

**GETTING STARTED**

.....

Lotus

**SMARTSUITE**

RELEASE **4**

The desktop solution for you and your team


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55 Cambridge Parkway  
Cambridge, MA 02142

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# Chapter 1

## Read Me First

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

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### How to use this book

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

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

### Who should read this book

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

### Conventions used in this book

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

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

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

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

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

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## Steps to get going

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

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

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

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## Checking your package

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

### Disks

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

### Documentation

SmartSuite includes the following printed documentation:

#### Word Pro

- *Exploring Word Pro*

#### 1-2-3

- *User's Guide*

#### Approach

- *User's Guide*

#### Freelance Graphics

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

#### Organizer

- *Exploring Organizer*
- *Quick Reference Card*
- *Print Layout Guide*

#### SmartSuite

- *Getting Started* (this book)

### Other contents

Your SmartSuite package also contains the following:

- Lotus Product Registration Card
- *Lotus Support Info*
- Warranty Registration Card for Canada (North America only)
- Group Scheduling Invitation Card (North America only)

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## Registering as a SmartSuite user

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

- **The latest information on product upgrades.** When an upgrade becomes available (and it will — based on customer comments, we frequently issue improved versions of our products), registered users can get it quickly at a reduced price.
- **Replacement disks** if your software ever becomes damaged.

The Lotus Product Registration Card takes only a moment to complete. Please fill out your postage-paid registration card and return it to Lotus today. Or call 1-800-346-6408 in the United States or 1-800-GO-LOTUS in Canada to register SmartSuite by phone.

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## System Requirements

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

### Hardware

To use SmartSuite you must have the following hardware:

- An IBM® PC or compatible (386 or higher) including IBM PS/2® or COMPAQ®
- A VGA (color or grey scale) or higher video adapter
- A mouse or other pointing device

### Memory

SmartSuite requires a minimum of 8 megabytes (MB) of random access memory (RAM) to operate one SmartSuite application at a time.

### Software

To use SmartSuite, you must have Windows 3.1 or later installed on your computer, running with DOS 4.X or later.

## Windows swap file

If you do not already have a permanent Windows swap file, Lotus recommends that you set one up. It should be at least as large as your available system memory. For example, if you have an 8MB system, you should set up a permanent Windows swap file of at least 8MB.

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

## Disk space

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

You need at least 56.5MB of available disk space to install the minimum features of all SmartSuite applications. Lotus recommends 118MB of available disk space to install all the features, tutorials, templates, and sample and demonstration files, as well as to allot space for temporary files and data files.

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

<i>Application</i>	<i>Disk Space Requirements</i>	
	<i>Minimum</i>	<i>Default</i>
Word Pro	16MB	38MB
1-2-3	12MB	22MB
Approach	8MB	19MB
Freelance Graphics	9MB	19MB
Organizer (stand-alone version)	7MB	11MB
ScreenCam	3MB	3MB
SmartCenter	1.5MB	6MB
	Total 56.5MB*	118MB*

\* Lotus applications share components, so the disk space used may be less than the Total numbers.

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## What to do next

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

For any technical assistance, see the *Lotus Customer Support Guide* in this package for information on Lotus technical support.

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## Chapter 2

# Installing SmartSuite Applications

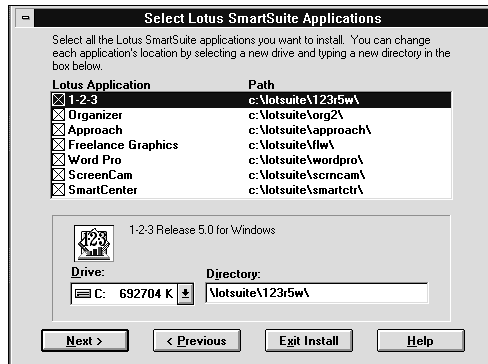
This chapter describes how to install SmartSuite applications. Remember, you can install the applications in any sequence.

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### Installing SmartSuite

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

The SmartSuite install program lets you install all SmartSuite applications at once or individual products as you need them.



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

## **To start the installation**

The instructions that follow assume that you are starting the Install program from your A drive. If you start Install from another drive, substitute the letter of that drive in the installation instructions. You will need to open the Install program from the Windows 3.1 or higher Program Manager, running with DOS 4.X or higher.

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

## **To get Help while installing SmartSuite**

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

- You can access the information by clicking the Help button.
- You can print any Help topic by choosing File - Print Topic when the topic is displayed in the Help window.
- You can use ALT-TAB to switch between Help and the Install program.
- You can close the Help window and return to Install by choosing File - Exit or pressing ESC.

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

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

## **To 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 automated install. To do so, you define directory locations and install options using a response file.

For information on using and modifying a response file, see the README.TXT file, located in the root directory of Disk 1. README.TXT includes the following topics:

- Before You Run the SmartSuite Install Program
  - Making Install Efficient

- Installing in a Win-OS/2™ Session
- Using Automated Install
- During SmartSuite Install
  - Installing on Computers with Multiple Configurations
  - Ignoring a Size Field
- After SmartSuite Install
  - Reading Individual Application README files
  - Deleting an Extraneous Directory
  - Updating SMARTCTR.INI
  - Using the SmartSuite Guided Tour and ScreenCam Movies
  - Creating Your Own Bitmaps

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

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

- Using Automated Install
- Supported Networks
- Why Use a SmartSuite Application on a Network?
- Steps to Complete Network Installation
- Designing a Directory Structure for SmartSuite Applications
- How to Install on a Network Server
- How to Install on a Network Node
- Creating Personal Directories
- Creating Shared Data Directories
- Information to Give Users
- If You Have a Problem
- Network-Specific Information for SmartSuite Applications

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

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## Chapter 3

# SmartSuite Capabilities

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### What Is SmartSuite?

SmartSuite is an integrated package of software applications that lets you do your job more easily and raises your level of productivity by letting you work more closely with your coworkers. This chapter describes each of the applications and SmartCenter — the icon bar that gives you direct access to all the applications and components.

### Looking at each part of SmartSuite

If you're using only one or two Lotus applications, you may want to look at the capabilities of the others and the advantages of working with integrated applications. All SmartSuite applications are mail-enabled. This means you can send what you are working on to coworkers without going to your e-mail application.

SmartSuite includes:

- Word Pro, the team word processor from Lotus
- 1-2-3, the world's most famous spreadsheet
- Approach, the award-winning relational database
- Freelance Graphics, the award-winning presentation graphics package
- Organizer, the leading personal information manager and the group-scheduling standard
- ScreenCam, an easy to use "show and tell" communication and teaching tool
- SmartCenter, the tool that gives you one-click access to all your desktop applications

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## Word Pro



Word Pro is a revolutionary new word processor for teams. In addition to state-of-the-art word-processing capabilities, Word Pro lets you work more effectively with your coworkers and automates the creation and editing of documents. Word Pro provides the following features:

- **SmartMaster templates**, pre-defined and professionally designed outlines to make your work easy and attractive. SmartMaster templates include a variety of designs for formatting reports, letters, memos, newsletters, and mailing labels. They also help you structure and think through your material.
- **SmartControls**, tools that give you greater control in displaying your documents or navigating through them.
  - Divider tabs provide an easy way to organize and navigate through long documents.
  - A page sorter displays all the pages in a document as editable thumbnails, making it easy for you to view and reorganize a document.
  - A page gauge displays precisely where you are in a long document.
  - Special document views let you split the screen to see different parts of a document at the same time. You can select text and drag and drop it between the views.
- **SmartSense**, built-in task sensitivity that gives you the tools you need when you need them. With a task-sensitive interface, Word Pro displays only the options for what you are working on.
- **Smart Assistance**, a revolutionary and personalized way of helping users complete tasks. SmartAssistance includes a concise online Help system and Ask the Expert, which lets you type a question in your own words. The Expert tells you how to complete your task.

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## 1-2-3



1-2-3, the world-famous spreadsheet, offers many new features designed to improve individual and workgroup productivity. Some of the capabilities that help you in creating your worksheet include:

- **Version Manager™**, an advanced “what-if” technology that lets you track worksheet changes over time. You and your workgroup can create multiple versions of data in the same file. Networked users can share these files by electronic mail, the 1-2-3 file reservation system, or Lotus Notes®. With Version Manager, you can collaboratively test financial scenarios, analyze business assumptions, and discover other possibilities.
- **SmartMaster templates**, which give you a head start on tasks such as creating budgets, tracking expenses, and preparing invoices. Because the formulas, macros, and formatting are built in, you focus on the data without having to develop the spreadsheet from scratch.
- **One-step charting**, which lets you build a chart complete with labels, titles, and legends with just a click of the mouse.
- **Mapping**, which lets you link worksheet data with a map to display regional, statewide, or country-wide data in a graphical way.

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## Approach



Approach is a full-featured, relational database designed for business professionals who need to manage, analyze, and report on information. It's the only database that combines genuine ease of use with exceptional relational database power. Some capabilities include:

- **Ease of learning and use.** Approach includes sample applications and SmartAssistants, which guide you through your work and make you productive right away. Most users are up to speed and producing real results within two hours of opening the box.
- **Lightning-quick production of reports, forms, and mailings.** PowerClick reporting helps you generate professional reports that you can preview and print as you build. You can design attractive, effective forms with the comprehensive built-in forms package, and use mailmerge and the Mailing Label Assistant to get ready quickly for mass mailings.

- **Relational power.** With Approach you can manage information easily, and you can link up to 50 databases. You can group, sort, and organize information with the Approach X10 speed technology. Approach ships with 14 operators and 84 functions, which allow you to generate powerful calculations.
- **Access to corporate data.** You have high-performance access to dBASE®, Paradox®, FoxPro®, Access, and SQL.

### Approach and Notes

Approach delivers fast, easy access to Notes™ files, making it an excellent tool for reporting on, analyzing, and updating Notes data. Developers can now use Approach integration with Notes to create sophisticated, pre-defined applications for users, or users can design their own.

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## Freelance Graphics



Freelance Graphics continues to be ranked number one in the industry as the best process for creating a presentation. Freelance Graphics is designed to produce the most effective presentations possible with minimal effort. Freelance Graphics helps you do so in the following ways:

- **SmartMaster templates** guide you through creating a presentation. Even a new user can create a simple, effective presentation in minutes. SmartMaster templates set up the page layouts for your presentation and provide prompts that walk you through your tasks.
- **Freelance Graphics as a meeting tool** helps you inform, persuade, motivate, and educate. You can generate flip charts, screen presentations, or handouts for your meetings.
- **Freelance has the right tool for the job**, whether you want to create text charts, data charts, diagrams, tables, or organizational charts.
- **Integration with Lotus Notes** lets you create a presentation library to store, distribute, and share presentations with your coworkers.

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## Organizer



Organizer is an easy-to-use personal and group-scheduling application that lets you manage your busy load, stay in touch with business contacts, and schedule meetings. The intuitive notebook interface gives you the following:

- **Organizer's seven notebook sections** help you manage all your personal information. The notebook sections show Calendar and group meetings, ToDo List, Address records for business and personal contacts, Calls information for contact management, Planner events, Notepad, and Anniversary reminders.
- **The ability to share Calendar information** with another person makes collaboration easy. You can also set up a file so that other members of your workgroup can track a project. You control who has access to your information.
- **Workgroup capabilities** help you find free time slots for meeting with coworkers. You can also reserve a conference room, and send out invitations using Notes, cc:Mail™, or a Local Area Network (LAN) server. As invitees accept, decline, or delegate invitations, you can easily track their status.
- **Convenient views** show any of your ToDo tasks, Planner events, Calls to make, or Anniversary reminders in your Calendar so you can see all your business and personal commitments in one place.
- **Links between entries** help you keep all related information at your fingertips. For example, you can link an appointment to a person's address, go from the appointment to the address, and easily go back again.
- **Customizable sections** help you track and sort your information according to your needs. You can add or delete sections and change your notebook display in each section.
- **Flexibility in printing** lets you print using a variety of professional-looking layouts on many page sizes. You can print pages that fit into your paper binder.

With Organizer, it's easier than ever to manage your time, whether you work alone or in a group.

**Note** To take advantage of group scheduling with Organizer, contact your network administrator. Group scheduling installation requires the Lotus Organizer 2.1 *Administrator's Guide* and Lotus Organizer Scheduling Agent 2.1 disks. You can get these items by sending in the Group Scheduling Invitation card in your SmartSuite package.

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## ScreenCam Movies



ScreenCam is a show-and-tell teaching and communication tool that lets you record movies of screen activity. Each screen movie you create includes all mouse-pointer movements and other screen events. To provide additional information, you can narrate your movie with a voice-over (if you have sound hardware), or with text captions (if you don't have sound hardware or want to create smaller movie files). For example, you can quickly create a training movie to show how a feature works.

You can play back a screen movie, save it in a file, and link or embed it in other applications. You can also distribute screen movies to others. If you want to distribute screen movies to users who don't have ScreenCam, you can save and send the movies in a stand-alone format.

If you use Notes or cc:Mail, you can mail screen movies to other users while you are working in ScreenCam. If you use Notes, you can also organize screen movies in Notes databases using Notes Field Exchange (Notes/FX™).

SmartSuite comes with four teaching movies. See "Using SuiteAnswers" later in this chapter for more information.

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## SmartCenter



SmartCenter ties SmartSuite together by providing single-click access to each application. SmartCenter includes SuiteAnswers™, which consists of Help cards and ScreenCam movies that guide you through cross-application tasks.



SmartCenter also provides the ability to drag and drop information between OLE 2 applications. You can drag documents and files to SmartCenter for quick access to them.

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

The first time you start SmartCenter, it automatically adds icons for any Lotus applications you have installed. You can also add icons for non-Lotus applications to SmartCenter.

## If SmartSuite is installed on a server

If some of your applications are on a file server and are unavailable when the server is down or when you are using your laptop as a standalone PC, the following icon appears to tell you that the application is unavailable:



Once you log into the network again or place your laptop back into the docking station and click the icon, SmartCenter loads the product, and the application icon appears.

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## Using SmartSuite

The SmartSuite environment makes your tasks easier by letting you:

- Add, remove, or change the icons in SmartCenter — so that the customized icons represent the way you work.
- Use SuiteAnswers to help you complete your cross-application tasks.
- Create your own ScreenCam movies.
- Learn about SmartSuite by viewing the Guided Tour.

## Using SmartCenter

Using the SmartCenter Properties InfoBox described below, you can change the icons that represent an application or add or remove them. You can also add or remove applications from the SmartCenter menu.

### Adding an application or file to SmartCenter

You can add an application or a file created in an application to SmartCenter in two ways: from File Manager or from the InfoBox.

**From File Manager:** To add an application, find the .EXE file for the application and drag it to SmartCenter. For example, to add Paintbrush, find PBRUSH.EXE in File Manager and drag it to SmartCenter. You can add word processing, worksheet, database, and other application files in the same way.

For example, to add your own expense report worksheet, find the .WK4 file and drag it to SmartCenter. A duplicate copy of the 1-2-3 icon appears in SmartCenter, but bubble help identifies the icon by its file name — EXPENSE.WK4. You can use the SmartCenter InfoBox to select another icon to represent your file.

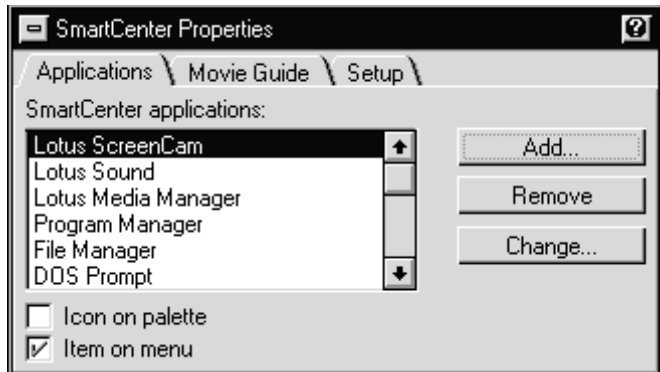
**From the InfoBox:** If, in addition to adding an application or file, you want to change the application or file or its properties in any way, use the InfoBox. From the InfoBox you can

- Use an icon other than the application icon, such as for the .WK4 expense report file mentioned above
- Designate a specific working directory for the application
- Identify the application as supporting OLE 2

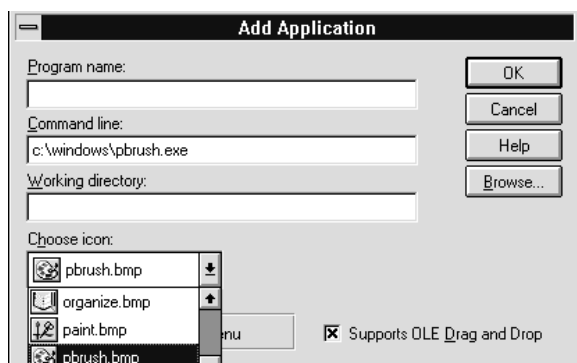
To use the InfoBox for adding the application or file:



1. Click the SmartCenter icon to display the SmartCenter menu.
2. Choose SmartCenter Properties.



3. Click Add.
4. Enter the Command line for the application, and click OK.



SmartCenter supplies the default information for all other fields, but you can identify a new working directory, choose a new icon for the application, or enter a name for the file in the Program name field. (Bubble help displays the name you enter in the Program name field.)

If the application supports OLE drag and drop, make certain the option is checked.

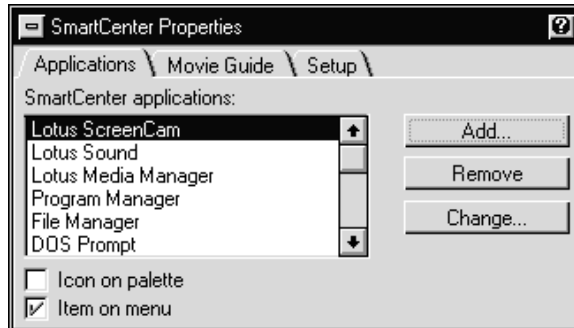
5. (Optional) Close the InfoBox.

### Displaying applications on the palette or menu

To display an application on the icon palette or on the menu, follow these steps:



1. Click the SmartCenter icon to display the SmartCenter menu.
2. Choose SmartCenter Properties.
3. In SmartCenter applications, select the application you want.
4. Select the appropriate check box.



### Removing an application from SmartCenter

To remove an application so that it no longer appears in the SmartCenter list, follow these steps:



1. Click the SmartCenter icon to display the SmartCenter menu.
2. Choose SmartCenter Properties.
3. Select the application you want to remove.
4. Click Remove.

**Tip** You can also remove an icon from the palette by pressing **SHIFT** and dragging the icon off the palette.

### Changing the icon that represents an application

If you have an icon that represents both an application and a file created by the application, you can choose a second icon for one of them. To use another icon, follow these steps:



1. Click the SmartCenter icon to display the SmartCenter menu.
2. Choose SmartCenter Properties.
3. Select the application or file whose icon you want to change.

4. Click Change.
5. From the Change dialog box, choose an icon from the Choose icon list, and click OK. If the icon you want doesn't appear in the list, you can add it by placing it in the \LOTSUITE\SMARTCTR directory.

### Changing the SmartCenter display

You can change the startup, icon palette, and placement options for SmartCenter. To change the display, follow these steps:



1. Click the SmartCenter icon to display the SmartCenter menu.
2. Choose SmartCenter Properties.
3. Click the Setup tab.
4. Select the options you want to use.
5. (Optional) Close the InfoBox.

### Using SuiteAnswers



SmartCenter includes online assistance called SuiteAnswers. SuiteAnswers provides the Help you need to use the applications together successfully. The type of Help you use depends upon the type of assistance you need.

- **Help cards** —You can get information on SmartCenter options by clicking the Help button in each dialog box or in the InfoBox. Help cards also provide information on how to complete tasks using more than one SmartSuite application.

For example, one Help card gives you the steps to create Approach mailing labels in 1-2-3. To access the Help cards, click and choose How Do I? or Search. Once you are looking at a Help card you can use to go back to the main list of topics, to print the current topic, and to shrink the display of the Help card.

- **ScreenCam movies** — SmartCenter comes with four ScreenCam movies: “Copy a 1-2-3 range to Word Pro”; “Copy an Organizer address to Word Pro”; “Link a 1-2-3 range to a Freelance chart”; and “Create Approach mailing labels in 1-2-3.” You can view these movies by clicking and choosing Movie Guide or clicking on the Help cards.
- **The Guided Tour** SmartCenter includes the SmartSuite Guided Tour, which provides a visual introduction of SmartSuite features. From the SuiteAnswers menu choose Guided Tour, or click the Guided Tour button in the Welcome dialog box. The Tour includes overviews of Team Computing, Productivity, and Integration.

## Using ScreenCam



Lotus ScreenCam is show-and-tell software that lets you record, save, and play back movies of screen activity. For example, you can create a movie to show how to perform a procedure or use a product feature.

Each screen movie can be

- Saved as a native Lotus ScreenCam movie (.SCM format).
- Saved as a standalone 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 or embedded in an OLE-compliant application.

**Note** The Movie Guide for SmartCenter plays movies in .SCM format only.

### Creating a screen movie

To create a screen movie, follow these steps:



1. Click the SmartCenter icon.
2. Choose Lotus ScreenCam.  
ScreenCam appears.
3. Choose File - New.
4. Click Mic to record sound only, Cam to record screen activity only, or Both to record both sound and screen activity.
5. Click Rec to begin recording.
6. When the stopwatch pointer disappears, perform the screen actions you want to record. If you have sound hardware, you can also include sound.
7. To stop recording, click the red Stop button.
8. To play back the screen movie, click Play.
9. To save the screen movie, choose File - Save.

### Clearing a screen movie

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

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

**Tip** To delete an embedded screen movie, first select the icon that represents the embedded screen movie, and then choose Edit - Delete, Edit - Clear, or Edit - Cut.

### Saving a screen movie

1. To save a screen movie, follow these steps:
2. Choose File - Save.
3. Enter a file name in the File Name box.
4. Tab to the movie description box and enter a description.

**Note** ScreenCam uses the 8-character file name in the Available ScreenCam Movies window in the tab of the SmartCenter Movie Guide. You can use the description box to create a more meaningful name to display in the Movie Guide. On the first line of the description, type a title for the movie. Then press **CTRL-BREAK** and then **ENTER** at the end of the first line.

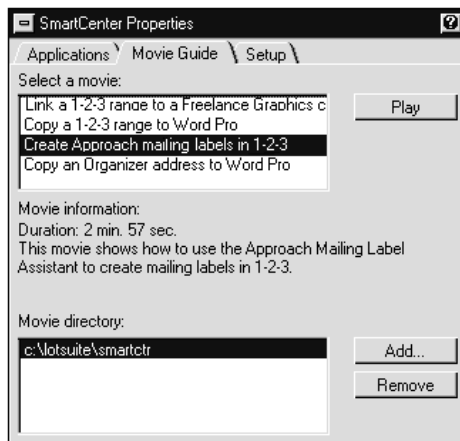
5. Click OK.

### Viewing screen movies

You can view screen movies that come with SmartCenter or ones that you or others create. To view a movie, follow these steps:



1. Click the SuiteAnswers icon.
2. Choose Movie Guide. The Movie Guide lists all the screen movies in the SmartCenter movie directory you selected.



3. Select the screen movie you want to view.
4. Click Play to start the screen movie.

### **Changing the screen movies SmartCenter displays**

To change the screen movies SmartCenter displays when you select Movie Guide from the SuiteAnswers menu, follow these steps:



1. Click the SuiteAnswers icon.
2. Choose Movie Guide.
3. To add a directory to search for screen movies, click Add and specify a directory.  
To remove a screen movie directory from the list, select the directory and click Remove.
4. Click Yes.

**Tip** When you select a screen movie, SmartCenter displays information about the screen movie in the Movie Information area.

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## Chapter 4

# How SmartSuite Helps You

SmartSuite is designed to give you and your team the tools to work efficiently. These tools provide:

- **Team computing.** Teams of all sizes can use SmartSuite to work together on a project, a document, report, and many other tasks.
- **Productivity.** SmartSuite sets a new standard for productivity with tools that work the same way in each of the SmartSuite products.
- **Integration.** SmartSuite lets you use the products together to get your work done quickly and easily.

This chapter describes how SmartSuite tools make your work easier.

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### Team Computing

Team computing is a term that describes the new ways you can use SmartSuite to communicate, collaborate, and coordinate with your coworkers. Team computing tools improve your productivity, whether you are working on a project with one other person or working in a large, structured group. Team computing tools automate how you gather, work with, and distribute information.

Here are some of the exciting new ways you can work more closely and efficiently with your associates:

- Word Pro TeamReview automates and controls the way you review documents in a group.
- Word Pro TeamConsolidate consolidates the changes everyone in your group contributes to a single document.
- 1-2-3 range routing lets you collect and consolidate data from many people into a single spreadsheet.
- Organizer group scheduling lets you schedule meetings with others more easily by checking when everyone is available, and by sending notices and attachments for the meeting.
- ScreenCam lets you create and distribute “show and tell” movies to your team.

- TeamMail lets you mail or route information directly from any one of the applications.
- 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 documentation for the specific product.

## Word Pro TeamReview

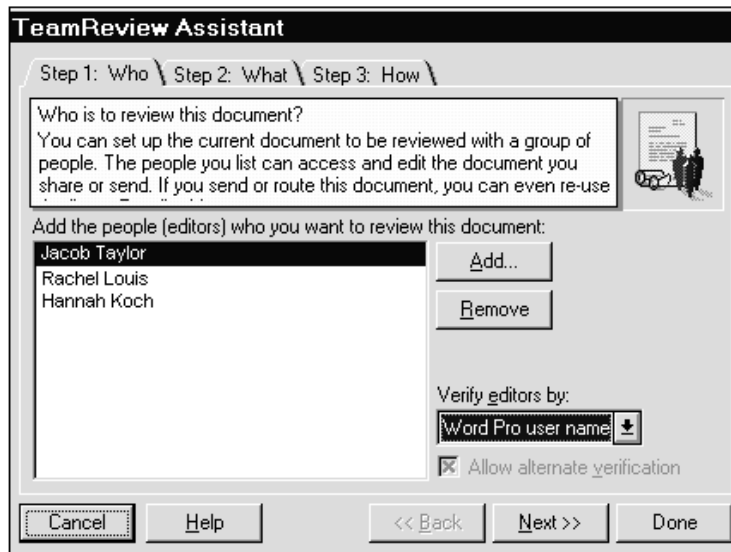
Word Pro TeamReview provides you with a step-by-step guide for sharing a document for review. It helps you notify your reviewers and control the editing process.

TeamReview offers you these benefits:

- It is easy to learn and use.
- It sets editing rights for the entire team or for individuals.
- It lets you send personal messages to each reviewer. TeamReview can be used with any distribution method, from network drive and routing to e-mail or floppy disks.

The TeamReview Assistant guides you in selecting **who** your editors are, **what** rights or options each editor has, and **how** you want to distribute the document.

The Assistant tabs step you through the process of setting up **who**, **what**, and **how** you want TeamReview to work



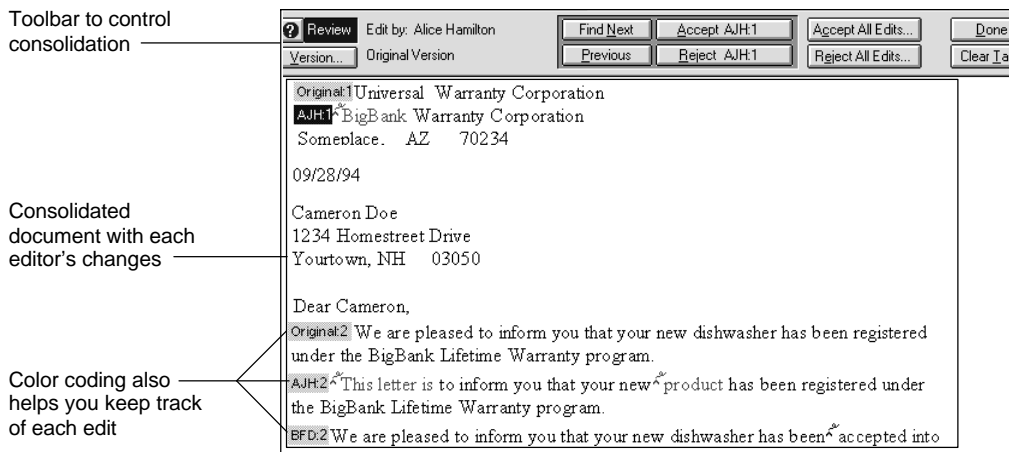
## 4-2 Getting Started

## Word Pro TeamConsolidate

TeamConsolidate lets you consolidate into one document all the edits you receive. Word Pro TeamConsolidate has the following benefits:

- It eliminates the mountains of paper and the manual errors you get with handwritten edits.
- It lets you compare and evaluate all your edits on one screen instead of opening multiple documents.
- It shortens the time spent on collaborative documents.

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



## 1-2-3 Range Routing

With range routing you can send selected ranges of your 1-2-3 worksheet to several people. You control the order in which reviewers receive your worksheet, and you control how you want to consolidate their input. For example, you can send a range that contains a budget to each department head, have that person add data, and automatically route the range to the next person on your list.

You can send the range simultaneously to everyone in the group, or you can route the range sequentially from one person on the mailing list to the next. You can also route the entire worksheet. 1-2-3 keeps track of each person's changes and lets you merge all the data into a single range.

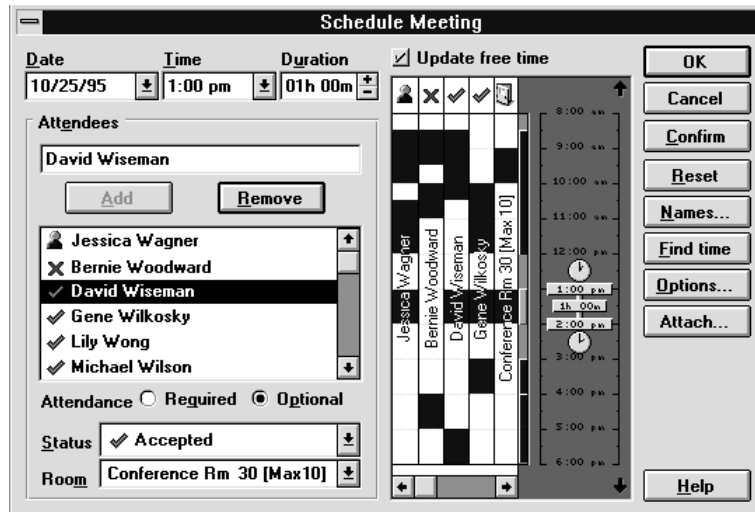
Range routing has the following advantages:

- You don't have to send parts of the file that you don't want others to see.
- Security features allow you to set a routing sequence no one can alter.

- Any changes can be consolidated into the original spreadsheet through Version Manager.

## Organizer Group scheduling

Organizer Group scheduling dramatically cuts the time it takes to set up a meeting and book a room. You can instantly see when coworkers who use this feature are available and then attach a meeting agenda or other file to your invitation. You send the invitation by Notes, cc:Mail, or a single LAN server.



**Keep up-to-date on upcoming meetings.** Meeting invitees can accept or decline an invitation or delegate a substitute attendee. Organizer automatically forwards the responses to you. When an invitee accepts a meeting invitation, Organizer also updates his or her Organizer Calendar. You can always check to see who can attend a meeting, and who's sending an alternate. Best of all, Organizer helps you do this in a fraction of the time it takes to set up a meeting using a phone, memos, or e-mail.

**Share Organizer files.** You can share Organizer sections with others or set up a common Organizer file that any member of your team can access. In fact, you and your coworkers can simultaneously edit each other's Organizer files to delegate tasks, coordinate group efforts, and maximize resources. Organizer lets you maintain a user access list to control who has access to your Organizer files. Your workgroup can also maintain a single Address book or Calls manager that everyone on the LAN can access.

**Consult master calendars.** You can share your Calendar information with a boss or assistant, and you can create a master Calendar for the entire team. For example, the team can use the Planner for a 12-month view of your group's upcoming events and long-term commitments.

### ScreenCam for “show and tell”

ScreenCam is a show-and-tell teaching and communication tool that lets you demonstrate to your coworkers how to perform a procedure or follow a process. ScreenCam captures all screen activity — the cursor movements, sound, and your dialog box choices. For example, suppose you want everyone in your group to follow the same procedure for team reviews. You can use ScreenCam to create a screen movie of the procedure as you perform it. You can then mail the movie files to everybody in your group, or you can create a library of screen movies to keep on a server for everyone to access.

SmartSuite supplies you with four screen movies: “Create Approach mailing labels in 1-2-3”; “Copy an Organizer address to Word Pro”; “Link a 1-2-3 range to a Freelance chart”; and “Copy a 1-2-3 range to Word Pro.”



You can see these movies by clicking the SuiteAnswers Help icon in SmartCenter.

### TeamMail

When you use SmartSuite applications, you never need to leave your work to send a mail message. Whether you use cc:Mail, Notes, or any other VIM or MAPI-compliant mail system, you can use the File - TeamMail or File - Send Mail command in any of the SmartSuite applications to send a message.

Suppose you are working in your spreadsheet and you remember that you want your coworker to confirm a number. You simply choose File - Send Mail. The Mail dialog box lets you address your mail, compose a message, and attach the spreadsheet file, all without leaving 1-2-3. All SmartSuite products offer you the same efficient way to send mail.

### Exchanging data using Notes/FX

Notes/FX (Field Exchange) is a programming technique, used primarily by developers, that integrates Notes and desktop applications. Lotus Notes/FX harnesses the power of Lotus Notes — the industry-standard workgroup software environment — to perform such tasks as document management, business process management, and information retrieval. If you are a Notes user, you can use Notes/FX together with SmartSuite to organize, store, access, track, and share information with your coworkers around the world.

Notes/FX lets you exchange data between fields in a Notes document and fields in files created in other Lotus applications for Windows. For example, you can maintain data in a 1-2-3 worksheet and access and update it in Notes, or use Notes to provide document descriptions and keywords for Word Pro documents.

Notes/FX uses OLE embedded objects: all Lotus applications you use for Notes/FX must be properly registered as OLE server applications for Notes/FX to work. See Notes Help or Help for individual SmartSuite products for details on OLE and Notes/FX.

**Lotus NotesSuite™** NotesSuite is the team-computing product line designed for people working in teams to perform business tasks more easily. NotesSuite provides the integration necessary to use Notes and SmartSuite applications to create collaborative applications for business needs, such as budgeting, forecasting, and shared document creation and management.

For examples and a set of applications that make use of the capabilities of Notes/FX, see your local sales representative and ask for information about NotesSuite.

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## Productivity

SmartSuite products have a common look and feel. They have tools in common, so if you know how to use one SmartSuite application, you are well on your way to being productive in another. SmartSuite offers:

- **A Common Install process**
- **Common tools**
- **SmartCenter**

### Common Install

Common Install manages all the resources that SmartSuite products share. SmartSuite requires less disk space for its applications than standalone versions because shared resources are installed only once.

**Easy customization** You can elect to install all products at once, or you can initially install one or two products and return to install other products as you need them. Common Install leads you through a series of choices that make customizing your installation easy.

Network administrators can easily set up an automated installation that creates a company standard for all users.

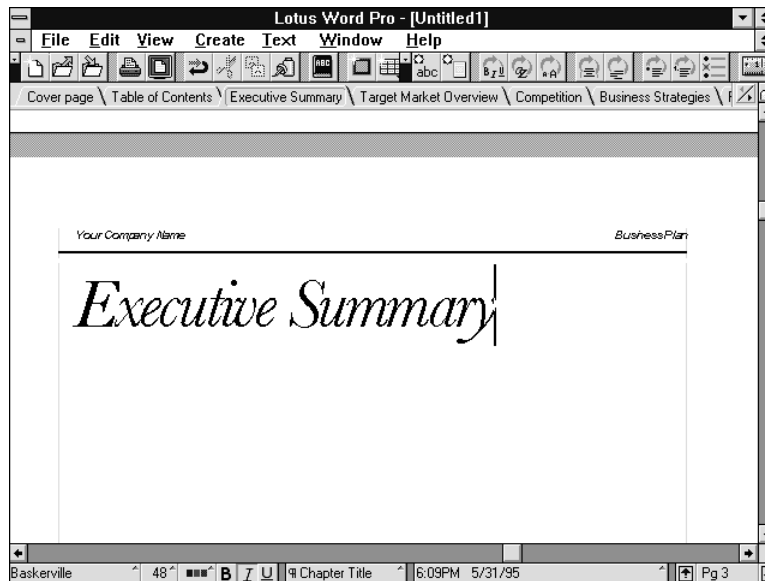
## Common Tools

SmartSuite provides tools common to its applications. These tools include SmartMaster templates, SmartIcons®, the status bar, and divider tabs.

### SmartMaster templates

A SmartMaster is a professionally designed template that gives you a quick start with everyday tasks. Approach, Freelance Graphics, 1-2-3, and Word Pro each come with a library of SmartMaster templates. You can start any new database, presentation, spreadsheet, or document with a SmartMaster. With its Click here...blocks, a SmartMaster can be more than an attractive format, however; it can help you think through your tasks.

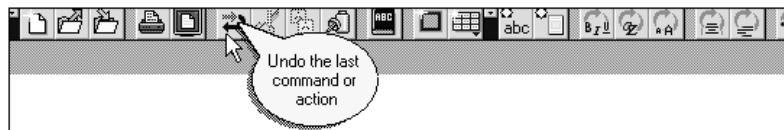
This business plan SmartMaster for Word Pro includes tabs to organize your information and Click here blocks that show you where and what information to type



### SmartIcons

SmartIcons exemplify the common look and behavior built into SmartSuite.

SmartIcons give you single-click access to frequently used features. Many SmartIcons are common to all the SmartSuite applications, so when you learn to use an icon in one application, you know 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, position the mouse pointer over the icon. A description appears in a bubble. Once you are familiar with the icons, you can turn the bubble help off through SmartIcons Setup. You can still access these descriptions by clicking the right mouse button when the mouse pointer is over an icon.

**SmartIcons help you work fast.** With SmartIcons, you get quick access to the actions that get your work done. To use SmartIcons:

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

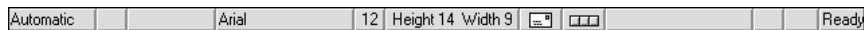
**You control SmartIcons.** To make it easy to get started, each application contains a default set of SmartIcons. Once you gain experience, you can:

- 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.

You can directly arrange icons on any icon bar (including SmartCenter). To arrange the icons, simply press and hold the **CTRL** key and right-click on the icon you want to move. Then drag and drop the icon to the desired location.

### Status bars

The status bar offers information about current selections as well as shortcuts for many commands. The status bar lets you display and change settings, such as font and point size in Word Pro, range formats in 1-2-3, and page layouts in Freelance Graphics.



### Divider tabs

Divider tabs make it easy to organize and manage large volumes of information. In Word Pro, you can use divider tabs to organize a long document. In 1-2-3, you can create multiple worksheets within a file using divider tabs. In Approach, you can set up different views of your data with divider tabs.

The InfoBox uses divider tabs to organize formatting options.



Word Pro divider tabs let you see all the sections of a long document.



## SmartCenter

SmartCenter, the icon bar that contains the SmartSuite application icons, provides a simple way to switch between applications and drag an object from one application and drop it in another. For more on SmartCenter, see Chapter 3, “SmartCenter.”



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## Integration

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

### Copying a 1-2-3 range to Word Pro using SmartCenter

Suppose you created a table in 1-2-3 that you want to include in a Word Pro document. Instead of retyping the data, you can quickly copy the 1-2-3 range to Word Pro using SmartCenter.

To copy a 1-2-3 range to Word Pro, follow these steps:

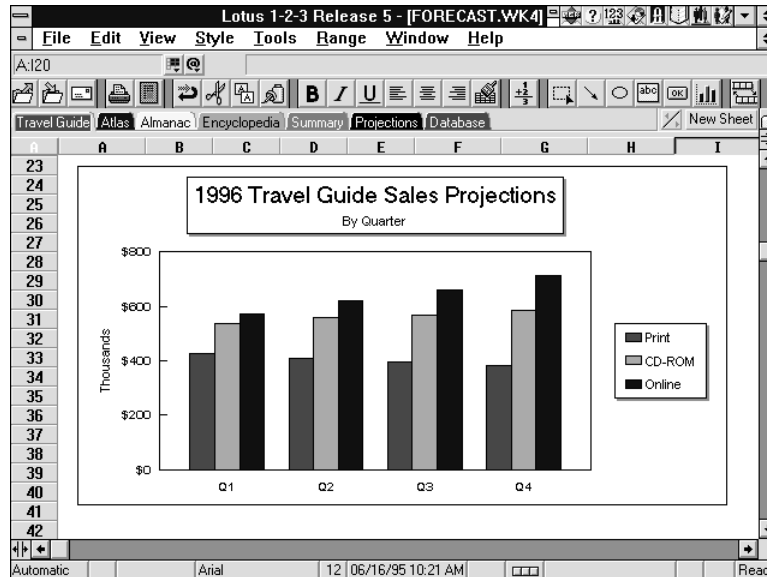
1. Open Word Pro and position the mouse pointer where you want to place the range.
2. Select the data in your 1-2-3 worksheet that you want to copy into Word Pro.

**Note** Make sure you saved the 1-2-3 file.

3. Place the cursor at an edge of the selected range until the drag and drop hand appears.
4. Drag the range over the Word Pro icon in SmartCenter.
5. Word Pro surfaces.
6. In the Word Pro document, drop the range where you want it to appear.



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

Suppose you want to use the chart you've created in 1-2-3 in a Freelance Graphics presentation. This easy procedure links and automatically reformats the chart to fit the style and look of the Freelance SmartMaster you've chosen.

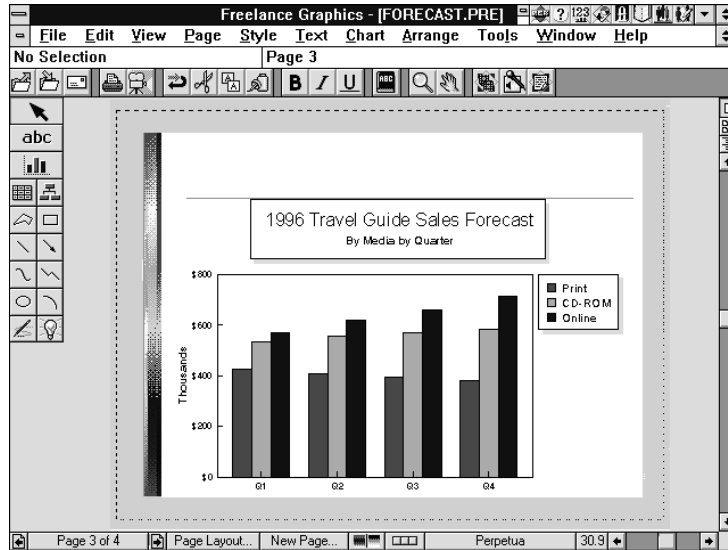


**Note** For the steps below to work correctly, make sure your 1-2-3 file is saved.

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

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

Your chart appears in your presentation, resized and reformatted with colors, fonts, and placements that match any SmartMaster you choose.



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

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

**Note** Linked charts are distinguished from non-linked charts by the blue line within the window.

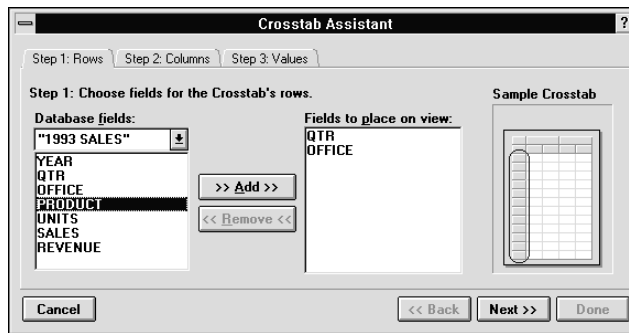
### Creating an Approach dynamic crosstab with data in a 1-2-3 file

Do you ever need to analyze spreadsheet data — by quarter, region, product, or salesperson? Then you need dynamic crosstabs from Approach. Dynamic crosstabs let you reorganize your data just about any way you want simply by dragging — all from within 1-2-3.

To create an Approach dynamic crosstab with data in a 1-2-3 file, follow these steps:

1. Select the 1-2-3 database table from which you want to create a cross-tabulation table.
  - The table must have at least two rows and three columns.
  - Make sure you selected column headings with the database table.
2. Choose Tools - Database - Dynamic Crosstab.

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



3. Perform Step 1 by choosing fields for the Crosstab's row.
4. Perform Step 2 by choosing fields for the Crosstab's column.
5. Perform Step 3 by choosing a field for the summary.
6. When you are finished, click Done.

**Note** You cannot modify data in the crosstab.

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

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

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

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

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

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

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

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

Did you ever wish you could turn address information stored in 1-2-3 into ready-to-use mailing labels? With Approach you can. As soon as Approach is installed, an automatic mailing-label generator is added to your 1-2-3 menu. The labels can be matched to standard Avery label codes, or customized to virtually any specification.

To create Approach mailing labels from a 1-2-3 data file, follow these steps:

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

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

2. Choose Tools - Database - Mailing Labels.

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



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

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

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

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

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

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

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

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

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

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

Approach lets you create customizable, intelligent forms that streamline data entry and ensure accuracy on your 1-2-3 spreadsheet. In designing forms, you can take advantage of automatically entered default values, drop-down lists, radio buttons, validation rules and more — just by pointing and clicking. From 1-2-3, follow these steps:

1. Select the 1-2-3 database table you want to view in the form.

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

2. Choose Tools - Database - Form.

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

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

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

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

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

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

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

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

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

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

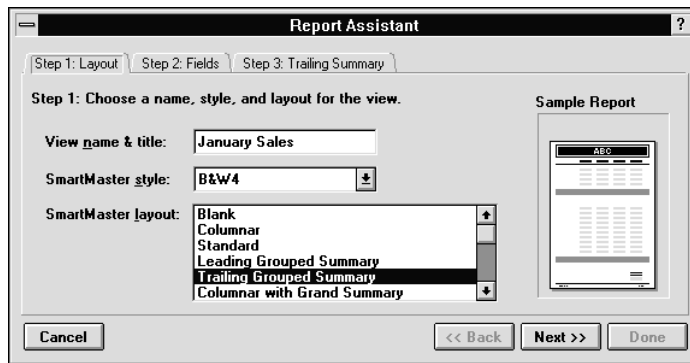
### **Creating an Approach report from data in a 1-2-3 file**

With the exclusive PowerClick reportwriter of Approach, you can create sophisticated summary reports on your spreadsheet data — without leaving 1-2-3. You can select the specific columns and rows you want to report on, and then sort, group, and calculate information by clicking the appropriate icon from the SmartIcons bar.

To create an Approach report from data in a 1-2-3 file, follow these steps:

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

1-2-3 starts the Approach Report Assistant.



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

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

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

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

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

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

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

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

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

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## Chapter 5

### Where to Go from Here

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

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#### SmartSuite Help cards

With Help cards, you can get information on how to complete cross-application tasks. You can also get information on SmartCenter dialog boxes by clicking the Help button in each dialog box. For example, you can get a Help card that gives you the steps to link a 1-2-3 chart to Freelance.

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#### 1-2-3 documentation

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

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

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## Word Pro documentation

Word Pro comes with the following printed and online documentation:

- *Exploring Word Pro* includes conceptual information about SmartMasters, modeless bars, organizing a document, team computing, and how to write a letter using Word Pro.
- Online Tour provides an overview of Word Pro features. Use the tutorial to become familiar with the Word Pro window, SmartIcons, paragraph styles, page layout, frames, pictures, and editing techniques.
- Online Help is streamlined and has been redesigned for easy and immediate access to how-to information. Help is task-oriented, featuring step-by-step procedures of tasks. The procedural help displays a window that stays on top while you follow the instructions. Help also includes documentation for the Word Pro LotusScript language.
- Ask the Expert, available from the Help menu, lets you use your own language to ask questions about using Word Pro. You simply type in your question and get a helpful answer.

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## Freelance Graphics documentation

Freelance Graphics comes with the following printed and online documentation:

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

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## Approach documentation

Approach comes with the following printed and online documentation:

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

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## Organizer documentation

The personal information management version of Organizer 2.1 comes with the following printed and online documentation:

- *Exploring Organizer* gets you started. It explains what's new in Organizer 2.1, and how to get information from Help. It also provides information on how to schedule appointments and group meetings, manage your information in each Organizer notebook section, tie all your information together, and print your file.
- *Quick Reference Card* explains how to do basic Organizer tasks and shortcuts, and how to use Help to accomplish tasks such as group scheduling.
- *Print Layout Guide* contains samples of each print layout so you can choose which ones suit your needs for printing schedules, address and notes information, and so on.
- Online Help provides context-sensitive help, procedures for Organizer functions, and other general topics. The Help procedures remains on your screen while you follow the instructions.
- ALMANAC.OR2 is a sample file installed in the \ORG files directory. It contains general reference material, such as telephone area codes and information about holidays.

To install and configure group scheduling, the network administrator will receive the following printed and online documentation:

- The *Administrator's Guide* explains how to plan, install, set up, and maintain Organizer files on a network. It provides details on how to set up mail-based group scheduling with Lotus Notes or cc:Mail, or group scheduling with a single (LAN) file server.

- Several Organizer files contain tips and techniques for advanced users: TECHNORE.OR2 (general and group-scheduling information), NDEPLOY.OR2 (for Notes group-scheduling sites), and CDEPLOY.OR2 (for cc:Mail group-scheduling sites).
- Lotus Organizer Administration 2.1 program provides context-sensitive help for mail-based and single-server scheduling, procedures for maintaining Organizer files, and overviews of general administration topics. The Help procedure window remains on your screen while you follow the instructions in Lotus Organizer Administration 2.1.