the same time. This method of data-sharing, called **optimistic record locking**, is an efficient way to work — and Approach helps you make careful use of it.

If you have optimistic record locking set for your network environment — it's the default setting for Approach — other users will be able to edit a record at the same time you do. When two users edit the same record, the changes are saved in the database for the *first user* to enter the changes. When the second user tries to enter his or her changes, an alert box informs that the record has been modified by another user while the record was open. The second user may accept the new version of the record or save the second set of changes to the record.



Approach runs faster with optimistic record locking.

If you don't want other users to edit a record at the same time you do, you can turn off optimistic record locking. This way, once you've clicked in a record, other network users can view the record but cannot make changes to it until you go to another record.

Database passwords

Some database formats can store a password with the data. If your team looks at a database in applications other than Approach, you probably want to use a database password in addition to TeamSecurity passwords to control access to the data.

To set a password in your dBASE or FoxPro database that affects only access to the data, choose File - User Setup - Approach Preferences and set the password on the Password tab. You can define read / write or read-only privileges, depending on what your database format supports.

Approach TeamSecurity offers you single-password access, even when you have database passwords set. The passwords you specify in TeamSecurity automatically open the databases in the application with the correct passwords. You can override single-password access in the TeamSecurity dialog box, Database tab, if you want to require users to know the database password in order to work with the data.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Passwords, user privileges

   Passwords, creating for Approach files

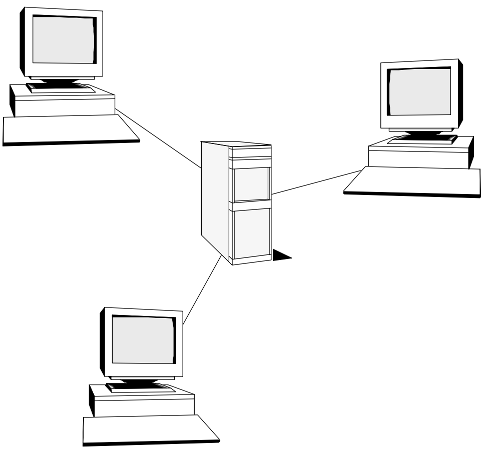
   Passwords, creating for databases

   Record locking
3. Click the index entry you want, then click Display.

Working on a network

You can store any Approach file and any database file supported by Approach on a network. Users who work on the network can create, open, and save files and work with data in them just as if the files were stored on their own local drives.

Most often, you set up a **server** by placing files on a central device that users have access to through the network. The server is usually a more powerful computer than the local devices, with a large drive and network software to process users' requests. The users will work with the files on their own local or **client** computers.



In general, each Approach user must have his or her own license, even if Approach is run from a server. For details about restrictions on network use, see your Approach license agreement.

As you work with a database on a network, the original database remains in its network location — what you see on the screen is just a copy of those records in your computer's memory. If you have write access to the database, you can make changes to the data and the changes are saved in the original database on the network.

Refresh network data

As you work in a network database, Approach places a copy of the data you see on the screen in your computer's memory.

Approach refreshes the data from a network database when you edit, find, or sort data, when you preview or print, and when you change what you see on the screen (such as move to another record or go to Design). You can also refresh the data yourself, to see the result of your own edits and the edits of other users working on the same network database.

- To refresh the network data on your screen, choose Refresh Data from the Browse context menu. If you're working with a found set or with sorted data, Refresh inserts any new records into the found set or the sort order as appropriate.

Working as a single user

In general, you'll probably want to share network databases with other users because this is the most efficient way to work. But there may be times when you want to open a particular database as a single user — for example, if you need to make structural changes to the database or if you have a lot of previewing and printing to do. You can temporarily change Approach's network settings to let you open databases as a single user.

For more information

1. Choose Help **-** Help Topics and click the Index tab.
2. Type one of these phrases:

   Networks, file-sharing

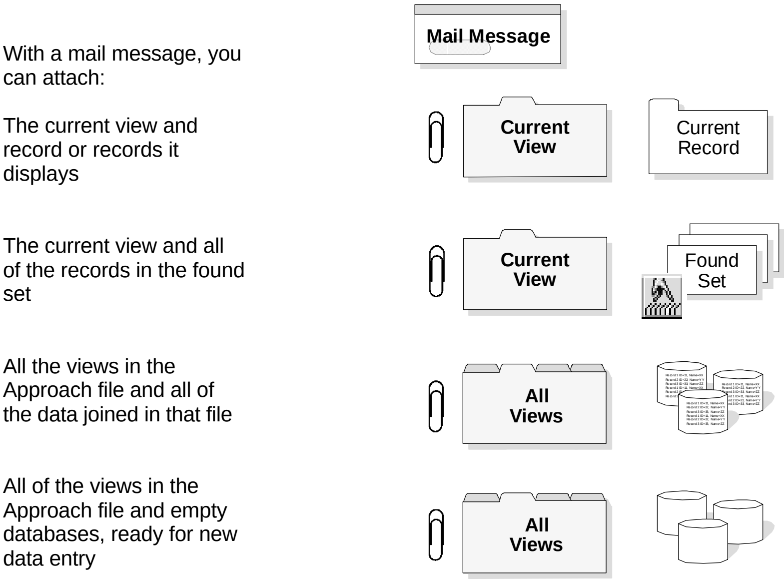
   Single-user access to network files
3. Click the index entry you want, then click Display.

Distributing data and Approach views

Whether you are connected to the same databases as your workgroup or working with separate sets of information, you can share whole database applications or pieces that illustrate a particular point. When you're working from large databases, it can be especially helpful to pass along a special section of a database for your workgroup to see. Approach connects easily to your current e-mail system and you can also combine Approach views with other documents by copying a view or views to the Clipboard and pasting them into another application.

TeamMail

If you are connected to a network and have access to a VIM- or MAPI-compliant e-mail package (such as Lotus Notes or cc:Mail), you can include Approach views and data in your e-mail messages. Approach lets you e-mail all or part of the current Approach file. If you attach the current view to a mail message, you can include the current record or the current found set. If you attach the entire Approach file, you can include all data, or just the database file without any data.



Note If you are using Notes, you can e-mail an image of the current view in addition to other combinations of views and data.

You can choose to mail the entire database application, but you have other options, too:

- To send a Windows metafile (.WMF) image of the current Approach file view, select “Include a snapshot of the current view.”
- To send the current Approach file with either all views or the current view only, select “Attached Approach file with.”
- Use the No Databases option when the person you’re sending the Approach file to has access to the database files on the same network as you.

TeamMail also allows you to specify a route for the mail to follow from e-mail address to e-mail address. After each person on the routing list receives the mail, the mailer prompts for the message to be sent to the next person on the route. The originator can track the progress of the mail through the route, including changing the route order.

TeamMail offers these routing options:

- Send a message to the document’s originator when the document is forwarded.
- Send a message to anyone on your mailing list (whom you choose by clicking the mail icon) when the document is forwarded.
- Include the routed document with any tracking messages.
- Send a return mail receipt when the routed document is open.

Copying views as OLE objects

Approach lets you take a snapshot of a view or set of views and move them into another Windows application. Choose Edit - Copy View to open a dialog box for choosing which views to copy. Approach prompts you for the format you would like to use for the transfer.

You can paste the view or views from the Clipboard in any of the following forms:

- An object that you can embed.
- A Windows metafile (.WMF) picture that you can paste as a graphic.
- Tab-delimited text (for example, to paste into a spreadsheet).
- Rich Text Format (RTF) text with formatting.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Mail, sending TeamMail

   Mail, sending with attachments

   OLE, Approach as server application
3. Click the index entry you want, then click Display.

Chapter 38
Approach: The Internet Connection

Using the Internet capabilities of Approach, you can connect to the Internet to share and view Approach databases and views. You can upload Approach files to an FTP (File Transfer Protocol) or World Wide Web server, so you and other Approach users have fast access to changing data. You can also publish Approach forms, reports, worksheets, and crosstabs to HTML (HyperText Markup Language) format files to display as a Web site on the Internet, or on your local system.

Connecting to the Internet

To work with Approach files on the Internet, you need to have access to an FTP or Web server.

FTP servers

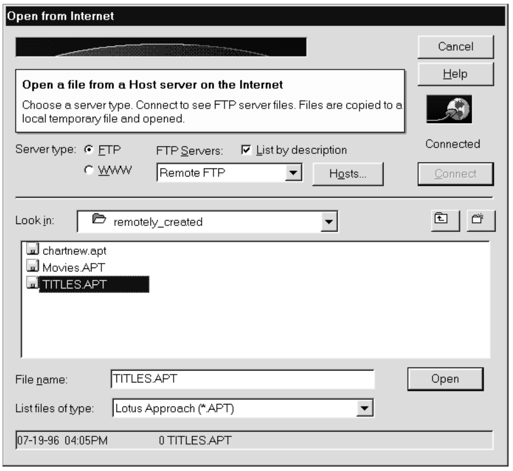
An FTP server can be owned and maintained in the following ways:

- By your company. The server is only used internally for storing and retrieving files.
- By an outside provider. The server can be used by anyone who has read-only or read-write access to it.

In either case, you access the server through the Internet using the File Transfer Protocol.

After you access an FTP server, navigating its directory structure is very similar to navigating through the directories on your system. You can go up and down through directories to find the files you want, or to find the location where you want to publish your files.

In Approach, you can open and save .APT files (a format that combines and compresses .APR and database files) to and from an FTP server.



To automatically connect to an FTP server when you open from or save to the Internet, choose File - Internet - FTP Connection Setup. To set up a new connection, click Hosts in any of the Internet dialog boxes.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Internet, connecting

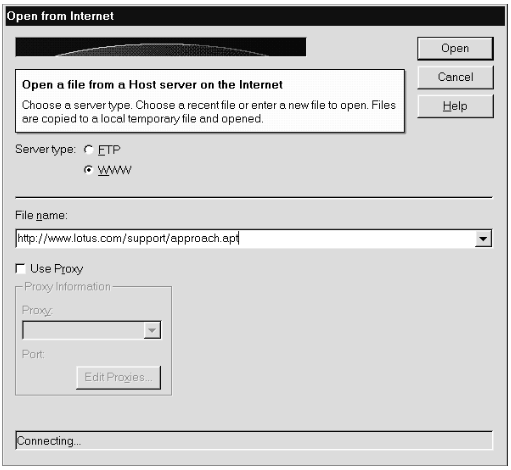
   Internet, overviews
3. Click the index entry you want, then click Display.

Web servers

Web servers are mainly used for storing HTML files (.HTM) (a format that displays information on Internet browsers) that are then published as a Web site and can be viewed on an Internet browser. Another name for a Web server is an HTTP (HyperText Transfer Protocol) server.

If you can access a Web server using an Internet application tool, you can also store .APT files there in the same way as on an FTP server. If other members of your workgroup do not have direct access to the Web server, however, they can open the .APT files in their copies of Approach only if they have the exact path and file name, for example:

`http://www.lotus.com/support/approach.apt`



Host information

Before you can connect to a host server, you need to enter connection information, such as the host address, passwords, and any proxy addresses. See your System Administrator for more information.

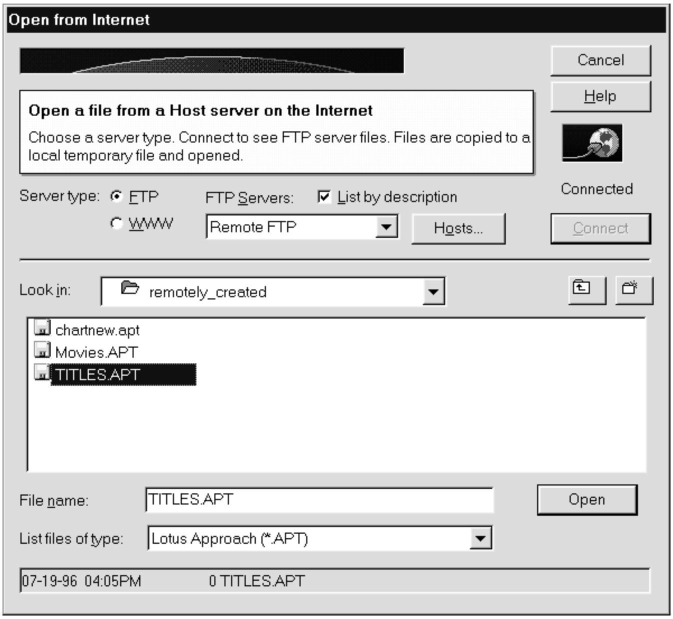
Working with Approach files on the Internet

Saving Approach files

When you want to share updated information with other Approach users, save an Approach .APR file and its associated databases as an .APT file on an FTP server. You can save the current view or all views and any display data from any of the following:

- All databases
- Found set
- Current record
- Blank databases

To save the current file on an FTP server, choose File - Internet - Save to Internet. After you select what you want to save, select the FTP server and directory where you want to store the .APT file.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Internet, saving views to
3. Click the index entry you want, then click Display.

Opening Approach files

You can open .APT files stored on either an FTP or Web server by choosing File - Internet - Open from Internet. If the file is stored on an FTP server, you can navigate through the directories to find the file. If the file is stored on a Web server, you must enter the full path and file name, for example:

`http://www.lotus.com/support/approach.apt`

When you select the file, Approach downloads the file to a directory on your system and then opens it as a read-only file. If you want to make changes to the file, use the Save As command. Approach prompts you for a new name for the .APR and associated database files. Once you have renamed the files, you can update the information and save it on an FTP server again.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Internet, opening databases
3. Click the index entry you want, then click Display.

Publishing Approach views

If you want Internet users to view your data through an Internet browser, choose File - Internet - Publish as Web Page(s) to publish the current Approach view. Approach saves the view in HTML format, and posts the files to your Web server. Approach uploads the resulting HTML file (.HTM) to your Web server. You can create a link to the files from other Web sites, or use them as stand-alone files. If other users want to view the files on an Internet browser, you have to give them the full path and file name. For example:

`http://www.mypage.com/report_1.htm`

For more information

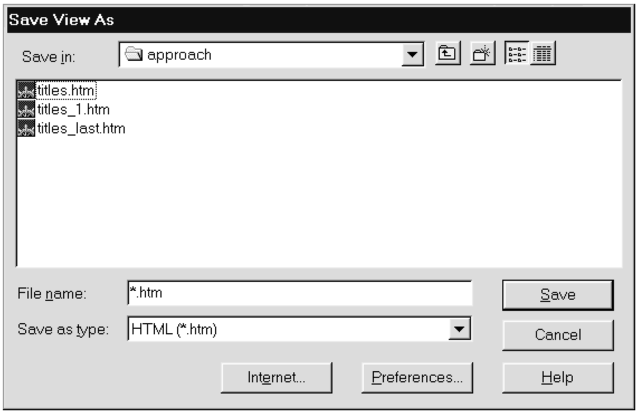
1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Views, publishing to the Web
3. Click the index entry you want, then click Display.

Saving Approach views as HTML files

You can also save Approach views as HTML files (.HTM) on your local system or server. Choose File - Save View As, and select HTML files as the file type. You can view the files yourself, or share them with other users who access the server.

You can later upload the HTML files (.HTM) to a Web server using your Internet application tool.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Internet, saving views to
3. Click the index entry you want, then click Display.

Chapter 39
Getting Started with Freelance Graphics

If you're not sure where to start when creating a presentation, start with this chapter. It gives you an overview of what a presentation is, and what is in a presentation. If you're already familiar with Freelance Graphics®, you may want to take a quick look at the first section, which describes the new role of a SmartMaster™ template in creating a presentation.

For those of you who are upgrading to this release of Freelance Graphics, the last section in this chapter has highlights of new features and enhancements to existing features.

The components of a presentation

Creating a presentation can seem overwhelming, but it doesn't need to be. Once you have the big picture of what makes up a presentation, the details can fall into place. Freelance Graphics guides you from the big picture to the smaller details.

The big picture

A presentation always has a topic — the type of information you want to convey, the reason you're making the presentation. Examples of presentation topics include market research, service briefing, product launch, project proposal, project status report, strategic goals, and even a brainstorming session.

In addition to a topic, an effective presentation has a consistent "look" throughout. The look includes a common background design and color on all pages, and a collection of text formats that use complementary fonts and colors.

Freelance Graphics gives you a headstart on effective presentations by providing you with content topics, which include suggested content and a suggested look. First choose a SmartMaster content topic, then choose a look.

A content topic provides you with suggested pages and page content for the presentation. For example, if you're using the Project Status Report content topic, some of the suggested pages are Agenda, Project Overview, Objectives, Milestones, and Next Steps.

You choose which pages you want in a presentation — you can follow the content topic suggestions, or you can choose some pages and not others, the same page more than once, and pages in any order that suits your purposes.

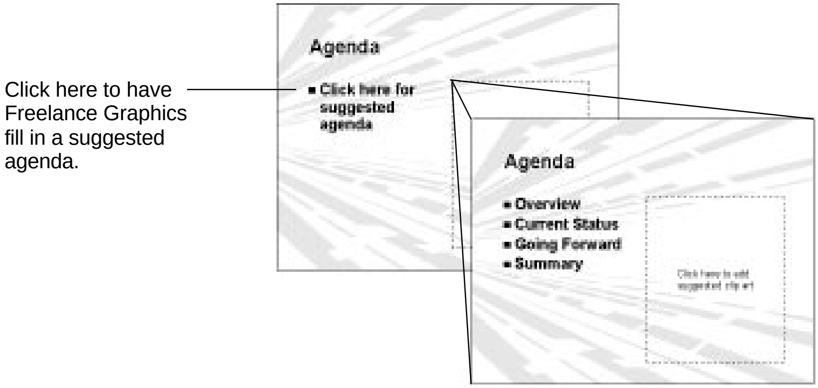
Note SmartMaster content topics are provided solely for your convenience. Lotus provides no assurances that use of the SmartMaster content topics or their suggested structure will produce an effective analysis or presentation.

The details

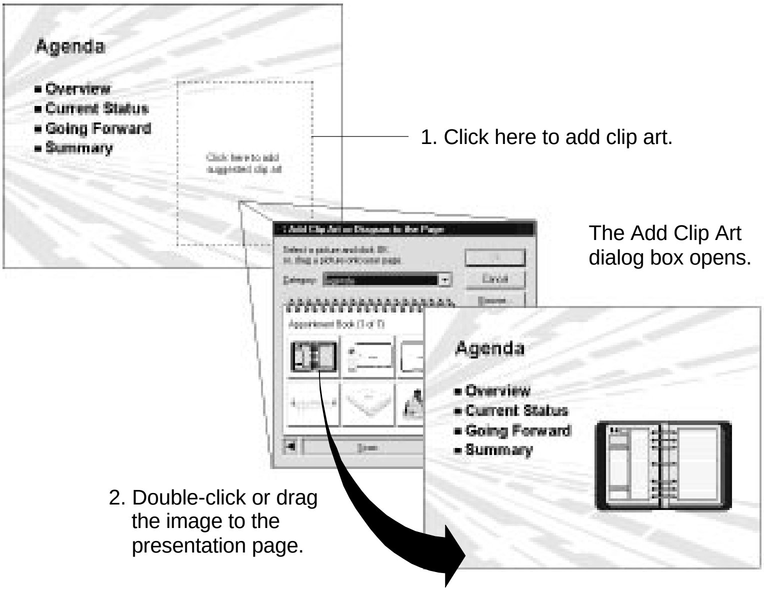
A presentation page can have a title, bulleted lists, text blocks, data charts (such as bar charts and pie charts), timeline charts, diagrams, organization charts, clip art, tables, and drawings. When you're working with a content topic, it has content pages that help you organize the details of the presentation. For example, content pages can have

- Click here blocks that provide information specific to a content page (for example, "Click here for suggested agenda")
- Specific advice regarding the content of the page you're working on
- Text and graphics already filled in — you can keep the content as is or modify it

For example, the following illustration shows the Agenda content page in the Project Status Report content topic. You can have Freelance Graphics fill in a suggested agenda, modify the suggested agenda, or enter your own agenda.



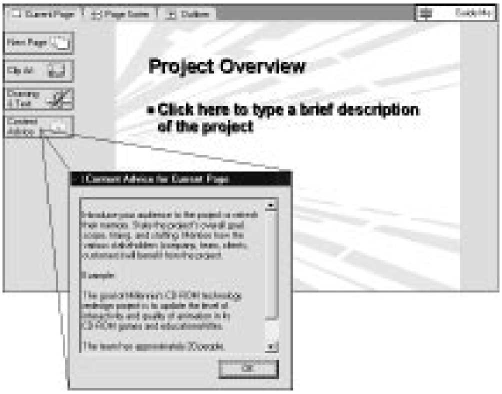
Similarly, you can easily add clip art to the page.



Note If you choose not to use a Click here block, the block does appear as you work, but it won't appear in the final presentation, a screen show, or a printed presentation.

For some content pages, Freelance Graphics offers content advice.

Click here for content advice.



You always have a choice: using content topics is optional, and you decide how and when to use the suggested content pages. There are even pages without content (page layouts) that you can use instead of a content page at any point in a presentation.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Click here... blocks

   Clip art, adding to a page

   Pages, adding

   Presentations, tips for

   SmartMaster content topics, overview

   SmartMaster looks
3. Click the index entry you want, then click Display.

What’s new

If you’re upgrading to this release of Freelance Graphics, there are new features as well as enhanced features that you may want to investigate. The following sections are a partial listing of what’s new in this release. For complete information, see the Help book “What’s New” in the Freelance Graphics Help Contents.

Online Help

Everything you need to know to produce effective presentations is available in online Help. The Help system has a new design that provides easy access to task-oriented and how-to information. Help also has new features that provide information when you need it.

- Click the Guide Me button for fast information on the task you’re working on.

- The shortcut icon appears in many Help procedures. As you work through the procedure, click the shortcut icon to open a dialog box rather than choose a menu command.

- Demos show you how to perform a task. A demo uses sample data, and performs the task steps one at a time. Demos are available in many Help topics.
- Tips appear in many dialog boxes. In a dialog box, look for the text against a yellow background. When available, a tip gives you information on how to use the dialog box settings.

SmartMaster content topics and SmartMaster looks

The SmartMaster templates now have actual content for your presentations. These templates are called SmartMaster content topics. Content topics contain pages that guide you through the process of creating specific types of presentations, such as business plans or project updates. Content pages use a fill-in-the-blanks approach by suggesting appropriate text and graphics.

When you work with a SmartMaster content topic, it provides you with

- Pages with task-specific prompts (for example, “Click here to add organization chart”)
- Content advice to help you complete a content page
- Pages with actual text and graphics already filled in — you can keep the content as is or modify it
- Charts that provide an appropriate chart type and style — all you need to do is enter the data
- Automated tasks such as adding a new block to a pyramid diagram or adding data from one page to other pages in a presentation

Current Page, Page Sorter, and Outliner views

There are changes in the views as well as a new way of displaying the views. In this release of Freelance Graphics, you can quickly and easily switch from one view to another by clicking a tab at the top of the presentation window.

You'll also notice changes in the views themselves; for example,

- Current Page view offers a cleaner, less-cluttered look at the current page.
- Outliner view now has an option that displays the page images in the left margin, so you can see the page design and layout without returning to Current Page view. You can turn the display of page images on and off. Outliner view also has an improved toolbar that makes it easier to manipulate the outline.
- Page Sorter view has a zoom feature so you can zoom out to view more pages, or zoom in for a closer look.

An improved context-sensitive interface

As you're working on a presentation, Freelance Graphics senses your current task and automatically modifies the interface to provide the appropriate menus, SmartIcons®, and InfoBox.

For more information, see Chapter 40.

Improved Click here blocks

You no longer need to click a Click here block before adding text to a page — just start typing. Freelance Graphics automatically opens the first Click here block on the page.

Improved and new text features

Handling text is now faster and more powerful.

- You can save collections of text properties as named styles, then reuse these styles as often as you need.
- The space between bullets and text can now be adjusted.
- The Reset to Style command removes all local character formatting.
- The Text - Fast Format commands copy the format from one text object and apply it to another text object.
- You can globally change the text font for an entire presentation.

- There are new features for building bulleted lists in screen shows, including,
  - Easier ways to set up a page that “builds” a bulleted list without having to add extra pages to a presentation
  - More control over the appearance of a bullet build, including the ability to assign a visual or sound effect to each bulleted item as it appears
  - Automatic detection of when the text will run to the next page
- New text effects, such as shadowed text, superscripts, and subscripts are now available.

Team Computing

Team Computing comprises several features designed to enhance the productivity of teams,

- TeamReview™ lets you distribute a presentation electronically to team members for review comments, then returns the comments to you for consolidation. With TeamReview you can distribute a presentation using e-mail, a Lotus Notes® database, a network, or a floppy disk. The reviewers can use the Freelance Graphics reviewer tools to mark up the presentation with comments on yellow stickies, and to create lines, arrows, circles, and freehand drawings.
- TeamMail™ lets you send a message using your e-mail system from within Freelance Graphics. You can attach selected pages or an entire presentation to an e-mail message, which can be routed to members of your workgroup for team review. You can route the e-mail to all recipients at once, or sequentially, one after another.
- TeamShow™ lets you display and run a screen show on a computer in a remote location.
- The ability to post a presentation to the World Wide Web means that any team member with access to the Web can review a presentation.

Copying pages from other presentations

You can now easily copy pages from one presentation to another. Freelance Graphics opens the second presentation, and you select the pages you want to copy. If you’re in Page Sorter or Outliner view, you can also specify where Freelance Graphics is to place the copied pages. The copied pages automatically take on the look of the current presentation.

Ready-made diagrams

There are over 100 ready-made diagrams — just choose the diagram you want and type the text. You can also use a ready-made diagram as the starting point for creating customized diagrams.

Screen show

Screen show includes a number of new features, including,

- Rehearsal mode for screen show

  In rehearsal mode, Freelance Graphics tracks the elapsed time for both the whole presentation and individual pages. When you finish the rehearsal, you can display a summary report of total presentation time. As you rehearse, you can view, edit, and create speaker notes onscreen.

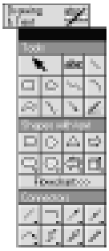
- Mobile Screen Show Player

  With the Mobile Screen Show Player, you can run a Freelance Graphics presentation on any Windows 95-based computer, or give a copy of your presentation to anyone to view, even if they do not have a copy of Freelance Graphics.

- Built-in animation and multimedia effects (with multimedia SmartMaster looks)
- The option of omitting specific pages from a screen show
- Transition effects for individual objects or entire pages
- The ability to set the sequence and time the appearance of objects

Making global changes

You can now make global changes to all selected objects with the InfoBox, change the typeface for all text in a presentation, and create named text styles. A named text style is a collection of text properties that you can group together, save with a name, then easily reuse. Changing a named style automatically changes all text objects using that style. You can also modify the presentation backdrop, thus changing the look of all presentation pages.



New Drawing & Text palette

The Drawing & Text palette in Current Page view has a new look and new functionality. When you click the Drawing & Text button, the new palette appears. The palette now includes ready-made shapes with text, a selection of flowcharts, and connectors. The shapes with text and connectors are particularly useful for making your own diagrams. (Connectors “connect” any two objects. When you move one object, Freelance Graphics automatically repositions the connector, stretching and shrinking it as needed.)

Printing enhancements

New printing features include the ability to preview a presentation before printing it. Also, you can now easily change the font of headers and footers, and add page numbers, dates and times, and the presentation file name to headers and footers.

LotusScript

LotusScript® is a scripting language used by a number of Lotus products. With LotusScript you can increase user productivity by creating “scripts” that automate redundant tasks and integrate data from other applications. As a developer of your own SmartMaster content topics, you can also use LotusScript to enhance and customize content topics and content pages. Freelance Graphics also provides ready-made scripts that you can tailor to fit your customized applications.

Note In addition to online Help for LotusScript, several books are available to help you learn LotusScript. They are the *LotusScript Programmer’s Guide*, the *LotusScript Language Reference* and *Developing SmartSuite Applications Using LotusScript*. To receive these manuals, use the order form on the back cover of *Getting the Most Out of LotusScript in SmartSuite 97*, a pamphlet which comes in your package. *Getting the Most Out of LotusScript in SmartSuite 97*, *Developing SmartSuite Applications Using LotusScript*, the *Programmers Guide*, and the *Language Reference* are also available as DocOnline for CD users.

Notes/FX

Freelance Graphics and Lotus Notes can exchange field data through Notes/FX™. With Notes/FX you can

- Display the value of any standard Freelance Graphics presentation properties field in a Notes form
- Exchange the values of up to eight custom-defined presentation properties fields between Freelance Graphics and Notes™, and update the information from either Freelance Graphics or Notes
- Use a Notes template to create Notes applications that let multiple users create and store presentations in a Notes database

For more information

1. Choose Help - Help Topics and click the Contents tab.
2. Double-click the **What’s New** book.
3. Double-click the book next to the category that interests you.
4. Select a topic, then click Display.

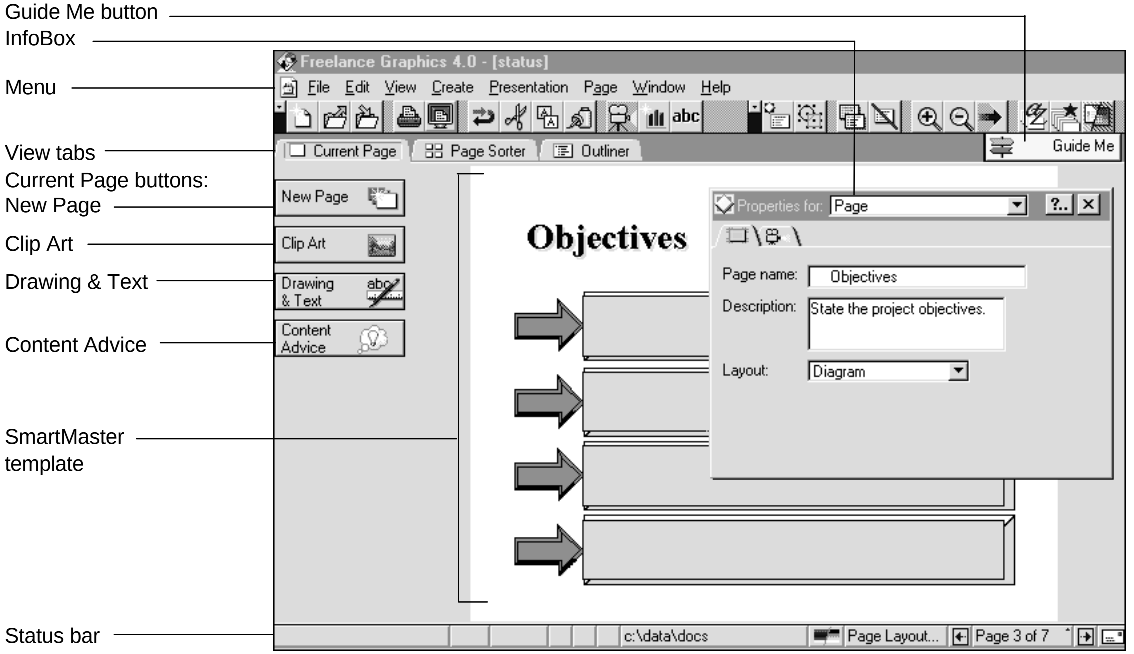
Chapter 40
Freelance Graphics-Specific Tools

Helping you be a self-reliant user

The goal of this chapter is to show you where to find useful tools in Freelance Graphics and how to use them. Once you know where to go and what to do, you'll be a more self-reliant user.

What the tools are

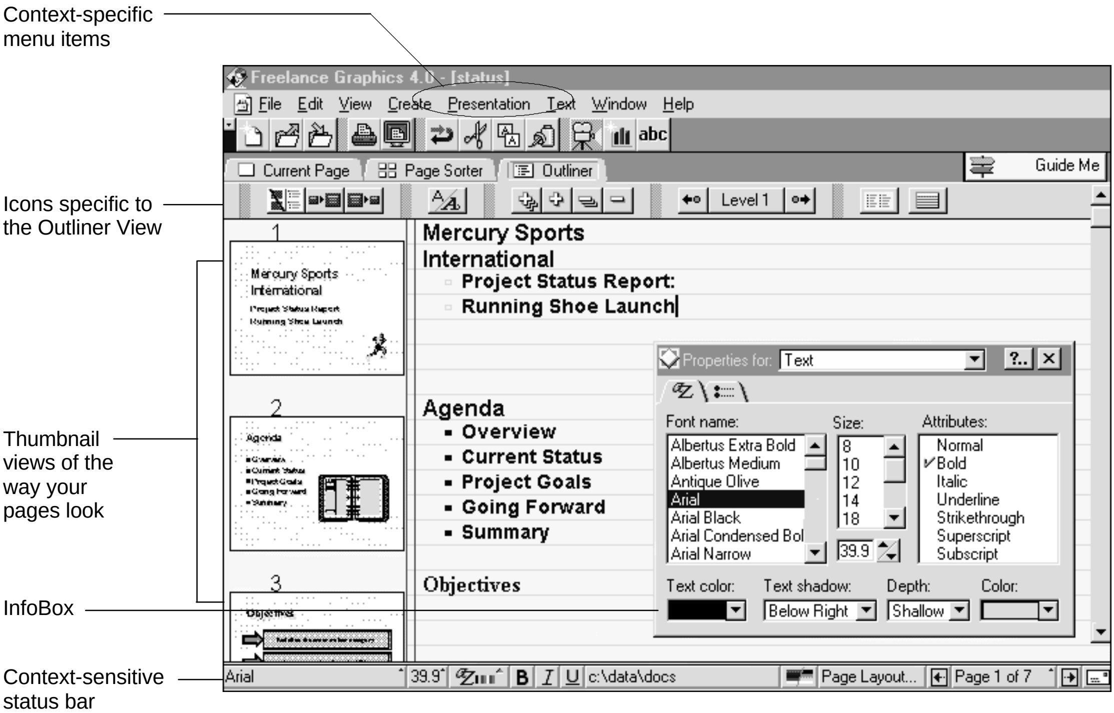
Here, in a Current Page view, are most of the tools this chapter deals with:



Freelance Graphics tools are context-sensitive

Tools in Freelance Graphics appear when you need them. For example, if you are working in the Outliner view, as illustrated below, the tools on your desktop reflect what you are doing.

Compare this desktop with the one on the previous page, where the tools reflect options for the Current Page view.

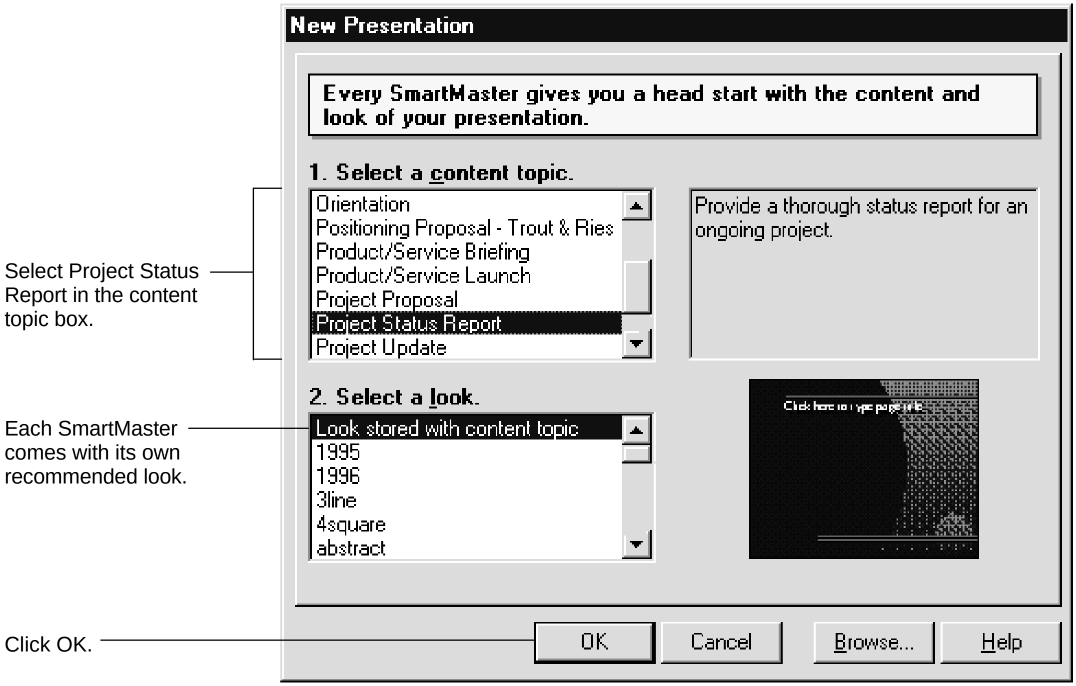


The SmartMaster: more than just a stylish format

A SmartMaster is a professionally designed template that lets you create presentations with minimum effort. A SmartMaster features not only a designer "look," but a content structure for such topics as business plans, marketing plans, sales presentations, project status reports, and many others. When you choose the right SmartMaster content topic, the scope, the order, and even some of the language of your presentation is already complete.

Each time you start Freelance Graphics you are presented with a dialog box that lets you open an existing presentation or create a new presentation using a SmartMaster.

To show you how a SmartMaster works, let's assume you want to make a presentation to your group about the current status of your project.

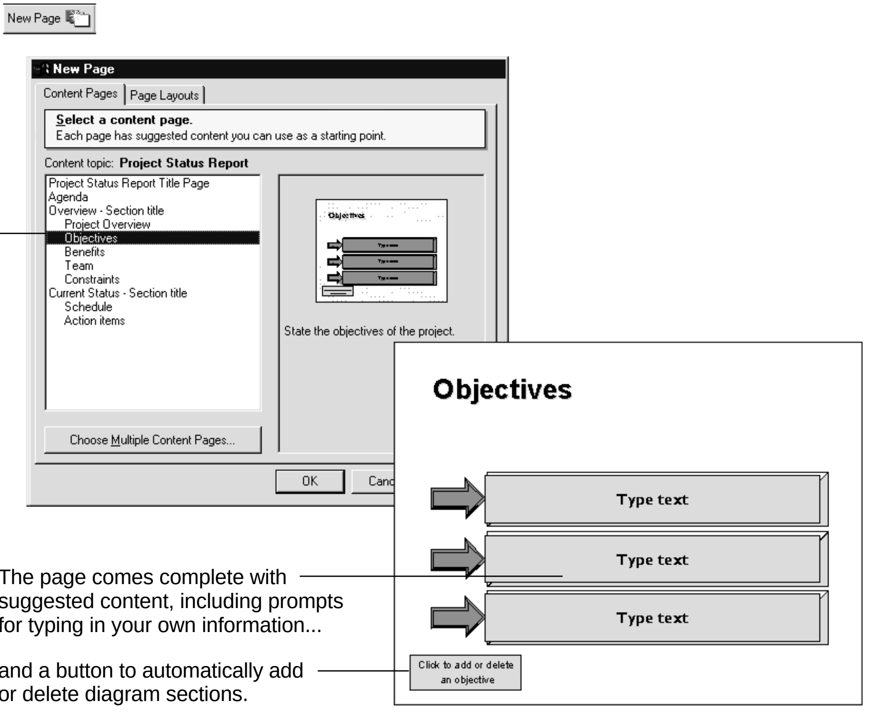


SmartMaster content: helps you with thinking

The SmartMaster for the Project Status Report comes with a list of suggested content pages you can choose to build your presentation.

When you choose a new page from the Current Page view...

choose a content topic from the list.



The page comes complete with suggested content, including prompts for typing in your own information...

and a button to automatically add or delete diagram sections.

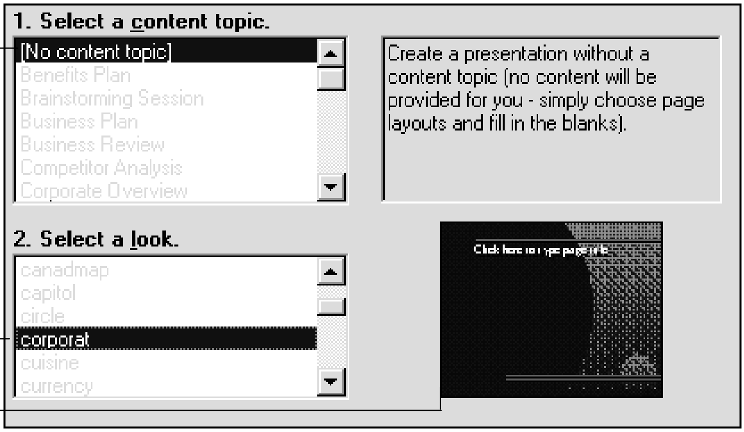
Choosing a look

A SmartMaster content topic comes complete with its own recommended look, but you can choose another look, or choose to create a presentation using Click here blocks, which guide you in typing in your content. Freelance Graphics comes with over 120 looks, each designed by a professional graphic artist.

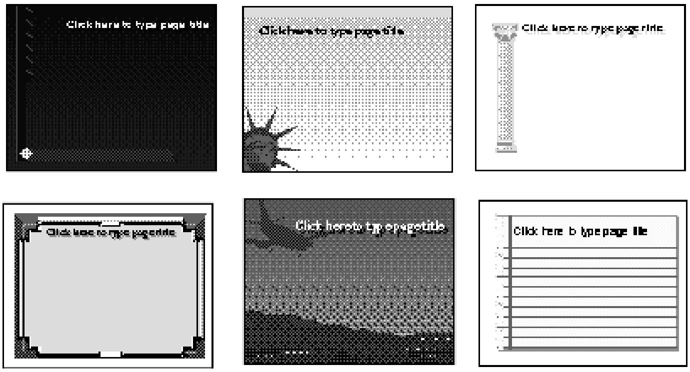
Click here to create a presentation without filled-in content.

Choose a look.

A thumbnail view of the highlighted look



Six of the over 120 available looks, each with Click here blocks



Choosing another SmartMaster look

If you decide you don't like the look you've chosen, choose Presentation - Choose a Different SmartMaster Look.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

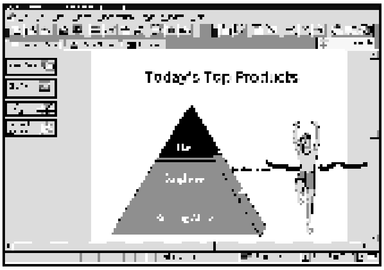
   SmartMaster content topics, overview

   Tips
3. Click the index entry you want, then click Display.

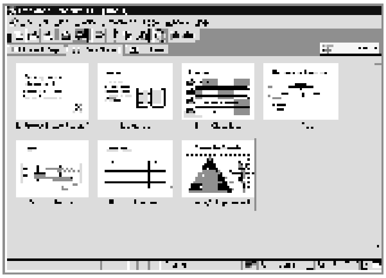
View tabs: for an organized desktop

Freelance Graphics offers you three views of your work, each with tools that make it easy to concentrate on one aspect of creating a presentation. Click a tab to see a view. (For an illustration of where to find view tabs, see the first page of this chapter.)

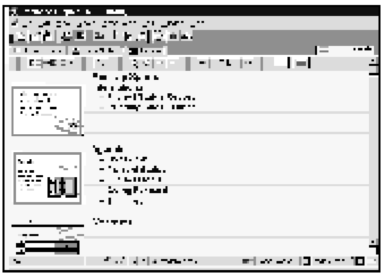
Current Page view
You see both graphics and text on one page.



Page Sorter view
You see the scope of your whole presentation and rearrange it.



Outliner view
You create and edit the text of your presentation.



Current Page buttons: easy access to frequent tasks

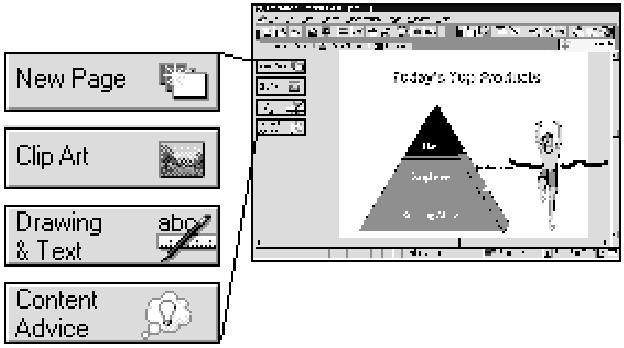
In Current Page view, buttons let you...

add a new page to your presentation,

add clip art to a presentation page,

draw your own pictures or diagrams and add text to them,

and receive advice about organizing and creating your presentation.

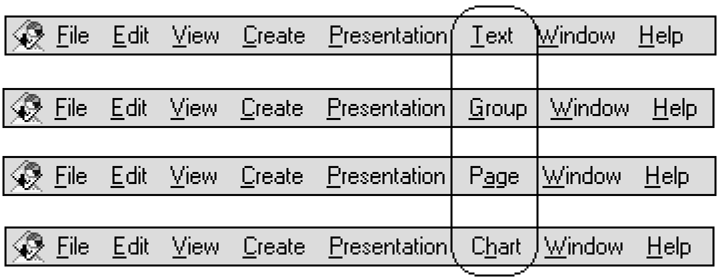


The context-sensitive screen

Menus, SmartIcons, and the status bar are context-sensitive parts of every Freelance Graphics screen.

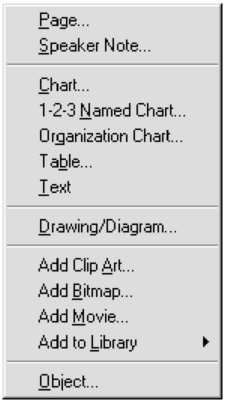
The menu: predictable and context-sensitive

Here are standard Freelance Graphics menus. Whatever you are working on appears in the menu, always in the same place.



The Create menu

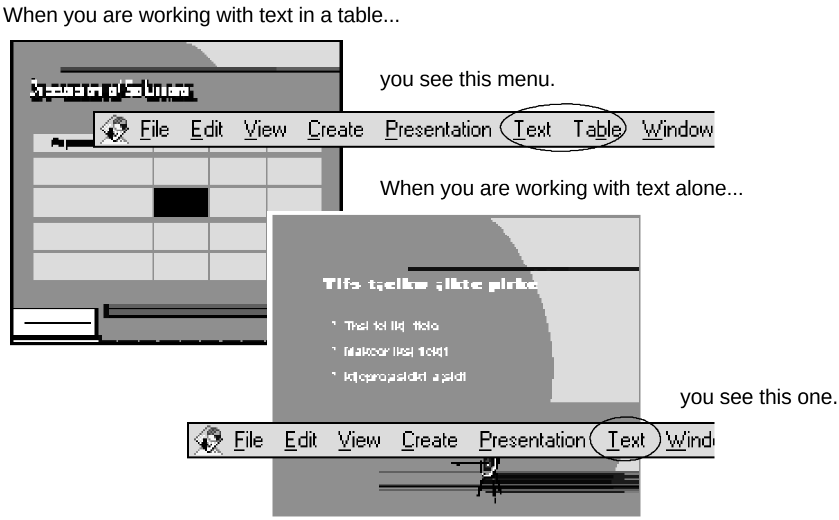
When you want to add any new element, you can add it from the Create menu.



What to do if you can't find the menu you want

You may not be able to find the menu you want for one of two reasons:

- You must create or import an object (using the Create menu or one of the buttons in the Current Page view) before you can work on a task related to the object. For example, you must create a chart before Chart appears in the menu.
- You must click the object to select it. Remember, you must be working on the object you want to change before its menu appears.

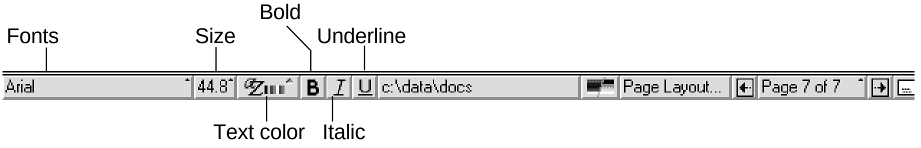


The status bar: for quick changes

The status bar always appears at the bottom of your Freelance Graphics screen, providing information on your current pages and letting you change such settings as text fonts and sizes quickly.

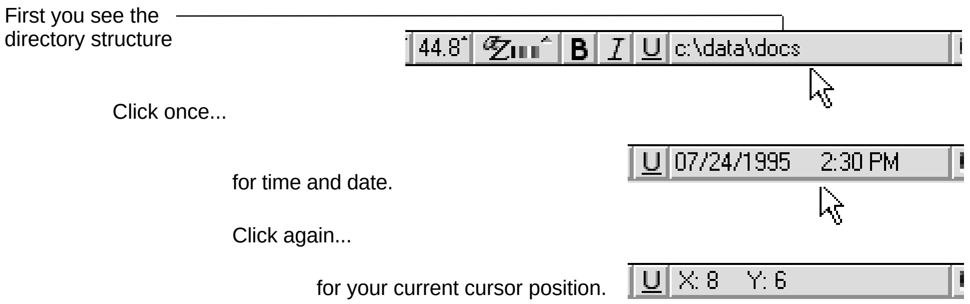
Text style options

When you are working in text, you can change the following text settings by clicking buttons on the status bar:



Updates

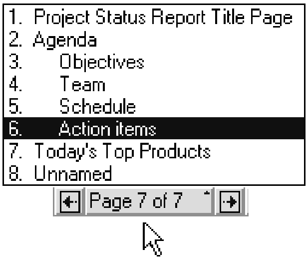
The long button in the middle of the status bar gives you current status updates:



Changing pages

Click the page number to see a pop-up list to take you to any page in the presentation.

Click the arrows to go forward or back one page.

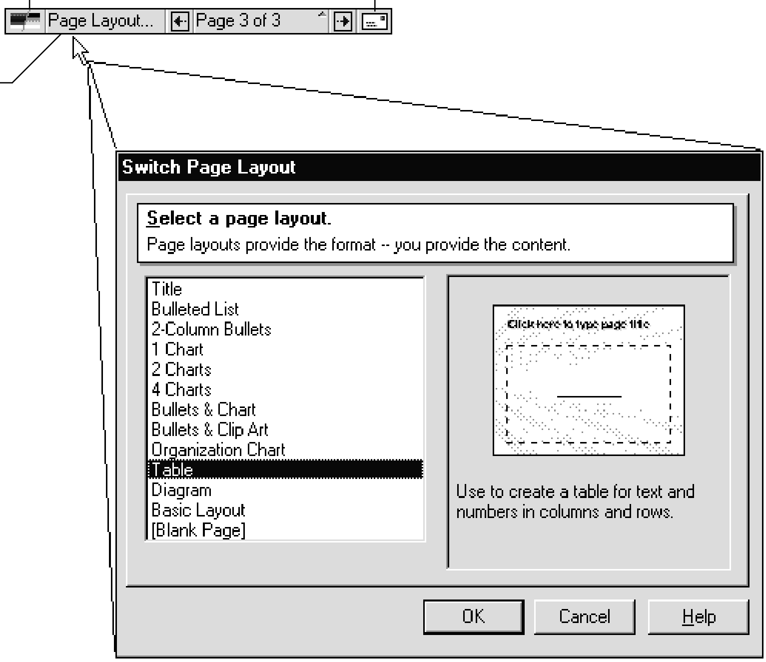


Other changes

Switch between color and black and white views.

Start TeamMail.

Click to change Page layout.

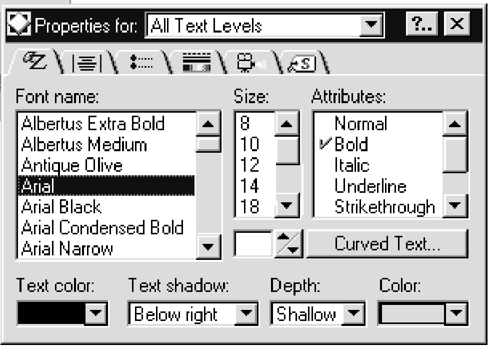


The InfoBox: one-stop shopping for formatting

The InfoBox lets you change the look of text or an object (such as a table or clip art) by changing all the attributes from one place. Like other Freelance Graphics tools, the InfoBox is context-sensitive.

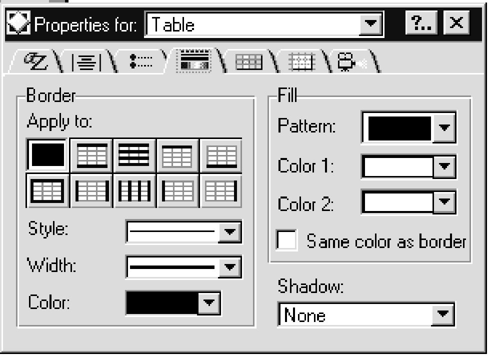
When you have a text block selected...

you get a text-related InfoBox.



When you are working in a table...

you get an InfoBox for tables.

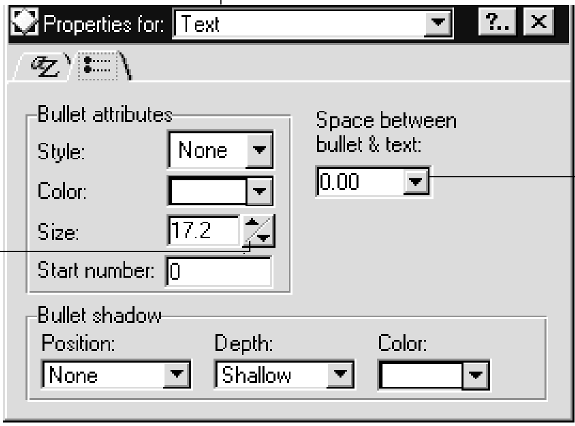


A close look at the InfoBox for text

You get the InfoBox below when your cursor is in text. Using the options on the panel of the InfoBox below, you can change the look of bullets in your presentation. Here is how the InfoBox works:

Here is what you have selected.

Tabs let you see and choose any related options for text.



Click the arrow to see spacing options.

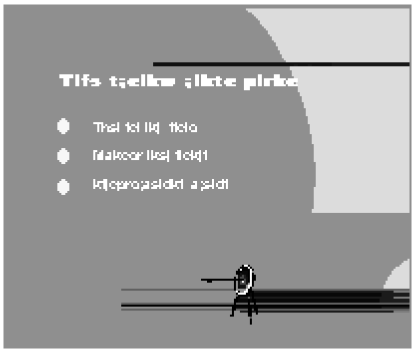
Click an arrow to change the bullet size.

An example of using the InfoBox

Suppose you decide you don't like the style of the bullets in your presentation. You can use the InfoBox to make them larger, bolder, and more openly spaced.

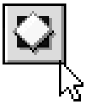
Before

After

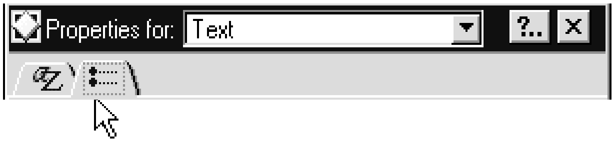


Here's how to change bullets in a presentation.

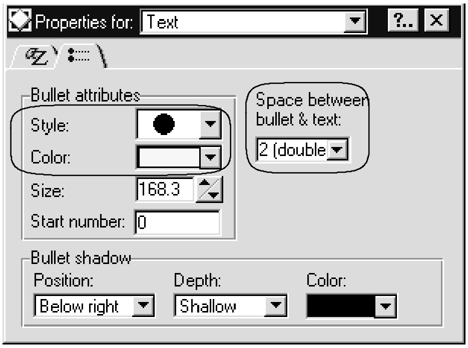
1. Select all the bulleted text.
2. Click this icon.



3. Click the bullet tab.



4. Choose the following options for larger, more brightly colored, and more widely spaced bullets.



Experiment using the InfoBox

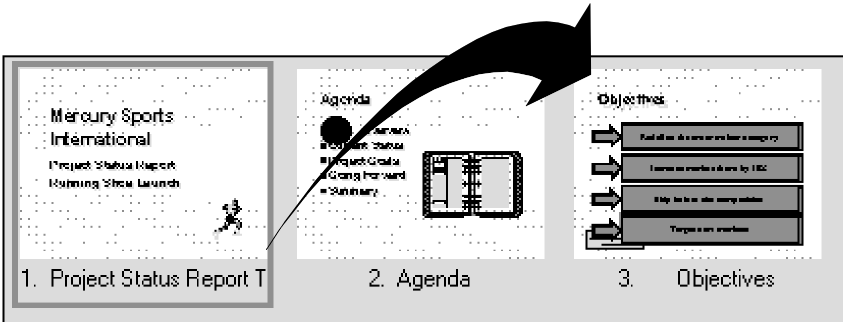
It's easy to experiment using the InfoBox. Click an option. The changes take place instantly. If you don't like the change, try another or choose Edit - Undo. In the InfoBox you don't have to click OK or Cancel to apply the options you selected.

Using drag and drop

Freelance Graphics lets you use drag and drop to make creating presentations easier.

To rearrange pages in the Page Sorter view

Select the page you want to move and drag it just past the page you want to appear before it.



Result

To draw flowchart elements from the toolbox

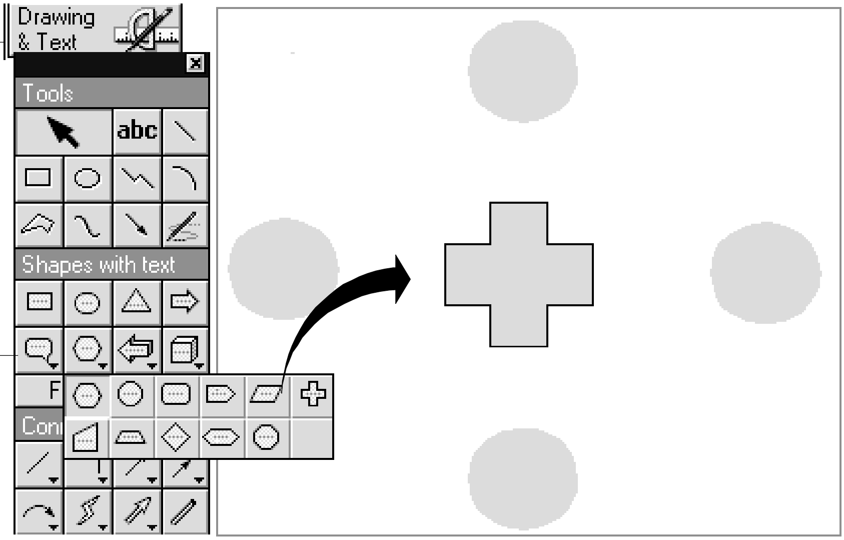
When you drag diagram or connector objects from the toolbar, the objects are consistently sized.

Click to draw a diagram.

Choose a shape.

Shapes with down arrows indicate more shapes.

Drag the shape you want to the page.



To reorder bulleted lists

1. Select the bulleted list.
2. Select the text.

3. When the cursor turns to a hand, grab the bullet.

4. Move the hand until a line appears where you want to insert the bullet.

5. Drop the bullet.

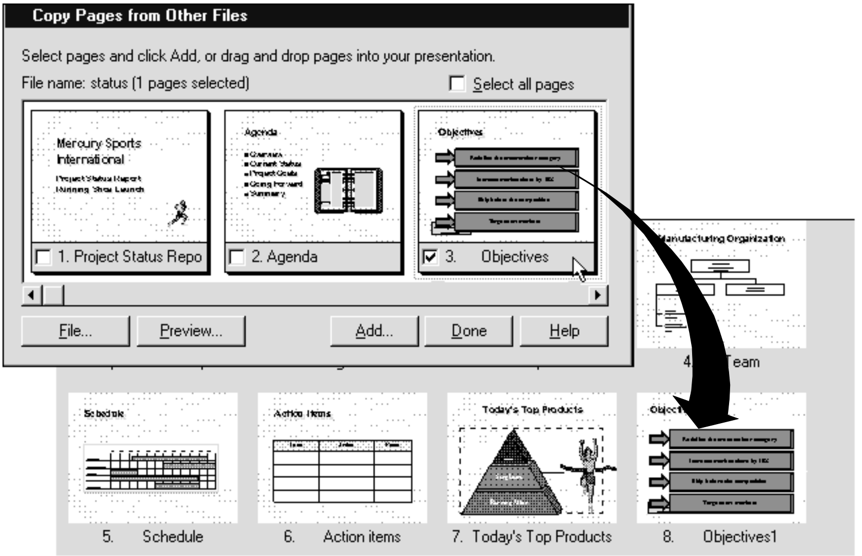
To copy pages from other files

Suppose you created a presentation page about the early objectives of your project. When you give a new presentation, you can copy a page from the older file directly into your new file.

1. In Page Sorter view, choose File - Copy Pages from Other Files.
2. Look through the thumbnail pages to find the page you want.

3. Click the page you want to use.

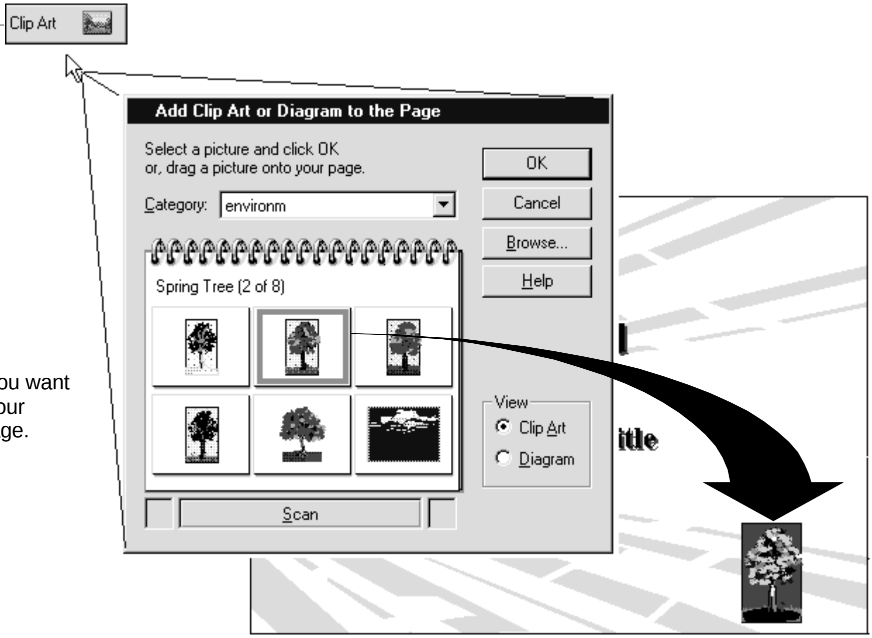
4. Drag it to where you want the page to appear in your new presentation.



Illustrating your message

Add pizzazz to your presentation by using clip art.

Click



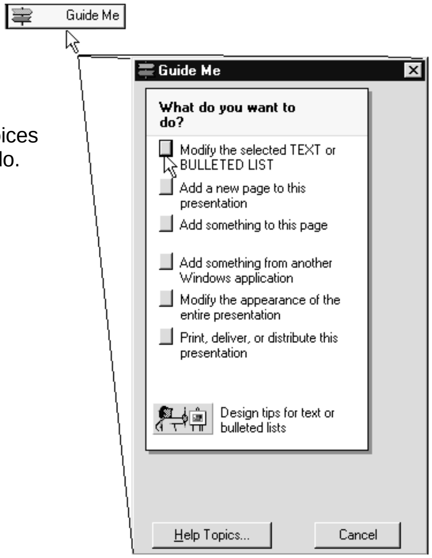
Select the art you want and drag it to your presentation page.

Guide Me: help with Help

Sometimes it's hard to know where you want to go in Help. Guide Me, represented by the yellow button near the top right of your screen, provides a series of questions that direct you to the correct Help.

Click Guide Me.

Click a button to see choices about what you want to do.



Chapter 41
Starting Smart with a SmartMaster

SmartMaster content topics and SmartMaster looks provide an easy and quick way to create presentations. This chapter presents a series of procedures that show you how to create a presentation quickly and fill in content pages with information such as text, bulleted lists, diagrams, charts, clip art, and organization charts.

Getting to work: creating a presentation

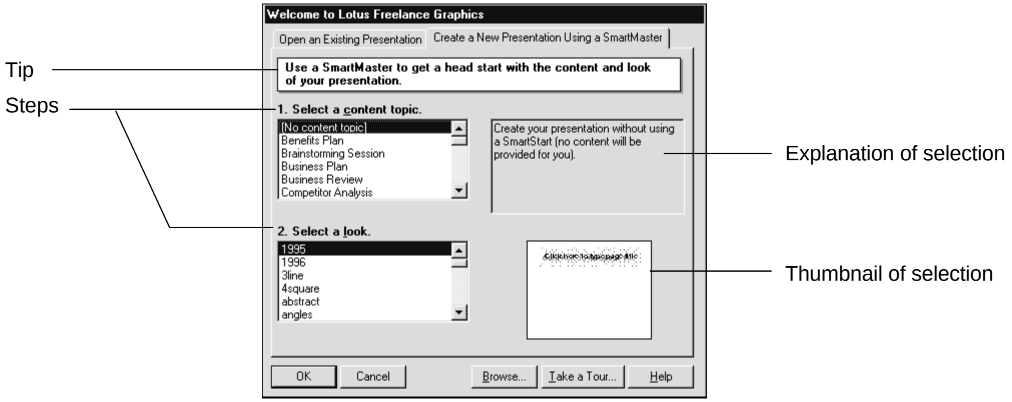
This section walks you through selecting a SmartMaster content topic and look, and creating the first page of a presentation.

1. Start Freelance Graphics.

   The Welcome to Lotus Freelance Graphics dialog box is displayed.

2. If necessary, click the Create a New Presentation Using a SmartMaster tab.

   Take a moment to notice the information now provided in dialog boxes in Freelance Graphics.



   The yellow bar contains an in-line tip that explains why you are using the dialog box. The steps you can perform are listed in the dialog box. As you move the highlight through the Select a content topic list box, an explanation of that content topic appears to the right of the list box.

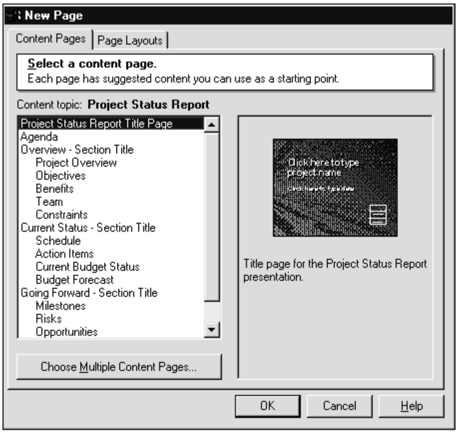
Similarly, for the choices in the Select a look list box, Freelance Graphics displays a thumbnail of the look design.

3. Select a content topic.
4. Select a look.

   The "Look stored with content topic" is the recommended look for the selected topic; however, you can select whichever look you prefer. For example, the illustrations in this book use the motion look.

5. Click OK.

   You're ready to create the first page, and Freelance Graphics displays the New Page dialog box.



The listed content pages are pages you would typically find in a presentation with the content topic you selected. The pages are listed in the order in which they are typically used, but you can use the pages in any order you choose. As you move the highlight through the list, a thumbnail of that page's design and an explanation of its content appear to the right.

6. Select the content page you want and click OK.

Freelance Graphics displays the new page. The following illustration shows the title page for a Project Status Report.

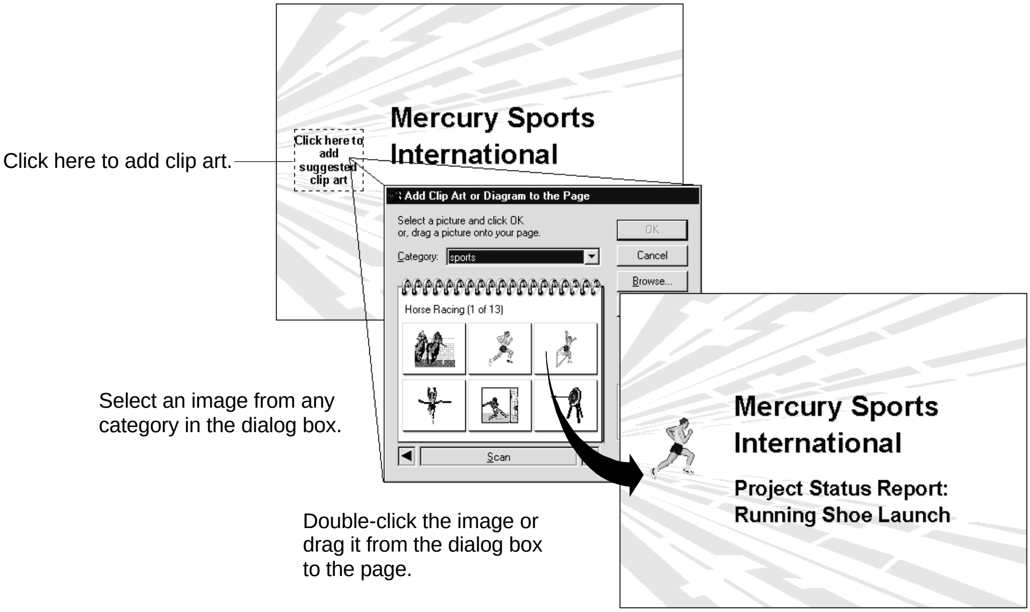
7. Start typing the title of the presentation.

If you start typing on a new page with a Click here block, Freelance Graphics automatically places the text in the first text block.

8. Click the next Click here block and type the text for that block.

Regardless of the suggested content, you can always edit the content of a Click here block to the text you want. For example, the second block tells you to "Click here to type date." Typing the date is a suggestion — the text you type is up to you.

9. Click the Click here block to add clip art to the title page.



That's it — the page is finished.

This procedure showed you the basic tasks you need to create a presentation. You select a SmartMaster content topic and a SmartMaster look, then add content pages and fill in the blocks. Some pages have content already filled in; you can keep or modify this content as you need. The next section gives you more practice with content pages.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Click here... blocks

   Clip art, adding to a page

   Creating, new presentations

   SmartMaster content topics, overview

   SmartMaster looks
3. Click the index entry you want, then click Display.

Building a presentation with content pages

Content pages are just that — the contents of a presentation. When you choose a SmartMaster content topic, it provides you with a selection of content pages that are typically used in that type of presentation. These pages are also listed in the order in which they usually appear in a presentation, but you can choose any page you want in any order that you want them.

Content pages use Click here blocks to help you place text, clip art, charts, diagrams, and other objects on a presentation page. A Click here block also provides the properties for the text or chart that will be placed in the block. These properties are set to give a consistent look to charts, text, and diagrams throughout a presentation.

Some Click here blocks also have suggested content. When you click the block, Freelance Graphics “writes” the suggested content on the presentation page. You can edit, rewrite, delete, or keep the suggested content.

The following procedures show you how to select and fill in content pages to create a presentation using the Project Status Report SmartMaster content topic.

Filling in the Project Overview content page

This procedure shows you how to complete the Project Overview content page by filling in a bulleted list.

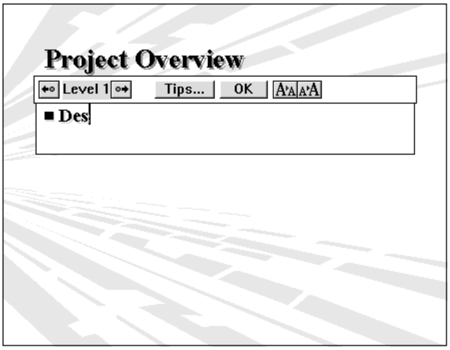
1. Click the New Page button to open the New Page dialog box.

2. Select the Project Overview content page and click OK.

3. Click the Click here block for the bulleted list.

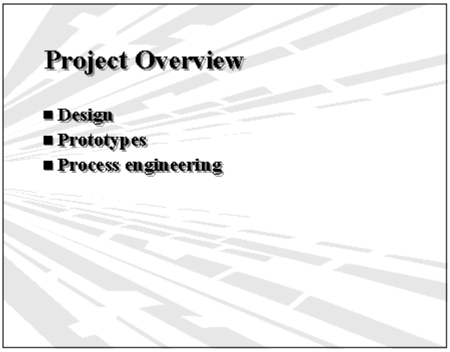
   Tip You can recognize a bulleted list by the bullet character in the left margin.

4. Start typing the first bullet item.



5. Press **ENTER** to add a second bulleted item to the list.

6. Click OK (in the text block) when the bulleted list is complete.

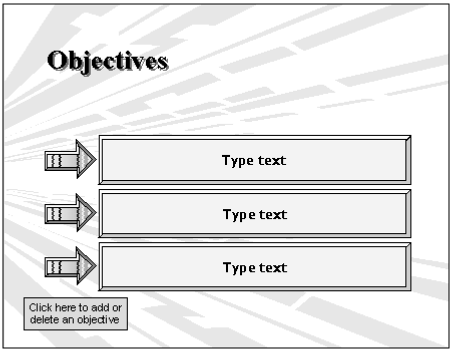


Filling in the Objectives content page

Objectives are a topic frequently found in a presentation. With the Objectives content page, all you need to do is type the objectives — the graphic format is already in place. When you want to add or remove objectives, you tell Freelance Graphics where to place the new ones or which ones to remove.

The following procedure uses the Objectives content page from the Project Status Report content topic.

1. Click the New Page button to open the New Page dialog box.
2. Select the Objectives content page and click OK.



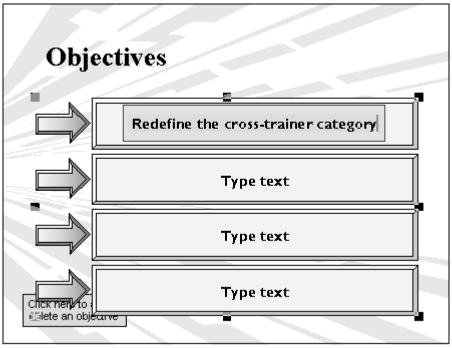
In order to show how simply you can add and remove objectives, assume that you already know that there will be four objectives.

3. Click the Click here button to add another objective.

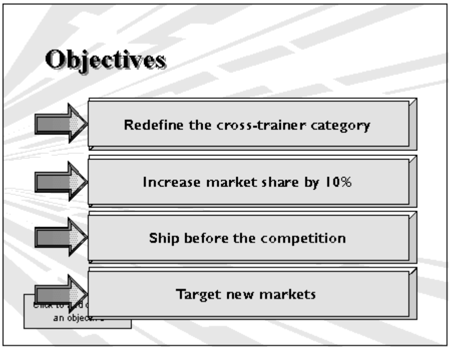
Click the button to open the Add or Delete an Objective dialog box.

You use this dialog box to add or remove objectives from a new list or an existing list. You can specify where you want a new objective inserted, or an existing objective you want removed.

4. Click OK to add an objective.
5. Click the objectives list on the presentation page.
6. Click the “Type text” phrase to type an objective.



7. Repeat step 6 to add the remaining objectives.



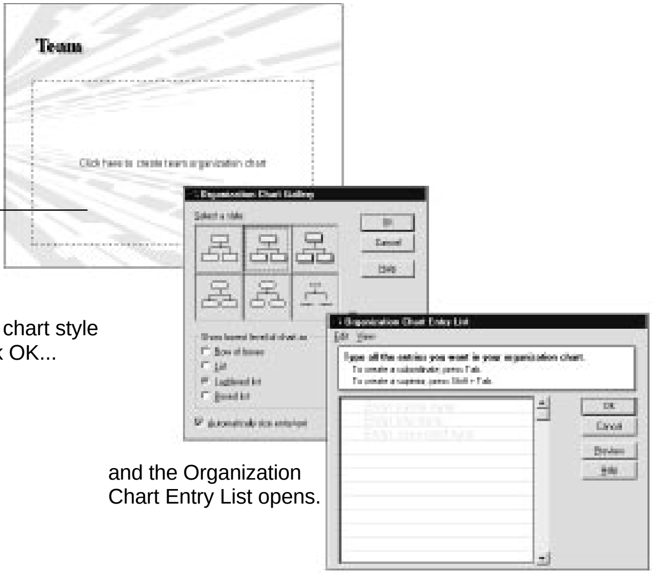
Filling in the Team content page

The Team content page has an organization chart to show the team members. All you need to do is choose a chart style, then type the entries. The number of blocks and levels are adjusted to match your entries.

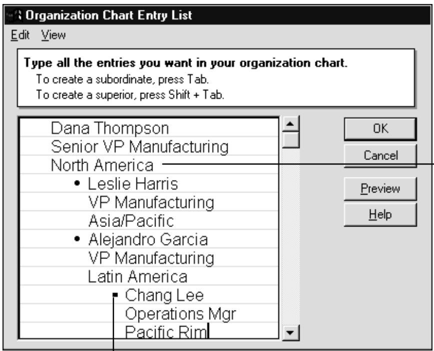
The following procedure uses the Team page from the Project Status Report content topic.

1. Click the New Page button.
2. Select the Team content page.

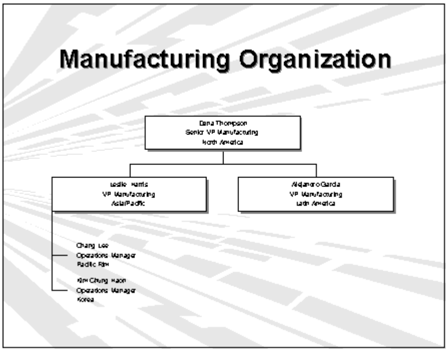
3. Click the Click here block to create the organization chart. First you select the style of organization chart you want.



4. Type the entries for the organization chart.



5. Click OK to add the chart to the page.
6. If you want, double-click the Team text block to change the title to one of your choosing.



For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Click here... blocks

   Content pages

   Diagrams

   Organization charts
3. Click the index entry you want, then click Display.

Mix and match content pages with page layouts

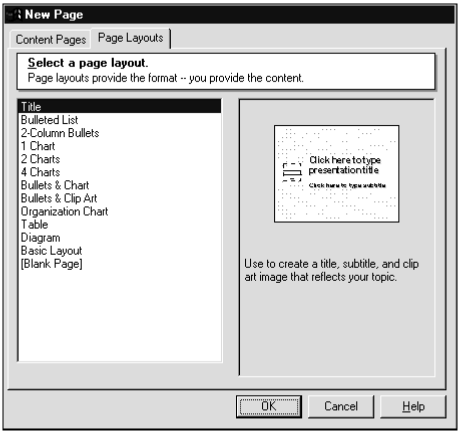
In addition to the content pages in a SmartMaster content topic, you can choose a page layout or a blank page. Page layouts provide a design — you provide the content. For example, there are page layouts for a chart, a bulleted list and a chart, two charts, and a table. Page layouts automatically use the same look as the rest of the presentation pages.

The following two sections show how to create a bar chart and a diagram using page layouts.

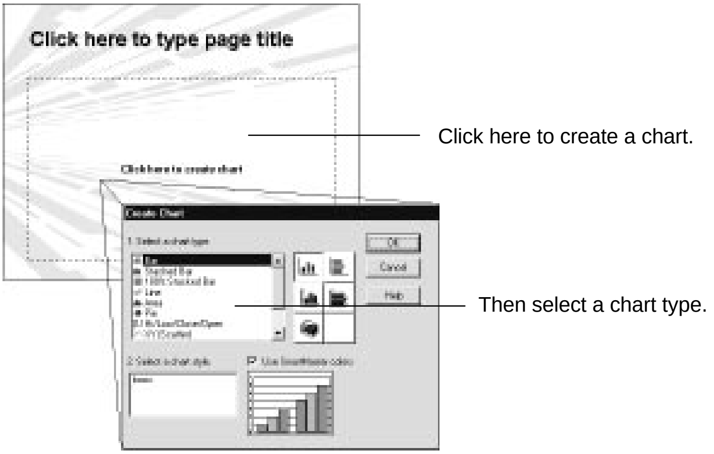
Filling in a bar chart page layout

Bar charts provide a visual comparison of individual values over a period of time. The following procedure uses the 1 Chart page layout to create a bar chart.

1. Click the New Page button to display the New Page dialog box.
2. Click the Page Layouts tab.



3. Select the 1 Chart page layout and click OK.
4. Click the Click here block to open the Create Chart dialog box.

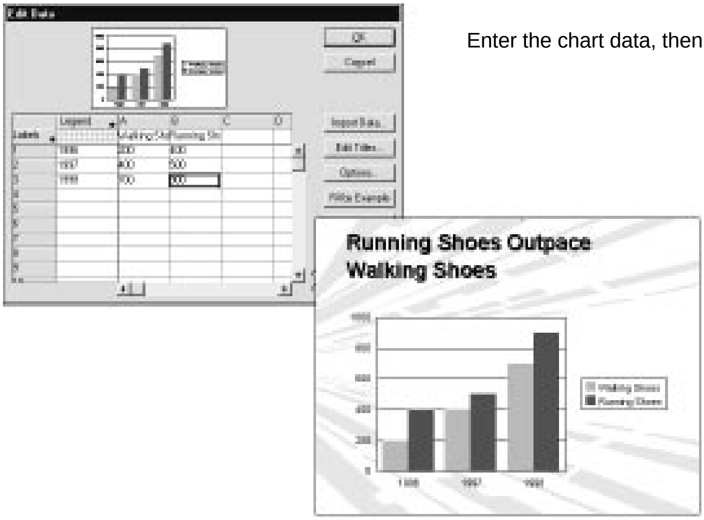


5. Select the Bar chart type and click OK.

   The Edit Data dialog box appears.

6. Enter the data for the bar chart, then click OK.

   As you add the data, the thumbnail sketch at the top of the dialog box shows the chart in progress. When you click OK, the chart is added to the presentation page.



Enter the chart data, then click OK...

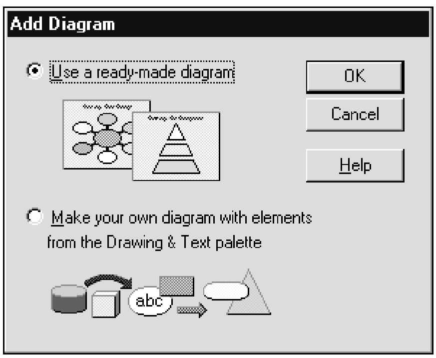
to place the chart on the page.

Filling in a diagram page layout

Freelance Graphics has a variety of diagrams of different designs and structures. You can use a ready-made diagram as is, or customize and rearrange the diagram components to suit your needs.

The following procedure uses the Diagram page layout.

1. Click the New Page button to display the New Page dialog box.
2. Click the Page Layouts tab.
3. Select the Diagram page layout and click OK.
4. Click the Click here block to open the Add Diagram dialog box.

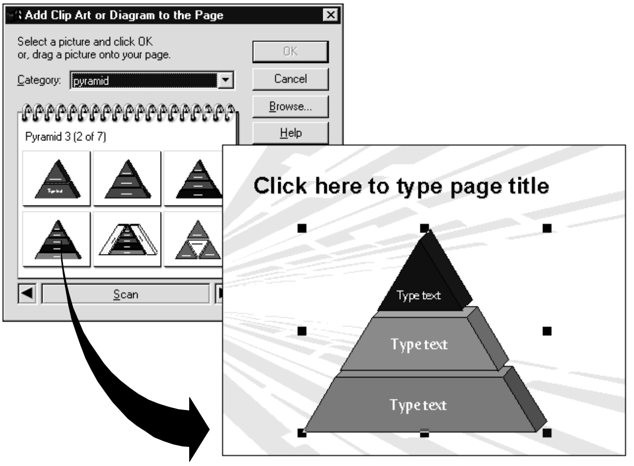


5. Select "Use a ready-made diagram" and click OK.

   The Add Clip Art or Diagram to the Page dialog box is displayed.

6. Select the diagram you want.

Double-click or drag the diagram you want to the page.



7. Click the "Type text" prompts in the diagram to type the label for each tier.

8. If you want, click the page title block and type a title.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Bar charts

   Click here... blocks

   Diagrams

   Page layouts

3. Click the index entry you want, then click Display.

Adding objects without a Click here block

You can add any type of object to a page, even without a designated Click here block. As an example, the following procedure shows how to add clip art to a page that does not have a Click here block for clip art.

1. Click the Clip Art button.
2. Select an image from the dialog box.
3. Either double-click the image to place it on the page, or drag it into position, adjusting its size as needed.

Tip You can also use the Create menu to add pages, speaker notes, drawings, clip art, and any other object to a presentation page.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Click here... blocks

   Creating

   Drawings

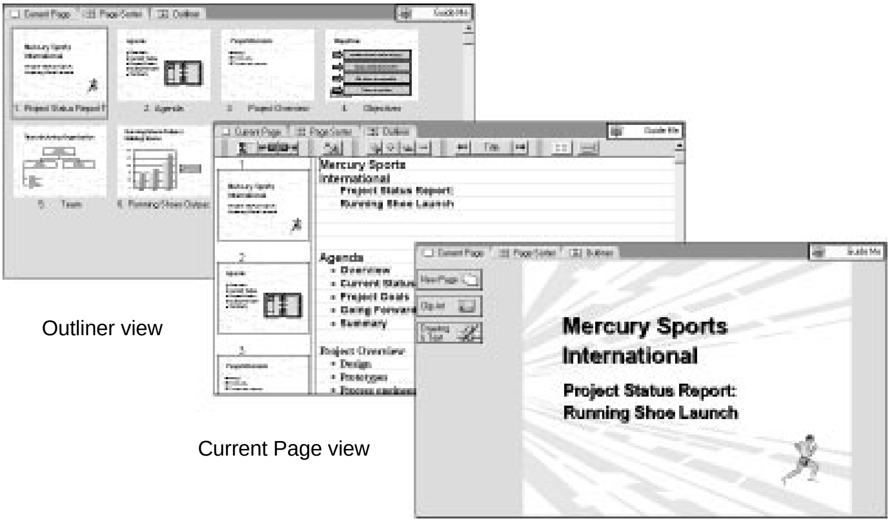
   Objects
3. Click the index entry you want, then click Display.

Getting a new perspective from another view

The Current Page view gives you the up-close working view of each page in a presentation. The Page Sorter and Outliner views give you a global view of a presentation, which makes it easier to organize. You use the tabs at the top of the presentation window to move from view to view.

- Page Sorter view is an overall view of the presentation. Each page appears as a thumbnail sketch. You can rearrange, copy, delete, and add pages in this view.
- Outliner view shows the presentation as an outline, with thumbnail sketches of each page in the left margin. In this view you can add, edit, move, and format text; add, move and delete pages; and expand and collapse the outline.
- Current Page view is where you work with text and graphics on the pages of a presentation.

Page Sorter view



Outliner view

Current Page view

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Tips

   Views
3. Click the index entry you want, then click Display.

Tips for creating a presentation

The online Help for Freelance Graphics is the definitive source of information on how to create a presentation, as well as a source of guidelines and tips for creating effective presentations. Help has the topics you would expect to find, such as procedures on how to perform basic tasks, as well as complex and advanced tasks. Yet Freelance Graphics Help also includes design tips, such as suggestions on how to use color and text, recommendations for illustrating a presentation, advice on body language for a presenter, and techniques for answering audience questions.

The few minutes you take to acquaint yourself with the scope of information in Help will be well invested. Help is your “at hand” guide and reference for creating presentations.

When you’re creating a presentation, remember to use Guide Me, Content Advice, and the demos in Help. These three features provide immediate information for the task you’re currently working on.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Tips
3. Click the index entry you want, then click Display.

Designing your own SmartMaster content topics

You can customize an existing SmartMaster content topic or create your own to serve as a standard format for your workgroup. For example, if all your presentations include a similar agenda or quarterly sales figures depicted in charts, you can include these in a content topic so you don't need to create the pages from scratch for every presentation. Or you may want to convert an existing presentation into a content topic to be used as the basis for similar presentations.

By creating a custom content topic you ensure that every presentation that uses that content topic will have the same basic format, the same core content, and a consistent look.

Keep in mind, though, that you need to have advanced knowledge of Freelance Graphics, and a thorough understanding of SmartMaster content topics, SmartMaster looks, and Click here blocks in order to design your own SmartMaster content topic.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Click here... blocks, creating

   Content topics, designing, overview

   Page layouts, creating

3. Click the index entry you want, then click Display.

Chapter 42
Team Computing with Freelance Graphics

Once a presentation is created, it usually goes out for review. After you've heard back from the reviewers and incorporated comments, it's time to start rehearsing for the final delivery.

If you show the presentation as a screen show, you can add visual and sound effects for individual pages and for objects on a page. You can also add speaker notes as prompts for what to say for a presentation page.

The following sections give you an introduction to the review and rehearsal phases for a presentation, delivering a presentation as a screen show, and printing a presentation.

Team collaboration and review

Team Computing improves decision-making because it's easier for team members to communicate and collaborate on a presentation. The Team Computing features of TeamReview and TeamMail make it easy to send out a presentation for review and to collect comments and suggestions from team members. Regardless of how widespread team members are or how conflicting their schedules, TeamComputing brings a team together electronically.

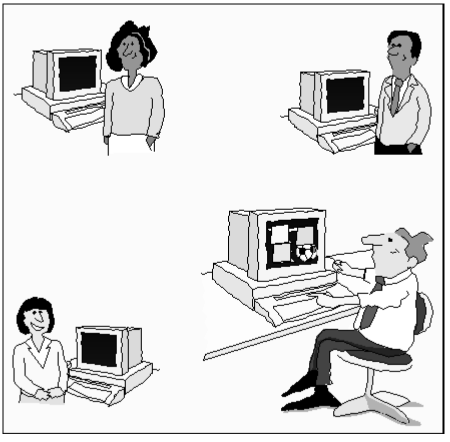
TeamReview collects team members' ideas

With TeamReview, you can easily distribute and collect comments from your team members. TeamReview has three steps: distribute the presentation to team members, let team members input their comments, and consolidate and return the comments to the author.

For the first step, you decide how to distribute the presentation: e-mail, a Notes database, a network, or floppy disks. You can also send an e-mail message to the team members to alert them to a team review.

For the second step, the team reviewers add their comments to the presentation, using the TeamReview tools. Reviewers can add yellow stickies with comments, and create lines, circles, arrows, and freehand drawings to highlight comments and sections of the presentation.

For the third step, TeamReview consolidates all reviewer comments into one presentation, and returns that presentation to you electronically. You can view the comments from all reviewers at once, or individually — you decide which comments to incorporate into the presentation.



TeamMail routes a presentation to team members

TeamMail is another method for distributing a presentation to team members. With TeamMail you distribute a presentation to a mailing list. Freelance Graphics can e-mail the presentation to all recipients at once, or sequentially, along a routing list. Each recipient reviews the presentation in Freelance Graphics, then sends you an e-mail with any comments or suggestions.

Post a presentation to the Web for review

World Wide Web surfers can save a Freelance Graphics presentation so that it can be posted on the Web. This approach is best if your viewer's computer (a Macintosh® or UNIX® system, for example) cannot run Freelance Graphics or the Mobile Screen Show Player. Before posting the presentation, however, you must create a link from your home page to the Web presentation. (If you do not have a home page, you must create one, then add the file references to it.)

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   TeamMail

   TeamReview

   World Wide Web
3. Click the index entry you want, then click Display.

Practice, practice: rehearsing a presentation

Rehearsing a presentation helps assure you of success. As you rehearse you can refine your delivery, create or modify speaker notes, and have Freelance Graphics track the elapsed time. You'll know how much time you're spending on each page, and the total amount of time for the entire presentation.

If you're interrupted while rehearsing, you can "pause" the timer, then restart when you're ready to continue.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Rehearsing, presentations

   Tips
3. Click the index entry you want, then click Display.

Speaker notes

A speaker note is a note that is associated with a presentation page. Speaker notes serve as prompts while you are giving a presentation, as storage places for supporting facts or data sources, or as messages to colleagues who might deliver your presentation. Speaker notes can also be used for handouts. Enter the narrative or background information in speaker notes, then print the presentation with the notes alongside or below your graphics.

The text of a speaker note is visible only when you open the Speaker Note window or when you choose to print speaker notes with a presentation.

You can create speaker notes at any time while you are working on a presentation. Speaker notes can be created in the Current Page, Outliner, and Page Sorter views, and when you are rehearsing.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Speaker notes
3. Click the index entry you want, then click Display.

Screen shows

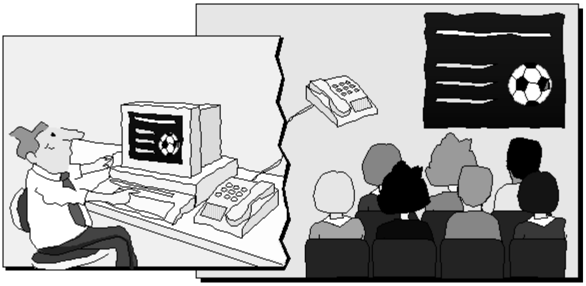
When you deliver a presentation as a screen show, the presentation becomes more like a movie than like a book: animated colored images flow from one page to the next. To get an animated effect, you apply visual effects to pages and to objects and text.

During a screen show, you can play movies and sounds to add cinematic flair to a presentation. Movies can be interleaved with other events on a page, and sounds can be attached to objects, page transitions, and bulleted points; you can even activate sounds by clicking an object.

For remote screen shows, you can use TeamShow or the Mobile Screen Show Player.

TeamShow runs a screen show from any location

With TeamShow you can run a screen show from your computer in one location while others watch it on another computer in a remote location. You can talk by telephone or video conference as you deliver the presentation, and any speaker notes are displayed only on your computer.



Mobile Screen Show Player makes any screen show portable

With the Mobile Screen Show Player, you can run a Freelance Graphics presentation on any Windows 95-based computer, or give a copy of a presentation to anyone to view, even if they do not have a copy of Freelance Graphics. You can also distribute the Mobile Screen Show Player via TeamMail or the Internet® to non-Freelance Graphics users who need to view a presentation.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Screen shows

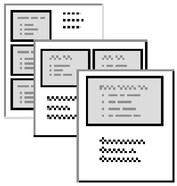
   TeamShow
3. Click the index entry you want, then click Display.

Printing a presentation

Depending on how you plan to use a printed presentation, there are several different ways in which you can print it. You can print an outline, one presentation page per printed page, or two or more presentation pages on each printed page.

Two, four, or six presentation pages per printed page...

with speaker notes...



or as audience handouts.

You can also preview the presentation first, to make sure it will print the way you want.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type one of these phrases:

   Previewing

   Printing
3. Click the index entry you want, then click Display.

Chapter 43
Getting Started with Organizer

Organizer uses the metaphor of a notebook to help you manage your time by tracking appointments, showing tasks, listing phone calls, displaying special dates, and storing contact information. It's like a paper-based day planner you may already use. Organizer has tabs that you turn much like tabs in a paper day planner. However, with Organizer, your work is in an electronic notebook, which allows you to access and manipulate information more quickly and efficiently.

What is Organizer?

With Organizer, you create a custom calendar to track your meetings and appointments, as well as manage your to do lists, long-range events, and anniversaries. You save contact information in the Address section and track phone calls in the Calls section. Organizer provides a Notepad to capture text and graphics or store information from other documents and applications.

Organizer also lets you see the big picture. You can view time-related information (To Do, Planner, Anniversary) separately in each section, or together in Calendar. You can link entries to other entries between sections. Plus, you can print information in over two dozen print layouts.

You can also use Organizer to share calendars, task lists, address books, and other information across your local area network (LAN) with your workgroup. You can even e-mail Organizer entries to coworkers using TeamMail™.

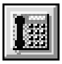
Organizer sections

The Organizer notebook contains seven sections: Calendar, To Do, Address, Calls, Planner, Notepad, and Anniversary. Switch from one section to another by clicking the tabs. You can also include two or more copies of a section in your Organizer file. To learn about inserting sections, see Chapter 45, "Customizing your Organizer Notebook." To learn about each Organizer section, see Chapters 46-52.

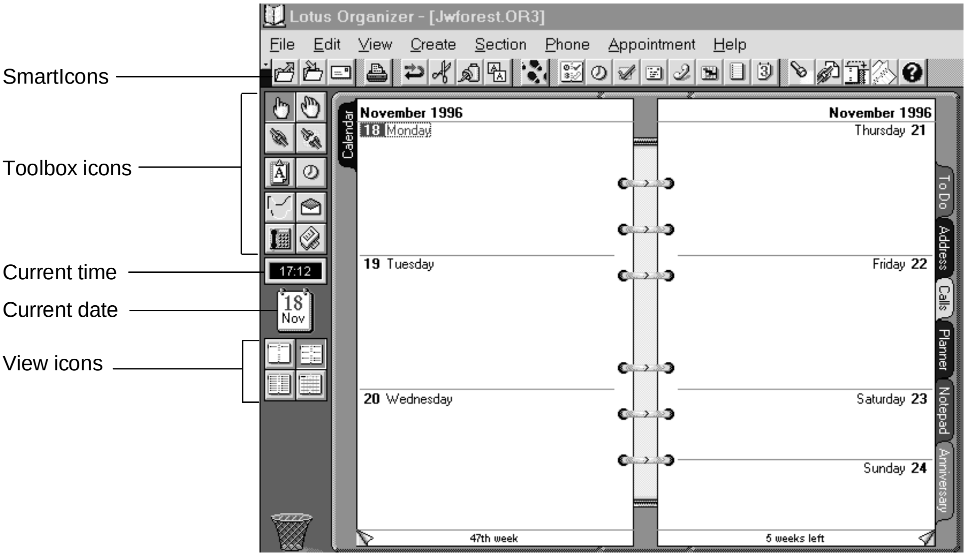
Icons, mouse pointers, and Organizer symbols

Toolbox icons and SmartIcons provide shortcuts for performing Organizer tasks. To use Toolbox icons and SmartIcons, position your mouse pointer on an icon and click the left mouse button.

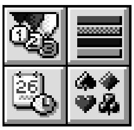
Toolbox icons



Toolbox icons let you perform Organizer-specific tasks. For example, you can drag a phone number from your Address section to the Phone icon, and Organizer automatically dials the phone number, if you've installed and set up a modem.



Toolbox icons appear on the left side of the Organizer workspace. You can drag and drop an Organizer entry to the Toolbox icons.



The View and Sort icons let you display entries in different ways. For example, in the To Do section, you can view entries by the priority you assign the entries (such as 1, 2, 3, and None), by the status you assign the entries (such as Current, Completed, Overdue, and Future), by a start date you assign the entries, or by the category you assign the entries (such as Expenses).

The View and Sort icons change depending on what section you're in. Go from section to section (by clicking the section tabs) to see how these icons change. When you've included entries in some of these sections, click one of these icons to see how it affects the entries. When you click one of these icons, you're only changing how or what information appears. You won't lose any information you added.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Toolbox icons, list

3. Click Display.

Mouse pointer shapes and Organizer symbols

In Organizer, the mouse pointer can assume various shapes. Shapes change according to what you're doing. Also, you can animate mouse pointers.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Mouse pointer, list of

3. Click Display.

What's new in Organizer 97?

Organizer offers a Windows 95 look and feel, with features such as common dialogs, long file names, and registry support. Organizer also offers enhancements to its personal information management (PIM) features.

This release includes the following enhancements:

- A new Day per page view using time slots and a time ruler that lets you graphically display and block time for your appointments.
- Address label and envelope printing for International address formats.
- Support for TAPI (Telephony Application Programming Interface) dialing, which means more streamlined automatic number dialing capabilities in both the Calls and the Address sections.
- Rich text formatting, such as bold, italic, underlining, and font size, type, and color in the Notepad.

- Support for linking and embedding OLE objects, such as spreadsheets, metafiles, word processing documents, presentations, and, if you have a World Wide Web browser, Web sites and home pages on Notepad pages.
- An Organizer Tour that gives you an overview of the product.
- Easy conversion process of Organizer 1.x and Organizer 2.x files to Organizer 97 files (with the new .OR3 extension).
- New ways to set access rights to your file using passwords.
- Features such as animated mouse pointers and sounds.

Working with Organizer files

Organizer 97 uses the .OR3 default extension. For information on upgrading an Organizer Release 1.x or 2.x file, see "Upgrading to Organizer 97," later in this chapter.

Opening a file

If you saved a file already, you can open the existing file.

1. Choose File **-** Open.

The Open dialog box appears.

2. Click the Files of type box to select the type of file you want to open.

For example, if the file is an Organizer 97 file, select Organizer 97 (*.OR3). If the file is an Organizer 2.x file (*.OR2), see "Upgrading to Organizer 97" later in this chapter.

3. Select the file you want to open in the large list box, or enter a name in the File name box.

Tip To find where the file might be or what you named a file, click the Look in box to select the path where the file you want to open might be.

4. Click Open.

Organizer opens the file.

Saving a new file

1. Choose File **-** Save As.

2. Enter a name in the File name box.

You can select different drives and directories in which to save the file using the Save in box.

3. (Optional) If you want to protect the file with a password, click the Passwords button, select Owner, and enter a password.

See Chapter 54 for information on setting passwords for Owner, Assistant, and / or Reader.

4. Click OK.

If you enter a file name that already exists, Organizer asks whether you want to replace the existing file with the current file.

5. Click one of the following buttons:

- Click Yes to replace the existing file with your current file.
- Click No to return to the Save As dialog box.

Upgrading to Organizer 97

Organizer 97 has a new file format, and the extension is .OR3. You can upgrade or convert Organizer Release 1.x or 2.x files to Organizer 97 files. When you upgrade a file, Organizer creates an Organizer 97 file and leaves the old file in its original format and location.

Upgrading a file from earlier releases of Organizer (1.x or 2.x)

In Organizer 97, when you open a file created in earlier versions of Organizer, you're automatically prompted to upgrade (or convert) your file to the new file format. Organizer keeps the file information as it appears in the original version, except for the following information:

- Address section information is converted into the Street, City, State, and Country fields in Organizer 97 if the Organizer 1.x information was entered in a standard format for US business addresses (for example, 55 Cambridge Parkway, Cambridge, MA 02142).
- For Organizer 1.x files, addresses without company names are converted to the home template (H tab) in Organizer 97. Addresses with company names are converted to the business template (B tab).
- For Organizer 2.x files, addresses without company names show alphabetically under the tabs where they were placed originally.
- Address section information in an Organizer 1.x Type field is converted into the Categories field.
- For Organizer 1.x files, phone log information is converted and inserted in the Calls section.
- Organizer preferences in Organizer 1.x files aren't converted. The Planner key names, however, are converted.
- Repeating entries in Organizer 1.x files are converted as individual, rather than repeating, entries; that is, if you modify one entry, the changes can be applied only to the selected entry.

- Anniversary entries in Organizer 1.x files are set to repeat annually on the same date.
- Included sections from other Organizer 2.x files aren't included in the new Organizer 97 file. You can include only Organizer 97 sections in an Organizer 97 file.

Organizer 97 prompts you to convert your Organizer 1.x and 2.x files to Organizer 97 files.

Caution The default extension for Organizer 97 is .OR3. When you convert a file, Organizer changes the extension from the Organizer 1.x extension (.ORG) or Organizer 2.x extension (.OR2) to the Organizer 97 extension (.OR3). After you convert the file, the Organizer 1.x or Organizer 2.x file still exists in its original format and location. While you may open an Organizer 1.x (.ORG) or 2.x (.OR2) file in Organizer 97, you can't open an Organizer 97 (.OR3) file in Organizer 1.x or 2.x.

Converting your Organizer 1.x file to Organizer 97

1. Remove any included sections from the file.

   See "Removing included sections from an Organizer 1.x file," later in this chapter for instructions.
2. Use Lotus Organizer 1.x Utilities to check and compress the file.

   See "Checking and compressing your Organizer 1.x file," later in this chapter for instructions.
3. Open and save the file in Organizer 97.
4. Use Organizer 97 to archive any information you don't need on a daily basis.

   See "Archiving information," later in this chapter for instructions.

Converting your Organizer 2.x file to Organizer 97

Organizer will display a warning if the file you're converting is damaged. Also, the conversion process removes included sections from Organizer 2.x files.

1. Start Organizer 97.
2. Choose File - Open.
3. Click the Files of type box and select Organizer 2.x (*.OR2).
4. Select a file to open.
5. Click Open to open the file.

   Organizer asks if you want to convert the file to an Organizer 97 file. Organizer also reminds you that converted files will increase in size. You can also compact files. See "Compacting Organizer files," in Chapter 53. See "Archiving information," later in this chapter.

6. Click Yes to confirm that you want to convert the file.
7. Organizer converts the file.
8. Click OK when Organizer completes the conversion.
9. Do one of the following actions to automatically open the file or not when you start Organizer:
   - Click Yes if you want to open this file automatically every time you start Organizer.
   - Click No if you don't want to open this file automatically.
10. Choose File - Save.

Note If you want to reduce the size of this file, you need to archive it. See "Archiving information," later in this section.

Removing included sections from an Organizer 1.x file

Included sections are sections that you share with other users. For example, you might have a To Do section in your current file that you share with an assistant or manager. Organizer 1.x files don't automatically remove included sections, therefore you need to remove these included sections before you can convert the file.

1. Start Organizer 1.x and open your file.
2. Make sure you aren't currently in an included section. You can't remove an Organizer section if it is open.
3. Choose Section - Customize.
4. Select an included section and click Remove.
5. Click Yes to confirm the deletion.
6. Repeat steps 3 - 5 for any other included sections.
7. When you are finished removing included sections, click OK.

Checking and compressing your Organizer 1.x file

You use Lotus Organizer Release 1.x Utilities to check and compress a file. If you can't find Lotus Organizer Release 1.x Utilities or already deleted the files in your Lotus Organizer Release 1.x directory, call Lotus Technical Support at (508) 988-2500.

Note The procedure below explains how to start Organizer utilities from within Organizer 1.x. You can also use the Windows Program Manager to start Lotus Organizer Release 1.x Utilities. From Start, run ORGUTILS.EXE in your Lotus Organizer 1.x directory.

1. Start Organizer 1.x.
2. Choose File - Close to close all open Organizer files.
3. Click the System menu in the top left corner of the Organizer window.

4. Choose Run.
5. Select Lotus Organizer Release 1.x Utilities and click OK.
6. Click Open and select your file.
7. Click OK.
8. If Organizer finds any errors, click Yes to repair the file and then click OK to continue. If Organizer doesn't find any errors, click OK to continue.
9. If Organizer prompts you to compact the file, click Yes. Click OK when the file compression is complete.
10. Click Save and then click Close.
11. Click Exit to leave Lotus Organizer Release 1.x Utilities.

Note By default, Organizer 97 displays files with the .OR3 extension in the File name list box. You may need to click the Files of type box and select Organizer 1.x (.ORG) to display your file.

Opening and saving the Organizer 1.x file in Organizer 97

1. Start Organizer 97.
2. Choose File - Open.
3. Click the Files of type box and select Organizer 1.x (*.ORG) .
4. Select a file to open.
5. Click Open to open the file.

   Organizer reminds you to run Lotus Organizer Release 1.x Utilities to check and compact the file.
6. Click Continue.

   Organizer asks if you want to convert the file to an Organizer 97 file.
7. Click OK to confirm that you want to convert the file.

   Organizer converts the file and asks if you always want to open this file when Organizer starts up.
8. Do one of the following actions to automatically open the file or not when you start Organizer:
   - Click Yes if you want to open this file automatically every time you start Organizer.
   - Click No if you don't want to open this file automatically.
9. Choose File - Save.

Archiving information

Organizer 97 lets you archive any information in your file that isn't needed on a daily basis, for example, a previous year's appointments or To Do tasks. You still have access to archived information; however, it is stored in a separate file. Archiving streamlines your Organizer file.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Archiving information

3. Click Display.

Note Information from an Organizer 1.x phone log is converted to the Organizer 97 Calls section. If you used the autodialer feature, you may have a large amount of information that you can archive or delete from the file.

Chapter 44
Printing in Organizer

Organizer lets you print your Organizer information (or the entries you created) in a variety of professional ways. You can print your work on papers that fit a day-planner you use (for example, a Franklin Day Planner® Classic or DayRunner® Classic), or you can customize your own look. You can print entries from one or several Organizer sections, or select specific entries you want to print. Organizer provides you with many options for how to print your Organizer information.

You can also print Organizer information to take with you when you travel. For example, you can carry your Organizer information in a paper day-planner in order to keep track of your appointments, tasks, addresses, events, notes, calls, and special dates, or you can print only your day's appointments and responsibilities, so you can take them to a meeting.

This chapter first explains terms, then explains how to print your work and select layouts and paper types, and last, how to select a printer.

Understanding basic printing concepts in Organizer

When you're ready to print, you can select the print layout (or how you want your information to appear on the printed output) and the paper type (or the paper size) you want, and then select any Organizer section (or any information from the section) you want to print.

Organizer print layouts

What you print reflects the layout you select rather than what you see on your computer screen. Print layouts let you customize what you want to print. That is, you can select a print layout that prints your information as you would like to see it. Organizer includes many predefined layouts, including specific layouts associated with each Organizer section, such as a label layout to print your Addresses. You can also select a layout that includes information from more than one Organizer section or a layout that matches your paper datebook. In most cases you won't need to change the predefined layouts; however, you can customize these layouts as well.

Organizer paper types

The other selection you'll commonly make is the paper type to use. When you select a paper type, you're choosing the size and style of the paper upon which your information will appear. For example, you can select a paper size, such as an 8½ x 11" letter paper size, a Rolodex® card size, an 8½ x 14" legal paper size, or you can customize a paper size. If you decide to customize your paper type, you can adjust the paper size, margins, spacing, and more.

Printing Organizer information

There are many ways to print your Organizer information. You can print your day's activities, print information from any section, and print Organizer information for different paper datebooks.

Printing your day's scheduled activities

You can print your scheduled activities for a day, or you can print a combination of appointments, tasks, and Calls entries on one 8½ x 11" page.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

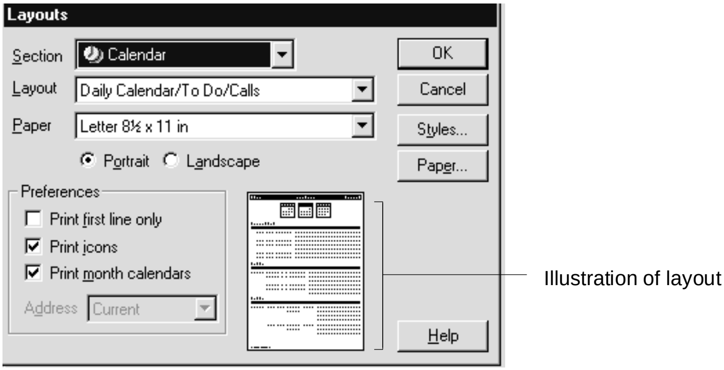
   Printing, Calendar appointments
3. Click Display.

Printing information from any Organizer section

1. Choose File - Print.

   Tip You can also press **CTRL+P**.
2. Click the Section box and select the Organizer section that contains the information you want to print.
3. Click the Layout box and select the layout in which you want your printed information to appear.

To see an illustration of the layout you select, click Layouts. The illustration appears next to the Preferences group box. Click OK to return to the Print dialog box. See Chapter 55 for illustrations of all layouts available in Organizer.



The layouts available to you are designed for the section you select. For example, the layouts for addresses include envelope and label. Some layouts are also designed to combine several sections on one printout. For example, the trifold layouts print your Calendar, To Do, Planner, Calls, and Anniversary entries all on a single printout.

If you're printing the Calendar section and you've selected to show through entries from the To Do, Planner, Calls, or Anniversary section in Calendar, you can print the shown-through entries along with your appointments. To do this, select one of the following layouts: Monthly Calendar, Daily Page, or Weekly 2-Page.

4. Click the Paper box and select a paper type.

To see an illustration of the paper style and type you selected, click Layouts, then click Paper. Click OK and click OK again to return to the Print dialog box.

5. Select Single sided to print on one side of the page or Double sided to print on both sides of the page.

See Help for more information on double-sided printing options.

6. Under Range, select the option for what range of information you want to print.

See Help for more information on selecting a range of information to print.

7. (Optional) For Copies, enter the number of copies you want to print: 1–99.

You can enter a specific number, or click + (plus) to increase or - (minus) to decrease the number. To print the copies in sequence, select Collated.

8. (Optional) If you selected a layout that prints information from multiple sections (one of the trifold layouts), click Sections to select how you want to map your Organizer sections, and click OK.

   Mapping is necessary only when your file contains more than one of the same Organizer section. See Help for more information on mapping sections.

9. Click OK to start printing.

   Note If, after you make your selections in the Print dialog box, OK is dimmed, it may be because you selected a trifold layout but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

Tip You can also print an Organizer entry by dragging and dropping the entry to the Printer icon in Toolbox.

Printing information for different paper datebooks

You can print your Organizer information to fit a specific datebook paper that's already preprinted, such as Franklin Day Planner Classic.

Specifying a range of information you want to print

You can print all the pages of a section, or you can specify a range to print.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, specifying a range of information you want to print

3. Click Display.

Mapping sections

You can add or create additional sections of Organizer. If you added an Organizer section, you'll have more than one of the same sections in your Organizer file. For example, let's say you included both your manager's and your own To Do section as part of your Organizer file. If you're printing just one of these sections, you can select the section you want to print.

You can only print one section at one time. If you select a trifold layout, you need to specify (map) which section (your or your manager's To Do tasks) you want to print in the To Do part of the layout. If you don't specify the mapping, Organizer prints information from the section that appears first in your Organizer file. That is, if your To Do tab appears before your manager's To Do tab, Organizer will print your To Do tasks first — unless you specify the manager's To Do tasks as the section to print.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Mapping sections, when printing
3. Click Display.

Stopping printing

You can stop printing at any time that the Printing dialog box appears by clicking Cancel.

Customizing print layouts, layout elements, and paper types

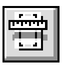
You can customize what you print (by selecting a print layout) and the paper size you print to (by selecting a paper type).

Organizer includes many layouts, and in most cases you won't need to change them. You may want to customize a layout to change its orientation on the printed page and to specify what and how much information you want to print. You can also change certain aspects of a layout, called **elements**, such as the header, footer, page number, column headings, grid lines, or the text font. Changing layouts is optional. If you don't change a layout, Organizer uses the default.

In most cases you won't need to customize the predefined paper types that come with Organizer. But for those times when you do, you can customize various aspects of a paper type, such as the margin size, paper size, number of columns, and column widths.

Customizing print layout options

You customize a layout to change its orientation on the printed page, and to specify what or how much information you want to print.



1. Choose Edit - Layouts.
2. Click the Section box and select the section for which you want to customize a layout.
3. Click the Layout box and select the layout you want to customize.

4. Select the printing orientation.

Option	*Result*
Portrait	Prints information across the width of the page.
Landscape	Prints information across the length of the page.

5. Under Preferences, select the options you want.

Option	*Result*
Print first line only	Prints only the first line of the description for each entry. (The default is to print the full description.)
Print icons	Prints (default) or doesn't print any symbols that appear with entries, for example, the alarm symbol or repeating entry symbol.
Print month calendars	Prints (default) or doesn't print the monthly calendars for layouts that include monthly calendars.
Address	Specifies whether to print the home Address record, business Address record, both home and business Address records, or the current Address record when you're printing Address records. If you select Current, Organizer prints whichever record currently appears in the foreground in the Address section.

6. If, after you make your selections in the Layout dialog box, OK is dimmed, it may be because you selected a trifold layout but your Organizer notebook doesn't contain one of the sections that would be included in the Trifold layout. Select another layout.

7. Click OK to save your changes.

The layout changes will be in effect the next time you print using that layout.

Tip You can also customize print layout options by choosing File - Print, selecting the section and layout, clicking Layouts, and then customizing the layout.

Customizing layout styles

You can determine what elements you use and how they appear in a layout, such as the header, footer, title, grid lines, borders, and so on. Organizer uses the default settings for these elements, but you can change them. For example, you can change the font color of a title, add a patterned background to column titles, or include a code that prints the current date in the footer.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, customizing layout styles
3. Click Display.

Changing the font size, font type, and font color for printing

You can select a font for any text element, for example, a header or footer in a print layout. A **font type** is a particular lettering style, or typeface (for example, Helvetica) with a particular size, such as 12 point. The fonts available to you often depend on the printer you selected, and whether or not you installed additional fonts in the Fonts folder in the Windows Control Panel.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, selecting fonts
3. Click Display.

Customizing paper types

Organizer comes with a number of predefined paper types, which in most cases you won't need to customize. But for those times when you do, you can customize aspects of a paper type, such as the margin size or paper size. Changing paper type settings is optional. If you don't change the settings, Organizer uses the default paper type.

Caution If you make changes to a default paper type and want to keep the original paper type settings, save the changed paper with a new name.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, customizing the paper settings
3. Click Display.

Selecting global printing options

Global printing options let you select preferences that affect all of your printed work. The changes you make stay in effect until you change them again. For example, you can set Organizer to always print in black and white, or always print on both sides of your paper. You can also select the number of copies to print. Some global printing options are only available for certain paper types: for example, selecting the order that your information prints is only available for paper types that include rows and columns, such as labels.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Printing, blank entries

   Printing, information in a selected order

   Printing, in black and white only

   Printing, double-sided print options

   Labels, selecting printing options
3. Click Display.

Selecting the number of copies to print

By default, Organizer prints one copy of any information you print. You can print up to 99 copies in a single printing.

1. Choose File - Print.

   Tip You can also press **CTRL+P** to change the number of copies.
2. For Copies select the number of copies you want to print.

   Click + (plus) to increase or - (minus) to decrease the number of pages. You can also highlight the number in the Copies box and then enter another number for the copies you want.
3. Click OK to start printing.

Printing in portrait or landscape orientation

By default, the layout you select determines the orientation. You can change the print orientation when you print Organizer information.

1. Choose File - Print.

Tip You can also press **CTRL+P** to select the printing orientation.

2. Click Setup.

3. Select one of the following options.

Option	*Result*
Portrait	Prints information across the width of the page.
Landscape	Prints information across the length of the page.

4. Click OK.

5. Click OK to start printing.

Selecting printer setup options

You can change various printer setup options. The options available to you are specific to the printer drivers you installed on your system, and differ from printer to printer. See your printer documentation for specific information on your printer.

Note The selections you make when you choose File - Print (in the Print, Layout, and Paper dialog boxes), override the options you select in the Printer Setup dialog box. For example, the paper size and orientation you select in Organizer take precedence over the printer setup options you select.

1. Choose File - Print.

Tip You can also press **CTRL+P** to select printer setup options.

2. Click Setup and make your changes.

To display Help for an option in this dialog box, click ? (question mark) in the top-right corner of the dialog box, then click the option or command button.

3. Click OK until you exit all the Setup dialog boxes.

4. Click OK to start printing.

Selecting a printer

Before you can print information from Organizer, you need to select your printer. Organizer uses the default printer specified in the Printers folder in the Windows Control Panel unless you select another printer. In many instances, the printer you select determines the fonts and other options available to you when you print.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Printing, selecting printers

3. Click Display.

Chapter 45
Customizing Your Organizer Notebook

Organizer comes with seven standard sections: Calendar, To Do, Address, Calls, Planner, Notepad, and Anniversary. You can add additional Organizer sections and rename sections as you like. For example, you can create one Notepad section for meeting notes and another for travel information. You can also reorganize your Organizer sections.

You can use Organizer sections to build complete books of information that are specific to your work. For example, you can create a corporate Organizer notebook, called "Policy," that's accessible to all employees or a personal journal that contains your personal goals and strategies. You can create each notebook as a separate section in one Organizer file, or you can create separate files: one called POLICY.OR3, the other called JOURNAL.OR3.

Customizing your Organizer binder

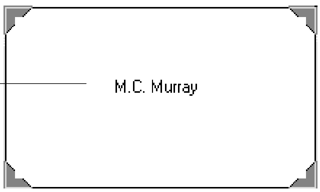
You can change the appearance of your Organizer binder to reflect your personal style.

Changing the name of your Organizer binder

You can personalize the name of your Organizer binder by adding text to the front page. For example, you might include your name, company name, and address. When you save your file, these changes are saved.

1. Click the inside of the front cover of your Organizer binder.
2. Click inside the label area on the first page of the binder.

Click here and enter your information.



3. Enter any text that you want to appear.

Changing the color and texture of your binder

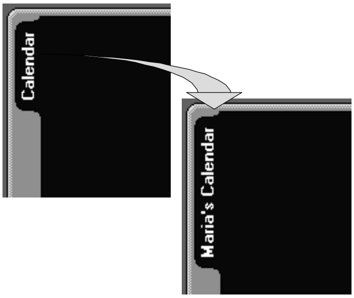
1. Choose Section - Customize.
2. Click the Book tab.
3. Under Binder, click the Color box and select the color you want.
4. Click the Texture box and select the texture pattern for your binder.
5. Click OK.

Customizing your Organizer file

Organizer lets you customize your individual Organizer files. You can change a section name and the order of section tabs, choose the color, position, size, and width of section tabs, and display a picture on a section divider. You can also add and delete sections, or decide what Organizer section you want Organizer to automatically open to when you start Organizer. The changes you make affect only the current file.

Changing the name of an Organizer section

The name of a section appears on the section tab.



1. Choose Section - Customize.
2. Under Tabs, select the section whose name you want to change.
3. Click Rename.
4. For New name, enter the new name you want to assign to this section.

   For example, type Maria's Calendar if you want to rename the Calendar section Maria's Calendar.
5. Click OK.

   The new section name appears under Tabs.
6. Click OK.

Adding a new Organizer section

You can add new Organizer sections, and you can create an unlimited number of sections in one Organizer file, provided the file doesn't exceed the maximum 4GB (4000 MB) file size.

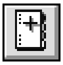
1. Choose Section - Customize.
2. Under Tabs, click the section below which you want the new section tab to appear.
3. Click Add.
4. Click the Section type box and select the type of Organizer section you want to add.
5. For Section name, enter a name for the section you want to add.

   For example, Amy's Tasks.
6. Click OK.

   The new section name appears in the list under Tabs.
7. Click OK.

Changing the order of your Organizer sections

When you change the order of your Organizer sections, you change the position of the section tab in your binder.



1. Choose Section - Customize.
2. Under Tabs, select the section tab you want to reorder.
3. Click Up or Down to move the section tab up or down the list.
4. Click OK.

Changing the color of an Organizer section tab

1. Choose Section - Customize.

2. Under Tabs, select the section tab whose color you want to change.
3. Click the Color box and select the color you want for the section tab.
4. Click OK.

Changing the size of an Organizer section tab

You can change the size of an Organizer section tab to display more or less of the contents on the tab.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Tabs, changing the size or width of

3. Click Display.

Setting your Organizer file to open to a particular section

You can choose where you want your binder to open to each time you open your Organizer file.

1. Choose Section - Customize.
2. Click the Book tab.
3. Click the Open to box and select where you want to open to.

   The default is to open to today’s date in Calendar or to the Organizer front cover, if no Calendar section exists.

4. Click OK.

For more information

To learn how to change font size, delete section tabs, or to add a picture to a section divider page, refer to Help (online documentation).

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Changing, font sizes

   Removing, sections

   Changing, picture for a section

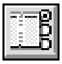
3. Click Display.

Customizing Organizer preferences

Organizer preferences are options you select that affect how Organizer opens and saves files and folders, and how the Organizer environment appears and functions.

The default file options you select determine which Organizer file will open automatically when you start Organizer, and whether new Organizer files will be based on an existing one. The environment options you select determine whether to display the clock and today’s date; how your mouse pointer appears and acts; what your favorite alarm tune is; and what sound you want associated with what action. The folders options you select determine the paths and directories used to store similar Organizer information. For example, you can store Organizer files in one folder and paper layouts in another. Finally, the save options you select determine whether Organizer will automatically save your file and when.

Selecting an Organizer file to open automatically



1. Choose File - User Setup - Organizer Preferences.
2. Select one of the following options.

Option	*Result*
Automatically open	Automatically opens the file you specify.
Always start with a new Organizer file	Automatically opens a new Organizer file (default).

   If you select Automatically open, you can enter the name of the .OR3 file directly in the box or you can click Browse to see the Organizer files available to you. Select the file you want and click Open.

3. (Optional) For Base new Organizer file on, enter the name of a file to create new Organizer files from.

   For example, you can base new Organizer files on an existing file whose sections and colors you’ve customized. Click Browse to see the Organizer files available to you. Select the file you want and click Open.

4. Click OK.

Changing Organizer display settings

Display settings determine whether or not the clock and today’s date appear in Organizer, and whether animated pages turn when you click the page-turner symbols. By default, Organizer displays the Clock and Today’s date icons in Toolbox, and page-turner symbols appear so you can turn the page by clicking them. You can choose whether or not to use these display settings.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Opening files, Organizer files automatically

   Display options, changing

   Preferences, changing alarm

   Preferences, changing display

   Preferences, changing mouse pointer

   Preferences, changing sound
3. Click Display.

Changing Organizer paths

Paths are used to specify the directories (folders) where you want to store similar kinds of Organizer information. You can select one folder for your Organizer files, another for print layouts, another for icons, and another for backup files. You can change the defaults to suit your needs.

Let's say you want separate directories for your business and personal Organizer files; for example, \ORGANIZER\ORGFILES\WORK and \ORGANIZER\ORGFILES\HOME. You can change the Organizer files directory to \ORGANIZER\ORGFILES\HOME when you want to work with your personal files; you can change the Organizer files path to \ORGANIZER\ORGFILES\WORK when you want to use your business files.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Paths
3. Click Display.

Changing automatic save and backup preferences

You can automatically save your files after each change or at the interval of time you specify. For example, you can have Organizer save your file after each change, only when told, or every so many minutes (depending on a number you specify). You can also specify that when you open a file, Organizer creates a backup file with the same file name and extension in the backup directory. Then, if you accidentally save changes to the file, you can restore the previous version.

For more information

1. Choose Help - Help Topics, and click the Index tab.

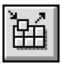
2. Type this phrase:

Changing, save interval

3. Click Display.

Changing the set of SmartIcons you want to display

Organizer has four default sets of SmartIcons: Universal (default), Working Together®, Text, and OLE. Each of these sets of SmartIcons are related and provide you with quick access to many Organizer tasks.



1. Choose File - User Setup - SmartIcons Setup.

2. Under Bar to set up, click the Bar name box and select the set of SmartIcons you want to display.

Organizer lets you choose from the following default sets of SmartIcons; however, you can create and then choose a custom set of SmartIcons. See Help for more information on how to create a custom set of SmartIcons.

Option	*Result*
OLE	Lets you insert objects and access the Manage Links dialog box.
Text	Lets you set font sizes, font styles, and alignment. Use this set when you edit a Notepad page.
Universal	Lets you perform most Organizer menu commands (default).
Working Together	Lets you start other Lotus SmartSuite applications, if they're installed.

3. Click the Bar can be displayed when context is box and select the option you want.

Option	*Result*
Always	Displays selected set of SmartIcons at all times in all Organizer sections.
Notepad page edit	Displays selected set of SmartIcons when editing Notepad pages only.

4. If you want the selected set of SmartIcons to display at specific times, select the Bar is enabled to display during its context option.

   This option works in conjunction with your selection to control which set of SmartIcons appears when you edit Notepad pages.

5. Click OK.

For more information

To learn how to position a set of SmartIcons, change the size of SmartIcons, add a set of SmartIcons, customize your own set of SmartIcons, delete a set of SmartIcons, create a new icon, or change an icon, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

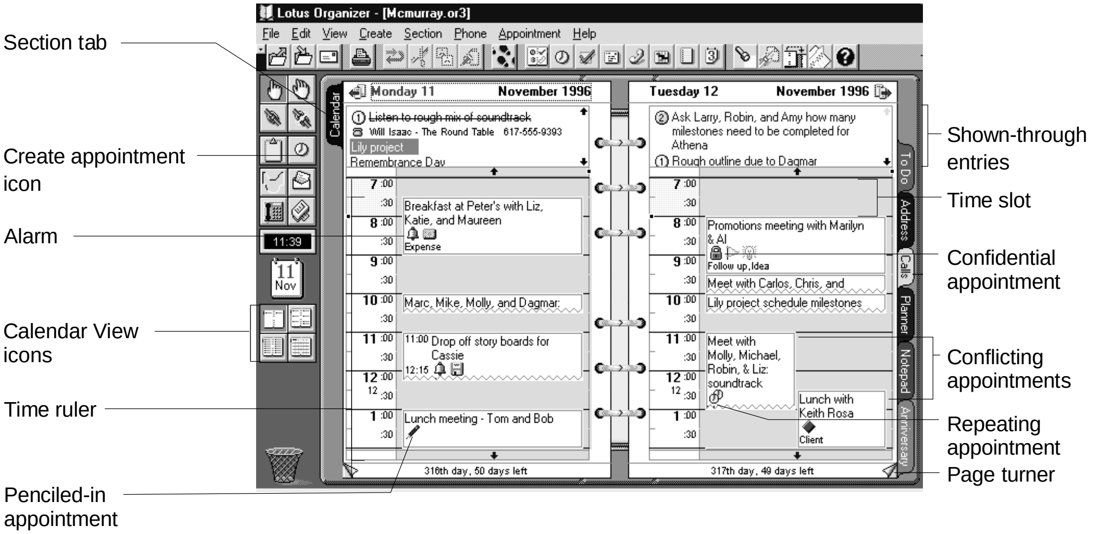
   SmartIcons

3. Select the index entry you want, and click Display.

Chapter 46
Managing Your Time with Calendar

The Calendar section lets you manage your time and view appointments at a glance. Entries you create in Calendar are called **appointments**. With Calendar, you can create and change appointments, set alarms to remind you of appointments, and create tentative appointments. Organizer even helps you find time in your Calendar when you try to book a conflicting appointment.

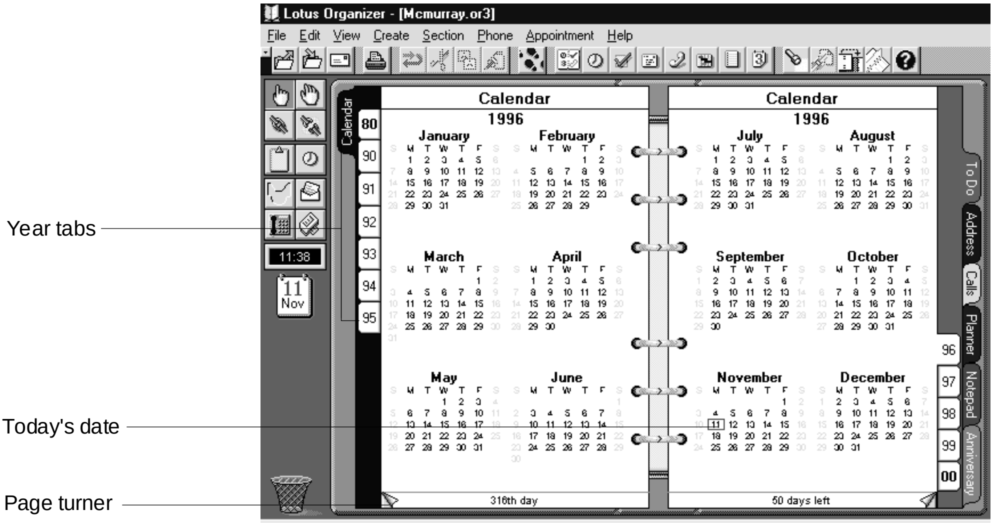
Organizer also lets you show information in Calendar from other Organizer sections, so that you can see your upcoming commitments in the context of your daily work. For example, you can see To Do tasks you need to complete and calls you need to make, along with your appointments.



Finding your way in Calendar

1. Click the Calendar section tab to display the yearly calendar.

   Today’s date appears outlined in red. Year tabs appear along the left and right sides of the calendar.



2. (Optional) To display the Calendar for a different year, click the appropriate year tab, or click the page turners to go to the previous or next year.
3. (Optional) To display the previous or next decade, click the year tab on the top-left or bottom-right edge.
4. Double-click the date you want to go to.

Tip To go directly to today’s date, click the Today’s date icon in Toolbox. To move around when you’re viewing Calendar, turn your page by clicking the page turners in the bottom-left and bottom-right corners.

Correcting the time for Today’s date and Clock icons

The Today’s date and Clock icons in Toolbox display the system date and time. If the system date and time aren’t correct, use the Windows Control Panel to change them.

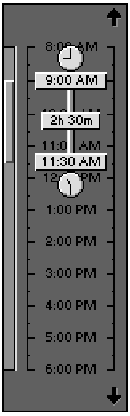
Creating a Calendar appointment

1. In the Calendar section, double-click the Calendar page.

Tip You can also choose Create - Appointment or press **INS** when you're in the Calendar section to create an appointment.

In the Day per page view, if the appointment time slots are displayed, you can click an appointment time or a time slot and start entering information for that time. Press **F2** or click outside the appointment to enter it. See "Viewing your Calendar appointments," later in this chapter, for information on displaying the Day per page view. See Help for more information on displaying time slots.

2. If necessary, click the Date box and select a date for the appointment.



To move to the previous or next month, click the arrows at the top of the calendar. You can also click the Date box, then press ↑ and ↓ to change to the previous or next day, or enter a date in the Date box.

3. If necessary, click the Time box to use time tracker and select a time for the appointment to start and end.

If necessary, click the Duration + (plus) to increase or - (minus) to decrease the duration of the appointment.

4. Under Description, enter a description of the appointment.

For example, "Staff meeting," or "Interview with Erin McIntyre."

5. (Optional) Click the Categories box and select a category for your appointment. See Help for more information on categories.

6. Select the options you want.

Option	*Result*
Warn of conflicts	Alerts (default) or doesn't alert you when there's a conflict with the appointment and another appointment or meeting.
 Pencil in	Enters a tentative appointment.
 Confidential	Makes or doesn't make (default) the appointment confidential, so others accessing your file can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential. See "Sharing your files," in Chapter 55, for more information.

7. (Optional) Click Alarm to set an alarm for your appointment, click Repeat to make an appointment repeat at intervals you specify, and/or click Cost to assign a customer and cost code to your appointment.

See Help for more information on alarms, repeating appointments, and customer and cost codes.

8. To create additional appointments, click Add and repeat steps 2 - 7.
9. When you finish entering appointments, click OK.

Setting the time and duration of an appointment using time tracker

You can use time tracker to change the start and end times of an appointment and to control an appointment's duration.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Time tracker, using
3. Click Display.

Finding time for an appointment

There are occasions when you need to schedule an appointment for whenever you're next available. Finding your next free time slot saves you the bother of looking through your calendar manually. You specify the duration of the appointment, and let Organizer find the next available time slot in your schedule. Organizer searches through each day, looking for an opening of the specified duration.

Organizer uses the default start-of-day and end-of-day settings in your Calendar in a search to find time, and it doesn't include weekends in its search. You can change the time your days start or end in Calendar by choosing View - Calendar Preferences and clicking the Days start at or Days end at boxes and selecting new times. To include weekends in Organizer's search for an alternative time, select the Include weekends option in Find Time search in the Calendar Preferences dialog box.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Finding time
3. Click Display.

Setting up a tentative appointment

You can set up a tentative appointment in Calendar by penciling in the appointment. Let's say that the Sales department in your organization is planning a lunch-time seminar on Friday, November 29. You're not sure if you'll be able to make the seminar, but you don't want to forget about the date and other particulars of the appointment.

1. Create or edit an appointment.

   See Help for more information on editing appointments.

2. Select Pencil in.
3. Click OK.

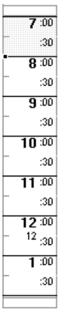
In the weekly and daily views, Organizer displays your appointment with a pencil-in symbol in your Calendar. If you customized your preferences in Calendar to indicate that you don't want the symbol to appear, the pencil-in symbol won't appear with your appointment. See Help for more information on customizing preferences in Calendar.

Tip You can also quickly pencil in an existing appointment in the Calendar section. Select the appointment and choose Appointment - Pencil in.

Booking and handling conflicting appointments

If you created two appointments for the same time, Organizer displays the Conflicting Appointment dialog box to warn of the conflict (unless you use View - Calendar Preferences to indicate that you don't want to be alerted). You can either schedule the appointment as a conflict, or resolve the conflict by changing appointment information in the Conflicting Appointment dialog box. To schedule the appointment as a conflict, click OK. To resolve the conflict, perform the steps below.

1. Do one of the following:
   - Change the date, time, and / or duration of the appointment.
   - Click Find Time and Organizer will automatically find the next available time after the conflicting appointment.
   - Click Turn To to display the date of the conflicting appointment to see other appointments and available times.
2. Click OK to accept the changes and schedule the appointment, or click Cancel to leave the dialog box without scheduling the appointment.



If you decide to enter the appointment and a conflict still exists, Organizer displays both appointments with a vertical red line to the left of the conflicting entries.

Note In the Day per page view, if you're working with time slots and click either a time slot or a time in the time ruler to create an appointment, Organizer doesn't notify you of an appointment conflict. Because you can view the conflict, it's assumed you're scheduling it intentionally. See "Customizing Calendar," later in this chapter, for information on displaying time slots.

Changing an appointment

You can change or edit existing appointment text directly, and you can drag and drop the appointment to a new date. To edit an appointment directly, click the appointment to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

Note When you're working with time slots in the Day per page view, you can also position the mouse pointer on the appointment and click to edit the description. To change the start time, drag the appointment to another time; to change the duration, drag the appointment's top or bottom border. See "Viewing your Calendar appointments," later in this chapter, for information on displaying the Day per page view. See "Customizing Calendar," later in this chapter, for more information on displaying time slots.

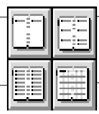
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, appointments
3. Click Display.

Viewing your Calendar appointments

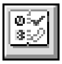
You can quickly display Calendar entries as a single day on each page, a one-week spread across two pages, a week on each page, or a month spread across two pages, by clicking one of the View icons in Toolbox.



The View icons change depending on what section you're in, so the view that you pick affects only the Calendar section you're in. Click a View icon to see how your view of Calendar changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Showing other Organizer sections in Calendar

You can show entries from the To Do, Planner, Calls, and Anniversary sections in the Calendar section. Showing entries from other sections can help you see your commitments in the context of your daily work. For example, you can see To Do tasks for the day along with your appointments.



1. In the Calendar section, choose Section - Show Through.
2. Click the Show into box and select Calendar.
3. Under From, you can select the sections whose information you want to appear in Calendar.

   For example, you can select To Do to show your tasks, Planner to show your events, Calls to show your Calls entries, and Anniversary to show your special dates through to the Calendar section.
4. Click Preferences and select the options for how you want shown-through information to appear in Calendar.

Option	*Result*
Above appointments	Displays entries above appointments (default).
Below appointments	Displays entries below appointments.
First line only	Displays only the first line of entries from other sections above or below appointments.

   Note Planner events appear in Calendar as labeled strips of color. For example, a red strip labeled Vacation, a yellow strip labeled Meeting, and so on.

5. Click OK.
6. Click OK.

Customizing Calendar

In the Calendar section, you can set various preferences to customize how your appointments appear and what information appears with them. Changing preferences is optional. If you don't change your Calendar preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Calendar section, customizing preferences in
3. Click Display.

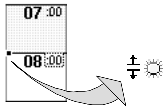
Working with time slots in the Day per page view

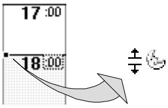
Displaying time slots in the Day per page view is particularly useful when your day is a series of scheduled appointments because both booked and available time slots are displayed.

With time slots, you create, edit, and manage your appointments as easily as in the other Calendar views. In addition, you can dynamically change the default start and end times for the day, and the time slot increments.

Changing the day’s start and end times from the Day per page view

When you display time slots in the Day per page view, you can dynamically change the default start and end times for all days in Calendar.





1. Do one of the following:
   - Position the mouse pointer on the solid box to the left of the current start time. The pointer changes to include a sun symbol.
   - Position the mouse pointer on the solid box to the left of the current end time. The pointer changes to include a moon symbol.
2. Drag the solid box to change the time.

Tip When you change the time slots, Organizer uses the time increments on the time ruler. For example, if the time increments are 15 minutes, the start time can be 8:00 or 8:15, but not 8:10.

Changing the time-slot increments from the Day per page view

When you display time slots in the Day per page view, you can dynamically change the default time-slot increments for the Calendar section.

1. Position the mouse pointer on a time line on the time ruler.
2. Drag up to decrease the increments; drag down to increase the increments.

   The increments can be 5, 10, 15, 20, 30, or 60 minutes.

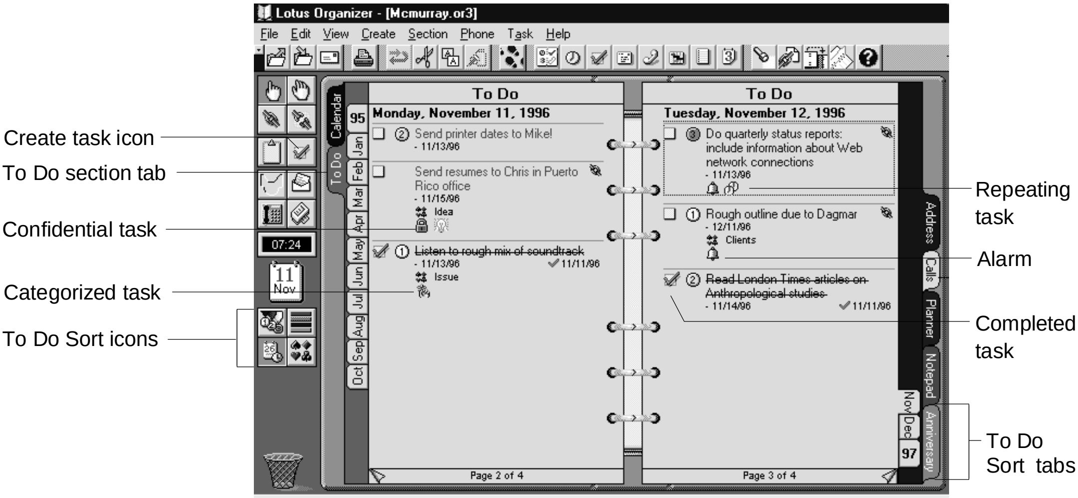
Note You can also choose View - Calendar Preferences to change the default time slot increments.

Other things you can do

For more information on how to copy, move, and delete Calendar appointments, and how to set alarms for appointments, create appointments that repeat at intervals you specify, create links, assign categories and cost codes, and search for information in Calendar, see Chapter 53.

Chapter 47
Managing Your To Do List

The To Do section lets you keep track of what you want to do and when you need to do it. Entries you create in To Do are called **To Do tasks**. You can organize these tasks with categories, prioritize tasks by status, set alarms for tasks you need to do at certain times, and mark tasks confidential so other users with access to your file can’t view your tasks. Organizer also lets you show through To Do tasks in Calendar; this lets you see your tasks in your Calendar, and lets you see all your commitments in your Calendar. The To Do section lets you track projects, ideas, and status reports. You can also customize the way To Do works and the way tasks appear.



Creating a To Do task

Enter To Do tasks to track things you need to do and the time you need to set aside to do them. You can set various options such as priority, category, status, and alarm to classify your tasks in To Do.

1. In the To Do section, double-click the To Do page.

   Tip You can also choose Create - Task or press INS to create a To Do task, or click the Create task icon.

2. Under Description, enter a description and / or notes about the To Do task.

   For example, “Complete status report for Waller project.”

3. Under Date, select a date for your task to start and when you want it due.

   To enter a start date, click the Start box and select a date. To enter a due date, click the Due box and select a date.

4. Click the Categories box to select a category for your To Do task.

   For example, you could create a category called “Waller Project.”

   See Help for more information on categories.

5. Under Priority, select the priority for your task: 1, 2, 3, or No priority.

6. (Optional) Select Confidential to make the task confidential, so others who have access to your files can’t view this task.

   Note Users who have Owner access to your file can see your confidential To Do tasks. See “Sharing your files,” in Chapter 54 for more information.

7. (Optional) Click Alarm and set an alarm for your To Do task, and / or click Cost to assign a customer and cost code.

   See Help for more information on setting an alarm and / or assigning customer and cost codes.

8. To create additional tasks, click Add and repeat steps 2 - 7.

9. When you finish entering all your tasks, click OK.

Changing a To Do task

You can change or edit existing tasks directly. Click the task to select it, and click the text you want to edit (the mouse pointer changes to an I-beam). Make your changes and press **F2** to enter your changes.

For more information

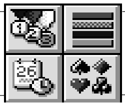
For more information on how to add information to To Do task fields you previously left blank, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, To Do tasks
3. Click Display.

Sorting your To Do tasks

You can quickly sort To Do tasks by priority, status, start date, or category, by clicking one of the Sort icons in Toolbox.



The Sort icons change depending on what section you're in, so the view that you pick affects only the To Do section you're in. Click a Sort icon to see how your view of To Do changes. Your selection affects all entries in that section, not just one or two. When you change a view, you're only changing how or what information appears.

Checking the status of a To Do task

Tasks are color-coded by status. Organizer checks the due date to determine status. If you didn't assign a due date, the task is current. The color assigned to a task tells you the status of the task. You can change the status colors at any time.

1. In the To Do section, choose View - To Do Preferences.
2. Under Status color, click the box for each of the default status colors you want to change, and select the color you want to represent the status of the task you enter.

Status	*Default Color*
Overdue	Red
Current	Green
Future	Blue
Completed	Black

3. Click OK.

Marking a To Do task completed

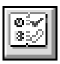
When you complete your task, you can mark it completed. A check mark appears next to the task so that you know if it's completed.

1. Double-click the To Do task you want to mark completed.
2. Click the Completed on box and select a date.

   Tip You can also click the Completed on box to the left of the To Do task description to mark the task completed with the current date as the completion date.

3. To show completed tasks with strike-through text, select View - To Do Preferences and choose Strikeout.

Showing To Do tasks in Calendar



You can show entries from the To Do section through to the Calendar. Showing tasks in Calendar can help you see your tasks in the context of your daily work, for example, you can see the tasks you need to do first on a particular day. See "Showing other Organizer sections in Calendar," in Chapter 46 for more information.

Customizing To Do

In the To Do section, you can set preferences to customize how your tasks appear and what information appears with them. Changing preferences is optional. If you don't change your To Do preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   To Do section, customizing preferences in

3. Click Display.

Other things you can do

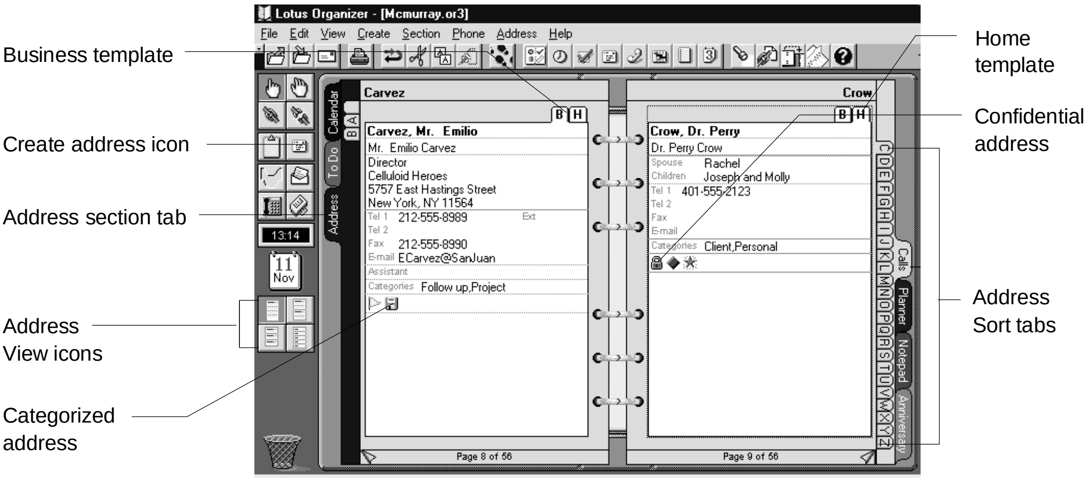
For more information on how to copy, move, and delete To Do tasks, how to set alarms for tasks, create tasks that repeat at intervals you specify, make tasks confidential, create links, assign categories and cost codes, search for information in To Do, and use filters, see Chapter 53.

Chapter 48
Address Records in Organizer

The Address section acts like an address book; however, the Organizer electronic Address section lets you do more. You can sort your addresses either by last name, company, category, or zip code. You can even create a customized address field, such as a field for a car phone telephone number or pager telephone number. In the address section, each address is called an **Address record**.

You can view your Address records in different ways. For example, you can view Address records with all of the information you entered for a record, with just a name and address, and so on.

The Address section also helps you quickly create duplicate Address records for multiple contacts within the same company, without having to copy or re-enter the same company-related information repeatedly.



Creating an Address record

Organizer provides you with two different address templates that look like address cards with tabs. One tab is for business addresses and the other is for home addresses.

1. In the Address section, double-click the Address page.

Tip You can also choose Create - Address or press **INS** when you're in the Address section to create an Address record.

2. Click the Title box and enter or select a title for the person's name you'll include in the Address record. For example, you can use the title Ms., Mr., Prof., and so on.

3. For First name and Last name, enter the person's name.

4. Click the Business or Home tab to select the type of Address record you want.

You can determine what tab appears in front automatically. See Help for more information on customizing preferences in Address.

5. Enter the information you want listed in the fields for that business or home Address record.

Tip Press **TAB** to move quickly between options in the Create Address dialog box.

6. (Optional) Click the Categories box and select a category for your address.

See Help for more information on categories.

7. (Optional) Select Confidential to make your Address record confidential, so others accessing your file can't view it.

If you assigned a password to your file, only the Owner can see and change entries that are confidential. See "Sharing your files," in Chapter 54, for more information.

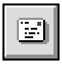
8. To create additional Address records, click Add and repeat steps 2 - 7.

9. When you finish entering Address records, click OK.

Entering different business associates for the same business address

You can include more than one contact at the same company without re-entering the address information repeatedly. Organizer copies company information from one Address record to another to save you time. If some information in the new Address record differs from the original address, you can change that information.

Note This procedure assumes that you've entered at least one other contact's business address from the same company and location.



1. Create the new business Address record.
2. Enter your contact's name and company name.
3. Press **TAB**.

   The Similar Address Found dialog box appears.
4. Under Copy details from, select the company you want.
5. Click OK.

   Organizer automatically fills in the address, zip code, phone number, and fax fields for the new Address record.

   You can change any information in the Address record by editing the field you need to change. See Help for more information on editing Address records.
6. (Optional) To create additional Address records, click Add and repeat steps 2 - 5.
7. When you finish entering Address records, click OK.

Renaming address fields

You can rename any address field. The changes you make to field names affect all the business or home address fields in the current Address section.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Address record fields, changing field names

   Editing, field names in Address records
3. Click Display.

Changing an Address record

You can change or edit existing address text directly. Click the Address record to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press F2 to enter your changes.

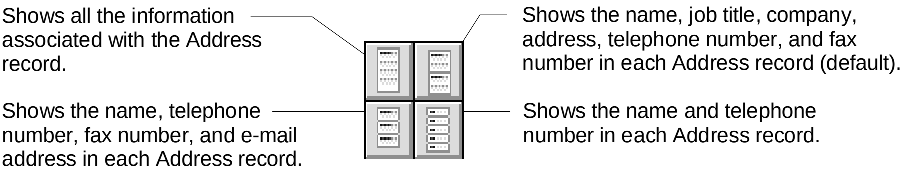
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, Address records
3. Click Display.

Viewing your Address records

You can quickly change how much information you see with each Address record by clicking one of the View icons in Toolbox.



The View icons change depending on what section you're in, so the view that you pick affects only the Address section you're in. Click a View icon to see how your view of Address changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Sorting Address records

You can sort Address records by last name, company, category, or by a particular Address record field. The sorting you select affects the order in which your Address records appear within the Address section. At any time, you can change how you want to sort your Address records.

1. In the Address section, choose View.
2. From the View menu, choose the command you want to sort your Address records.

Command	*Result*
By Last Name	Sorts (default) your Address records alphabetically by last name.
By Company	Sorts your Address records alphabetically by company name.
By Zip	Sorts your Address records by zip code (default) or by any of the other fields you select through this option, such as title, company, and so on.
By Category	Sorts your Address records alphabetically by category for Address records you already assigned categories for. Page tabs include # for Address records you didn't assign a category to. See Help for more information on categories.

Customizing Address

In the Address section, you can set various preferences to customize how your addresses are sorted and what information appears with them. Changing preferences is optional. If you don't change your Address preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Address section, customizing

3. Click Display.

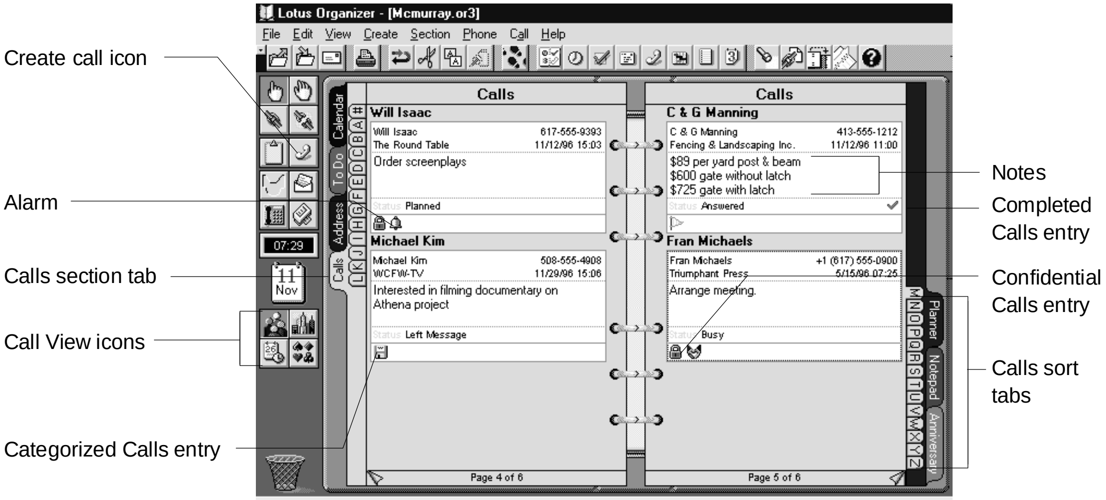
Other things you can do

For more information on how to copy, move, and delete Address records and how to create links, assign categories, search for information in Address, and use filters, see Chapter 53.

Chapter 49
Tracking Phone Calls in Organizer

The Calls section lets you keep track of phone calls. You can jot down notes on both your incoming and outgoing phone calls, include information on who the call was from or to, keep track of the duration of the call, or set it to automatically track the duration of the call when you answer it. You can also schedule calls you want to make at some future date and set an alarm to remind yourself. You can track the status of follow-up calls, and quickly redial unanswered calls you already made. In the Calls section, each entry you make for a call is called a **Calls entry**.

The Calls section works closely with the Address section. You can access any name, company, and phone number you entered in your Address section. If you installed and connected a modem, you can use Organizer to dial any phone number that appears in your Calls section, Address section, or any other section.

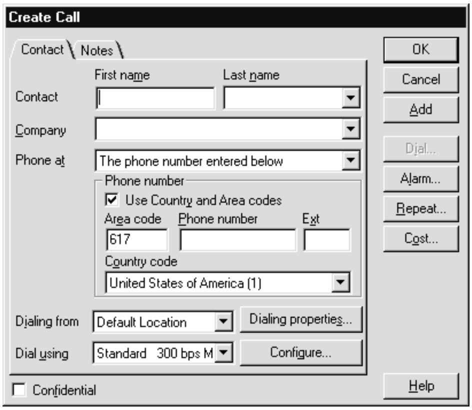


Creating a Calls entry

1. In the Calls section, double-click the Calls page.

   Tip You can also choose Create - Call or press **INS** when you're in the Calls section to create a Calls entry.

2. Enter the contact's first name, last name, and company, or click the boxes and select names you already entered in your Address section.

   Organizer attempts to match any part of an Address record you enter. For example, if you click the Last name box and select a name from the list, Organizer supplies the person's company name and phone number.

3. Click the Phone at box and select the telephone number you want to use.

   After you select a contact or company name, click the Phone at box to select any phone number associated with that name or company. If you don't use an Address record to specify information for your call, the Phone at box uses "The phone number entered below." In this case you must specify a phone number for the Phone number box.

4. Under Phone number, select the options for the phone number you want.

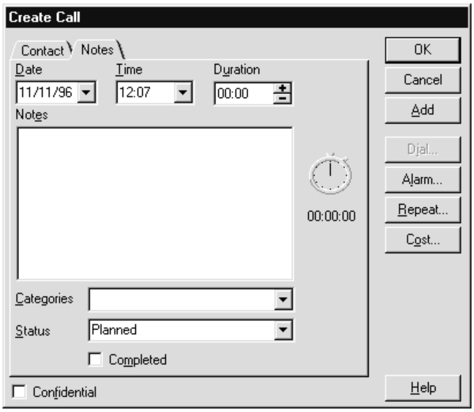
Option	*Result*
Use country and area codes	Uses (default) or doesn't use the country and area codes of a telephone number when Organizer dials a telephone number.
Area code	Lets you specify the area code of the telephone number you want to call.
Phone number	Lets you specify the telephone number you want to call.
Ext	Lets you specify the extension number of the telephone number you want to call.
Country code	Lets you select a specific country code for a Calls entry. If you don't specify a county code, Organizer uses the country specified in the current Dialing from location. See Help for more information on dialing a phone number from Organizer.

Note If you select a contact name and / or company, the area code, phone number, and extension are automatically filled in from information you supplied in the Address record.

5. (Optional) Click Alarm to set an alarm for your Calls entry, click Repeat to make a Calls entry repeat at intervals you specify, and / or click Cost to assign a customer and cost code.

See Help for more information on setting an alarm, creating repeat intervals, and / or assigning customer and cost codes.

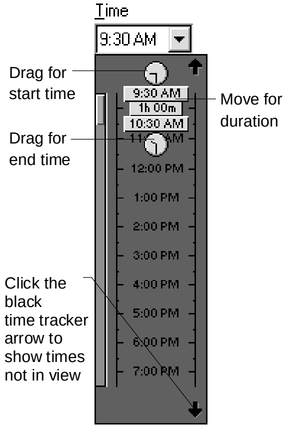
6. Click the Notes tab.



7. Click the Date box and select the date for the Calls entry.

8. Click the Time box and select the time for the Calls entry (with time tracker) or enter the time.

   If necessary, for Duration, specify the duration of the Calls entry by clicking the + (plus) to increase or - (minus) to decrease the time of the call.



9. Under Notes, enter a description of the Calls entry.
10. (Optional) Click the stopwatch to start tracking the duration of the call. Click the stopwatch again to stop timing the call.
11. Click the Categories box and select a category for the call.

    See Help for more information on categories.
12. If necessary, click the Status box and select a status from the list that appears.

    See “Assigning the status for a Calls entry,” later in this chapter, for more information.
13. Select the options you want.

Option	*Result*
Completed	Marks or doesn’t mark (default) your Calls entry completed. See “Marking a Calls entry completed,” later in this chapter, for more information on completing a call.
Confidential	Makes or doesn’t make (default) the Calls entry confidential, so others accessing your file can’t view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential. See “Sharing your files,” in Chapter 55, for more information.

14. To create additional Calls entries, click Add and repeat steps 2 – 13.
15. When you finish entering all your Calls entries, click OK.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Incoming calls, creating Calls entry for
3. Click Display.

Dialing a phone number from Organizer

Organizer can dial telephone numbers that appear in any Calls entry. Organizer can also quickly dial any phone number that appears with an entry in your To Do, Address, Calls, or any other section.

You must be connected to and use a modem to dial phone numbers from Organizer.

For more information

Choose Help - Help Topics, and click the Index tab.

1. Type one of these phrases:

   Dialing, changing dialing from location

   Dialing, configuring your modem

   Dialing, phone numbers

   Dialing, phone numbers quickly

2. Select the index entry you want, then click Display.

Clocking a phone call

You can clock how much time you spend during a phone call. Choose Create - Call, click the Notes tab, and click the stopwatch when you start the phone call. The Organizer stopwatch automatically times the duration of the call until you click the stopwatch again, at the end of your phone call.

Assigning the status for a Calls entry

You can change the status for any Calls entry at any time. The status you select helps you identify the result of the phone call. For example, if you select Busy or No answer, you'll know to try the call again.

1. In the Calls section, double-click the Calls entry for which you want to assign the status.
2. Click the Notes tab.
3. Click the Status box and select a status from the list that appears: Planned, Try later, Answered, Incoming, Left message, Calling back, No answer, Follow up, or Busy.
4. Click OK.

   Organizer displays the status you assigned in the status field of the Calls entry in your Calls section.

Recording a follow-up phone call

When you record a follow-up Calls entry, by default, Organizer automatically links the follow-up Calls entry to the original Calls entry you made.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Follow-up calls
3. Click Display.

Changing a Calls entry

You can change or edit existing Calls entry text directly. Click the Calls entry to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press **F2** to enter your changes.

For more information

For more information on how to add information to Calls entry fields you previously left blank, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, Calls entries
3. Click Display.

Marking a Calls entry completed

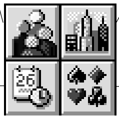
When you complete your Calls entry, you can mark the call completed. A check mark appears in the Calls entry so that you know it's been closed.

1. Go to the Calls entry you want to mark completed and select it.
2. Choose Call - Completed.

Organizer displays the Calls entry with a green check mark.

Viewing and sorting your Calls entries

You can quickly sort your Calls entries by clicking one of the View icons in Toolbox. When you change the view, you change the sort order.



Sorts and displays Call entries by last name (default).

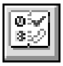
Sorts and displays Call entries by company name.

Sorts and displays Call entries by date and time.

Sorts and displays Call entries by category if you already assigned categories to your Calls entries. Includes # for entries you didn't assign a category to or that start with non-alphabetical characters, such as @ or numbers like 01890. See Help for more information on categories.

The View icons change depending on what section you're in, so the view that you pick affects only the Calls section you're in. Click a View icon to see how your view of the Calls section changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Showing Calls entries in Calendar



You can show entries from the Calls section in the Calendar section so that you can see your commitments in the context of your daily work. See "Showing other Organizer sections in Calendar," in Chapter 46 for more information.

Customizing Calls

In the Calls section, you can set various preferences to customize how your Calls entries appear, and what information appears with them. Changing preferences is optional. If you don't change your Calls preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Calls section, customizing preferences in
3. Click Display.

Changing telephone dialing preferences

Telephone dialing preferences determine the device, such as a modem, as well as settings Organizer uses to dial telephone numbers, and the Address section Organizer uses to look for telephone numbers. Changing telephone dialing preferences is optional; if you don't change your telephone dialing preferences, Organizer uses the default preferences.

For more information

1. Choose Help **-** Help Topics, and click the Index tab.
2. Type this phrase:

   Telephone dialing, changing preferences in

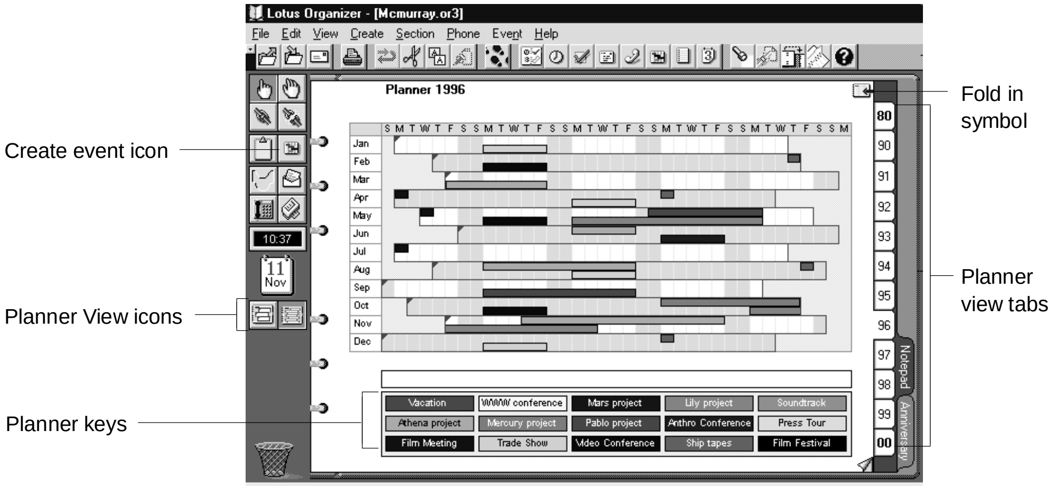
3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Calls entries, and how to set alarms for Calls entries, create Calls entries that repeat at intervals you specify, create links, assign categories and cost codes, search for information in Calls, and use filters, see Chapter 53.

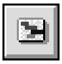
Chapter 50
Charting Events in Planner

The Planner section helps you see what lies ahead as you manage your long-term schedule. Entries you create in Planner are called **Planner events**. With Planner, you designate blocks of time for particular activities, such as vacations, training sessions, and conferences. You can view events by year or by quarter, and you can specify that your events show through in the Calendar section so that you can see events in the context of your daily work.



Creating a Planner event

You can create Planner events in two ways: through the Create Event dialog box or with the pen tip (mouse pointer). If you enter many events at once but you don't need to fill in details right away, you'd probably prefer the pen tip. See "Entering an event with the pen tip," later in this chapter. If you'll be filling in the details when you create the event, use the procedure below.

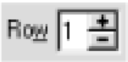


1. In the Planner section, double-click the Planner page.

Tip You can also choose Create - Event or press **INS** when you're in the Planner section, or click the Create Event icon.

2. Click the Event type box and select an event type.

3. For Row, click + (plus) to increase or - (minus) to decrease the row number: 1-4 for the Year per page view and 1-8 in the Quarter per page view.



Tip If you don't select a row, your first entry goes into row 1 by default. See "Displaying overlapping events," later in this chapter, for more information.

4. Under Notes, enter a description of the event.

5. Click the From and Until boxes to select the start and end date of the event, or enter dates for them.

You can enter an end date for any event, and Organizer automatically adjusts the number of days for the event. If you enter a specific number of days, Organizer automatically adjusts the end date.

Click the Days + (plus) to increase or - (minus) to decrease the duration of the event.

6. Click the Categories box to select a category for your event.

See Help for more information on categories.

7. (Optional) Click Confidential to make the event confidential, so others who have access to your files can't view it.

See "Sharing your files," in Chapter 54, for more information.

8. Click Alarm to set an alarm for your event, click Repeat to make an event repeat at intervals you specify, and / or click Cost to assign a customer and cost code.

See Help for more information on setting an alarm, creating repeating intervals, and / or assigning customer and cost codes.

9. To create additional Planner events, click Add and repeat steps 2 - 8.

10. When you finish entering all your Planner events, click OK.

Entering an event with the pen tip

You can quickly enter Planner events with the pen tip. Event types, such as Vacation, Training, and Conference, have color-coded Planner keys which you can see beneath the Planner chart. You select a Planner key, then enter events for that type on the Planner chart.

1. Click an event type from the color-coded Planner keys beneath the Planner chart.

   For information on customizing Planner keys, see “Changing Planner Keys,” below.

2. Move the mouse pointer to the Planner chart.

   Notice the mouse pointer changes to look like the tip of a pen.

3. Do one of the following:

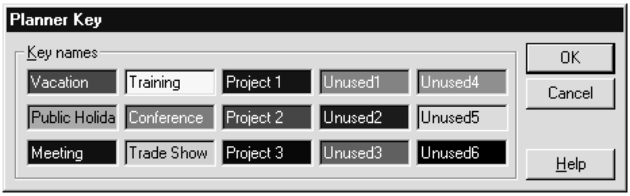
   - To enter an event for a single day, click a day on the Planner chart to start the event.
   - To enter an event over several days, drag the pen tip over those days in the Planner chart.

Changing Planner keys

Planner keys help you color code your Planner events. These color-coded Planner keys represent event types. You can customize the names of events by changing the key names. Planner keys appear beneath the Planner chart.

1. Double-click a Planner key you want to change.

   For example, “Unused1.”



   A blinking cursor appears in the Planner key you want to change.

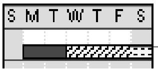
2. Press **DEL** until the current key name is removed and enter a new key name.

3. Click OK.

Displaying overlapping events

Planner days are divided into 4 rows in Year per page view and 8 rows in Quarter per page view. All rows of an event you create in Quarter per page view will appear in Year per page view. However, if you create rows in the Year per page view then switch to the Quarter per page view, Organizer combines two rows into a single row in Quarter per page view.

If you chart Planner events on top of each other or create more events than the Planner chart has rows to display, Planner displays cross hatching in a color block to indicate that there's an event you can't see.



Cross-hatching indicates events that overlap

Changing a Planner event

You can change or edit existing Planner events directly on the Planner chart with the pen tip. Place the mouse pointer on the event in the Planner chart; when the mouse pointer changes to a double arrow, press and hold the mouse button and drag the arrow left or right to increase or decrease the duration of the event.

To move an event, keeping the same duration, click the event, then drag and drop it to the desired date.

For more information

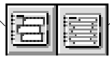
1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Events, changing Planner events
3. Click Display.

Viewing Planner events

You can quickly display Planner events by quarter or by year by clicking one of the View icons in Toolbox.

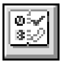
Shows your Planner chart by quarter with tabs for the four quarters and for the previous and next year.



Shows your Planner chart by year with tabs for the years and for the previous and next decade.

The View icons change depending on what section you're in, so the view that you pick affects only the Planner section you're in. Click a View icon to see how your view of Planner changes. Your selection affects all entries in that section, not just one or two. When you change a view, you're only changing how or what information appears.

Showing Planner events in Calendar



You can show entries from the Planner section in the Calendar section so that you can see your commitments in the context of your daily work. See "Showing other Organizer sections in Calendar," in Chapter 46 for more information.

Showing Calendar appointments in Planner

You can show Calendar information (which appears as a color band) in the Planner section so that you can see your commitments grouped in your Planner chart.

To help you quickly identify Calendar information in Planner, you can color code the Calendar information (the color band). For example, you may want to represent Calendar information (the color band) by using text in the same color that the Calendar section tab uses.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Showing in Planner
3. Click Display.

Customizing Planner

In the Planner section, you can set various preferences to customize how your events appear and what information appears with them. Changing preferences is optional. If you don't change your Planner preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   Planner section, customizing preferences in
3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Planner events, and how to set alarms for events, create events that repeat at intervals you specify, make events confidential, assign categories and cost codes, search for information in Planner, and use filters, see Chapter 53.

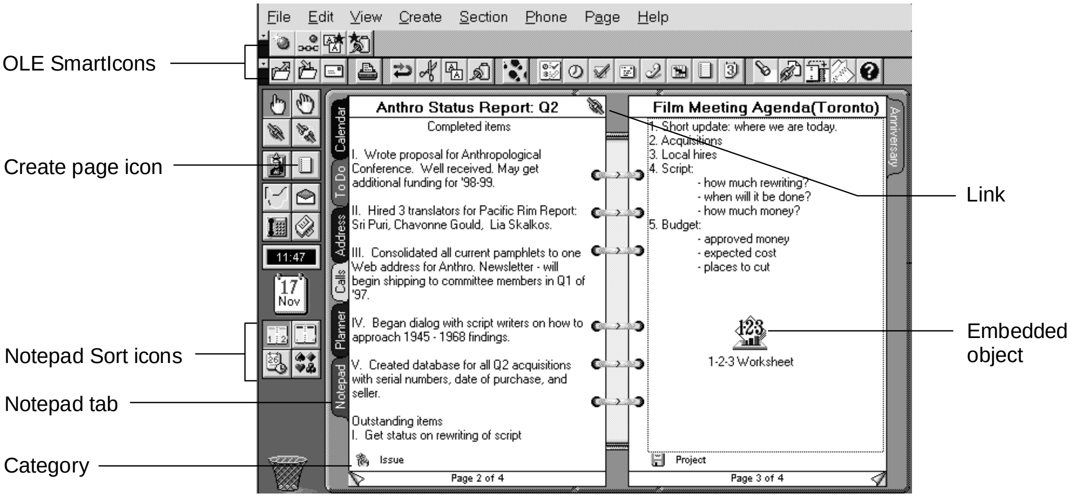
Chapter 51
Centralizing Information in Notepad

The Notepad section helps you organize information in the form of notes, lists, memos, spreadsheets, sales charts, diagrams, organizational charts, maps, and logos.

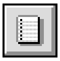
Entries you create in Notepad are called **Notepad pages**. A Notepad page holds information that you either enter in Organizer, or embed or link from other applications.

If you embed an object — such as a spreadsheet, word processing document, or presentation — its information can be viewed and edited from Notepad. If you also specify that the information is linked to its original file, the information is automatically updated whenever you make changes to the original file.

You can sort the information in Notepad by color coding pages, by assigning categories and cost codes to pages, and by specifying how pages are listed on the Contents page. You can specify that the Notepad Contents page list pages by their titles, page numbers, categories, or date.



Creating a Notepad page



1. In the Notepad section, double-click the Notepad page.

   Tip You can also choose Create - Page or press INS when you're in Notepad to create a Notepad entry.

2. Under Title, enter a page title.

   For example, "Waller Project Status Report."

   This field is optional; however, it's a good idea to title your entry because Notepad can list pages by their titles on the Contents page.

3. Under Page number, select Automatic (default) or Manual to enter a page number and override automatic page numbering.

4. Under Style, select the appropriate options.

Option	*Result*
Start a chapter	Establishes a chapter beginning with this page.
Links page	Lets you link pages within and across Organizer sections that contain related information.
Folded	Makes a page a double-width size when you open it; a single-width size when you fold it.
Color	Lets you assign a color to the page.

5. (Optional) Click the Categories box and select a category for your Notepad page.

   See Help for more information on categories.

6. (Optional) Select Confidential to make the page confidential, so others who have access to your files can't view it.

   See "Sharing your files," in Chapter 54, for more information.

7. To create additional Notepad pages, click Add and repeat steps 2 - 6.

8. When you finish entering all your Notepad pages, click OK.

To add text to a page

After you've entered a title for your Notepad page, and completed any other steps above, you can add text to your page. Position your mouse pointer on a Notepad page and click. The I-beam appears. Begin entering (or typing) the text you want on that page.

Changing text settings

You can customize your Notepad text by selecting different fonts and attributes. You can make selections that affect entire Notepad pages of text or only individual letters of a single word.

Customizing how text wraps

You can choose to have text wrap within the Notepad page margins as you type on the Notepad page, or have the text wrap after you finish typing it. Notepad page text wraps as you type, by default.

1. Go to the Notepad page you've created.
2. Choose Text - Word Wrap to toggle off or on the word wrap function.

Changing text fonts

1. Go to the Notepad page you've created.
2. Select the text you want to change by highlighting it.
3. Choose Text - Font.
4. Select the fonts and attributes you want.

   Click the Font, Font style, and Size boxes and choose from the fonts, font styles, and font sizes shown.
5. Under Effects, select Strikeout to draw a line through text or Underline to underline text.
6. Click the Color box to select the color for the text you selected.
7. Click OK.

Changing text alignment

1. Go to the Notepad page you've created.
2. Select the text you want to align.
3. Choose Text - Alignment.
4. Select the appropriate option.

Option	*Result*
Left	Selected text appears aligned along the left margin of the Notepad page.
Right	Selected text appears aligned along the right margin of the Notepad page.
Center	Selected text appears centered on the Notepad page.

5. Click OK.

Indenting paragraphs

You can indent any paragraph on a Notepad page so that it appears exactly where you want it to appear.

For more information

For more information on indenting paragraphs on Notepad pages and changing the appearance of text on your Notepad pages, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Notepad section
3. Select the index entry you want, and click Display.

Sharing data using OLE

Object Linking and Embedding (OLE) lets you share data across applications. Depending on the task, you either create a link or embed the data.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   OLE, overview
3. Click Display, select a topic, and click Display again.

Embedding a file as an OLE object on a Notepad page

1. Select the Notepad page on which you want to embed a file.
2. Click the page to place the insertion pointer on the page.

3. Choose Create - Object.
4. Select Create an object from a file.
5. For File, enter the path and file name of the file you want to embed.

   You can enter the path and file name in the File box or click Browse to locate the file you want to use.
6. (Optional) To also create a link to the file, select Link to file.
7. Select the Display as icon option to display an icon to represent the contents of the embedded object.

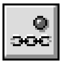
   If you don’t select this option, Organizer inserts a picture of the file’s contents in the Notepad page.

8. Click OK.

Managing links

When you create a linked OLE object, Organizer automatically updates the information on your Notepad page when you start Organizer. You can also manually update the information.

1. Select the object you want to edit.



2. Choose Edit - OLE Links.
3. In the link box, select the link you want to update.
4. For Update, select Manual to change how the link will be updated.
5. To update the linked information now, click Update Now.
6. Click Done.

For more information

For more information on creating and editing OLE and linked objects and on managing links, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Objects
3. Select the index entry you want, and click Display.

Using the Contents page of your Notepad pages

You use the Contents page to view a listing of your Notepad pages. You can choose to have the pages listed by page number, page title, date, or category. You can also double-click a page in the listing to go to that page in your Notepad. Notepad automatically creates the Contents page and updates it as you add pages.

For more information

For more information on using the Contents page to view Notepad pages, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Pages in Notepad, sorting

3. Select the index entry you want, and click Display.

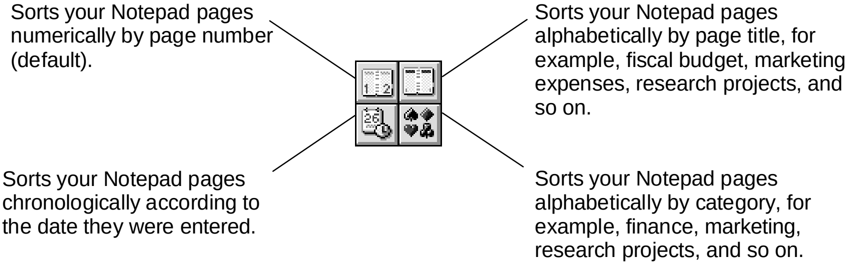
Using the Contents page to move a Notepad page

1. Click the Notepad tab to display the Contents page.
2. Choose View - By Page Number.
3. Click the title of the page you want to move.
4. Drag and drop the page in its new location in the listing on the Contents page.

   Tip You can also select the page then choose Edit - Cut, click where you want to place the page, then choose Edit - Paste.

Sorting your Notepad pages using the Sort icons

You can quickly change how the Contents page sorts your Notepad pages by clicking one of the sort icons in Toolbox.



These icons change depending on what section you're in, so the view that you pick affects only the Contents page in the Notepad section. Click an icon to see how your view of the Contents page changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Customizing Notepad

In the Notepad section, you can set preferences to customize how your Notepad pages appear and what information appears with them. Changing preferences is optional. If you don't change your Notepad preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Notepad section, customizing preferences in
3. Click Display.

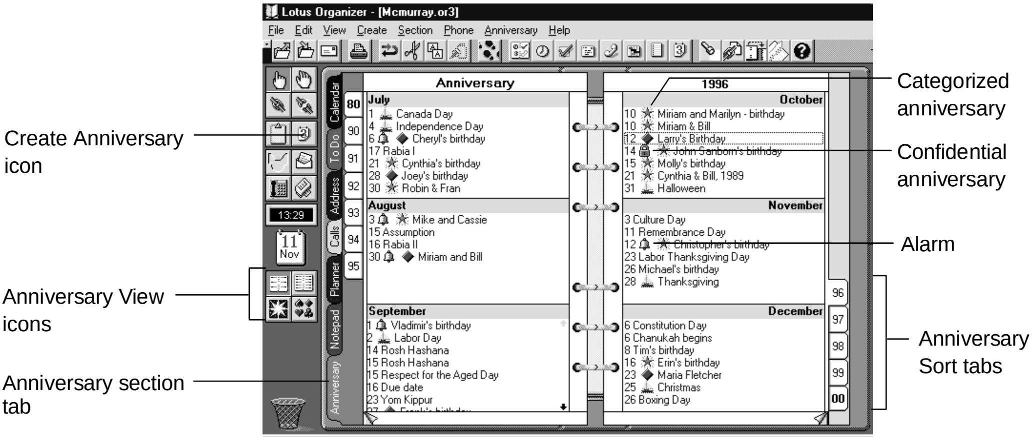
Other things you can do

For more information on how to copy, move, and delete Notepad pages, create links, assign categories and cost codes, and search for information in Notepad, see Chapter 53.

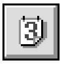
Chapter 52
Remembering Anniversaries and Other Dates

The Anniversary section lets you keep a list of all the important dates you need to remember every year. You can include anniversaries, birthdays, wedding dates, or special days (for example, pay days) you want to be reminded of. You can enter as many anniversaries as you like. Entries you create in the Anniversary section are called **Anniversary entries**.

You can specify that an anniversary you enter is automatically carried forward every year; you can sort and view your anniversaries by year, month, category, or zodiac sign; and you can set an alarm for an anniversary to remind you when the anniversary date is current. Organizer also lets you show through your anniversaries in your Calendar section, so you can see the anniversaries in the context of your daily work.



Creating an Anniversary entry



1. In the Anniversary section, double-click the Anniversary page.

   Tip You can also choose Create - Anniversary or press **INS** when you're in the Anniversary section to create an Anniversary entry.

2. Under Description, enter a description of the anniversary.
3. Click the Date box and select the date for the anniversary.
4. (Optional) Click the Categories box and select a category for your anniversary.

   See Help for more information on categories.

5. Select the options you want.

Option	*Result*
Occurs on same date every year	Enters (default) or doesn't enter the anniversary on the same date every year after the year in which you created it.
 Confidential	Makes or doesn't make (default) the anniversary confidential, so others accessing your file can't view it. If you assigned a password to your file, only the Owner can see and change entries that are confidential. See "Sharing your files," in Chapter 55, for more information.

6. (Optional) Click Alarm to set an alarm for your anniversary, click Repeat to make an anniversary repeat at intervals you specify, and / or click Cost to assign a customer and cost code.

   See Help for more information on setting an alarm, creating repeating intervals, and / or assigning customer and cost codes.

7. To create additional anniversaries, click Add and repeat steps 2 - 6.
8. When you finish entering all your anniversaries, click OK.

Changing an Anniversary entry

You can change or edit an Anniversary directly to change the description of the anniversary. Click the Anniversary entry to select it, click the text you want to edit (the mouse pointer changes to an I-beam), and make your changes. Press F2 to enter your changes.

For more information

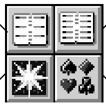
1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, anniversaries

3. Click Display.

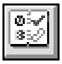
Viewing and sorting your anniversaries

You can quickly change how your anniversaries are sorted and what information appears by clicking one of the Anniversary View icons in Toolbox. When you change the view, you change the sort order.



The View icons change depending on what section you're in, so the view that you pick affects only the Anniversary section you're in. Click a View icon to see how your view of Anniversary changes. Your selection affects all entries, not just one or two. When you change a view, you're only changing how or what information appears.

Showing anniversaries in Calendar



You can show entries from the Anniversary section in the Calendar section. Showing anniversaries in Calendar can help you see your special dates in the context of your daily work. See “Showing other Organizer sections in Calendar,” in Chapter 46 for more information.

Customizing Anniversary

In the Anniversary section, you can set various preferences to customize how your anniversaries are sorted and what information appears with them. Changing preferences is optional. If you don’t change your Anniversary preferences, Organizer uses default preferences.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Anniversary section, customizing preferences in

3. Click Display.

Other things you can do

For more information on how to copy, move, and delete Anniversary entries, and how to set alarms for anniversaries, create Anniversary entries that repeat at intervals you specify, create links, assign categories and cost codes, search for information in Anniversary, and use filters, see Chapter 53.

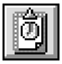
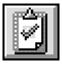
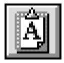
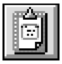
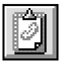
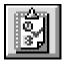
Chapter 53
Putting It All Together

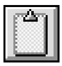
Now that you're familiar with some of the key features available in each Organizer section, you can try some features that are available across all or many Organizer sections, between Organizer files, and between Organizer and other applications. By the end of this chapter, you'll see why Organizer is such a powerful, integrated productivity tool.

Copying Organizer information

You can copy and paste Organizer information between Organizer sections and with other applications. You copy and paste information using Organizer Clipboard in Toolbox or Windows Clipboard. When you copy information, your newly copied information writes over anything that is currently on Clipboard, and you must paste this information to see it in its new destination.

Note When you copy information to Organizer Clipboard, notice that what appears on Clipboard is relevant to the kind of information you're copying to it.

Type of copied information	*Clipboard icon with copied entry*	*Type of copied information*	*Clipboard icon with copied entry*
Calendar appointment		Anniversary entry	
To do task		Text	
Address record		Metafile	
Calls entry		Bitmap	
Planner event		Mixed entry (multiple entries)	
Notepad page			

Note An empty Clipboard looks like this: 

Quickly copying entries between different Organizer sections

You can use Clipboard in the Organizer Toolbox to quickly copy an entire Organizer entry or multiple entries. The entry or entries can contain text, links, a metafile, or a bitmap.

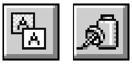
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Copying, entries

3. Select the index entry you want, and click Display.

Using Windows Clipboard to copy entries



You can also use Windows Clipboard to copy and paste entries between sections. Select the entry you want to copy and choose Edit - Copy, or press **CTRL+C**. Then go to the page on which you want to paste the entry and choose Edit - Paste or press **CTRL+V** to paste the entry from Clipboard. You can also press and hold **CTRL** as you drag and drop the entry to the section tab of the section you want to copy to.

Copying text between Organizer sections and other applications

You can copy selected text from any Organizer entry to Clipboard, and paste the text either to another Organizer entry or to another application.

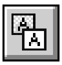
1. Click the entry you want to copy to select it.

   When you move the pointer over the selected entry, it changes to the I-beam.

2. Click where you want to begin copying the text.

   The pointer changes to a blinking vertical cursor.

3. Select the text you want to copy by pressing and holding the left mouse button while you highlight the text.
4. Choose Edit - Copy.

   Tip You can also press **CTRL+C** or you can drag and drop your selection to Clipboard icon in Toolbox to copy text you selected.

5. Do one of the following:
   - If you're copying text to another Organizer entry, click an Organizer entry to select it.

     The pointer changes to the I-beam.

   - If you're copying information to another application, switch to the application where you want your copied text to appear.

Tip To switch between Organizer and any open Windows application, press **ALT+TAB.**

6. Click where you want to paste the text.

7. Choose Edit - Paste.

   Tip You can also press **CTRL+V** to paste previously copied text.

To copy information from another application to Organizer, copy the text in the application and paste it to an Organizer entry, by reversing this procedure.

Using Edit - Copy Special to copy Organizer field information

You can copy specific Organizer field information from any Organizer entry to another Organizer section or to another application. In many cases, the fields you can select are combined into a useful format. The fields you can copy also depend on the type of entry you select.

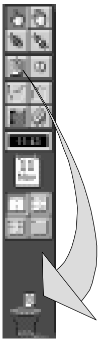
For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Copy Special

3. Click Display.

Deleting the contents of Clipboard



You can delete Clipboard contents at any time. Deleting Clipboard contents means that any information you copied to Clipboard is cleared from Clipboard.

Caution You cannot retrieve, nor use Undo to retrieve, deleted Clipboard contents.

To delete the contents of Clipboard, drag and drop Clipboard to Trash in Toolbox.

Moving Organizer information to a new location

You can move an entry to another area, another page, or another section.

If you're moving an entry that repeats, you can select whether to change any of the other repeating entries, too. See Help for more information on moving repeating entries.

1. Go to the entry you want to move.

2. Click the Pick up icon in Toolbox.

3. Select the entry you want to move by clicking it.

A symbol representing the type of entry you're moving appears in the hand when it picks up the entry.

Type of information	*Symbol*	*Type of Information*	*Symbol*
Calendar appointment		Planner event	
To Do task		Notepad page	
Address record		Anniversary entry	
Calls entry			

4. Click where you want the information moved: another area, another page, another section, and so on.

Tip You can also move an entry to another area, page, or section by dragging and dropping the entry to the new location.

You can also select the entry you want to move, choose Edit - Cut, go to the new area, and then choose Edit - Paste.

Deleting Organizer information

You can delete a single entry or many entries at one time.

If you deleted an entry or entries by mistake, you can retrieve the deleted entry or entries by choosing Edit - Undo. You can undo only the last action you performed.

1. You can delete one or more entries in the following ways:

- If you're deleting one entry, click the entry you want to delete.

- If you’re deleting two or more entries that are in sequence, select the first entry you want to delete, press and hold **SHIFT**, and click the last entry.
- If you’re deleting two or more entries that aren’t in sequence, select the first entry you want to delete, press and hold **CTRL**, and click each entry.

2. Drag and drop the entry or entries to Trash in Toolbox.

Tip You can also delete an appointment by selecting it and then pressing **DEL**, choosing Edit **-** Cut, or pressing **CTRL**+**X**.

Setting an alarm for an entry

You can set alarms in the Calendar, To Do, Calls, Planner, and Anniversary sections. Organizer can start an application automatically for you — such as a spreadsheet or a word processing application — if you set an alarm and specify what application you want to start. You can open a file, remind yourself of an appointment, or remind yourself to make an important phone call simply by setting an alarm. You can also display a message when your alarm goes off, for example, “Bring financial forecasts to meeting!”

1. Create or edit an entry.

See Chapters 46 **-** 52 for information on creating and editing entries in a specific Organizer section.

2. Click Alarm.

3. Click the Date box and select the date you want your alarm to go off.

4. Click the Time box and select the time you want your alarm to go off.

You can set the alarm to go off minutes before or after the time you selected. To do this, select the number of minutes you want by clicking + (plus) to increase or **-** (minus) to decrease the number of minutes. Then select Before or After to indicate when you want the alarm to go off (before the entry or after the entry is scheduled).

5. Click the Tune box and select the tune you want.

The default tune is the sound of an alarm clock. You can hear each tune by selecting a tune and then clicking Play.

6. For Message, enter the message you want to appear.

For example, “Meeting with David; bring new tapes for demo!”

7. For Start, enter the application you want to start or the file you want to open, when the alarm goes off.

If necessary, click Browse for a listing of your files and applications to choose from.

8. (Optional) If you don't want the alarm to display, click the Display alarm option to deselect it.
9. Click OK.
10. Click OK.

Tip You can recognize entries which you set alarms for by displaying the alarm symbol next to entries (except Planner events) in your Organizer section. If you haven't set your Organizer section to show the alarm symbol next to your Organizer entries, choose one of the following commands, depending on what section you're in: View - Calendar Preferences, View - To Do Preferences, View - Calls Preferences, or View - Anniversary Preferences. Under Options, select the alarm symbol, and click OK.

Responding to an alarm

When your alarm goes off, the Alarm dialog box appears, unless you deselect the Display alarm option when you set the alarm.

1. Select Snooze for by clicking + (plus) to increase or - (minus) to decrease the number of minutes to reset the alarm to go off again at another time. (The default is 5 minutes).
2. Click Turn to to turn to the entry for which the alarm was set.
3. Click OK to close the Alarm dialog box.

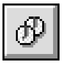
   Note If you selected the Start option when you set an alarm, Organizer starts the application you specified when you click OK. If you deselect this option, Organizer cancels starting an application when you click OK.

Canceling an alarm

You can cancel an alarm that you set.

1. Edit the entry that you set an alarm for.
2. Click Alarm.
3. Click Cancel Alarm.
4. Click OK.
5. Click OK.

Creating an entry to repeat at intervals you select



You can create Calendar appointments, To Do tasks, Calls entries, Planner events, and Anniversary entries to repeatedly appear in your Organizer section. For example, you can create weekly meetings in Calendar, bi-weekly tasks in To Do, daily phone calls in Calls, and so on.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Repeating entries, creating
3. Click Display.

Deleting or changing a repeating entry

When you delete or change a repeating entry, the deletion affects the repeating entry as it represents one specific group of repeating entries. The deletion or change doesn't affect all repeating entries in Organizer. Let's say you have an appointment that repeats every third Tuesday, and another repeating appointment the occurs every Friday, and you decide to delete or change the first repeating appointment (every third Tuesday). Only those appointments for every third Tuesday are affected; the repeating appointment that occurs every Friday isn't affected.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Repeating entries, deleting
3. Click Display.

Linking Organizer entries

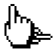
You can create links between discrete pieces of information in different Organizer sections or between entries in the same section. Creating links lets you cross-reference associated Organizer material. For example, you can link an appointment in your Calendar to a person in your Address section for quick access to that person's phone number. You can also create multiple links from an appointment scheduled in Calendar to all the Address records of the people attending the appointment, and then to a Notepad page that lists the appointment's agenda.

You can link information in Organizer to other files or applications. For example, you can link a scheduled budget appointment to a spreadsheet that contains budget forecasts.

Note Creating Organizer links is different from creating OLE links in Organizer. Organizer links are created in all sections of Organizer; OLE links are created in the Notepad section exclusively.

Creating one or multiple links

1. Go to the information you want to link.
2. Click the Link icon in Toolbox.



   When you move the mouse pointer over the information you want to link, it changes to a hand with a partial link.
3. Select the information you want to link, for example, a To Do task.

   The pointer changes to a hand holding a complete link.
4. Locate the information you want to link to, such as an Address record.

5. Click the entry you want to link to.

   When you select the entry you want to link to, Organizer places the link symbol next to each entry you clicked.
6. Repeat steps 1 – 5 above to create more links.

Tip You can also create a link between two or more selected entries. Click the first entry you want to link; then press and hold **CTRL** as you click any additional entries you want to link to. You can also choose Create - Organizer Link to create a link between two or more selected entries.

Seeing what a link is connected to

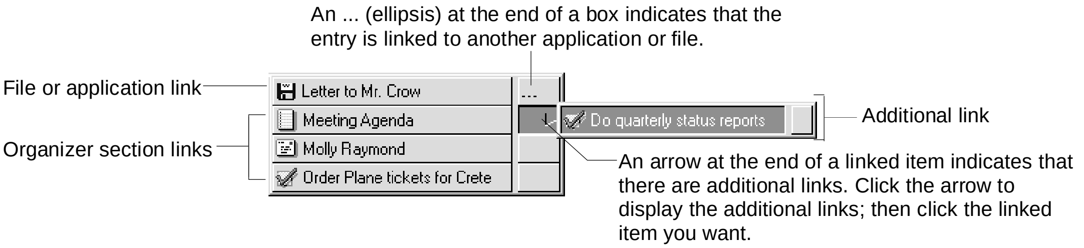
You can quickly see what a link is connected to in what is called a Link menu. A **Link menu** is a rectangular box that displays the link's description, the Organizer section the linked information is in, and whether the linked entry contains more than one link. If there is more than one link, there are several rectangular boxes — one box for each link. You can use the

Link menu to navigate through linked information by clicking the description of the linked information you want to go to.

1. Go to the linked entry and click the link symbol next to the entry.

   One or more rectangular boxes appear.

2. From the Link menu, click the link you want more information on.



   Organizer goes to the linked item you select.

   You can remove the display of the Link menu by clicking anywhere on the page.

Changing the order of links

You can change the order in which your linked entries and descriptions appear. For example, you can display your links by the date each entry was created, rather than in the order in which you created the links.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, links

3. Select the index entry you want, and click Display.

Displaying a list of Notepad links on a Notepad Links page

You can use a Notepad Links page to display a list of links you make to the Notepad page. For example, you can create a page with links to all the information for one project or to your most commonly used applications.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Links, links page in Notepad
3. Click Display.

Deleting or “breaking” links

You can delete any link you create. When you delete a link, you don’t delete information, you only remove the link.

You can undo breaking a link by choosing Edit - Undo Link Delete before you perform another action.

1. Go to the information you want to remove the link for.

2. Click the Broken link icon in Toolbox.

   When you move the pointer over the link symbol you want to break, it changes to a hand holding a broken link.

3. Click the link symbol next to the entry you want to unlink.

   The Link menu appears, listing any links associated with the selected entry.
4. Click the link you want to delete.

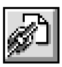
   When the last link to an entry is deleted, the link symbol no longer appears next to the entry.

Tip You can also delete links by choosing Edit - Organizer Links. From the Organizer Links dialog box that appears, select the link you want to delete and click Delete.

Linking information with other files and applications

You can create a link from information in Organizer to other files and applications so those files and applications are accessible in the context of your daily work. For example, you can link a scheduled budget appointment to a spreadsheet that contains budget forecasts.

1. Select the Organizer information you want to link.



2. Choose Create - File Link.
3. For Link description, enter a description of the link.
4. For File, enter the path and file name of the file you want to link to.

   If necessary, click Browse to see the Organizer files available to you.

To link to an external file with a non-standard extension, specify the path to the application that the file was created in, followed by a space; then specify the path to the file.

For example, C:\WPWIN\WPWIN.EXE D:\ORGANIZE\SAMPLE\MAILMRG.PRM

5. Click OK.

Accessing another file or a linked application

You can access another file or run an application using a link you already established.

1. Go to the entry that's linked to the file or application you want.
2. Click the link symbol.

   The Links menu appears. Any link to another file or application displays an ... (ellipsis) after the link's description.

3. Click the link's description to the external file or application you want.
4. When you finish with the external file or application, choose File - Exit or switch back to the Organizer window.

   Tip To switch between Organizer and any open Windows application, press **ALT+TAB**.

Some applications don't let you run more than one copy of the application at a single time. Also, if you select a link and nothing happens, the application may already be running.

Changing a link's description, file name, or application to link to

You can change the description or file name of any link to another file or application.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Changing, links to external files or applications
3. Click Display.

Working with categories

Categories help you manage entries and keep track of related entries across sections. You can assign one or more categories to any Organizer entry.

Although Organizer includes a number of common categories, including Clients, Expenses, Issues, and more, you can create or customize your own categories. For example, you can create a category for all entries that apply to a particular project, and then assign the entries in various sections to that category. You can then easily view and work with all appointments, To Do tasks, Calls entries, and other entries that pertain to a particular project.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Categories
3. Select the index entry you want, and click Display.

Using customer and cost codes

Customer and cost codes let you track the costs associated with an entry. For example, you can associate all your meetings with a client with a specific cost per hour. You create your own customer and cost codes and then assign them to entries in your Calendar, To Do, Calls, Planner, and Anniversary sections.

Let's say MCR Consulting is one of your clients. You can create a customer code for MCR Consulting, as MCR, and a cost code, as $50.00 per hour. At the end of the month, you can estimate monthly billing for MCR Consulting based on the customer and cost code you assigned.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Cost codes
3. Select the index entry you want, and click Display.

Searching for information in your Organizer entries

You can find specific text in any Organizer section by entering the same text contained in the entry you want to find. You can find text from any section of Organizer. For example, you can find text from any field of any Address record you're looking for, such as name, company, notes, and so on.

1. From any Organizer section, choose Edit - Find.

   Tip You can also press **CTRL+F** to search for text in an Address record.

2. For Find, enter the text you want to find.
3. Under Options, select the options for how you want Organizer to find your information.

Option	*Result*
Case sensitive	Searches for an exact text match, including the same capitalization. For example, if you search for the name Smith, Organizer won't find smith.
Whole word	Searches for whole words, specifically, not just the first few letters of a word. For example, if you search for the word plumber, you must use the whole word, not plumb.
Section	Searches for a text match in the Organizer section you specify.
All sections	If you go to the section in which you want to look for text, the default will be to look in that section.

   Organizer searches for exact text by default.

   If you don't select the case sensitive or whole word option, the default is to search for any text you enter, regardless of case sensitivity or whole word status.

4. Click one of the following command buttons.

Command button	*Result*
Find Next	Finds one entry at a time for you and turns to that entry within which the specified text appears.
Find All	Finds all entries within which the specified text appears, and lists them in the Occurrences box.

   If no match is found, Organizer displays a message saying that the text you're searching for can't be found.

5. To go to an entry you want to see, double-click the entry in the Occurrences box.

   Occurrences displays your entries that match your search in either of two ways: one text match at a time or all text matches in a list.

Tip You can also select the entry in the list box and click Turn To to go the entry.

6. Select one of the following options.

Option	*Result*
Clear list	Clears the list after each text search is completed (default).
Append to list	Maintains a list of all text search matches.

7. When you finish searching, click Close.

Using filters

You can use filters to display a subset of your Organizer entries based on criteria you specify. You can base your criteria on text, numbers, dates, Organizer attributes (such as a category or cost code), or any combination of these. For example, if you want to prepare a mailing, you can use a filter to display only Address records for New York City; or if you want to create a status report, you can use a filter to display all Calls entries and To Do tasks that occurred before a specified date.

When you create a filter, you enter the section or sections to which you want to apply the filter along with the criteria. Only sections that you refer to in the filter are affected. You can save the filters you create, and you can also add them to the Organizer menu under the View - Apply Filter menu, so you can quickly switch between a filtered view and a view of all entries.

Organizer works the same way whether you're displaying all entries or a subset of entries. Any operation you can normally do in Organizer you can also do while a filter is in place. When you clear the filter, operations you performed while in the filtered view will also affect the entries that didn't display before you set the filter.

Creating a filter

You must create a filter before you apply it.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Filters, creating
3. Click Display.

Applying a filter

You can apply a filter when you create it, or whenever you need to apply the filter.

Note If a filter is already in place when you select a new filter, Organizer clears the currently selected filter and then applies the new filter to all entries. To see if there is currently a filter in place, choose View. If the Clear Filter command is dimmed, there is no filter in place.

If you add a new entry that doesn't match a filter's criteria while the filter is in place, the new entry will appear in the section until you apply the filter again. For example, if the current filter displays all Calendar appointments earlier than November 14, and you create an appointment on November 15, the appointment for November 15 will appear until you apply your filter again.

1. Choose Create - Filter.
2. Under Filters, select the filter you want to apply.
3. Click Apply.

Clearing a filter

To clear a filter so that Organizer redisplays all entries in all sections, while keeping the filter to use at a later date, choose View - Clear Filter. You can also choose Create - Filters, select (None), and then click Apply.

Removing a filter

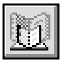
Caution You can't undo deleting a filter.

1. Choose Create - Filters.
2. Under Filters, select the filter you want to delete.
3. Click Remove.
4. Click Yes when Organizer asks whether you want to delete the filter.
5. Click Close.

Compacting Organizer files

You can compact your files on a periodic basis to ensure they remain the smallest size possible. When you compact a file, Organizer actually reduces the size of the file on disk. Let's say you're using Organizer on a notebook computer. You can compact your Organizer files to conserve limited hard-disk space on that notebook computer.

Note You cannot compact an open file.



1. Choose File - Compact.
2. (Optional) Click the Look in box and select the path you want Organizer to use to find the file you want.
3. For File name, enter the name of the file you want to compact.
4. (Optional) Click the Files of type box and select the type of file you want to compact.
5. Click Compact.

   Organizer tells you that Organizer will create a backup file before compacting your file.
6. Click Yes to make a backup file.
7. Click OK when Organizer successfully compacts your file.

   The Lotus Organizer 97 File Compact dialog box appears.
8. (Optional) To compact additional files, follow steps 2 – 7.
9. Click Exit when you're finished compacting files.

   You won't leave Organizer, you'll close only the Lotus Organizer 97 File Compact dialog box.

Archiving Organizer information

To keep your Organizer file size manageable, you can archive information you don't need on a day-to-day basis. For example, you can archive old To Do tasks or Calendar appointments.

When you archive information from a file, Organizer deletes the information from your file and stores the archived information in a separate .OR3 file. You can still access this archived information because you can open the archive file. However, the archived information will no longer appear in your original Organizer file.

The archive file includes all alarms, cost codes, and categories made in the original file. Entries that were repeating still appear in the archive file but they're no longer designated as repeating and they no longer include the repeating entry symbol.

You can archive more than one section in a single archive file, although you must perform a separate archive operation for each section you archive.

1. Choose File - Archive.

   Tip You can also press **CTRL+A** to archive information.

2. If you haven't saved changes to your file, Organizer asks you if you want to save the file. Click one of the following command buttons.

Command button	*Result*
Yes	Saves your changes to the file and then closes the file.
No	Closes the current file without saving your changes.
Cancel	Returns to the current file without closing or saving it.

3. Click the Section box and select a section from which to archive entries.
4. Under Range, select one of the following options.

Option	*Result*
All	Archives all entries in the section you select.
Before	Archives all entries prior to the date you select in the section you select. Organizer archives entries as follows: appointments or anniversaries that occur before the date you select; completed To Do tasks whose due date occurs before the date you select; Planner events with an end date before the date; Calls entries made before the date you select; Notepad entries entered before the date you select.

5. For Archive file, enter a name for your archive file.

   A file name can contain up to 255 characters, including spaces, but it can't contain any of the following characters: \ / : * ? " < > |

   If necessary, click Browse to see the Organizer files available to you.

6. (Optional) Select the Compact file after archive option to compact your file after you're finished archiving the file.

   Note If the file you're archiving allows more than one person to have the file open at the same time, you must be the only user with that file open to compact the file after archiving. To ensure you're the only user using the file, change the file type to Single-user access. Choose File - Save as. Under Save file as type, select Single-user access Lotus Organizer (*.OR3) and click OK.

7. Click OK.

8. Repeat steps 1 – 7 for any other sections you want to archive.

Importing and exporting information with Organizer

When you import or export information, you're copying one application's file and all of its information to another application's file. For example, you can import Address records from a database application directly into your Address section; or you can export Notepad entries to another application, such as a word processor.

For more information

For more information on importing information with Organizer, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Importing entries

3. Select the index entry you want, and click Display.

Exporting

You can export Organizer information for use in another application. If you want to export information, you must export it in a format that the other application understands. Organizer provides several formats, such as ASCII (*.TXT), ANSI Text (*.TXT), dBASE (*.DBF), and FoxPro (*.DBF) formats. Many applications support the ASCII and dBASE file format.

To export a subset of information, apply a filter to the section before you export the information. See Help for more information on filters.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Exporting, exporting entries
3. Click Display.

Using and managing field mapping

When you map fields while you're exporting or importing, you're selecting which fields in a file to copy to which locations in another file.

You can map all fields, or you can map specific fields. For example, you can import a file from an application or export a file to an application whose fields are named differently from the fields in Organizer. You can also import or export only a portion of the information contained in the import or export file, such as a person's name and telephone number.

Let's say you're exporting a business Address record, and the file you're exporting to has a field named Field 1 - Business position. You can map the Organizer section field (named Job title) to the export file field (named Field 1 - Business position).

If you import or export the same type of information from or to the same applications on a frequent basis, the fields you map to are always the same. When you map fields with Organizer, you can save the field-mapping connections you created to avoid repeating the actual field map.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Mapping fields, while importing or exporting entries
3. Click Display.

Chapter 54
Team Computing with Organizer

You can work with Organizer with your workgroup over your network. In a network environment, Organizer provides password protection for your files and lets you share files and sections with other users on the network. You can set up your Organizer file for multiple-user access so that you and others can open and use the file at the same time. The merge feature lets you consolidate any changes you make to your notebook computer file with the file on the network you use at work.

TeamMail, a new feature of Organizer, uses the mail system installed on your computer to create and send text-only messages to one or more people without leaving Organizer. TeamMail also lets you send a message containing selected Organizer entries.

Organizer Help menu choices and SmartIcons give you automatic access to Lotus Internet sites. You can access the Lotus home page, the Lotus Customer Support home page, and the Lotus Customer Support FTP site. These sites contain information on a variety of topics and give access to Lotus Customer Support.

Using passwords to protect your file

You can use passwords to protect your file so that other users can't open your file. You can also use passwords to allow different types of access to your files, or how much information others can see or change in your file.

Setting passwords for a file

When you create a password for a file, you must enter that password to open the file. Any other user to whom you give a password must also enter the password to open the file.

You can set three types of access when you set passwords for a file: Owner, Assistant, and Reader. You must give the password to those you want to be able to access your file with the particular access right. For example, if you used "Antioch" as a Reader password, give this password to any users you want to have Reader access to your file.

1. Open the file for which you want to set a password.
2. Choose File - Save As.
3. Click Passwords.
4. Enter a password for each type of access you want to give a user.

Option	*Result*
Owner	Lets a user see and change all entries (including entries marked confidential) in and preferences for a file. Owner access lets a user set the type of access and passwords for other users. If you don't enter an Owner password, the file isn't protected by a password and anyone who either gets a copy of your file or accesses it from a network can view your file and make changes to it. If you give someone else Owner access along with you, they can view all the contents of your file, make changes to your file, as well as change all passwords. It isn't recommended that you give anyone else Owner access to your file.
Assistant	Lets a user see and change entries (except entries marked confidential) in and preferences for a file. Assistant access lets a user schedule appointments and change preferences but won't let a user view or change entries that are confidential. Assistant access doesn't allow a user to change passwords for the file.
Reader	Lets a user see, but not change, entries in a file that aren't confidential.

Note If you're entering passwords for the first time, you must enter them in order; that is, Owner before Assistant, and Assistant before Reader. After you enter a password for Owner access, press **TAB** to highlight the Assistant password field and enter a new password. Press **TAB** again to highlight the Reader password field and enter a new password.

5. Click OK.
6. Confirm the password by entering it again.
7. Click OK to confirm the password.
8. Click OK.

Note All passwords are case-sensitive. For example, Hope with a capital H and hope with a lowercase h are two different passwords.

For more information

For more information on changing or removing a password, refer to Help.

1. Choose Help - Help Topics, and click the Index tab.
2. Type one of these phrases:

   Passwords, changing

   Passwords, removing
3. Click Display.

Sharing your files

If you share your Organizer files with other users on a network, you can control access to your files with passwords, and you can also control how many users can access your file at one time.

In addition to sharing entire Organizer files, you and other users can share sections of Organizer files by including those sections.

Controlling how many users can access a file at one time

You can specify single-user access or multiple-user access when you save an Organizer file. **Single-user access** means that only one user can access the file at a time. **Multiple-user access** means that more than one user can open and use the file at a time.

Note If two users work on the file at the same time, Organizer saves the file after each change that is made to the file.

1. Choose File - Save As.
2. If necessary, in the File name box, enter a file name.

   Click the Save in box and select the path you want Organizer to use to save the file.

3. Click the Save as type box and select whether one user or more than one user can access your file at the same time.

Option	*Result*
Single-user access Lotus Organizer (*.OR3)	If you use Organizer on a network where other users can access your files, lets you specify that only one user can open the file at one time. (The default is Single-user access.)
Multi-user access Lotus Organizer (*.OR3)	If you use Organizer on a network where other users can access your files, lets you specify that more than one user can open the file at one time.

4. Click Save.

Tip You can use this feature in conjunction with passwords to control access and changes to your file. For example, if you save a file with multiple-user access and assign Reader access to the file, you can give the Reader password to several users so they can all open and read your file at the same time but no one can make changes to the file. If you want someone to be able to change your file, you can give them Assistant access to a file and save the file with multiple-user access. That way, both you and the user you give the Assistant password to can work on the file at the same time.

Sharing and merging files

If you share a file on the network with another user who keeps track of your schedule, you may want to give that user Assistant access to your file. With Assistant access, that user can make changes to your file, schedule your appointments, keep a list of calls for you to make, and update your To Do list. To give a user Assistant access, you must create an Assistant password and give the password to the user.

If you're frequently out of the office, you can rely on someone with Assistant access to update your file on the network with changes you make away from the office and with changes they make to the network copy of your file.

For example, you can e-mail the copy of the file you're working on (while you're away) to the user with Assistant access to your file at regular intervals. The user with Assistant access to your file can merge your changes with his or her changes to the network, save this copy to the network, and e-mail a copy back to you. In this way, you both keep your file on the network up-to-date and you receive a copy of the file to continue working on while you're away from the office.

When you receive the updated file by e-mail, you should replace your copy with the updated copy that the user with Assistant access sends you. You shouldn't work in your current local copy while waiting for the user with

Assistant access to send you the updated copy. You must also be sure to maintain your original file in order to ensure accurate results when you merge the file you've been working on away from the office with your file at the office on the network.

Merging files

Consolidating Organizer files is called **merging**. The files you merge must share the same origin — that is, of the two files, one must be a copy from the original file.

Tip To create two files that can later be merged, use File **-** Save As to create the parent-child relationship. Save As retains the original file, and makes a copy that shares the same properties.

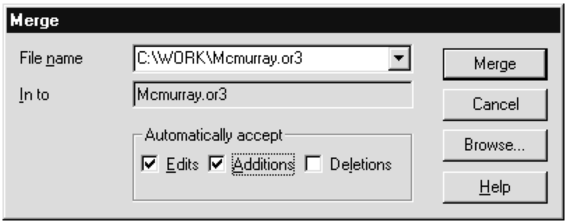
Organizer merges additions, deletions, and edits to entries in sections (for example, an edited appointment or added To Do task). Other settings (such as password changes, access levels, or changes to section preferences) aren't merged.

1. Choose File **-** Open and select the target file into which you want to merge the source file.
2. Choose File **-** Merge.

   Tip You can also press **CTRL+M** to merge files.
3. Click the File name box and select a file (the source file) to merge.

   If necessary, click Browse to select the source file to merge.

   Tip The file you select to merge must be a parent or child of the one you're merging it with. You must have created one file from the other at some point.



4. Click Merge.

5. Under Automatically accept, select the appropriate options to indicate which changes and additions from the source file you want to automatically enter in the target file.

Option	*Result*
Edits	Enters all edits from the source file.
Additions	Enters all additions from the source file.
Deletions	Enters all deletions from the source file.

6. If you don't automatically accept any options, Organizer displays the Select Merge Entries dialog box where you can select specific entries to merge into the target file.

   Click the tabs for each section: Edits, Additions, Deletions.

7. Click OK.

Sharing sections of Organizer files

Files containing shared sections must be saved in the same location. For example, you can save these files on a network server. These files must also be saved with multiple-user access. To save a file with multiple-user access, see "Controlling how many users can access a file at one time," earlier in this chapter.

You can make changes to an included section if its original file wasn't password-protected or if you entered either the Assistant or Owner password when you included the section. For example, if the file with the section you're including was saved with an Assistant password and multiple-user access, you can access the included section of that file at the same time as someone else.

Organizer keeps track of the entries in included sections and won't let two users work on the same entry at the same time. By default, Organizer saves a multiple-user access file after each change.

If the information in an included section changes in the originating file, you can see the change in the included section. Press **F9** while you work in the included section to update all entries in an Organizer file and see the section's most recent changes.

Including a section from another Organizer file

When you include a section from another user's file, your own file will include that section you're sharing unless you delete it. For example, if you're an assistant, you can include your manager's To Do section in your file with your own To Do section.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Including sections, from other Organizer files
3. Click Display.

Using TeamMail

TeamMail works with your current electronic mail system to send and receive mail messages from within Organizer. TeamMail uses the mail system installed on your computer to create and send messages to one or more people. TeamMail supports cc:Mail™, Lotus Notes®, and other e-mail systems including VIM® and MAPI-based systems.

Using TeamMail you can do the following tasks:

- Send a message and distribute it to one or more users.
- Send selected entries as the text of your message.
- Save a distribution list and use it to quickly send messages to frequently-used names, addresses, and mailing lists.
- Specify that you receive notification when your message is delivered.

Note To use TeamMail in Organizer 97, you don't need to close Organizer.

For more information

1. Choose Help - Help Topics and click the Index tab.
2. Type this phrase:

   TeamMail, sending messages
3. Click Display, select the appropriate topic, and click Display again.

Organizer and the Internet

In Organizer, if you have one of the supported World Wide Web (the Web) browsers on your computer, you can go to the Lotus home pages on the Web without leaving Organizer. The supported browsers are Netscape™ and the Microsoft Internet Explorer. Organizer includes Internet menu items (on the Help menu) that let you go quickly to the Lotus home page, the Lotus Customer Support home page, and the Lotus Customer Support FTP site. Organizer also includes Internet SmartIcons that you can add to your set of SmartIcons.

You can also embed a Lotus home page (or any other home page) on a Notepad page, providing you easy access to Internet resources and information from within Organizer. See Help for more information about embedding an OLE object.

For more information

1. Choose Help - Help Topics, and click the Index tab.
2. Type this phrase:

   Internet, overview
3. Click Display.

Selecting Lotus Internet sites

To automatically access Lotus sites, choose Help - Lotus Internet Support - and one of the commands shown below.

Command	*Result*
Lotus Home Page	Goes to the Lotus home page.
Lotus Support	Goes to the Lotus Customer Support home page.
Lotus FTP site	Goes to the Lotus FTP Site.

Chapter 55
Organizer Print Layout Guide

Organizer offers over 40 predefined layouts for printing your Organizer information. This guide is designed to show you what each print layout looks like so you can choose the print layouts best suited to your needs.

In the following pages, you'll find samples of all the Organizer print layouts. Each page contains the layout name, description, and a sample printout. For a comprehensive list of all print layouts and where they appear in this guide, see "Print Layout List," on the next page.

When you print, choose layouts from the Layout box in the Print dialog box. Remember that the list of layouts changes depending on the section you're in.

The samples in this chapter show how printouts look with Organizer's default settings. You can customize print layouts to suit your individual preferences.

For more information

For more information on customizing print layouts and print layout elements see Chapter 44, or refer to Help (online documentation).

1. Choose Help **-** Help Topics.
2. Type this phrase:

   Printing, customizing layout styles
3. Click Display.

Print Layout List

The following list contains all the Organizer print layouts by section and the page where each one appears in this chapter.

Calendar List

Prints appointments from a Calendar section for the date range you specify.

Calendar List 11/11/96 - 11/18/96 jwagner.OR3

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

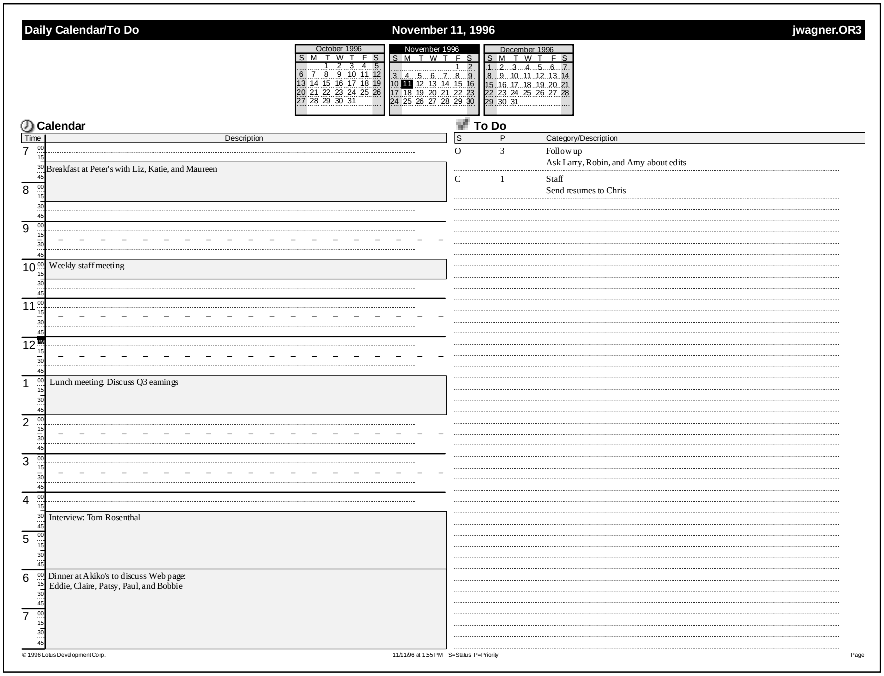
Calendar

	Start	End	Category	Description
11 Nov 1996	7:30 AM	8:30 AM	Expense	Breakfast at Peter's with Liz, Katie, and Maureen
	10:00 AM	10:30 AM	Meeting, Staff	Weekly staff meeting
	1:00 PM	2:00 PM		Lunch meeting: Discuss Q3 earnings
	4:30 PM	6:00 PM	Issues	Interview: Tom Rosenthal
	6:00 PM	8:00 PM	Ideas	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie
12 Nov 1996	9:30 AM	10:00 AM	Project	Meet with Carlos, Chris, and Barbara: publishing milestones
	11:00 AM	12:00 PM	Soundtrack	Meet with Molly, Michael, Robin, & Liz: soundtrack review
	2:00 PM	4:00 PM	Expense	Budget review with Cynthia, Jacques, & Leslie: Toronto project
	5:30 PM	6:00 PM		Meet with Vladimir, Bill, and Larry: Q1 revenue projections
13 Nov 1996	8:30 AM	9:30 AM	Ideas, Meeting	Meet regarding ad campaign strategy
14 Nov 1996	11:30 AM	12:30 PM	Promotions	Taping for TV ad
	4:00 PM	6:00 PM	Project	Steering committee meeting
15 Nov 1996	8:00 AM	10:15 AM	Product	Review catalog mockup
	2:00 PM	3:00 PM	Meeting	Pricing Committee
	6:00 PM	9:00 PM	Product	Dinner with T. Hill: post-product launch strategy
16 Nov 1996	2:00 PM	3:00 PM	Personal	Tennis
17 Nov 1996	2:00 PM	4:00 PM	Personal	Antique Fair at Bronsfield
18 Nov 1996	10:00 AM	10:30 AM	Meeting, Staff	Weekly staff meeting
	10:30 AM	11:30 AM	Tradeshow	Tradeshow schedule meeting

© 1996 Lotus Development Corp. 11/11/96 at 1:53 PM Page 1

Daily Calendar/To Do

Prints appointments and tasks from Calendar and To Do sections for the date range you specify as a single day on each page.


Daily Calendar/To Do　November 11, 1996　jwagner.OR3

October 1996 | November 1996 | December 1996

Calendar

Time	Description
7:30	Breakfast at Peter's with Liz, Katie, and Maureen
10:00	Weekly staff meeting
1:00	Lunch meeting. Discuss Q3 earnings
4:30	Interview: Tom Rosenthal
6:00	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie

To Do

S	P	Category/Description
O	3	Follow up Ask Larry, Robin, and Amy about edits
C	1	Staff Send resumes to Chris

© 1996 Lotus Development Corp.　11/11/96 at 1:55 PM　S=Status P=Priority　Page

Daily Calendar/To Do/Calls

Prints appointments, tasks, and calls from Calendar, To Do, and Calls sections for the date range you specify as a single day on each page.

Daily Calendar/To Do/Calls	Monday, November 11, 1996	jwagner.OR3

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Calendar

Start	End	Category	Description
7:30 AM	8:30 AM	Expense	Breakfast at Peter's with Liz, Katie, and Maureen
10:00 AM	10:30 AM	Meeting, Staff	Weekly staff meeting
1:00 PM	2:00 PM		Lunch meeting: Discuss Q3 earnings
4:30 PM	6:00 PM	Issues	Interview: Tom Rosenthal
6:00 PM	8:00 PM	Ideas	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie

To Do

S	P	Category/Description
O	3	Follow up Ask Larry, Robin, and Amy about edits
C	1	Staff Send resumes to Chris

Calls

Time	Person/Phone Number	Company	Status	Category/Notes
11:30 AM	Emilio Carvez 809-555-5757	Celluloid Heroes	No Answer	Ideas What are his '97 openings: June - August
3:00 PM	Will Isaac 617-555-9393	The Round Table	Planned	Order screenplays for film class.

© 1996 Lotus Development Corp. 11/11/96 at 9:56 AM S=Status P=Priority Page 1

Daily Page

Prints appointments and any entries showing through to a Calendar section for the date range you specify as a single day on each page. This example contains entries showing through from the Planner, To Do, Calls, and Anniversary sections.

Daily Page | **November 11, 1996** | **jwagner.OR3**

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

11 Monday

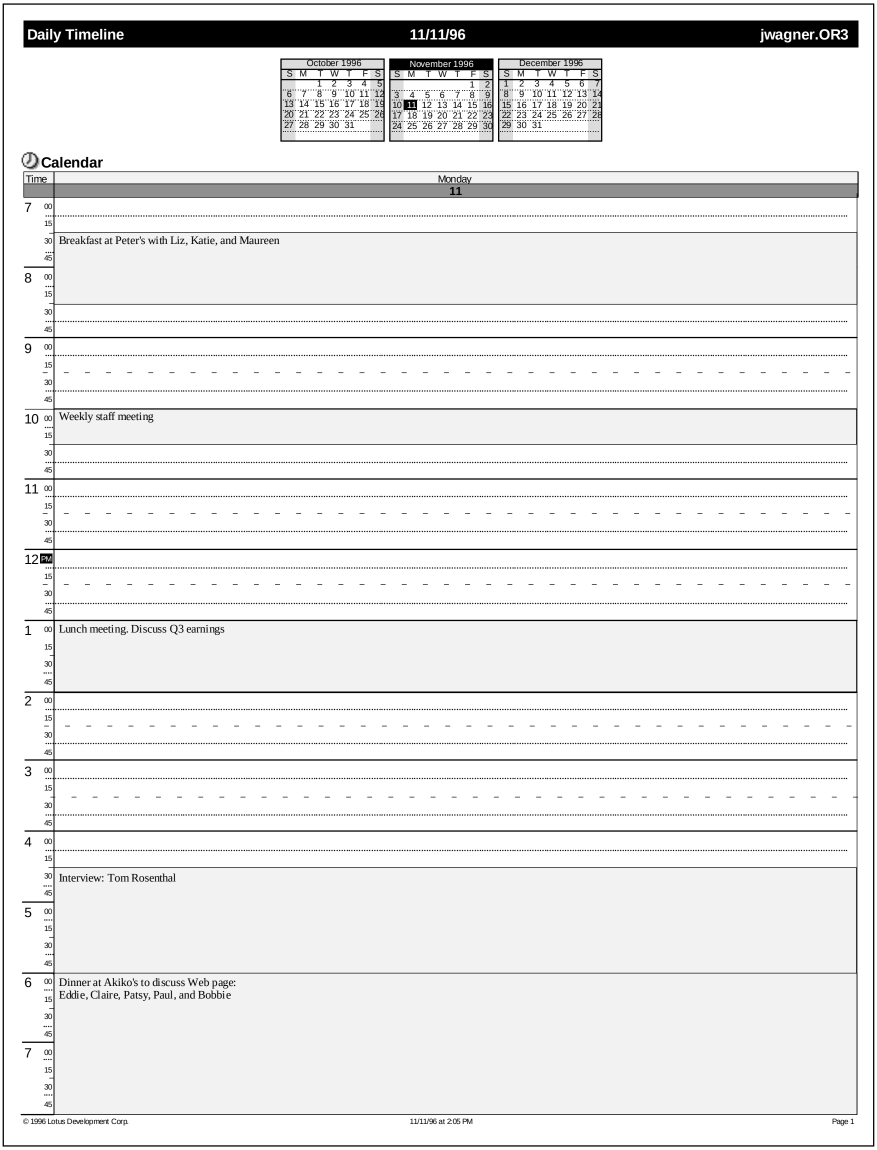
3 Ask Larry, Robin, and Amy about edits
1 Send resumes to Chris
Emilio Carvez 809-555-5757
Will Isaac 617-555-9393
Film Review
Christopher's birthday

7:30 AM Breakfast at Peter's with Liz, Katie, and Maureen
10:00 AM Weekly staff meeting
1:00 PM Lunch meeting: Discuss Q3 earnings
4:30 PM Interview: Tom Rosenthal
6:00 PM Dinner at Akiko's to discuss Web page:
Eddie, Claire, Patsy, Paul, and Bobbie

© 1996 Lotus Development Corp. 11/11/96 at 12:54 PM Page 1

Daily Timeline

Prints appointments from a Calendar section for the date range you specify as a single day on each page.



Daily Timeline	11/11/96	jwagner.OR3

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

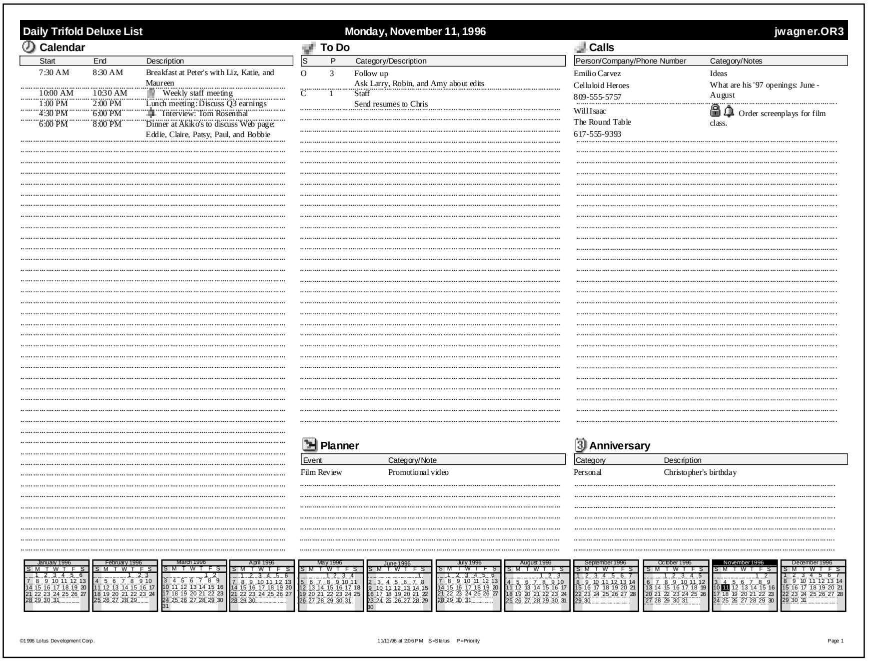
Calendar

Time	Monday 11
7:30	Breakfast at Peter's with Liz, Katie, and Maureen
10:00	Weekly staff meeting
12 PM	
1:00	Lunch meeting. Discuss Q3 earnings
4:30	Interview: Tom Rosenthal
6:00	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie

© 1996 Lotus Development Corp. 11/11/96 at 2:05 PM Page 1

Daily Trifold Deluxe List

Prints appointments, tasks, calls, events, and anniversaries from Calendar, To Do, Calls, Planner, and Anniversary sections for the date range you specify as a single day on each page.



Daily Trifold Deluxe List — **Monday, November 11, 1996** — **jwagner.OR3**

Calendar

Start	End	Description
7:30 AM	8:30 AM	Breakfast at Peter's with Liz, Katie, and Maureen
10:00 AM	10:30 AM	Weekly staff meeting
1:00 PM	2:00 PM	Lunch meeting: Discuss Q3 earnings
4:30 PM	6:00 PM	Interview: Tom Rosenthal
6:00 PM	8:00 PM	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie

To Do

S	P	Category/Description
O	3	Follow up Ask Larry, Robin, and Amy about edits
C	1	Staff Send resumes to Chris

Calls

Person/Company/Phone Number	Category/Notes
Emilio Carvez Celluloid Heroes 809-555-5757	Ideas What are his '97 openings: June - August
Will Isaac The Round Table 617-555-9393	Order screenplays for film class.

Planner

Event	Category/Note
Film Review	Promotional video

Anniversary

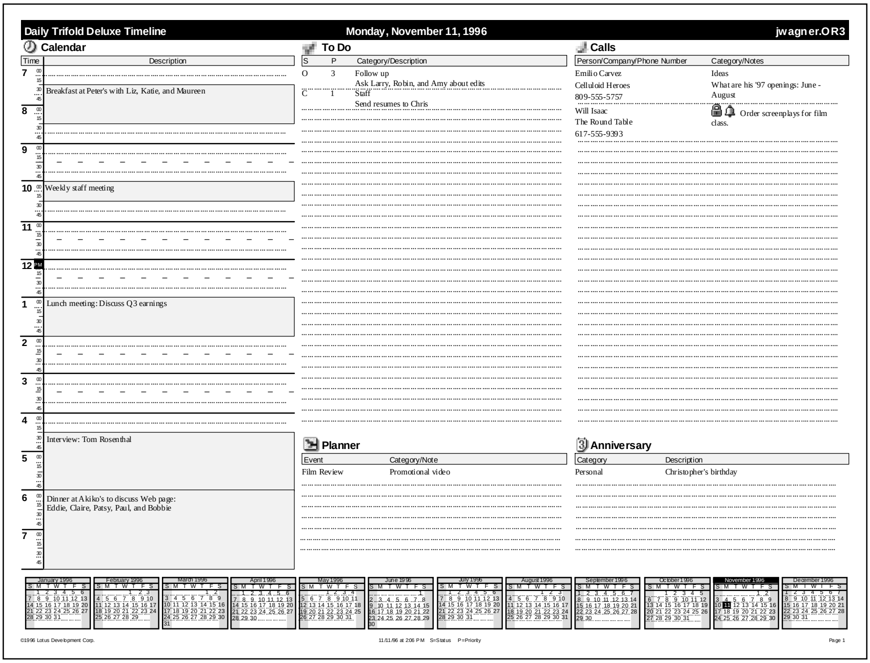
Category	Description
Personal	Christopher's birthday

January 1996 · February 1996 · March 1996 · April 1996 · May 1996 · June 1996 · July 1996 · August 1996 · September 1996 · October 1996 · November 1996 · December 1996

©1996 Lotus Development Corp. — 11/11/96 at 2:06 PM S=Status P=Priority — Page 1

Daily Trifold Deluxe Timeline

Prints appointments, tasks, calls, events, and anniversaries from Calendar, To Do, Calls, Planner, and Anniversary sections for the date range you specify as a single day on each page.


Daily Trifold Deluxe Timeline   Monday, November 11, 1996   jwagner.OR3

Calendar

Time	Description
7:30	Breakfast at Peter's with Liz, Katie, and Maureen
10:00	Weekly staff meeting
1:00	Lunch meeting: Discuss Q3 earnings
4:30	Interview: Tom Rosenthal
6:00	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie

To Do

S	P	Category/Description
O	3	Follow up Ask Larry, Robin, and Amy about edits
C	1	Staff Send resumes to Chris

Calls

Person/Company/Phone Number	Category/Notes
Emilio Carvez Celluloid Heroes 809-555-5757	Ideas What are his '97 openings: June - August
Will Isaac The Round Table 617-555-9393	Order screenplays for film class.

Planner

Event	Category/Note
Film Review	Promotional video

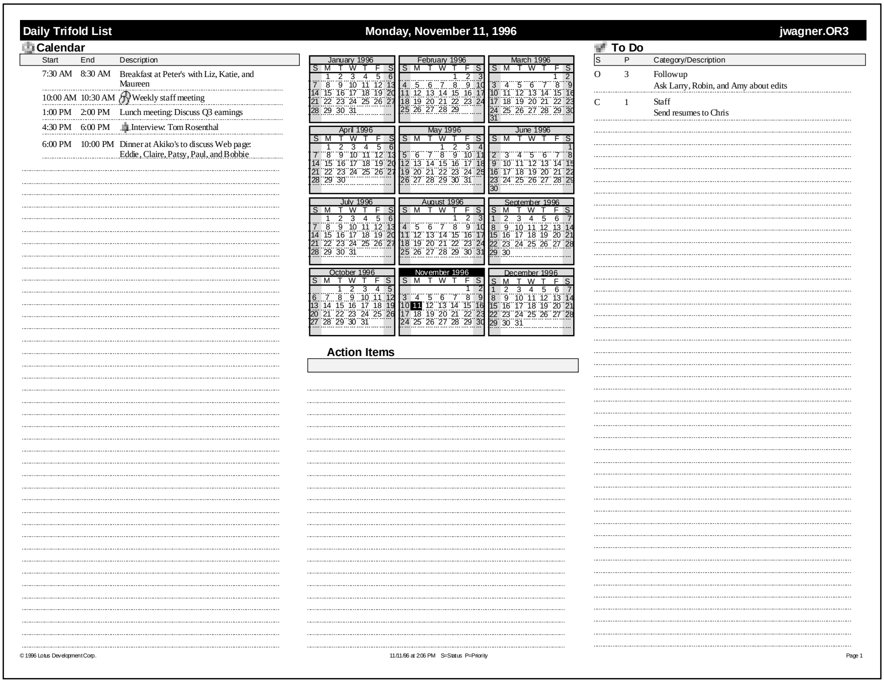
Anniversary

Category	Description
Personal	Christopher's birthday

©1996 Lotus Development Corp.   11/01/96 at 2:06 PM   S=Status   P=Priority   Page 1

Daily Trifold List

Prints appointments and tasks from Calendar and To Do sections for the date range you specify as a single day on each page. An Action Items section is included for you to write in comments or items.



Daily Trifold List | Monday, November 11, 1996 | jwagner.OR3

Calendar

Start	End	Description
7:30 AM	8:30 AM	Breakfast at Peter's with Liz, Katie, and Maureen
10:00 AM	10:30 AM	Weekly staff meeting
1:00 PM	2:00 PM	Lunch meeting: Discuss Q3 earnings
4:30 PM	6:00 PM	Interview: Tom Rosenthal
6:00 PM	10:00 PM	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie

January 1996 · February 1996 · March 1996 · April 1996 · May 1996 · June 1996 · July 1996 · August 1996 · September 1996 · October 1996 · November 1996 · December 1996

Action Items

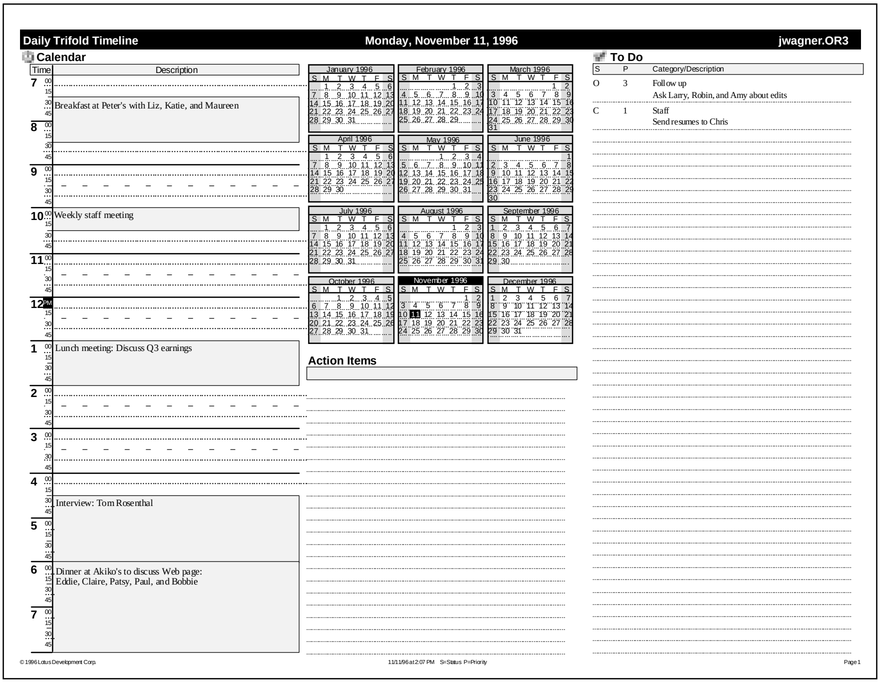
To Do

S	P	Category/Description
O	3	Followup Ask Larry, Robin, and Amy about edits
C	1	Staff Send resumes to Chris

© 1996 Lotus Development Corp. | 11/11/96 at 2:06 PM S=Status P=Priority | Page 1

Daily Trifold Timeline

Prints appointments and tasks from Calendar and To Do sections for the date range you specify as a single day on each page. An Action Items section is included for you to write in comments or items.



Monthly Calendar, To Do, Planner, Calls, or Anniversary

Monthly layouts for Calendar prints appointments and any entries showing through to a Calendar section for the date range you specify as a single month on each page. This example contains entries showing through from the To Do, Calls, Planner, and Anniversary sections.

Monthly layouts for To Do, Calls, Planner, and Anniversary sections only show entries from the individual sections.

Note Monthly Calendar, Monthly To Do, Monthly Planner, Monthly Calls, and Monthly Anniversary are the layout titles that appear in Organizer.

Monthly Calendar November 1 - 30, 1996 **jwagner.OR3**

October 1996						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

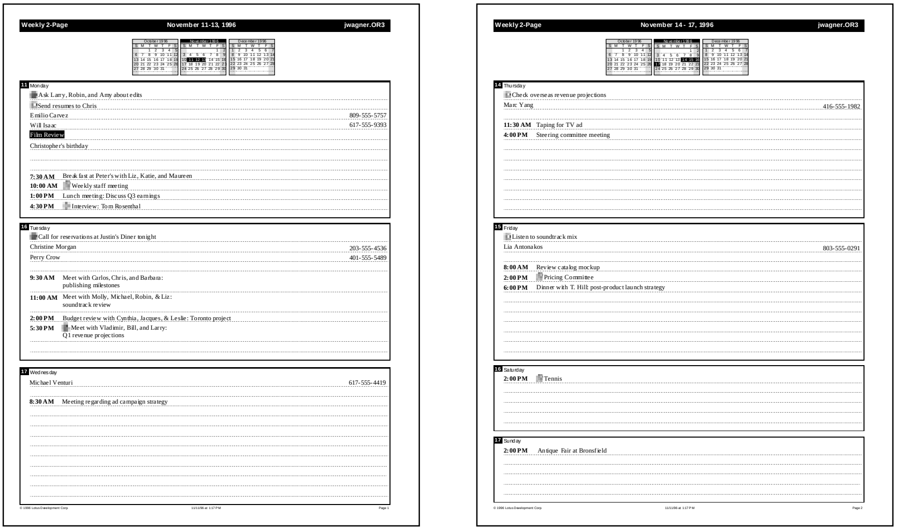
Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	**28**	**29**	**30**	**31**	**1**	**2**
Mercury project	Mercury project 10:00 AM Weekly staff meeting	Mercury project 8:30 AM Review slides for budget presentation w/ Alex	Mercury project 11:30 AM Review brochure layout 3:00 PM Meet with Soha about equipment distributor	Mercury project Halloween 12:00 PM Lunchtime series: "Managing Stress"	4:00 PM Production issues with Ops. Manager 6:00 PM Dinner with Thierry & Megan	2:00 PM Tennis 7:30 PM High School Reunion
3	**4**	**5**	**6**	**7**	**8**	**9**
12:00 PM Flea market	2 Send fax to Pablo regarding Q3 earnings WWW conference 10:00 AM Weekly staff meeting 11:30 AM Brainstorm w/Alice	WWW conference 11:00 AM Debrief on in-store promotions performance	Leslie Zenga 303-555-9091 WWW conference 12:00 PM Lunchtime Lecture: Elements of Effective Communication	**8:00 AM Videoconference with Megan to discuss future projects**	3 Review competitive analysis Michelle Rohr 617-555-7193 8:45 AM Debrief on mid-month in-store promotions	2:00 PM Tennis
10	**11**	**12**	**13**	**14**	**15**	**16**
9:00 AM Annual Park clean-up	3 Ask Larry, Robin, and Amy about edits 1 Send resumes to Chris Emilio Carvez 809-555-5757 Will Isaac 617-555-9393 Film Review Christopher's birthday 7:30 AM Breakfast at Peter's with Liz, Katie, and Maureen 10:00 AM Weekly staff meeting 1:00 PM Lunch meeting: Discuss Q3 earnings 4:30 PM Interview: Tom Rosenthal	3 Call for reservations at Justin's Diner tonight Christine 203-555-4536 Perry Crow 401-555-5489 9:30 AM Meet with Carlos, Chris, and Barbara: publishing milestones 11:00 AM Meet with Molly, Michael, Robin, & Liz: soundtrack review 2:00 PM Budget review with Cynthia, Jacques, & Leslie: Toronto project	Michael Venturi 617-555-4419 8:30 AM Meet regarding ad campaign strategy	1 Check overseas revenue projections Marc Yang 416-555-1982 11:30 AM Taping for TV ad 4:00 PM Steering committee meeting	1 Listen to soundtrack mix Lia Antonakos 803-555-0291 8:00 AM Review catalog mockup 2:00 PM Pricing Committee 6:00 PM Dinner with T. Hill: post-product launch strategy	2:00 PM Tennis
17	**18**	**19**	**20**	**21**	**22**	**23**
2:00 PM Antique Fair at Bronsfield	3 Do quarterly status Amal Naj 919-555-0954 Athena project 10:00 AM Weekly staff meeting 10:30 AM Tradeshow schedule meeting	Michaela DeSilvio 011-44-181-739-6395 Athena project 8:00 AM Press Briefing 1:00 PM Operations meeting 5:00 PM Discuss performance review with Anna Rohr	Athena project 11:30 AM Review brochure layout 3:30 PM Brief North American sales team on upcoming product promotion	2 Send printer dates to Mike! Andriana 212-555-2178 12:30 PM Lunch with J. Burke: product specs 2:00 PM Sales call: Locker, Inc.	Michael Kim 508-555-4908 10:30 AM Tradeshow schedule meeting 2:00 PM Pricing Committee	2:00 PM Tennis 4:00 PM Record Convention
24	**25**	**26**	**27**	**28**	**29**	**30**
10:00 AM Brunch at Johnny D's with Dar & Barbara	1 Conference call with Leslie, Afsar, and Chris Diane Wishna 416-555-3589 10:00 AM Weekly staff meeting 4:00 PM Review: Catalog mockup	Michael's birthday 9:00 AM Review manufacturig schedule with Andrea 3:00 PM Monthly videoconference with Headquarters	1 Rough outline due to Dagmar Al Parrish 508-555-0901 Maria & Norman 9:30 AM Seasonal promotion update 2:00 PM Steering Committee meeting	8:00 AM Breakfast at Peter's	1 Get car inspected! Michael Kim 555-4908 2:00 PM Pricing Committee	2:00 PM Tennis

 11/11/96 at 1:18 PM S=Status P=Priority Page 1

Weekly 2-Page

Prints appointments and any entries showing through to a Calendar section for the date range you specify as a single week on two pages. This example contains entries showing through from the Planner, To Do, and Calls sections.



Weekly Timeline

Prints appointments from a Calendar section for the date range you specify as a single week on each page.

Weekly Timeline 11/11 - 11/17/96 **jwagner.OR3**

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Calendar

Time	Monday 11	Tuesday 12	Wednesday 13	Thursday 14	Friday 15	Saturday 16	Sunday 17
7	Breakfast at Peter's with Liz, Katie, and Maureen						
8			Meet regarding ad campaign strategy		Review catalog mockup		
9		Meet with Carlos, Chris, and Barbara					
10	Weekly staff meeting						
11		Meet with Molly, Michael, Robin, & Liz: soundtrack review		Taping for TV ad			
12 PM							
1	Lunch meeting: Discuss Q3 earnings						
2		Budget review with Cynthia, Jacques, & Leslie: Toronto project			Pricing Committee	Tennis	Antique Fair at Bronsfield
3							
4	Interview: Tom Rosenthal			Steering committee meeting			
5		Meet with Vladimir, Bill, and Larry:					
6	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie.				Dinner with T. Hill: post-product launch strategy		
7							
8							

© 1996 Lotus Development Corp. 11/11/96 at 1:10 PM Page 1

Weekly Work Timeline

Prints appointments from a Calendar section for the date range you specify as a single work week (Monday - Friday) on each page.

Weekly Work Timeline 11/11 - 11/15/96 jwagner.OR3

October 1996 | November 1996 | December 1996

Calendar

Time	Monday 11	Tuesday 12	Wednesday 13	Thursday 14	Friday 15
7:30	Breakfast at Peter's with Liz, Katie, and Maureen				
8:00					Review catalog mockup
8:30			Meet regarding ad campaign strategy		
9:30		Meet with Carlos, Chris, and Barbara:			
10:00	Weekly staff meeting				
11:00		Meet with Molly, Michael, Robin, & Liz: soundtrack review			
11:30				Taping for TV ad	
1:00	Lunch meeting: Discuss Q3 earnings				
2:00		Budget review with Cynthia, Jacques, & Leslie: Toronto project			Pricing Committee
4:00				Steering committee meeting	
4:30	Interview: Tom Rosenthal				
5:30		Meet with Vladimir, Bill, and Larry:			
6:00	Dinner at Akiko's to discuss Web page: Eddie, Claire, Patsy, Paul, and Bobbie				Dinner with T. Hill: post-product launch strategy

© 1996 Lotus Development Corp. 11/11/96 at 1:12 PM Page 1

Yearly Calendar

Prints a 12-month reference calendar for the year you specify.

Yearly Calendar	November 11, 1996	jwagner.OR3

1996

January 1996

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February 1996

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

April 1996

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May 1996

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June 1996

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

July 1996

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August 1996

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

 11/11/96 at 13:02 Page 1

Status Report

Prints tasks from a To Do section in order of status (completed, overdue, current, and future) for the date range you specify.

Status Report 11/1 - 11/29/96 **jwagner.OR3**

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

To Do

Start	Due	S	P	Category	Description
11/4/96	11/7/96		2	Budget	Send fax to Pablo regarding Q3 earnings
11/6/96	11/8/96		2		Review competitive analysis
11/11/96	11/11/96	O	3	Follow up	Ask Larry, Robin, and Amy about edits
11/11/96	11/11/96	C	1	Staff	Send resumes to Chris
11/12/96	11/12/96	F	3	Personal	Call for reservations at Justin's Diner tonight
11/14/96	11/14/96	F	1	Follow up	Check overseas revenue projections
11/15/96	11/15/96	F	1	Project	Listen to soundtrack mix
11/18/96	11/18/96	F	3	Project	Do quarterly status reports
11/21/96	11/22/96	F	2	Follow up	Send printer dates to Mike!
11/25/96	11/25/96	F	1	Issues	Conference call with Leslie, Afsar, and Chris
11/29/96	11/29/96	F	1	Personal	Get car inspected!

 11/11/96 at 9:24 PM S=Status P=Priority Page 1

To Do List

Prints tasks from a To Do section sorted by date, status, category, or priority. This example shows tasks printed for a specified date range.

To Do List **11/1 - 11/25/96** **jwagner.OR3**

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

To Do

Start	Due	S	P	Category	Description
11/1/96					
11/2/96					
11/3/96					
11/4/96	11/4/96	✓	2	Budget	Send fax to Pablo regarding Q3 earnings
11/5/96					
11/6/96	11/8/96	✓	3		Review competitive analysis
11/7/96					
11/8/96					
11/9/96					
11/10/96					
11/11/96	11/11/96	O	3	Follow up	Ask Larry, Robin, and Amy about edits
	~~11/11/96~~	~~C~~	~~1~~	~~Staff~~	~~Send resumes to Chris~~
11/12/96	11/12/96	F	3	Personal	Call for reservations at Justin's Diner tonight
11/13/96					
11/14/96	11/14/96	F	1	Follow up	Check overseas revenue projections
11/15/96	11/15/96	F	1	Project	Listen to soundtrack mix
11/16/96					
11/17/96					
11/18/96	11/18/96	F	3	Project	Do quarterly status reports
11/19/96					
11/20/96					
11/21/96	11/22/96	F	2	Follow up	Send printer dates to Mike!
11/22/96					
11/23/96					
11/24/96					
11/25/96	11/25/96	F	1	Issues	Conference call with Leslie, Afsar, and Chris

© 1996 Lotus Development Corp. 11/11/96 at 1:18 PM S=Status P=Priority Page

Address Card

Prints business and home addresses, and telephone numbers from an Address section for the range you specify; they can be sorted by last name, company, category, or the field you select. This example is sorted by last name.

Address Card — **And - Has**

Address

A

Andrews, Ms. Laurie

Business		Home	
Ms. Laurie Andrews			
Sales Manager			
A & E Enterprises 111 Mall Road Burlington, MA 02145		2525 Sycamore Lane Weston, MA 02889	
Tel 1 617-555-2233	Ext	Tel 1 508-555-4567	
Fax 617-555-2000		Fax	

Antonakos, Mrs. Lia

Business		Home	
Mrs. Lia Antonakos			
Vice President			
Mountain Works, Inc. 2220 River Court Aurora, CO 80525		148 Lowell Lane Aurora, CO 80526	
Tel 1 803-555-0291	Ext	Tel 1 803-555-3849	
Fax 803-555-0202		Fax	

B

Bowman, Mr. Steven

Business		Home	
Mr. Steven Bowman			
General Manager			
Genco, Inc. 1200 Van Ness San Francisco, CA 94110		48 Maple Drive San Francisco, CA 94163 United States	
Tel 1 415-555-9000	Ext 245	Tel 1 415-555-8907	
Fax 415-555-9800		Fax 415-555-8911	

C

Carvez, Mr. Emilio

Business		Home	
Mr. Emilio Carvez			
Director			
Celluloid Heroes 5757 East Hastings Street New York, NY 11564		1212 Verde Avenue San Juan, Puerto Rico 98563	
Tel 1 212-555-8989	Ext	Tel 1 809-555-5757	
Fax 212-555-8990		Fax	

Crow, Dr. Perry

Business		Home	
Dr. Perry Crow			
Anthropologist			
University of Waterloo 1 Hyde Road Toronto, Ontario L4N 5G0 Canada			
Tel 1 401-555-5489	Ext 557	Tel 1	
Fax 401-555-5490		Fax	

D

Demetri, Mrs. Efronsina

Business		Home	
Ms. Efronsina Demetri			
Director of Marketing			
C&G Manufacturers 43 Princess Street Suite 234 Toronto, Ontario M5JR26 Canada		45 Clarendon Street Apt. #4 Toronto, Ontario M5JR28 Canada	
Tel 1 416-555-4300	Ext 123	Tel 1 416-555-0056	
Fax 416-555-0099		Fax 416-555-5677	

E

Estrada, Mr. Juan

Business		Home	
Mr. Juan Estrada			
Sales Manager			
Aqua 78 El Way Caugus, Puerto Rico 00621		I Gallante Way Caugus, Puerto Rico 00631	
Tel 1 809-555-9008	Ext	Tel 1 809-555-0087	
Fax 809-555-5600		Fax 809-555-0091	

F

Fernandez, Ms. Maria

Business		Home	
Ms. Maria Fernandez			
President			
C&G Manufacturers 43 Princess Street Suite 234 Toronto, Ontario M5JR26 Canada		345 E. River Road Toronto, Ontario M5JR27 Canada	
Tel 1 416-555-4300	Ext 123	Tel 1 416-555-6758	
Fax 416-555-0099		Fax 416-555-7744	

G

Gonzales, Mr. Emmanuel

Business		Home	
Mr. Emmanuel Gonzales			
Sales Associate			
Target Sports Stores 980 E. LaSalle Street Chicago, IL 60611		Caplan Square Apt. 4 Chicago, IL 60612	
Tel 1 312-555-2211	Ext	Tel 1 312-555-5645	
Fax 312-555-2748		Fax	

H

Haskell, Mr. Richard

Business		Home	
Mr. Richard Haskell			
President			
Relational Technology Inc. 5441 W. Montgomery Lane Port charles, NY 10022		107 Emerald Street Port Charles, NY 10022	
Tel 1 516-555-9899	Ext	Tel 1 516-555-2312	
Fax 516-555-6700		Fax	

© 1996 Lotus Development Corp. 11/11/96/ at 13:59 Page 1

Contact Card

Prints business and home telephone, fax, and e-mail information from an Address section for the range you specify; they can be sorted by last name, company, category, or the field you select. This example is sorted by last name.

Contact Card **And - Has**

Address

A

Andrews, Ms. Laurie

	Business		Home
	Ms. Laurie Andrews		
Tel 1	617-555-2233	Tel 1	508-555-4567
Tel 2	617-555-4545		
Fax	617-555-2000		
E-mail	LAndrews@AOL.com		

Antonakos, Mrs. Lia

	Business		Home
	Mrs. Lia Antonakos		
Tel 1	803-555-0291	Tel 1	803-555-3849
Fax	803-555-0202		
E-mail	LAntonakos@MW.com		

B

Bowman, Mr. Steven

	Business		Home
	Mr. Steven Bowman		
Tel 1	415-555-9000 Ext 245	Tel 1	415-555-8907
Tel 2	415-555-9001		
Fax	415-555-9800	Fax	415-555-8911
E-mail	SBowman@INB.com		

C

Carvez, Mr. Emilio

	Business		Home
	Mr. Emilio Carvez		
Tel 1	212-555-8989	Tel 1	809-555-5757
Fax	212-555-8990	E-mail	ECarvez@SanJuan

Crow, Dr. Perry

	Business		Home
	Dr. Perry Crow		
Tel 1	401-555-5489 Ext 557		
Fax	401-555-5490		

D

Demetri, Mrs. Efronsina

	Business		Home
	Ms. Efronsina Demetri		
Tel 1	416-555-4300 Ext 123	Tel 1	416-555-0056
Tel 2	416-555-0453		
Fax	416-555-0099	Fax	416-555-5677
E-mail	EDemetri@AOL.com		

E

Estrada, Mr. Juan

	Business		Home
	Mr. Juan Estrada		
Tel 1	809-555-9008	Tel 1	809-555-0087
Tel 2	809-555-9001		
Fax	809-555-5600	Fax	809-555-0091
E-mail	JEstrda@NU.com		

F

Fernandez, Ms. Maria

	Business		Home
	Ms. Maria Fernandez		
Tel 1	416-555-4300	Tel 1	416-555-6758
Fax	416-555-0099	Fax	416-555-7744
E-mail	MFernandez@CPU.com		

G

Gonzales, Mr. Emmanuel

	Business		Home
	Mr. Emmanuel Gonzales		
Tel 1	312-555-2211	Tel 1	312-555-5645
Tel 2	312-555-2217		
Fax	312-555-2748		
E-mail	EGonzales@AOL.com		

H

Haskell, Mr. Richard

	Business		Home
	Mr. Richard Haskell		
Tel 1	516-555-9899	Tel 1	516-555-2312
		Tel 2	516-555-3859
Fax	516-555-6700		
E-mail	RHaskel@AOL.com		

I

Isaac, Will

	Business		Home
	Will Isaac		
Tel 1	617-555-9393	Tel 1	617-555-0805
Fax	617-555-9394		

J

Jackson, Mr. Reginald

	Business		Home
	Mr. Reginald Jackson		
Tel 1	617-555-9921	Tel 1	617-555-0613
Tel 2	617-555-9922		
Fax	617-555-6752		

© 1996 Lotus Development Corp. 11/11/96' at 10:38 AM Page 1

Full Address Card

Prints primary business and home information for the range you specify for an Address section; they can be sorted by last name, company, category, or the field you select. This example is sorted by last name.

Full Address Card — **And - Car**

Address

A

Andrews, Ms. Laurie

Business			Home	
Ms. Laurie Andrews				
Sales Manager				
A & E Enterprises 111 Mall Road Burlington, MA 02145			2525 Sycamore Lane Weston, MA 02889	
Tel 1	617-555-2233	Ext	Tel 1	508-555-4567
Tel 2	617-555-4545		Tel 2	
Fax	617-555-2000		Fax	
E-mail	LAndrews@AOL.com		E-mail	
			[Unused1]	
			[Unused2]	
			Spouse	Alex Andrews
			Children	Alicia & Phillip
Category	Staff			

Transferred from the Allentown office in May of '96.

Very good in dealing with the retail channel.

Antonakos, Mrs. Lia

Business			Home	
Mrs. Lia Antonakos				
Vice President				
Mountain Works, Inc. 2220 River Court Aurora, CO 80525			148 Lowell Lane Aurora, CO 80526	
Tel 1	803-555-0291	Ext	Tel 1	803-555-3489
Tel 2			Tel 2	
Fax	803-555-0202		Fax	
E-mail	LAntonakos@MW.com		E-mail	
			[Unused1]	
			[Unused2]	
			Spouse	Charles Antonakos
			Children	
Category	Client			

Heading up the '97 product promotion schedule.

B

Bowman, Mr. Steven

Business			Home	
Mr. Steven Bowman				
General Manager				
Genco, Inc. 1200 Van Ness San Francisco, CA 94110			48 Maple Drive San Francisco, CA 94163 United States	
Tel 1	415-555-9000	Ext 245	Tel 1	415-555-8907
Tel 2	415-555-9001		Tel 2	
Fax	415-555-9800		Fax	415-555-8911
E-mail	SBowman@INB.com		E-mail	
			[Unused1]	
			[Unused2]	
			Spouse	Cheryl Ann Comerford
			Children	
Category				

In charge of creating retail displays.

C

Carvez, Mr. Emilio

Business			Home	
Mr. Emilio Carvez				
Director				
Celluloid Heroes 5757 East Hastings Street New York, NY 11564			1212 Verde Avenue San Juan, Puerto Rico 98563	
Tel 1	212-555-8989	Ext	Tel 1	809-555-5757
Tel 2			Tel 2	
Fax	212-555-8990		Fax	
E-mail			E-mail	ECarvez@SanJuan
Assistant				
Category	Follow up			

Check on availability of extended payment plan.

 11/11/96 at 10:59 AM Page 1

Phone List

Prints primary business and home telephone telephone numbers from an Address section for the range you specify; they can be sorted by last name, company, category, or the field you select. This example is sorted by last name.

Phone List — **And - Zen**

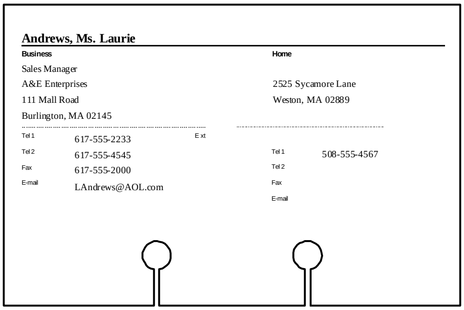
Address

	Name	Business	Ext		Home
A	Andrews, Ms. Laurie	617-555-2233	Ext		508-555-4567
	Antonakos, Mrs. Lia	803-555-0291	Ext		803-555-3489
B	Bowman, Mr. Steven	415-555-9000	Ext	245	415-555-8907
C	Carvez, Mr. Emilio	212-555-8989	Ext		809-555-5757
	Crow, Dr. Perry	401-555-5489	Ext	557	
D	Demetri, Mrs. Efronsina	416-555-4300	Ext	123	416-555-0056
E	Estrada, Mr. Juan	809-555-9008	Ext		809-555-0087
F	Fernandez, Ms. Maria	416-555-4300	Ext		416-555-6758
G	Gonzales, Mr. Emmanuel	312-555-2211	Ext		312-555-5645
H	Haskell, Mr. Richard	516-555-9899	Ext		516-555-2312
I	Isaac, Will	617-555-9393	Ext	608	
J	Jackson, Mr. Reginald	303-555-9921	Ext		617-555-0613
K	Kline, Mr. Jack		Ext		617-555-3456
L	Lee, Miss Ming	617-555-9252	Ext		617-555-5559
	Lilly, Mr. Robert	508-555-2333	Ext		508-555-4488
M	Morgan, Miss Christine		Ext		203-555-8971
N	Naj, Ms. Amal	919-555-0954	Ext		919-555-8242
O	O'Donohue, Mrs. Patricia	416-555-1937	Ext		416-555-7391
P	Parrish, Mr. Al	508-555-0901	Ext		508-555-4613
Q	Quinn, Mrs. Janet	416-555-6523	Ext		
R	Rohr, Dr. Michelle	617-555-7193	Ext		
S	Skalkos, Ms. Andriana	212-555-2178	Ext	21	011-44-181-739-6395
	Splinski, Mr. Bob	303-555-9099	Ext		303-555-5224
T	Trask, Mr. Richard	413-555-6835	Ext		413-555-6194
U	Unger, Miss Robin		Ext		319-555-5761
V	Venturi, Mr. Michael	617-555-4419	Ext		
W	Wishna, Mrs. Diane	416-555-3589	Ext		416-555-3251
X	Xylan, Mr. John	617-555-7769	Ext		
Y	Yang, Mr. Marc	416-555-1982	Ext		416-555-8891
Z	Zenga, Ms. Leslie	303-555-9091	Ext		303-555-1591
#			Ext		

© 1996 Lotus Development Corp. 11/11/96 at 9:33 AM Page 1

Address Card (Rolodex)

Prints business and home addresses, and telephone numbers from an Address section for the range you specify onto Rolodex® cards.

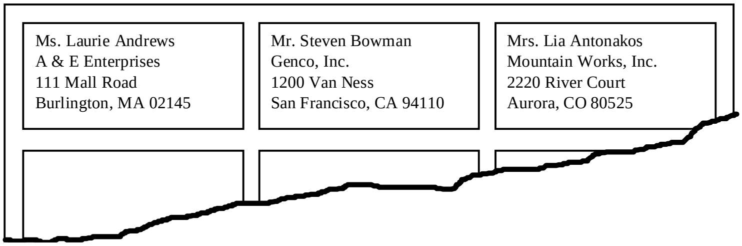


Envelope (and Envelope International)

Prints the business or home mailing address from an Address section using one contact name per envelope for the contacts you specify.

Label (and Label International)

Prints the business or home mailing addresses from an Address section for the range you specify using one contact per label.



Calls Card

Prints call information from a Calls section for the range you specify; they can be sorted by date, name, company, or category. This example shows calls sorted by name.

Calls Card | **And-Zen**

Calls

Antonakos, Lia

Call Lia re: seasonal promotions.
Lia Antonakos — Left Message
Mountain Works, Inc. — Promotions
11/15/96 4:45 PM
803-555-0291

Carvez, Emilio

What are his '97 openings: June - August
Emilio Carvez — No Answer
Celluloid Herios — Idea
11/11/96 11:30 AM
809-555-5757

Crow, Perry

Interesting published paper: see article in London Press 9/12/96
Perry Crow — Try later
University of Waterloo
11/2/96 12:00 PM
401-555-5489

DeSilvio, Michaela

Call her about trip to Crete: Knossos
Michaela DeSilvio — Calling Back
Vacation
11/19/96 2:30 PM
011-44-181-739-6395

Isaac, Will

Order screenplays for film class.
Will Isaac — Planned
The Round Table
11/11/96 3:00 PM
617-555-9393

Kim, Michael

Interested in filming documentary on Athena project.
Michael Kim — Left Message
WCFW-TV
11/22/96 4:00 PM
508-555-4908
Calling to confirm interview air date of December 23.
Michael Kim — Incoming
WCFW-TV
11/29/96 6:15 PM
555-4908

Morgan, Christine

Call re: new designs for store displays.
Displays will be ready Friday.
Christine Morgan — Follow-up
Pixel Punch — Promotions, Idea
11/12/96 9:30 AM
203-555-4536

Naj, Amal

Find out if they've received shipment yet.
Amal Naj — No Answer
Axco Industries
11/18/96 5:00 PM
919-555-0954

Parrish, Al

Discussed details of marketing proposal.
Al Parrish — Answered
R & L Associates — Clien
11/27/96 1:30 PM
508-555-0901

Rohr, Michelle

Call again re: alterations to living room.
Michelle Rohr — Left Message
Personal
11/8/96 1:00 PM
617-555-7193

Skalkos, Andriana

Call to confirm rental house deposit.
Andriana Skalkos — Answered
Close capture
11/21/96 4:10 PM
212-555-2178

Venturi, Michael

Need to get competitive information for strategic planning.
Michael Venturi — Left Message
Tower Research
11/13/96 11:30 AM
617-555-4419

Wishna, Diane

Arrange for legal review of contract.
Diane Wishna — Try Later
Lynch & Hobbes — Call
11/25/96 2:30 PM
416-555-3589

Yang, Marc

Follow up on possible telemarketing.
Marc Yang — Left Messag
Zenga Marketing Services — Promotions
11/14/96 4:45 PM
416-555-1982

Zenga, Leslie

Need to get competitive information for strategic planning.
Leslie Zenga — Planned
11/6/96 9:00 AM
303-555-9091

 11/11/96 at 11:05 AM Page 1

Calls List

Prints information from a Calls section for the range you specify; they can be sorted by date, name, company, or category. This example shows calls sorted by date.

Calls List | **11/6 - 11/21/96** | **jwagner.OR3**

October 1996

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Calls

Date	Time	Person - Phone Number	Company	Status	Category - Notes
11/6/96	9:00 AM	Leslie Zenga 303-555-9091		Planned	Need to get competitive information for strategic planning.
11/7/96					
11/8/96	1:00 PM	Michelle Rohr 6/17555-7193		Left Message	Personal Call again re: alterations to living room.
11/9/96					
11/10/96					
11/11/96	11:30 AM	Emilio Carvez 809-555-5757	Celluloid Heroes	No Answer	Idea What are his '96 openings: June - August
	300 PM	Will Isaac 617-555-9393	The Round Table	Planned	Order screenplays for film class.
11/12/96	9:30 AM	Christine Morgan 203-555-4536	Pixel Punch	Follow up	Promotions, Ideas Call re: new designs for store displays. Displays will be ready Friday.
	12:00 PM	Perry Crow 401-555-5489	University of Waterloo	Try Later	Interesting published paper: see article in London Press 9/12/96
11/13/96	11:30 AM	Michael Venturi 617-555-4419	Tower Research	Left Message	Need to get competitive information for strategic planning.
11/14/96	4:45 PM	Marc Yang 416-555-1982	Zenga Marketing Services	Left Message	Promotions Follow up on possible telemarketing.
11/15/96	4:45 PM	Lia Antonakos 803-555-0291	Mountain Works, Inc.	Left Message	Promotions Call Lia re: seasonal promotions.
11/16/96					
11/17/96					
11/18/96	5:00 PM	Amal Naj 919-555-0954	Axco Industries	No Answer	Find out if they've received shipment yet.
11/19/96	2:30 PM	Michaela DeSilvio 011-44-181-739-6395		Calling Back	Call her about trip to Crete: Knossos
11/20/96					
11/21/96	4:10 PM	Andriana Skalkos 212-555-2178	Close capture	Answered	Call to confirm rental house deposit.

© 1996 Lotus Development Corp. 11/11/96 at 2:36 PM Page 1

Planner List

Prints event information, including notes, from a Planner section for a date range you specify.

Planner List **11/1 - 11/30/96** **jwagner.OR3**

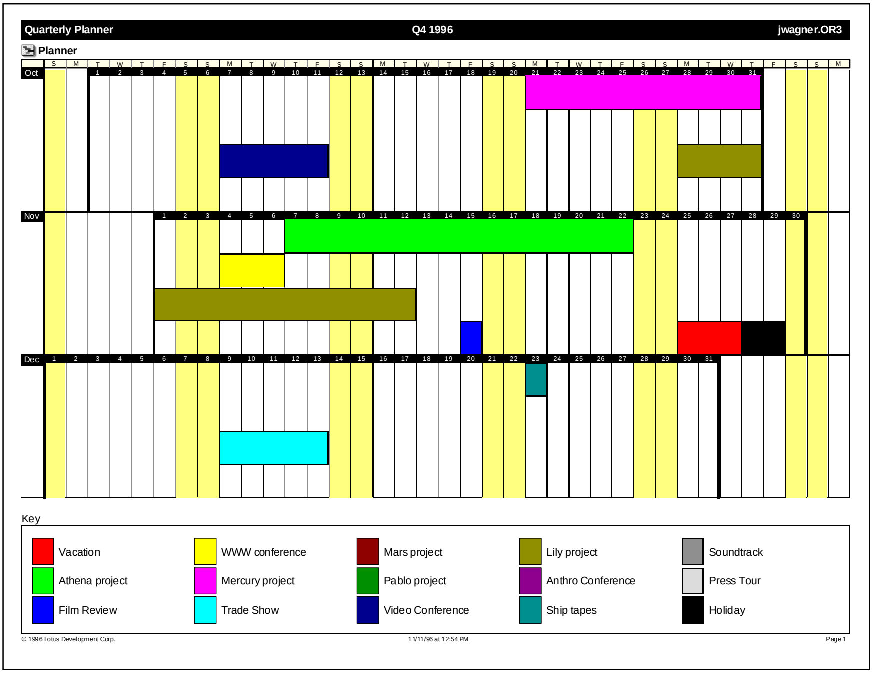
Planner

Start	End	Event	Category	Note
11/1/96				
11/2/96				
11/3/96				
11/4/96	11/6/96	WWW conference		
11/5/96				
11/6/96				
11/7/96				
11/8/96				
11/9/96				
11/10/96				
11/11/96	11/11/96	Film Review		Promotional video
11/12/96				
11/13/96				
11/14/96				
11/15/96				
11/16/96				
11/17/96				
11/18/96	11/20/96	Athena project	Follow up	Finish updates to project for mailing
11/19/96				
11/20/96				
11/21/96				
11/22/96				
11/23/96				
11/24/96				
11/25/96				
11/26/96				
11/27/96				
11/28/96				
11/29/96				
11/30/96				

© 1996 Lotus Development Corp. 11/11/96 at 2:37 PM Page 1

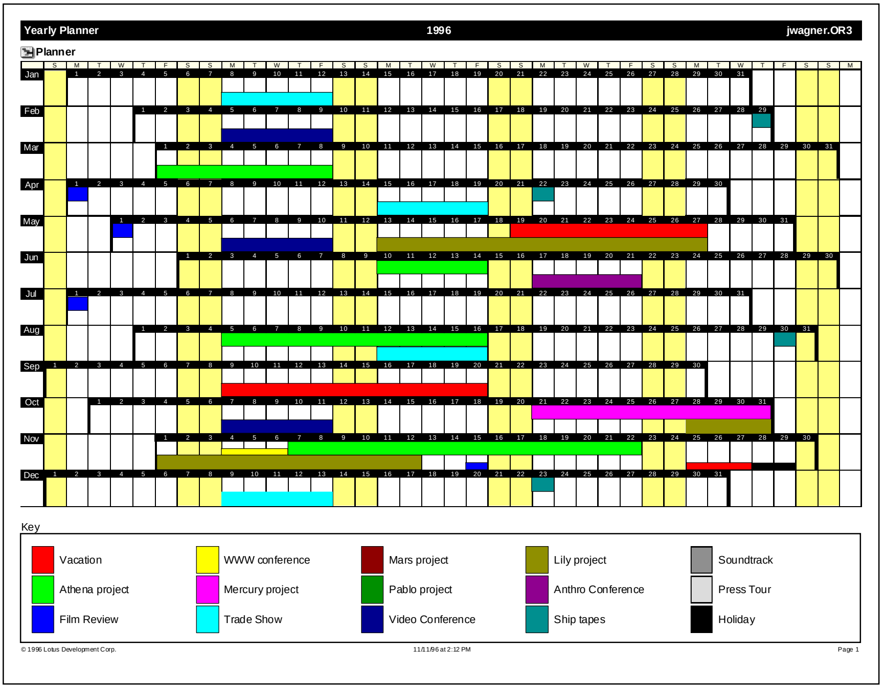
Quarterly Planner

Prints a graphical view of events from a Planner section for a quarter you specify.



Yearly Planner

Prints a graphical view of events from a Planner section for a year you specify.



Notepad Contents

Prints the table of contents from a Notepad section.

Table of Contents

© 1996 Lotus Development Corp. 11/11/96 at 12:51 PM Page i

Notepad Contents and Pages

Prints the table of contents and pages you specify from a Notepad section.

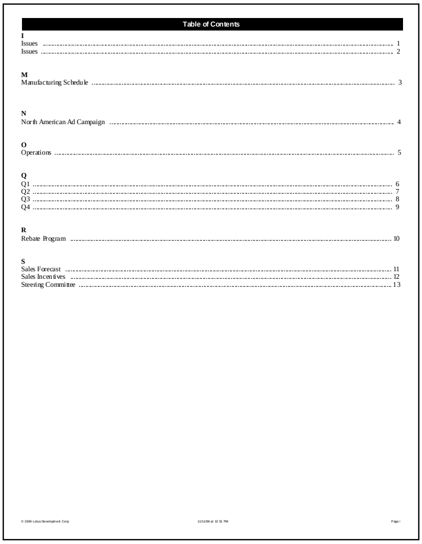
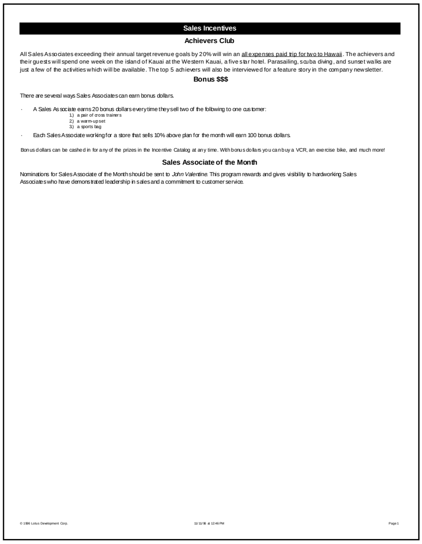


Table of Contents

© 1996 Lotus Development Corp. 11/11/96 at 12:51 PM Page i



Sales Incentives

Achievers Club

All Sales Associates exceeding their annual target revenue goals by 20% will win an all expenses paid trip for two to Hawaii. The achievers and their guests will spend one week on the island of Kauai at the Western Kauai, a five star hotel. Parasailing, scuba diving, and sunset walks are just a few of the activities which will be available. The top 5 achievers will also be interviewed for a feature story in the company newsletter.

Bonus $$$

There are several ways Sales Associates can earn bonus dollars.

- A Sales Associate earns 20 bonus dollars every time they sell two of the following to one customer:
  1) a pair of cross trainers
  2) a warm-up set
  3) a sports bag
- Each Sales Associate working for a store that sells 10% above plan for the month will earn 100 bonus dollars.

Bonus dollars can be cashed in for any of the prizes in the Incentive Catalog at any time. With bonus dollars you can buy a VCR, an exercise bike, and much more!

Sales Associate of the Month

Nominations for Sales Associate of the Month should be sent to *John Valentine*. This program rewards and gives visibility to hardworking Sales Associates who have demonstrated leadership in sales and a commitment to customer service.

© 1996 Lotus Development Corp. 11/11/96 at 12:46 PM Page 1

Notepad Pages

Prints the pages you specify from a Notepad section.

Sales Incentives

Achievers Club

All Sales Associates exceeding their annual target revenue goals by 20% will win an all expenses paid trip for two to Hawaii. The achievers and their guests will spend one week on the island of Kauai at the Western Kauai, a five star hotel. Parasailing, scuba diving, and sunset walks are just a few of the activities that will be available. The top 5 achievers will also be interviewed for a feature story in the company newsletter.

Bonus $$$

There are several ways Sales Associates can earn bonus dollars.

- A Sales Associate earns 20 bonus dollars every time they sell two of the following to one customer:
  1.) a pair of cross trainers
  2.) a warm-up set
  3.) a sports bag
- Each Sales Associate working for a store that sells 10% above plan for the month will earn 100 bonus dollars.

Bonus dollars can be cashed in for any of the prizes in the Incentive Catalog at any time. With bonus dollars you can buy a VCR, an exercise bike, and much more!

Sales Associate of the Month

Nominations for Sales Associate of the Month should be sent to *John Valentine.* This program rewards and gives visibility to hardworking Sales Associates who have demonstrated leadership in sales and a commitment to customer service.

© 1996 Lotus Development Corp. 11/11/96 at 12:46 PM Page 1

Anniversary List

Prints entries from an Anniversary section for the range you specify; they can be sorted by date, category, or zodiac sign. This example shows anniversaries sorted by date.

Anniversary List 11/1 - 11/28/96 jwagner.OR3

October 1996						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 1996						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 1996						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Anniversary

Date	Category	Description
11/1/96		
11/2/96		
11/3/96		
11/4/96		
11/5/96		
11/6/96		
11/7/96		
11/8/96		
11/9/96		
11/10/96		
11/11/96	Personal	Christopher's birthday
11/12/96		
11/13/96		
11/14/96		
11/15/96		
11/16/96		
11/17/96		
11/18/96		
11/19/96		
11/20/96		
11/21/96		
11/22/96		
11/23/96		
11/24/96		
11/25/96		
11/26/96	Clients	Michael's birthday
11/27/96		Maria & Norman
11/28/96		

 11/11/96 at 11:33 AM Page 1

Layout Code List

Code	Definition	Result
&d	Day as 1, 2, 3	Displays the current day as a single digit.
&dd	Day as 01, 02, 03	Displays the current day with two digits.
&M	Month as 1, 2, 3	Displays the current month as a single digit.
&MM	Month as 01, 02, 03	Displays the current month with two digits.
&MMM	Month as Jan, Feb	Displays the current month as a three-letter abbreviation.
&MMMM	Month as January, February	Displays the full name of the current month.
&yy	Year as 92, 93	Displays the current year as a two digit number.
&yyyy	Year as 1992, 1993	Displays all digits of the current year.
&e	First shown data	Displays the first item printed (for headers or footers).
&q	Last shown data	Displays the last item printed (for headers or footers).
&h	Hour as 1, 2, 3	Displays the current hour as a single digit.
&hh	Hour as 01, 02, 03	Displays the current hour as two digits.
&m	Minutes as 1, 2, 3	Displays the current minute as a single digit.
&mm	Minutes as 01, 02, 03	Displays the current minute as two digits.
&a	AM or PM suffix	Displays an AM or PM suffix based on the current time.
&l	Align left	Left justifies all text that follows.
&c	Align center	Centers all text that follows.
&r	Align right	Right justifies all text that follows.
&p	Page number	Displays page numbers.
&f	Filename	Displays the name of the current file.
&t	Registered user name	Displays the name entered at installation of Organizer.
&v	Organizer release number	Displays the Organizer release number.
&s	Section name	Displays the section name.
&k	Layout name	Displays the name of the layout for the current print job.
&z	Paper name	Displays the name of the paper for the current print job.
&H	Report heading	Displays the report heading of the current layout.
&D	Page date range long	Displays the date range in words (September 11 - 14, 1996).
&X	Page date range short	Displays the date range in numeric format (9/11 - 9/14/96).
&T	Time	Displays the current time.
&E	Today’s date	Displays today’s date.

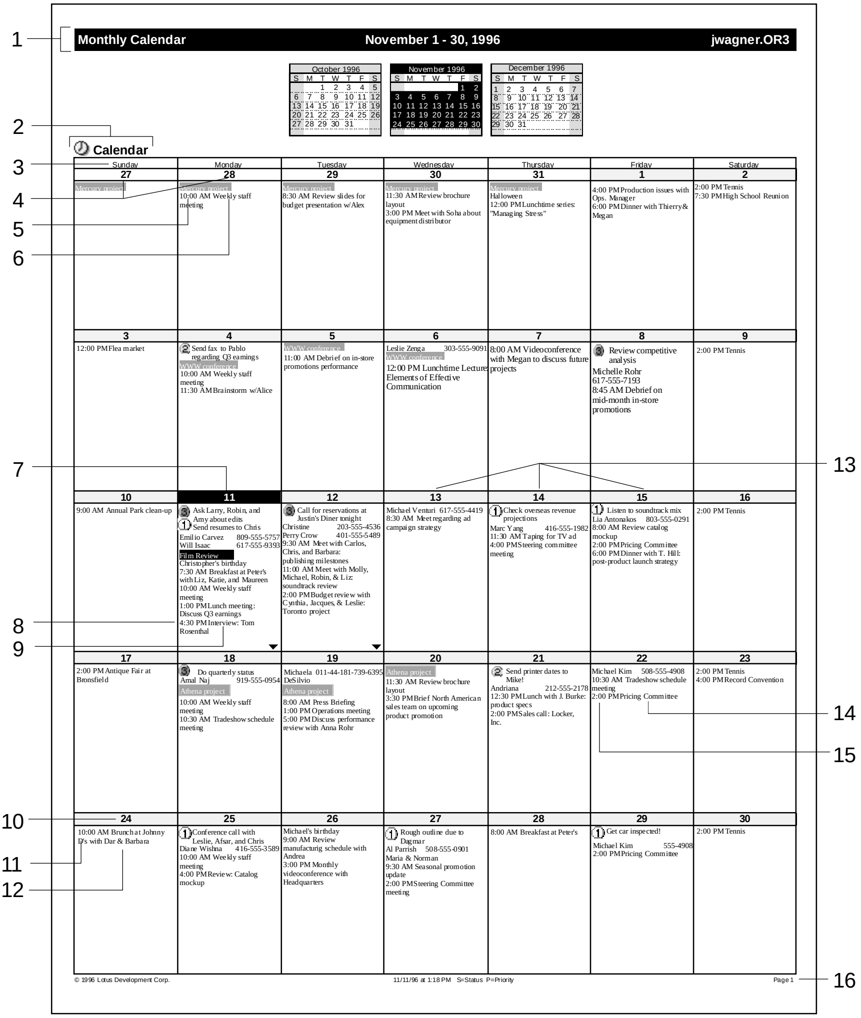
Print Layout Elements

The following sample printout is a Monthly Calendar layout. Each Organizer layout consists of layout elements. The numbers and names below indicate some of the elements of this layout.

A layout consists of fonts, attributes, text, and so on for an item on a particular layout. For example, for the Layout header, you can specify customized text, formatting codes, background pattern, and font.

You can use this sample as a reference point for editing elements in other layouts.

1. Layout header
2. Grid print heading
3. Day names
4. Next/Last month's day numbers
5. Next/Last month's start time
6. Next/Last month's appointment text
7. Today's day number
8. Today's start time
9. Today's appointment text
10. Weekend day numbers
11. Weekend start time
12. Weekend appointment text
13. Day numbers
14. Appointment text
15. Start time
16. Layout footer



1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
Monthly Calendar
November 1 - 30, 1996
jwagner.OR3
October 1996
November 1996
December 1996
Calendar
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
27 Mercury project
28 Mercury project 10:00 AM Weekly staff meeting
29 Mercury project 8:30 AM Review slides for budget presentation w/Alex
30 Mercury project 11:30 AM Review brochure layout 3:00 PM Meet with Soha about equipment distributor
31 Mercury project Halloween 12:00 PM Lunchtime series: "Managing Stress"
1 4:00 PM Production issues with Ops. Manager 6:00 PM Dinner with Thierry & Megan
2 2:00 PM Tennis 7:30 PM High School Reunion
3 12:00 PM Flea market
4 Send fax to Pablo regarding Q3 earnings WWW conference 10:00 AM Weekly staff meeting 11:30 AM Brainstorm w/Alice
5 WWW conference 11:00 AM Debrief on in-store promotions performance
6 Leslie Zenga 303-555-9091 WWW conference 12:00 PM Lunchtime Lecture: Elements of Effective Communication
7 8:00 AM Videoconference with Megan to discuss future projects
8 Review competitive analysis Michelle Rohr 617-555-7193 8:45 AM Debrief on mid-month in-store promotions
9 2:00 PM Tennis
10 9:00 AM Annual Park clean-up
11 Ask Larry, Robin, and Amy about edits Send resumes to Chris Emilio Carvez 809-555-5757 Will Isaac 617-555-9393 Film Review Christopher's birthday 7:30 AM Breakfast at Peter's with Liz, Katie, and Maureen 10:00 AM Weekly staff meeting 1:00 PM Lunch meeting: Discuss Q3 earnings 4:30 PM Interview: Tom Rosenthal
12 Call for reservations at Justin's Diner tonight Christine 203-555-4536 Perry Crow 401-555-5489 9:30 AM Meet with Carlos, Chris, and Barbara: publishing milestones 11:00 AM Meet with Molly, Michael, Robin, & Liz: soundtrack review 2:00 PM Budget review with Cynthia, Jacques, & Leslie: Toronto project
13 Michael Venturi 617-555-4419 8:30 AM Meet regarding ad campaign strategy
14 Check overseas revenue projections Marc Yang 416-555-1982 11:30 AM Taping for TV ad 4:00 PM Steering committee meeting
15 Listen to soundtrack mix Lia Antonakos 803-555-0291 8:00 AM Review catalog mockup 2:00 PM Pricing Committee 6:00 PM Dinner with T. Hill: post-product launch strategy
16 2:00 PM Tennis
17 2:00 PM Antique Fair at Bronsfield
18 Do quarterly status Amal Naj 919-555-0954 Athena project 10:00 AM Weekly staff meeting 10:30 AM Tradeshow schedule meeting
19 Michaela DeSilvio 011-44-181-739-6395 Athena project 8:00 AM Press Briefing 1:00 PM Operations meeting 5:00 PM Discuss performance review with Anna Rohr
20 Athena project 11:30 AM Review brochure layout 3:30 PM Brief North American sales team on upcoming product promotion
21 Send printer dates to Mike! Andriana 212-555-2178 12:30 PM Lunch with J. Burke: product specs 2:00 PM Sales call: Locker, Inc.
22 Michael Kim 508-555-4908 10:30 AM Tradeshow schedule meeting 2:00 PM Pricing Committee
23 2:00 PM Tennis 4:00 PM Record Convention
24 10:00 AM Brunch at Johnny D's with Dar & Barbara
25 Conference call with Leslie, Afsar, and Chris Diane Wishna 416-555-3589 10:00 AM Weekly staff meeting 4:00 PM Review: Catalog mockup
26 Michael's birthday 9:00 AM Review manufacturing schedule with Andrea 3:00 PM Monthly videoconference with Headquarters
27 Rough outline due to Dagmar Al Parrish 508-555-0901 Maria & Norman 9:30 AM Seasonal promotion update 2:00 PM Steering Committee meeting
28 8:00 AM Breakfast at Peter's
29 Get car inspected! Michael Kim 555-4908 2:00 PM Pricing Committee
30 2:00 PM Tennis
© 1996 Lotus Development Corp.
11/11/96 at 1:18 PM S=Status P=Priority
Page 1

Printing to Popular Datebook Papers

Organizer prints on blank paper sold by makers of paper-based datebooks so you can print your information to fit your manual datebook. The paper typically comes in 8½ x 11" blank sheets that are ready to feed into your laser printer. Once you’ve printed selected information from Organizer, you can remove extra paper at the perforations so the printouts will fit in your favorite binder. Use the following information to order the paper you need.

Avery® #41207	3¾ x 6¾" portrait
Avery #41257	3¾ x 6¾" landscape
Avery #41308	5½ x 8½" portrait
Avery #41358	5½ x 8½" landscape
Avery L7159 (24)	
Avery L7162 (16)	
Avery L7163 (14)	
Avery L7666	
Avery L7901 (Filofax®)	
Avery L7902 (A5)	

Avery-Dennison, 20995 Pathfinder Rd., Diamond Bar, CA. 91765-4000
Tel: 800-642-8379

DayRunner® Classic™	5½ x 8½"
DayRunner Entrepeneur™	8½ x 11"
DayRunner Running Mate™	8½ x 11"

DayRunner, Inc. 2750 Moore Ave., Fullerton, CA. 92633
Tel: 800-232-9786 Fax: 714-680-0535

Day-Timer® Junior Pocket	5½ x 8½"
Day-Timer Senior Pocket	3¾ x 6¾"
Day-Timer Junior Desk	5½ x 8½"
Day-Timer Senior Desk	8½ x 11

Day-Timer, Inc. One Day-Timer Plaza, Allentown, PA 18195-1552
Tel: 610-266-9000 Fax: 800-452-7398

Deluxe ® #190013	5½ x 8½"
Deluxe #190012	5½ x 8½"
Deluxe #190014	3¾ x 6¾"
Deluxe #190011	8½ x 11"

Deluxe, P.O. Box 64505 St. Paul, MN 55164-0505
Tel: 800-551-1224 Fax: 612-481-4463

Filofax

Filofax, Inc. 101 Merritt 7, 5th Floor, Norwalk, CT 06851
Tel: 800-345-6798 Fax: 203-846-6511

Franklin Day Planner® Classic	5½ x 8½" landscape
Franklin Day Planner Classic	5½ x 8½" portrait
Franklin Day Planner Monarch	3¾ x 6¾"

Franklin International Institute
2200 W. Parkway Blvd. Salt Lake City, UT 84119-2331
Tel: 800-487-1776 Fax: 800-242-1492

Index

How to use this index

There are three types of entries in this index. Two of them refer you to information in this book. For example,

AutoTotal in 1-2-3, 11-8	refers you to page 8 in the 11th chapter of this book.
Justification. See *Aligning*	refers you to the entry Aligning in this index.

The third type of entry refers you to a topic in an application's Help system. For example,

Printing in 1-2-3 ranges. See 1-2-3 Help*	refers you to the entry Printing, ranges in the 1-2-3 Help index.

To find a Help topic

1. Start the application (for example, 1-2-3), and choose Help - Help topics from the menu bar.

   (For a topic in Suite Help, start SmartCenter, click Lotus, then choose Help Topics.)
2. Click the Index tab.
3. Type the entry from the book index (for example, Printing, ranges).
4. Click the topic you want, then click Display.

Symbols

Numbers

A

*** From the application’s menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

B

C

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

D

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application’s menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

E

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

F

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

J

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

K

L

M

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

N

O

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

P

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

Q

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

R

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

S

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

T

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

U

V

W

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**

Y

Z

*** From the application's menu, choose Help - Help Topics, click the Index tab, and type the index entry. (For Suite Help, click Lotus, then choose Help Topics.)**