Using IBM® Lotus® Symphony™ Documents: Basics

Student Guide

Using IBM® Lotus® Symphony™ Documents: Basics

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About This Course

With IBM® Lotus® Symphony™ Documents, you can create simple or highly structured documents that can also include graphics, tables, charts, and spreadsheets. The features provided with Lotus Symphony Documents offer you a fine degree of control over the formatting of text, pages, sections of documents, and entire documents. You can also save the documents in a variety of formats. By performing some basic tasks in Lotus Symphony Documents, such as creating and opening documents, adding and formatting text, lists, and tables, and saving and printing documents, you can build a set of foundational knowledge for use in creating and enhancing many different types of documentation.

Course Description

Target Student

This course is designed for IBM® Lotus® Symphony™ end users who will use these materials to learn the basic tasks associated with the Lotus Symphony Documents editor.

Course Prerequisites

This course assumes that students have some experience with using word processing software.

How to Use This Book

As a Learning Guide

Each lesson covers one broad topic or set of related topics. Lessons are arranged in order of increasing proficiency with IBM Lotus Symphony Documents; skills you practice in one lesson are used and developed in subsequent lessons. For this reason, you should work through the lessons in sequence.

Each lesson is organized into results-oriented topics. Topics include all the relevant and supporting information you need to master Lotus Symphony Documents, and activities allow you to apply this information to practical hands-on examples.

As a Review Tool

Some of the information covered in class may not be relevant to your environment immediately, but it may become important later on. For this reason, we encourage you to spend some time reviewing the topics and activities after the course.

As a Reference

The organization and layout of the book make it easy to use as a learning tool and as an after-class reference. You can use this book as a first source for definitions of terms, background information on given topics, and summaries of procedures.

Course Objectives

After completing this course, you should be able to:

- Explore the most basic functions of Lotus Symphony Documents.
- Organize your information into tables and lists.

Course Requirements

Hardware

This course assumes users will be using their personal computer to take this course. The following are the system requirements to support an installation of IBM® Lotus® Symphony™ 1.1:

- At least 750 MB of free disk space on Linux and at least 540 MB of free disk space on Windows®.

- At least 512 MB RAM memory.

Software

The following list identifies the software requirements for installing Lotus Symphony 1.1. Please note that proper licensing for all software is required and is the responsibility of the training organization.

- Windows® XP + SP2 or Windows Vista®

- IBM Lotus Symphony 1.1

Class Setup

Course Files

The following table describes the course files.

Table 0-1: *Course files*

Title	File name	Description
Quarterly Report Start File	Quarterly Report Start File.odt	Data file for Lesson 1
Quarterly Report	Quarterly Report - BasicsL2.odt	Data file for Lesson 2

Course Setup Tasks

Complete the tasks in the following table to set up the course prior to the start of class. Detailed procedures for each task appear on the following pages.

Table 0-2: *Course setup tasks*

Task	Procedure
1	Uninstall any previously installed version of IBM Lotus Symphony.
2	Install Lotus Symphony 1.1.
3	Install the course data files.

Task 1: Uninstall Previous Versions of IBM Lotus Symphony

If you currently have an earlier version of Lotus Symphony installed, you will need to uninstall it prior to installing Lotus Symphony 1.1. Follow these steps to uninstall any previously installed versions of Lotus Symphony.

Table 0-3: *Uninstall previous versions of IBM Lotus Symphony*

Step	Action
1	Verify that Lotus Symphony is closed.
2	Click **Start→Control Panel→Add or Remove Programs.**
3	In the **Add or Remove Programs** dialog box, click **IBM Lotus Symphony** and then click **Remove.** **Note:** It may take a few minutes for the program to uninstall.

Task 2: Install Lotus Symphony 1.1

If you have not yet installed Lotus Symphony 1.1, you will need to do so before taking this course. Follow these steps to install Lotus Symphony 1.1.

Table 0-4: *Install Lotus Symphony 1.1*

Step	Action
1	In a Web browser, go to http://symphony.lotus.com/software/lotus/ symphony/home.nsf/home and click **Download** to download the Lotus Symphony 1.1 installation files. A new window opens and lists the IBM Lotus Symphony installation types. Click the version for the Windows operating system. In the next window, the product information is displayed. Select a language and click **Continue.** Select **I agree** after viewing the licensing information, and then click **I confirm.**
2	In the **Download using Download Director** dialog box, select **Lotus Symphony Setup for Windows** and click **Download now.**

Step	Action
3	After the files have finished downloading, click **Launch** in the Download Director.
4	The **Installation Wizard for IBM Lotus Symphony** is displayed. On the **Welcome to IBM Lotus Symphony 1.1** page, click **Next.**
5.	On the **Software License Agreement** page, select **I accept the terms in the license agreement,** and click **Next.**
6.	On the next page, leave the default install location or browse to and select a custom location, and then click **Next.**
7.	On the **File Type Associations** page, verify that the **Open Document Format file types** and **OpenOffice.org 1.1 file types** are selected by default. Click **Next.**
8.	On the next page, click **Install.**
9	On the **IBM Lotus Symphony Install Complete** page, verify that **Open Lotus Symphony** is selected, and then click **Finish.**

Task 3: Install the Course Data Files

Data files for students to use during the course activities are provided and installed as part of classroom setup. Follow these steps to install the course data files.

Table 0-5: *Install the course data files*

Step	Action
1	Open the **Y1300labfiles.zip** file and run the **Y1300labfiles.exe** self-extracting file. This executable will create the **\lotus_ed** folder and install sub-folders named **\Documents, \Spreadsheets,** and **\Presentations. Note:** These course files apply to all Lotus Symphony training modules, so you will only need to install these files once.

Course Icons

The following table explains the icons used in this course.

Table 0-6: *Course icons*

Icon	Description
	An **activity** is a student-centered learning process that allows students to learn by performing a task. Activities can be instructor-led or completed independently.
	Scenario information is used to introduce an activity problem or goal. Scenarios use fictitious people and organizations to present details, problem statements, and parameters that are used to complete the activity or lab exercise.
	Caution statements are included in the courseware to make students aware of potential negative consequences of an action, setting, or decision, that are not easily known.
	Tips and **notes** provide additional information, guidance, or a hint about a topic or task.
	An **Instructor Note** is a special comment to the instructor regarding delivery, classroom strategy, classroom tools, exceptions, and other special considerations. The Instructor Note is included in the Instructor Guide only.
	A **Display Slide** provides a prompt to the instructor to display a specific slide. The Display Slide icon is included in the Instructor Guide only.

Introduction to IBM® Lotus® Symphony™ Documents

- ■ **Topic A:** Getting Started with IBM® Lotus® Symphony™ Documents
- ■ **Topic B:** Creating Documents
- ■ **Topic C:** Opening Existing Documents
- ■ **Topic D:** Entering Text into Documents
- ■ **Topic E:** Naming and Saving Documents
- ■ **Topic F:** Finalizing Documents

Introduction

Imagine getting behind the wheel of a car without first learning how to operate it. How could a person be expected to drive safely without knowing which pedal moves the car, which stops the car, or knowing the rules of the road?

Similarly, when you are working with a new piece of software, taking the time to explore the most basic and commonly performed functions within that software can save you time and prevent problems when you are ready to begin using it. This lesson will introduce you to the IBM® Lotus® Symphony™ Documents interface and will familiarize you with the very basic skills that are required to begin using Lotus Symphony Documents, including creating and opening documents, adding and revising text, and saving and printing documents.

After completing this lesson, you should be able to:

● Explore available preferences in Lotus Symphony Documents.

● Create documents from templates.

● Describe how to open existing documents.

● Insert text in a document.

● Describe how to name and save documents.

● Describe how to finalize documents.

Topic A: Getting Started with IBM® Lotus® Symphony™ Documents

While working on new software, you could potentially waste a significant amount of time searching for specific options in the work environment. You can prevent this by familiarizing yourself with the user interface. This will help you achieve the output that you are seeking when you eventually begin using the software.

What Is Lotus Symphony Documents?

IBM® Lotus® Symphony™ is a suite of free, OpenDocument Format (ODF)-based software tools that handle the majority of commonly performed office productivity tasks. One of these core tools is IBM® Lotus® Symphony™ Documents. Lotus Symphony Documents is a program designed to let you create, edit, share, and save word-processing documents. To get started with Lotus Symphony Documents, simply double-click the IBM Lotus Symphony application on your desktop, and then on the Lotus Symphony home page, click **Create a new Document.**

The following figure shows the Lotus Symphony home page options.

Figure 1-1: *Lotus Symphony home page options*

Exploring the Lotus Symphony Documents Interface

When you click **Create a new Document** on the Lotus Symphony home page, a new Lotus Symphony Documents file is opened for you. The user interface is very intuitive, and may even remind you of similar word-processing programs you have used. The following table describes the interface elements.

Interface element	Description
Menu bar	High-level set of menus from which you can perform any function available in Lotus Symphony Documents.

Interface element	Description
Tab bar	Region that shows all files currently open in Lotus Symphony. Each tab represents an open file.
Context sensitive toolbar	Toolbar that displays icons for the most commonly performed functions available. You can use the icons as shortcuts instead of using the menus. These icons may change depending on the action being performed in the document.
Rulers	Horizontal and vertical guides that allow you to set the margins for document text.
Content window	Main region of the document that contains all text, tables, and diagrams that you have created.
Properties sidebar	Side pane of text and formatting properties that is readily available while you are creating your document.
Status bar	Bar along the bottom of the window that provides document information such as the page number, cursor position, magnification level, and the status of various text editing modes.

The following figure illustrates the position of each of these interface elements.
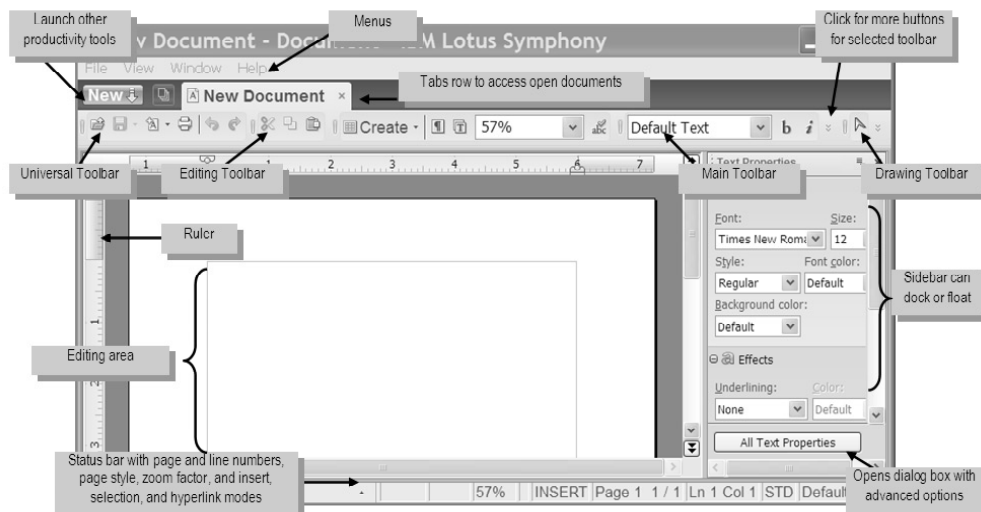
Figure 1-2: *Lotus Symphony Documents interface elements*

Screen tips

As you position the mouse pointer over items in the program window, such as toolbar buttons, a descriptive label for that item is displayed. These tips can help you identify the function of specific program window items or help distinguish between similar looking items.

Examining the Properties Sidebar

The most notable user interface element of Lotus Symphony Documents is the Properties sidebar, which is displayed to the right of the document you are creating. In some word-processing programs, formatting features may be hidden in menus and hard to find. However, in Lotus Symphony Documents, these formatting properties are always easily accessible as you create your document.

The contents of the Properties sidebar are context sensitive, meaning that the contents will change depending on whether you are modifying text, a table, a graphic, or a numbered list. The type of properties displayed for the current context can be changed by clicking the pop-up menu in the heading of the sidebar. For example, if you are modifying text, you can choose whether to display text properties, page properties, or paragraph properties. The following figure shows the Text Properties sidebar.

Figure 1-3: *The Properties sidebar*

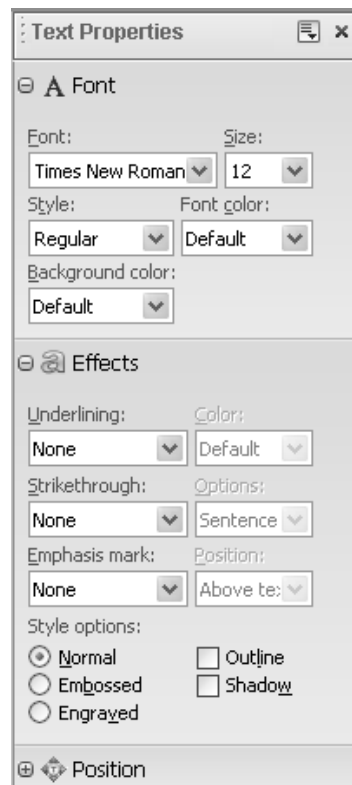This sidebar is open by default, but it can be closed by clicking the **X** in the upper-right corner, if you do not wish to have it displayed. If the Properties sidebar is closed, you can re-open it by clicking **View→Properties Sidebar→Open.**

Examining Preferences

In addition to the properties available in the Properties sidebar, there are global properties that you can modify for Lotus Symphony Documents. In the main menu bar, click **File→Preferences** to open the **Preferences** dialog box. Expand **IBM Lotus Symphony** if necessary, and then expand **Lotus Symphony Documents**. The available preferences are illustrated in the following figure.
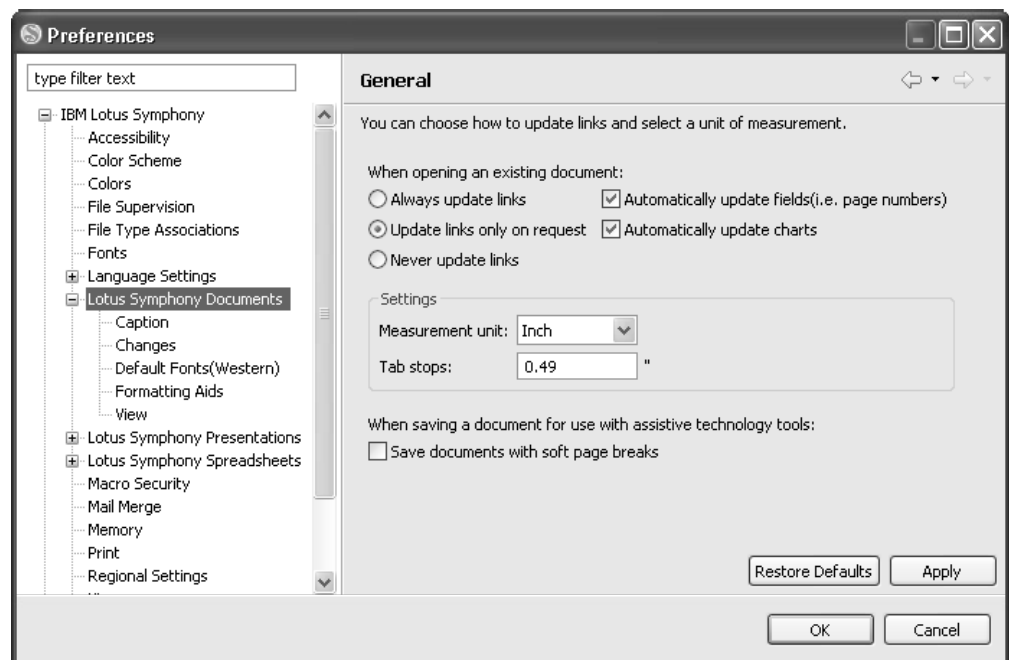
Figure 1-4: *The Preferences dialog box*

Nested within the Lotus Symphony Documents node in the navigation pane, you can click any of these categories to adjust the preferences to meet your needs. The following table describes the categories.

Category	Preferences to set
General (Lotus Symphony Documents)	Options for updating links, fields, and charts when opening an existing document, tab stops, and whether or not to use soft page breaks.
Caption	Optional labels and numbering style for captions in tables, frames, graphics, and charts.

Category	Preferences to set
Changes	Options for highlighting inserted text, deleted text, the color and format of changed text, and change indicators within the margin.
Default Views	Options for default text style for paragraphs, headings, lists, captions, and the index.
Formatting Aids	Options for displaying special characters by default in the documents, and the insertion style for Direct cursor.
View	Options for the page display rulers and handles, the window scroll bar display, and objects display.

Topic B: Creating Documents

IBM® Lotus® Symphony™ Documents is a word-processing program that allows you to create your own new documents, or build upon documents that have been created by others. Creating blank documents gives you the power to format the document and text to meet your needs. Using document templates can save you from repeatedly applying the same set of formatting features to documents that you create on a frequent basis.

Creating Blank Documents

When you first open Lotus Symphony Documents, a blank document is created for you. However, you will likely encounter a situation where you need to create a second blank document. There are two ways you can do this.

The first method for creating a new blank document is to click the **New** button in the tab bar, and then click **Lotus Symphony Document.** A new tab is created in the tab bar for this blank document. The following figure shows the **Lotus Symphony Document** option on the **New** button.
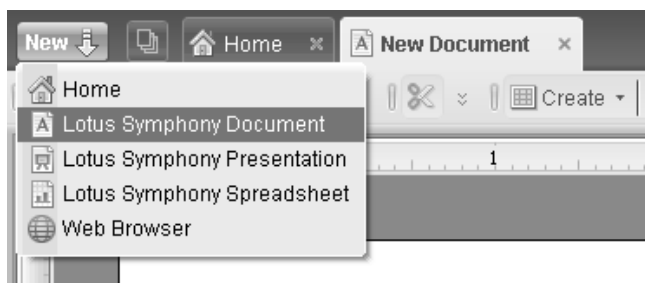
Figure 1-5: *Lotus Symphony Document option*

The second method for creating a blank document is to use the **File** menu. Click **File→New→Document** to create a new document.

Note: You can alternatively use the CTRL+N keyboard shortcut to quickly create a new blank document.

Creating Documents from Templates

In addition to creating a blank document, you can also create a new document from a template. This is a very useful feature if you frequently create documents that contain a lot of identical formatting, but do not contain the same body text, such as invoices, reports, or evaluations. You can save time by using a template that already has this formatting in place. To create

a new document from a template, click **File→New→From Template→ Document.** In the **New from Template** dialog box, you can select a template from the Template Organizer or specify the location of the template yourself. The following figure shows the **New from Template** dialog box.
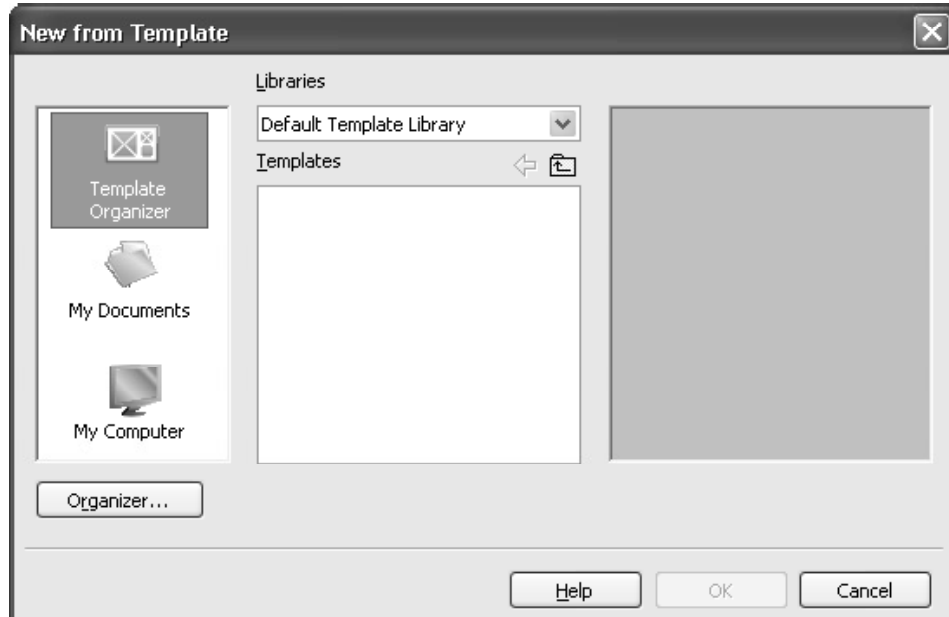

Figure 1-6: *The New from Template dialog box*

Topic C: Opening Existing Documents

Compatibility between word-processing programs allows people who use different programs to open and share documents with one another. IBM® Lotus® Symphony™ Documents supports many different file types, enabling you to better work with various people.

Opening Lotus Symphony Documents

There are several ways in which you can open an existing file created in IBM® Lotus® Symphony™ Documents. If IBM® Lotus® Symphony™ has not yet been launched, you can navigate to the file you wish to open, and then double-click it to start Lotus Symphony and open that document.

If Lotus Symphony is already running, click the **Open** 📂 icon in the context-sensitive toolbar. You can then search for the file in the **Open** dialog box. Another method of opening a file is to use the **File** menu. Click **File→ Open→File** to search for and open a document.

> **Note:** You can alternatively use the CTRL+O keyboard shortcut to quickly open an existing document.

Opening Other Document Types

A major benefit of Lotus Symphony Documents is its compatibility with other word-processing programs, including Microsoft® Word. Documents that have been written in Word can be viewed and edited in Lotus Symphony Documents. The process of opening a Word document is no different than opening a document created in Lotus Symphony; you can click the **Open** icon in the toolbar, or use the **File** menu. In the **Open** dialog box, navigate to the location of the Word document, and then click **Open.**

> **Note:** In the **Open** dialog box, verify that **All Files** is selected in the **Files of type** drop-down list. If this is not selected, Word documents may not be visible in the navigation window.

Supported document types

Document types that you can open with Lotus Symphony Documents include:

- OpenDocument (.odt)

- OpenOffice (.sxw)

- Lotus Word Pro (.lwp)

- Lotus 1-2-3 (.123)

- Microsoft Word 97/2000/XP (.doc)

- Microsoft Rich Text Format (.rtf)

- Text files (.txt)

Opening Recently Accessed Documents

Lotus Symphony Documents has a feature that allows you to quickly access the files that you most recently opened or edited. This is useful when you wish to view a file that you have recently accessed, without navigating to it again. Click **File→Recent Files** to view a short list of recently accessed files, and then click the file you want to open.

Topic D: Entering Text into Documents

IBM® Lotus® Symphony™ Documents is an efficient word processor. However, with no words to process, the program does little more than take up room on your computer. The first step toward creating a document is to capture your ideas by entering text into an open document.

Default Typing Features

Now that you are ready to begin entering content into your document, place the cursor in the main content window. You can freely type text into the document, just as with any other word processor. As you type, you may become aware of a number of features that are enabled by default. The following table describes the typing features that are enabled by default.

Feature	Description
Word Wrap	This feature automatically carries a word down to the next line if it is too long to fit at the end of the current line of text. There is no need to press Enter when you get close to the right margin.
Instant Correct	Lotus Symphony Documents checks for commonly misspelled words and will automatically correct them as you type. You can view the list of words to be automatically corrected. Click **Tools→Instant Corrections** to open the **Instant Corrections** dialog box. On the **Replace** tab, a list is provided that displays misspelled words, and their respective replacements. If you wish, you can add a term to this list by filling out the two text fields above, and then clicking the **New** button. Lotus Symphony Documents will now automatically make this replacement any time you type this word incorrectly, exactly as you have specified.
Instant Spellcheck	As you type, Lotus Symphony Documents will check your words for proper spelling. If Lotus Symphony Documents finds a term that it does not recognize, a wavy red line is shown below the word. If you correct the word, the line disappears. You have the option of right-clicking the word to view a small list of suggested replacements. If this word is correct and you would like Lotus Symphony Documents to stop identifying it as a misspelled word, right-click the word and click **Always Ignore.**

Feature	Description
Word Completion	With this feature enabled, Lotus Symphony Documents will sometimes offer to complete a word that you have begun to type. Click **Tools→Instant Corrections,** and then click the **Word Completion** tab to view a list of words. If Lotus Symphony Documents detects that you are beginning to type a word in this list, it will display the remainder of the word, highlighted in blue. By default, you can press Enter to accept this suggestion. To disregard the suggested word, continue typing the word you want to appear. If you wish to disable this feature, clear the **Enable word completion** check box on the **Word Completion** tab.

Displaying Nonprinting Characters

Nonprinting characters are document indicators that appear in the text area to indicate the location of spaces, paragraphs, tabs, line breaks, and so on. In the context-sentitive toolbar, click the **Nonprinting Characters** ¶ button to turn nonprinting characters on or off. The following figure shows a sample block of text with nonprinting characters displayed.

Figure 1-7: *Nonprinting characters enabled*

Copying and Pasting Text

The ability to copy and reuse text in multiple locations can save you from duplicated effort. The first thing you need to do is select the block of text that you wish to copy. Place the cursor at the beginning of the text to be copied, and then click and drag until you have highlighted all of the desired text. You can then either press CTRL+C to copy the text, click the **Copy** button on the toolbar, or click **Edit→Copy** on the menu bar.

Next, place your cursor where you would like this text to be copied. Press CTRL+V to paste the text, click the **Paste** button on the toolbar, or click **Edit→Paste** on the menu bar. The copied text is saved on the Windows Clipboard, so you can paste this text as many times as you wish or until you copy a different region of text.

Moving Text

You can also move text from one location to another. For example, you may determine that a particular paragraph would be better placed in a different section of your document. Highlight the section of text that you would like to move, and then press CTRL+X, click the **Cut** button on the toolbar, or click **Edit→Cut** on the menu bar. The difference between cutting and copying is that the original text is removed from the document. Place your cursor where you would like to place this text, and then press CTRL+V, the **Paste** button, or click **Edit→Paste** to paste it.

Note: Alternatively, you can select an area of text to be moved, and then drag and drop it to a new location in the document.

The Undo feature

You will likely encounter situations where you have either made a mistake or decided after making a change that you would like to revert the document to the way it was before the change. This is when the Undo feature becomes useful. You can press CTRL+Z, click the **Undo** button on the toolbar, or click **Edit→Undo** on the menu bar to undo the last change to the document. Performing this action multiple times in succession will continue to undo changes to your documents, from the most recent to least recent.

Changing Text and Paragraph Properties

In most cases, you will want to apply at least some degree of formatting to your text and paragraphs. The Properties sidebar contains the most commonly used formatting properties and is readily available to you. The content of the Properties sidebar depends on the context of the document. You can click the drop-down menu ⬇ icon in the heading of the sidebar

to switch between the properties shown. The following table describes the various properties that can be adjusted when editing text.

Properties	Description
Text	These properties are shown by default when editing text. The sidebar contains three categories: ● Font: Options for changing the text font, size, style, color, and background color. ● Effects: Options for enabling underlining, strikethrough, or emphasis. ● Position: Options for text position, spacing, rotation, and scale.

Properties	Description
Page	These properties allow you to change the orientation of the page, the margins, layout, and format.
Paragraph	These properties allow you to apply formatting changes to paragraphs. The sidebar contains three categories: ● Font: Options for changing the text font, size, style, color, and background color. ● Alignment: Options include Left, Right, Center, and Justified. ● Indents and Spacing: Options for indent placement and line spacing.

Adding a Page Break

It is not necessary to wait until you have reached the bottom of the page to begin a new page. Sometimes it makes sense to force a page break so that the content of your document can be better presented. To insert a page break and continue adding content on the next page, click **Create→Manual Break.** Verify that **Page Break** is selected as the type, and then click **OK.** You can also add a page break by pressing the key combination CTRL+Enter.

Topic E: Naming and Saving Documents

Working on an important document for hours would be a waste if you were unable to retrieve this information for later use. Thus, it is necessary to save the document. IBM® Lotus® Symphony™ Documents allows you to save a document with the same name and format, or save a document with a new name and in a different file format.

The Save As Command

When you are ready to save your document for the first time, you will notice that the **Save** menu option is unavailable both in the menu and on the toolbar. Instead, you will need to use the **File→Save As** command. This gives you the opportunity to provide a name for your document, specify the file format, and provide the location where the document should be saved.

The Save As command is also used to save an existing document with a new file name, a new file extension, or in a new location. It also provides direct access to options that enable you to save a copy of the file in the default Lotus Symphony .odt format, or to save it as an OpenOffice, Microsoft® Word, or as a plain text file.

The Save Command

The Save command is used when you have already saved your document at least once, or have made revisions to an existing document. The Save command overwrites the previous version of the document with this version, with the same name, same file format, and in the same location. To save your document in this manner, click **File→Save,** or click the **Save** icon on the toolbar.

Saving Files in Other Formats

When you use the Save As command to save your document for the first time, the OpenDocument format is selected by default in the **Save as type** drop-down list. This will apply the .odt extension to your file, thereby saving it as a Lotus Symphony Documents file. However, you have the option of saving your document in other formats, including Microsoft Word. In the

Save as type drop-down list, click **Microsoft Word 97/2000/XP (*.doc)** to save the file as a typical Word document. You can also save the file as a Word template, an OpenOffice document, an RTF file, or a text file. The following figure shows the **Save as type** drop-down list.
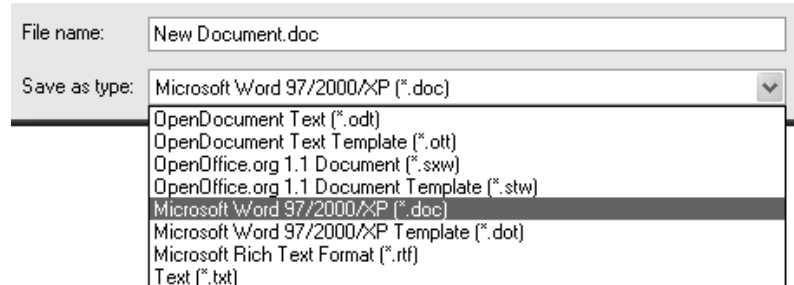
File name:	New Document.doc
Save as type:	Microsoft Word 97/2000/XP (*.doc)
	OpenDocument Text (*.odt)
	OpenDocument Text Template (*.ott)
	OpenOffice.org 1.1 Document (*.sxw)
	OpenOffice.org 1.1 Document Template (*.stw)
	Microsoft Word 97/2000/XP (*.doc)
	Microsoft Word 97/2000/XP Template (*.dot)
	Microsoft Rich Text Format (*.rtf)
	Text (*.txt)

Figure 1-8: *The Save as type drop-down list*

Note: It is recommended that you always save your document as a Lotus Symphony file before saving it as a different file type. When you save as an external file type, some formatting features may be lost. If you are using Linux, type the extension of the file name when choosing a new file type, as it does not correspond automatically to the saving file type chosen.

Saving a document as a template

In addition to saving a document in a different format, you may also optionally save the file as a template. This is useful when you want to create a standard, generic document that is pre-formatted in such a way that it can be re-purposed many times. An example of this might be a certificate that is given to students who successfully complete a training course. Instead of creating a new document each time you need one and spending time drawing all borders, applying all formatting, and so forth, you can instead save a blank certificate as a template. Whenever you need a certificate in the future, you would only need to open the template, enter the student's name, and the title of the completed course.

As shown in the previous figure, in the **Save as type** drop-down list, you can save your file as an OpenDocument template, an OpenOffice template, or even a Microsoft Word template.

Exporting Documents to PDF Format

A unique feature of the Lotus Symphony suite is the ability to export a document directly to Portable Document Format, or **PDF** format. No special add-ons, patches, or other tools are required for this. Click **File→Export** to open the **Export** dialog box. From here, you can provide a name for your PDF file, and provide a location for the exported file.

Topic F: Finalizing Documents

Whether you realize it or not, printing a document costs money. Each page may cost only a few cents for paper and ink, but those costs add up quickly if you are repeatedly printing a multi-page document, just to see how it will look on paper or to do a quick hard copy edit. By previewing your document before printing, you can still see how it will look and identify obvious errors without wasting money and the time it takes to print additional copies.

Using the Spell Check Feature

Before you e-mail or print your document for another person to review, it is recommended that you verify that your document is free of spelling errors. IBM® Lotus® Symphony™ Documents has a built-in spell checker that you can use to catch spelling errors in your document. Click **Tools→Spell Check** to begin using the spell checker.

When Lotus Symphony Documents has detected a misspelled word, a dialog box is displayed. The misspelled word is highlighted, and a short list of suggested replacements is provided. There are also several buttons to the right of the suggested words that will help you more efficiently spell check your document. The following figure shows the **Spellcheck** dialog box.
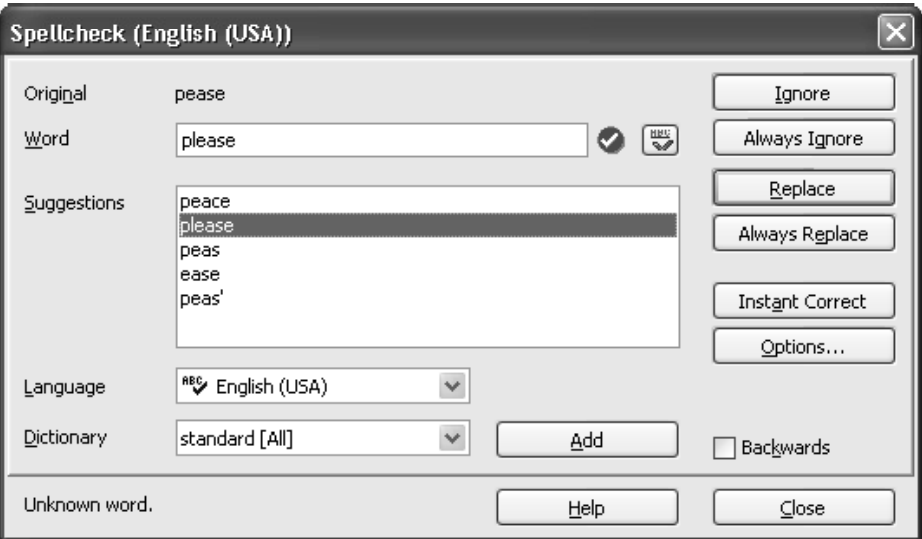
Figure 1-9: *The Spellcheck dialog box*

The following tables describes a few of the most commonly used buttons.

Spellcheck button	Behavior
Ignore	Skips the word and moves on to the next misspelled word in the document. If this word is found again, it will be flagged again.

Spellcheck button	Behavior
Always Ignore	Skips the word and moves on to the next misspelled word in the document. Future instances of this word will not be flagged for the remainder of the spell checking session.
Replace	Replaces the misspelled word with the word that you have selected in the list of suggested replacement words.
Always Replace	Replaces all instances of this misspelled word in your document with the word you have selected.

Caution: You should never completely rely on the spell checker to catch spelling errors in your document. The spell checker will not flag a misspelled word if such a word correctly spells a different word. For example, in the sentence "Mary could not remember the weigh home," the word "weigh" should be spelled as "way," but the spell checker will not catch this. There is no substitute for carefully reviewing your document before sending it off.

Using Print Preview

Before you print your document, you may want to take a moment to see how the document will appear. Print Preview is a view mode that enables you to view a document as it would appear on paper when printed. You can view or modify the document in this view to suit your requirements. Click **File→Print Preview** to review how your document will look when printed. Just to name a few things to watch for, you may want to verify that the page breaks are not in awkward locations, the margins are appropriate, and the overall page layout is appealing.

While in Print Preview mode, a toolbar is provided to assist you while reviewing the layout of your document. Buttons are provided that allow you to:

● Navigate back and forward through different pages.

● View multiple pages at a time.

● Zoom in and out of a page.

● Print the document from this view.

● Change the Print Preview options.

● Close this view and return to the normal editor view.

The following figure shows the Print Preview toolbar.
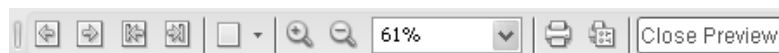
Figure 1-10: *The Print Preview toolbar*

Printing Documents

When you are confident that your document is error free and laid out properly, you are ready to print it. Click **File→Print,** or click the **Print** 🖶 icon in the toolbar. In the **Print** dialog box, there are a number of features available to you:

● Printer: If you have multiple printers configured, you can select which printer you would like your document printed from.

● Print range: If your document is long and you do not wish to print it in its entirety, you can specify exact pages or a range of pages to be printed. For those with a "green" mentality who wish to conserve resources, this is a nice option to be aware of.

● Copies: You can specify how many copies to print. If you are printing a multi-page document and want to print several copies, you can choose whether or not you want your copies collated.

● Properties: Clicking this button will open the properties for the printer. Among other options, you can typically change the orientation of the page, specify the print quality, and choose whether to print in duplex (two-sided) mode, if the printer supports it.

Activity 1-1: Get Started with Lotus Symphony Documents

Data Files:

- Quarterly Report Start File.odt

Scenario

To get started with Lotus Symphony Documents, you will revise a Quarterly Report for Worldwide Corporation. You will open the document in its current state, add and format the **Introduction** section, run Spellcheck, save the document, export the document to PDF format, and then preview the document with the Print Preview feature.

To complete this activity:

● Open the **Quarterly Report Start File.odt** file.

● Add and format the **Introduction** section so that the heading is 14-point Arial bold italic, and the body text is 12-point Times New Roman. For the body text, use the following text:

```
It has been a productive quarter for the Education
Division. We are pleased to present this summary of
our goals and accomplishments.
```

● Spell check on the document.

● Save the file to the desktop with the name My Quarterly Report.

● Export the document to PDF format.

● Preview the document in Print Preview.

Follow these steps to get started with Lotus Symphony Documents.

Step	Action
Open the Quarterly Report Start File.odt file.	
1.	Double-click the **IBM Lotus Symphony** icon on the desktop.
2.	On the **Home – IBM Lotus Symphony** page, click **File→Open→File.**
3.	In the **Open** dialog box, navigate to **C:\lotus_ed\Doucments** and double-click the **Quarterly Report Start File.odt** file to open it.
Add and format the Introduction section.	
4.	Click below the document title and press Enter. Type `Introduction`
5.	Highlight the section title you just typed. On the **Text Properties** sidebar, in the **Font** section, in the **Font** drop-down list, click **Arial.**

Lesson 1 ■ Introduction to IBM® Lotus® Symphony™ Documents

Step	Action
6.	In the **Size** drop-down list, click **14.** In the **Style** drop-down list, click **Bold Italic.**
7.	Click to place the cursor and the end of Introduction and press Enter. On the **Text Properties** sidebar, in **Font** drop-down list, click **Times New Roman.** In the **Size** drop-down list, click **12,** and then in the **Style** drop-down list, and click **Regular.**
8.	Type `It has been a productive quarter for the Education Division. We are pleased to present this summary of our goals and accomplishments.`
Run Spellcheck on the document.	
9.	To check the document for spelling errors, click **Tools→Spellcheck.** In the **IBM Lotus Symphony** message box, click **Yes.** Correct any errors that are present, and then close the Spellcheck dialog box.
Save the file to the Desktop with the name My Quarterly Report.	
10.	Click **File→Save As.** In the **Save As** dialog box, in the **File Name** field, type `My Quarterly Report` and click **Save.**
Export the document to PDF format.	
11.	Click **File→Export.** In the **Export** dialog box, verify that **Desktop** is in the **Save in** field and that **Portable Doucment Format** is in the **File format** field, and click **Save.**
12.	In the **PDF Options** dialog box, accept the defaults and click **Export.**
Preview the document in Print Preview.	
13.	To print the document, click **File→Print Preview.** After you have viewed how the document will look when it is printed, press **Esc.** **Note:** Leave the file open; you will use it in the next lesson.

Lesson Summary

Taking the time to familiarize yourself with a program before using it can save you from spending time searching for the features you need or correcting things that were not done properly the first time. This lesson has prepared you to begin using Lotus Symphony Documents effectively by exploring the most basic tasks that are necessary to create simple word processing documents. You became familiar with the Lotus Symphony Documents interface, and explored the features available to you as you open, create, save, and print your documents.

2

Incorporating Lists and Tables in Documents

■ **Topic A:** Working with Lists

■ **Topic B:** Working with Tables

Introduction

You should be familiar with the basic functions of IBM® Lotus® Symphony™ Documents, but there is more to this word-processing software than merely creating and editing text. Lotus Symphony Documents offers a number of tools and features that you can use to create professional-looking documents. By using these tools and features to add lists and tables to your documents, you can organize information so that it is easily understood by your readers. This lesson will show you how to add and format lists and tables in your documents.

After completing this lesson, you should be able to:

● Describe how to format lists.

● Work with tables.

Topic A: Working with Lists

When you want to describe a series of related items or describe a process within a document, it can be difficult to follow the order of the steps if they are merely presented in normal paragraph format. Using lists in your documents enables you to provide examples and other types of content in an appealing and easy-to-read format.

Defining List Types

A **list** is a data grouping method in which the items in the group are displayed one after the other. A list typically has lead-in text that provides a brief description about the items it contains. There can be any number of items in a list. IBM® Lotus® Symphony™ Documents allows you to create single- or multi-level lists that use various styles of numbers or bullets.

There are essentially two main types of lists in Lotus Symphony Documents. The following table describes the two types.

List type	Definition
Bulleted (Unordered)	A list that is used to denote a group of equally significant items. They are grouped under the same heading. You can customize the list by choosing different bullet styles. Bulleted lists can be multi-level. Each bulleted item in a list may be a single word, a short phrase, or a paragraph.
Numbered (Ordered)	A list that is used to denote a ranking among items or a sequence that must be followed. You can customize the list by choosing different alphabetic or number formats, such as numeric or Roman. Numbered lists can be multi-level, and the items in a list may be a single word, a short phrase, or a paragraph.

Creating Lists

Bulleted lists and numbered lists are both created in the same fashion. In fact, you can change a list back and forth between ordered and unordered formats, in the event that you later decide to change the list type. To start your list, place the cursor where you would like the first bullet to appear, and then click the **Bullets** ☰ ▾ icon in the toolbar. You can click the drop-down arrow to the right of this icon and click **Numbering** if you would prefer to have a numbered list. The icon will change to indicate that the list is now numbered. You can also create a list by using the menu bar. Click **Layout**→

Numbering→Numbering/Bullets to open the **Numbering and Bullets** dialog box. On the **Bullets and Numbering** tab, select the bullet style or number style that you prefer, and then click **OK.** The following figure shows the **Numbering and Bullets** dialog box.
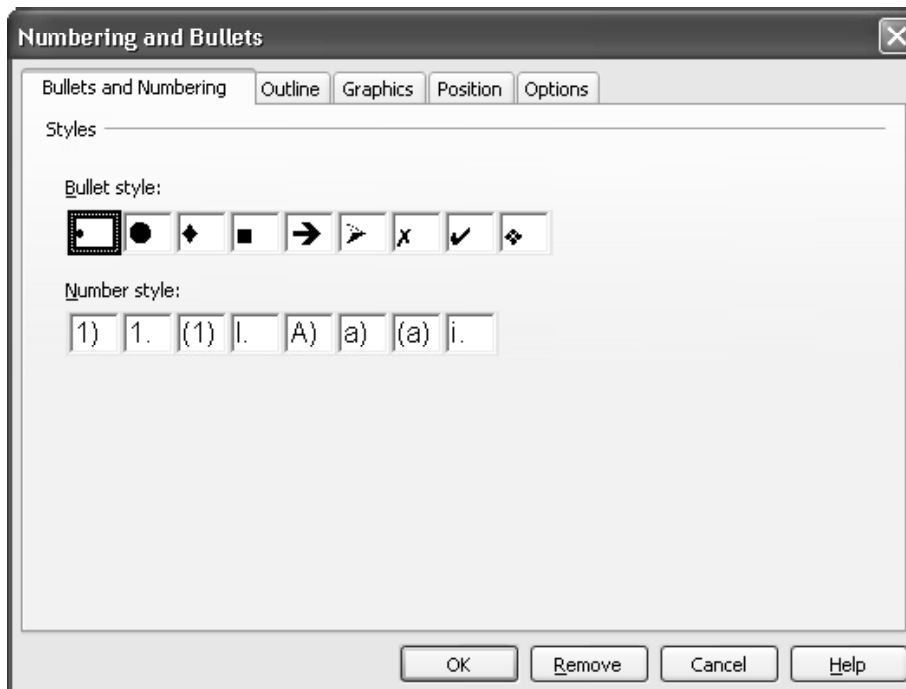
Figure 2-1: *The Numbering and Bullets dialog box*

When you create a list, Lotus Symphony Documents places a single bullet or number at the cursor position. To create additional bullets or numbers, you must enter text for the first bullet, and then press Enter to insert a second bullet or numbered paragraph. If you press Enter before you have entered any text for the bullet, the bullet will disappear and the list will be ended.

Creating a list from existing text

You can also make a list from text that is already in your document. For example, you may have a small set of items in your document that currently are not listed, but you determine that a bulleted list would improve their appearance. To do this, highlight all of the text that you would like included in the list, and then click the **Bullets** button on the toolbar. A list is automatically created for all of the highlighted text.

Formatting Lists

For some lists, a set of unformatted bullets will serve the purpose just fine. However, there are many features in Lotus Symphony Documents at your disposal for formatting complex lists.

Nested lists

A nested list is a list that appears as a subset of a larger list. This is typically the case when one of your bullets has a number of sub-bullets, which need to be presented at a different level than the major bullets. To indent a bullet, place the cursor anywhere in the text for that bullet, and then click the **Down One Level** icon on the toolbar. Conversely, you can click the **Up One Level** icon to move a bullet up a single level. You can add many levels to the list, if even greater complexity is required.

Bullet formatting

By default, any sub-bullets that you move up or down a level will inherit the same formatting as the parent bullet. For example, if you have a numbered list with items 1 through 5, then indenting one of these items will cause that bullet to be labeled "1." This can sometimes cause confusion, especially if you are providing a procedure that requires specific adherence to order. You may want your sub-bullets to be formatted differently, either with a different shape or with a different ordering scheme.

To change the way bullets appear, right-click within the list and click **Numbering and Bullets.** The five tabs in the dialog box contain a number of features available to help you customize your list:

- **Bullets and Numbering:** If you have a bulleted list, you can select the shape you would like the bullets to appear as. For numbered lists, you can choose between numbers, letters (uppercase or lowercase), or Roman numerals.

- **Outline:** On this tab, you can select the appropriate schema for managing the appearance of sub-bullets. Nested lists can appear numbered differently from major bullets for the ease of comprehension. For instance, sub-bullets of numbered list item "3" can appear as "a, b, c, ..." for better clarity.

- **Graphics:** Here, you can elect to make your bullets assume the color and shape of any number of graphics. You can also link to a graphic if you want your bullets to be customized with a specific image.

- **Position:** This tab allows you to specify the spacing of the indents and the alignment of the list.

- **Options:** Here, you can provide different formatting of the list per each level of the list. You can provide special characters for your bullets if desired.

The following figure illustrates a customized, multi-level numbered list. Note that the different levels of the list are indicated with lowercase letters and Roman numerals for better visualization.

Here is how Tom begins the day:
1. Get ready for work
    a. Get out of bed
    b. Get dressed
        i. Put on the following:
            ◆ Pants
            ◆ Shirt
            ◆ Socks
            ◆ Shoes
        ii. Brush teeth
        iii. Brush hair
2. Prepare breakfast
    a. Pour a glass of orange juice
    b. Prepare scrambled eggs
        i. Retrieve a skillet
        ii. Break three eggs into skillet
        iii. Cook for five minutes
3. Get to the office
    a. Drive to the highway
        i. Back out of driveway
        ii. Drive for two miles
        iii. Merge with traffic
    b. Park in the parking garage

Figure 2-2: *A sample multi-level list featuring numbers and custom bullets*

Modifying numbering in a list

There may be occasional situations in which you want a numbered list to begin with something other than the numeral "1." If so, right-click within your numbered list click **Numbering and Bullets**, and click the **Options** tab. In the **Start at** drop-down list, specify the number that you would like the list to begin at. You may also right-click within the list and click **Restart Numbering** to force the numbering to start over again.
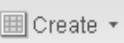
Topic B: Working with Tables

As you create your document, you may encounter a situation in which you want to convey a set of data to the reader. IBM® Lotus® Symphony™ Documents includes a feature that lets you create and adjust tables to accommodate this information. Including information in tables enables you to communicate this data in a consistent and readable format.

Creating Tables

A **table** is a grid-style container used to organize text, data, or pictures, and is made up of individual table cells. In Lotus Symphony Documents, tables contain five columns and two rows by default. You can insert, delete, append, and resize rows and columns; merge and split table cells; or draw a table. You can set various properties for an entire table or for one or more cells.

There are multiple ways to create a table. On the toolbar, click the down arrow next to the **Create** ⊞ Create ▾ icon, and click **Table.** As always, you also have the option of creating a table from the menu bar. Click **Table→ Create Table** to open the **Create Table** dialog box and specify the parameters of your table. You will want to specify the number of columns and rows, although you can modify these attributes after the table has been created. You may also optionally provide a name for the table and specify a column header or row label.

Navigation methods

Although you can click to select table cells to enter text, it is often more effi-cient to use the keyboard techniques in the following table to navigate within a table.

To move	Press this key
One cell to the right	Tab or Right Arrow
One cell to the left	Shift+Tab or Left Arrow
Down one row	Down Arrow
Up one row	Up Arrow

Formatting Tables

Formatting a table is a much richer experience than merely configuring cell sizes and text properties. Lotus Symphony Documents comes with a selection of pre-formatted tables for you to select from. Place the cursor inside any cell within your table, and then click **Table→Instant Formatting.** A list of supplied table formats is displayed alongside a preview window, so that you can choose the most appropriate scheme for your document.

If you do not wish to use any of these supplied designs, you can tailor any of these layouts to suit your needs. You can also format your table completely on your own. Click **Table→Table Properties** to view the properties of your table. Everything that you need to format the table is contained within the tabs of this dialog box. The following figure shows the **Borders** tab of the **Table Properties** dialog box.
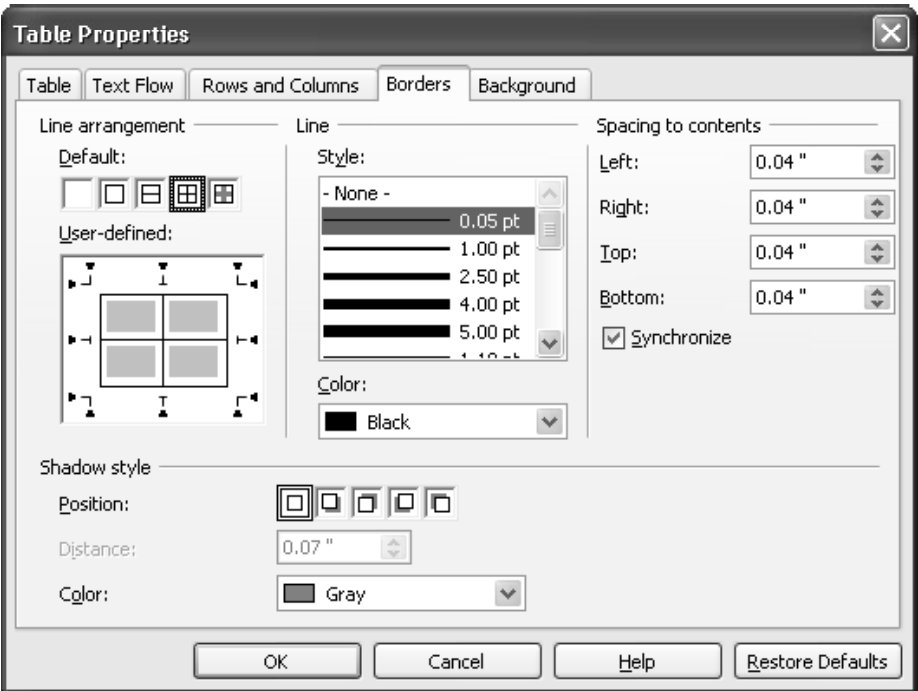
Figure 2-3: *The Borders tab of the Table Properties dialog box*

The following table describes the tab contents of the **Table Properties** dialog box.

Table Properties tab	Allows you to format
Table	● Table name ● Width ● Alignment ● Margin to table spacing
Text Flow	● Manual page or column breaks ● Table appearance across page breaks ● Vertical alignment
Rows and Columns	● Column width ● Headers and labels for columns or rows
Borders	● Table grid line arrangement ● Line style ● Cell content spacing ● Shadow style
Background	● Background graphics ● Background cell color ● Row, column, or table color

In addition to the many formatting options available to you in the **Table Properties** dialog box, you will notice that the **Text Properties** sidebar is also at your disposal. You can apply the same formatting to table text as you can to text outside of a table, including font, size, style, and text color.

Saving a table format

Lotus Symphony Documents also allows you to save your table format as a template for future use. Once you have formatted your table, click **Table→ Instant Formatting,** and then click the **Add** button. Provide a name for your table design, and then click **OK.** Your table is now saved in the list of supplied tables to use any time you like.

Splitting and Merging Cells

For most basic tables, the default table structure will suffice. However, there are circumstances where it is necessary to merge two or more cells into a single cell, for the sake of visual appearance. There are also occasions where you need to split a single cell into two or more cells to accommodate exceptions to the normal data flow of the table. Lotus Symphony Documents offers quick and easy ways to accomplish each of these tasks.

Merge cells

Merging multiple cells into one cell requires that you first select the range of cells to be merged. Highlight the block of cells that you wish to merge, and then click **Table→Cell→Merge.** The individual cells are now combined as one cell, as shown in the following figure.

Figure 2-4: *Table with top three cells merged*

Split cells

In order to split a single cell into multiple cells, first place the cursor within the cell to be split. Click **Table→Cell→Split** to open the **Split Cells** dialog box. Here, you can specify how many cells you would like to split this cell into, and also whether you would like the cells split horizontally or vertically. The following figure below the result of splitting the bottom cell of the first column into two cells.

Figure 2-5: *Table with lower-left cell split horizontally into two cells*

Adding and Removing Rows and Columns

You can specify the number of rows and columns when you first create a table, but it is very likely that you will later discover that a new row or column needs to be added to accommodate extra data, or that you need to add a new category of information. Similarly, you may need to remove rows or columns that are not needed.

Insert a row or column

Lotus Symphony Documents allows you to add multiple rows or columns to your table at once, so that you do not need to perform this action multiple times. You must first place the cursor at the position where you would like to insert a new row or column. From the **Table** menu, roll over either **Row** or **Column** (depending on which you are adding) and then click **Insert.** Within this dialog box, you can specify how many new rows or columns are added, and whether they should be placed before or after the current cell. In the following figure, two new columns will be added after the currently selected cell.
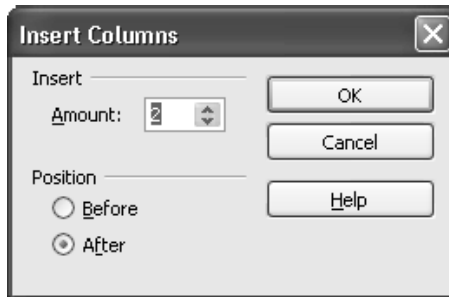
Figure 2-6: *The Insert Columns dialog box*

Delete a row or column

Removing a row or column is a very simple task. Place the cursor within any cell of the row or column that you wish to remove. You are not required to select the entire row or column. From the **Table** menu, roll over either **Row** or **Column** (depending on which you are removing) and then click **Delete.** Your change is immediately reflected in the table.

Activity 2-1: Incorporate Lists and Tables in Lotus Symphony Documents

Before you begin:

If you did not keep the file from the previous activity open, then navigate to C://lotus_ed/Y1300/Documents/Quarterly Report – BasicsL2.odt.

Scenario

In order to complete the Quarterly Report, the Quarterly Review, Goals for the Future and Projects in Progress sections have to be added. The **Quarterly Review** section will the list the departments accomplishments from the preceding quarter. The **Goals for the Future** section will list the top three goals the department is currently working toward. The **Projects in Progress** section will include a table detailing the projects the department is currently working on.

To complete this activity:

● Add the **Quarterly Review** section using a bulleted list.

● Add the **Goals for the Future** section using a numbered list.

● Add the **Projects in Progress** section using a table.

Follow these steps to incorporate lists and tables in Lotus Symphony Documents.

Step	Action
Add the Quarterly Review section.	
1.	In the My Quarterly Report file, click below the **Introduction** section and press Enter. Type `Quaterly Review`
2.	Highlight the section title you just typed. On the **Text Properties** sidebar, in the **Font** section, in the **Font** drop-down list, click **Arial.**
3.	In the **Size** drop-down list, click **14.** In the **Style** drop-down list, click **Bold Italic.**
4.	Click to place the cursor and the end of Quarterly Review and press Enter. On the **Text Properties** sidebar, in **Font** drop-down list, click **Times New Roman.** In the **Size** drop-down list, click **12,** and then in the **Style** drop-down list, click **Regular.**
5.	Type `Here are our accomplishments for the preceding quarter:` and press Enter twice.
6.	Click **Layout→Numbering→Numbering and Bullets.** Under **Styles,** verify that the first bullet is selected under **Bullet style** and click **OK.**
7.	Type `Completed two new internal courses` and press Enter and then press Tab.

Step	Action
8.	Type `Professional Development for Managers` and press Enter. Then type `Communication Skills` and press Enter.
9.	Press Backspace and then click **Layout→Numbering→Numbering and Bullets.** Under **Styles,** select the first bullet under **Bullet style** and click **OK.**
10.	Type `Delivered compliance training to three divisions` and press Enter and the Tab.
11.	Type `Sales` and press Enter. Type **Marketing** and press Enter. For the last bullet type `Executive Team`
Add the Goals for the Future section.	
12.	Click below the **Quarterly Review** section and press Enter. Type `Goals for the Future`
13.	Highlight the section title you just typed. On the **Text Properties** sidebar, in the **Font** section, in the **Font** drop-down list, click **Arial.**
14.	In the **Size** drop-down list, click **14.** In the **Style** drop-down list, click **Bold Italic.**
15.	Click to place the cursor and the end of Goals for the Future and press Enter. On the **Text Properties** sidebar, in **Font** drop-down list, click **Times New Roman.** In the **Size** drop-down list, click **12,** and then in the **Style** drop-down list, click **Regular.**
16.	Type `Here is our list of upcoming goals in order of priority:` and press Enter twice.
17.	Click **Layout→Numbering→Numbering/Bullets.** In the **Numbering and Bullets** dialog box, under **Number style,** click the **1.** style and then click **OK.**
18.	Type `Complete projects in progress as scheduled (see next section)` and press Enter.
19.	Type `Deliver compliance training to remaining corporate divisions` and press Enter.
20.	Type `Deliver Professional Development for Managers to front-line managers`
Add the Projects in Progress section.	
21.	Press Enter three times. Type `Projects in Progress`
22.	Highlight the section title you just typed. On the **Text Properties** sidebar, in the **Font** section, in the **Font** drop-down list, click **Arial.** In the **Size** drop-down list, click **14.** In the **Style** drop-down list, click **Bold Italic.**

Step	Action
23.	Click to place the cursor and the end of Projects in Progress and press Enter. On the **Text Properties** sidebar, in **Font** drop-down list, click **Times New Roman.** In the **Size** drop-down list, click **12,** and then in the **Style** drop-down list, click **Regular.**
24.	Type `This table shows the projects planned for next quarter:` and press Enter twice.
25.	On the main toolbar, click the **Create** drop-down arrow, and click **Table.**
26.	In the **Create Table** dialog box, verify that **Table1** is in the **Name** field.
27.	Set the **Columns** field to `3` and the **Rows** field `5`
28.	Under **Options,** select the **Column Header** check box, and then click the **Table Style** button.
29.	In the **Instant Format** dialog box, under **Format,** click **Blue.** Click **OK** and then click **OK** again to close the **Create Table** dialog box.
30.	In the top row of the table, in the first cell type `Title` In the second cell type `Hours of Training` In the third cell type `Completion Estimate (days)` **Note:** To center the information in a column or row, highlight the column or row and then right-click and click **Align Text→ Centered.**
31.	In the second row of the table, in the first cell, type `Conflict Resolution` In the second cell type `6` In the third cell type `10`
32.	In the third row of the table, in the first cell, type `Negotiating Skills` In the second cell type `10` In the third cell type `15`
33.	In the fourth row of the table, in the first cell, type `Delivering Feedback` In the second cell type `8` In the third cell type `12`

Lesson 2 ■ Incorporating Lists and Tables in Documents

Step	Action
34.	In the fifth row of the table, in the first cell, type TOTALS In the second cell type 24 In the third cell type 37 <table><tr><td>*Title*</td><td>*Hours of Training*</td><td>*Completion Estimate (days)*</td></tr><tr><td>Conflict Resolution</td><td>6</td><td>10</td></tr><tr><td>Negotiating Skills</td><td>10</td><td>15</td></tr><tr><td>Delivering Feedback</td><td>8</td><td>12</td></tr><tr><td>TOTALS:</td><td>24</td><td>37</td></tr></table>
35.	Click **File→Save.**

Lesson Summary

In this lesson, you were presented with a number of tools and features that you can use to enhance the presentation of information in your document. Using lists helps the reader to understand and distinguish between the similarities of related items, while tables help illustrate information for the purpose of making visual comparisons or viewing trends. These add a professional look to your document and help you convey key messages.

Follow-up

In this course, you examined the Lotus Symphony Documents interface. You also created, added text to, edited, and saved a document. Additionally, you enhanced the document by adding lists and tables.

What's Next?

After completing the *Using IBM® Lotus® Symphony™ Documents: Basics* course, you may want to continue with the *Using IBM® Lotus® Symphony™ Documents: Beyond Basics* and *Using IBM® Lotus® Symphony™ Documents: Power User* courses.

Also available are the following courses:

- *Using IBM® Lotus® Symphony™ Spreadsheets: Basics*
- *Using IBM® Lotus® Symphony™ Spreadsheets: Beyond Basics*
- *Using IBM® Lotus® Symphony™ Spreadsheets: Power User*
- *Using IBM® Lotus® Symphony™ Presentations: Basics*
- *Using IBM® Lotus® Symphony™ Presentations: Beyond Basics*
- *Using IBM® Lotus® Symphony™ Presentations: Power User*

Finally, information about the Lotus Symphony product is available at the Lotus Symphony Web site, which is at http://symphony.lotus.com/software/lotus/symphony/home.nsf/home.

Appendix A

Additional Resources

The following additional resources are available for more information on Lotus Symphony Documents:

- Tour: http://symphony.lotus.com/idcontents/pdf/N8T30/start_n8t30.htm

- Demo: http://symphony.lotus.com/software/lotus/symphony/help.nsf/DemoForDocuments

- Tutorial: http://symphony.lotus.com/idcontents/tutorial/en/documents_tutorial/start_documents.htm

- Toolbar Reference Card: http://symphony.lotus.com/idcontents/refcard/en/n8r30_refcarddita-pdf-minimal.pdf

- Keyboard Reference Card: http://symphony.lotus.com/idcontents/refcard/en/n8r30_shortcutdita-pdf-minimal.pdf
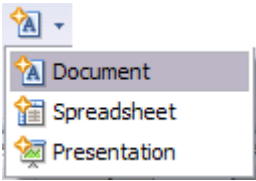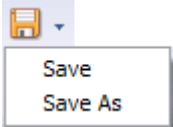
As they are developed, other resources may be added to this location: http://symphony.lotus.com/software/lotus/symphony/help.nsf/home.
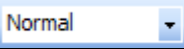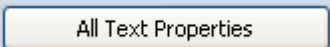
Available Plug-Ins

Extend the value of Lotus Symphony with plug-ins from IBM, partners, and developers. A complete list of all available plug-ins can be found here: http://symphony.lotus.com/software/lotus/symphony/plugin.nsf/home

Moving from Microsoft® Word to IBM® Lotus® Documents

Launch other productivity tools

Menus

Click for more buttons for selected toolbar

Tabs row to access open documents

New Document - Document - IBM Lotus Symphony

File   View   Window   Help

New   New Document   ×

Create   ▼   57%   Default Text   b   i

Universal Toolbar   Editing Toolbar   Main Toolbar   Drawing Toolbar

Ruler

Text Properties

Font: Size:
Times New Roma ▼   12
Style: Font color:
Regular ▼   Default
Background color:
Default ▼

Sidebar can dock or float

Editing area

Effects
Underlining: Color:
None ▼   Default

All Text Properties

Status bar with page and line numbers, page style, zoom factor, and insert, selection, and hyperlink modes

57%   INSERT   Page 1   1 / 1   Ln 1 Col 1   STD   Defaul

Opens dialog box with advanced options

Creating and editing documents
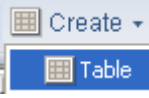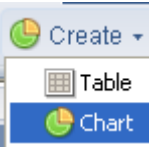
Microsoft Word	Lotus Documents
To open a document, click	Click .
To create a new document, click .	Document / Spreadsheet / Presentation Click .
To create a new doc from a template, click **File→New**, select the template location, and browse for the template.	Click **File→New→From Template.**
To save a document, click .	Save / Save As Click .
To print, click .	Click .
To revise documents, click **Tools→Track Changes.**	Click **Edit→Revisions→Show.**
To show or hide the task pane, click **View→Task Pane.**	Click in the Sidebar and choose **Float** or **Close**, or click **View→Properties Sidebar.**
To spell check, click .	Click .
To customize application behavior, click **Tools→Customize** or **Tools→Options.**	Click **File→Preferences.**

Formatting documents

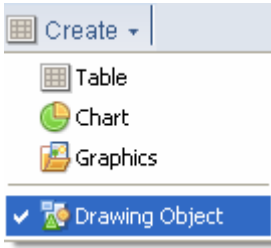| Microsoft Word	Lotus Documents
To change font appearance, click **B**, **I**, or **U**	Click **b**, **i**, or **U**
To apply a style, select one from the **Style** list. Normal ▼	Select one from the **Apply Style** list. Title ▼
To align text, click , , , or .	Click , , or .
To indent or outdent, click or .	Click or .
To change spacing, click ▼.	Click .
To apply other text formats, click **Format→Font.**	Select the format option in the **Text Properties Sidebar** or click All Text Properties .
To apply other paragraph formats, click **Format→Paragraph.**	Select the format option in the **Paragraph Properties Sidebar** or click All Paragraph Properties .
To copy formatting, click .	Click .
To add a note, click **Insert→Comment.**	Click **Create→Note.**

Moving from Microsoft® Word to IBM® Lotus® Documents
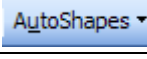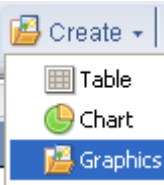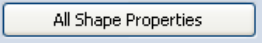
Using lists, tables, and charts

Microsoft Word	Lotus Documents
To create a bulleted list, click .	Click .
To create a numbered list,	Click .
To customize list formats, click **Format→Bullets and Numbering.**	Click .
To create a table, click .	Click Create → Table
To convert text to tables, click **Table→ Convert→Text to Table.**	Click **Table→Change Text to Table.**
To merge or split cells, click or .	Click or .
To enter a formula, Click **Table→Formula.**	Click **View→Formula Input Line.**
To insert a column or row, click **Table→Insert→ Columns** or **→Rows.**	Click or .
To delete a column or row, click **Table→ Delete→Columns** or **→Rows.**.	Click or .
To add borders or shading, click **Format→Borders and Shading.**	Click **Table→Table Properties.**
To sort a list or table, click or .	Click **Table→Sort.**
To create a chart, click **Insert→Object** and click **Microsoft Excel Chart** or **Microsoft Graph Chart.**	Click Create → Table, Chart
To format a chart, double-click the chart.	Right-click the chart and click **Edit.**

Managing document layout

Microsoft Word	Lotus Documents
To change page orientation, click **File→Page Setup.**	Click **Layout→Properties→ Page Properties.**
To create a header or footer, click **View→Header and Footer.**	Click **Layout→Properties→ Page Properties.**
To create custom columns, click **Insert→Columns.**	Click **Layout→Columns.**
To create a section, click **Insert→Break** and choose the section break type.	Click **Create→Section.**

Inserting and formatting graphics

Microsoft Word	Lotus Documents
To display the **Drawing** toolbar, click .	Click Create → Table, Chart, Graphics, ✓ Drawing Object .
To create a text box, click .	Click **T** .
To draw a shape or line, click a shape on the **Drawing** toolbar, or click AutoShapes ▾	Click or any other shape on the **Drawing** toolbar.
To insert a graphic file, click **Insert→Picture→ From File.**	Click Create → Table, Chart, Graphics .
To insert from a graphic gallery, click **Insert→ Picture→ClipArt.**	Click **Tools→Gallery.**
To format a shape, click **Format→AutoShape.**	Click All Shape Properties .
To insert text as a graphic, click .	Click **AB Fontwork** .

Shortcuts

To…	Do this…
Close a document	Click × on the document's tab.
View dynamic Help	Press F1.
Customize the Help search scope	In the Help window, click **Search Scope** and click **New.**
Create a PDF	Select **File→Export as PDF**
Open Print Preview	Press Ctrl+Alt+P.
Search through thumbnails of all open documents	Click , then type in the **Find** field.
Move to any part of the document by page, section, or object	Press F5 to open the **Navigator.**
Open the Style List	Press F11.
Turn on numbering	Press Ctrl+W.
Turn on bullets	Press Shift + F12.
Manage Instant Corrections settings	Click **Tools→Instant Corrections.**

Glossary

drag and drop
The action of clicking an object, holding down the mouse, and dragging it to a different location on the screen.

list
A data grouping method in which the items in the group are displayed one after the other.

Lotus Symphony
A suite of free, OpenDocument Format (ODF)-based software tools that handle the majority of commonly performed office productivity tasks.

nonprinting characters
Document indicators that appear in the text area to indicate the location of spaces, paragraphs, tabs, line breaks, and so forth. These characters are not displayed when you print the document.

ODF
(OpenDocument Format) A file format for office documents such as spreadsheets, presentations, and word-processing documents.

PDF
(Portable Document Format) A file format created by Adobe used for representing two-dimensional documents in a manner independent of the application software, hardware, and operating system.

Properties sidebar
A context-sensitive tool that is displayed to the right of your document and contains a set of the most commonly used formatting options for the given context.

Save As
Menu command that allows you to save a document with a new name, into a new location, or in a new file format.

Save
Menu command that saves the current document with the same name, to the same location, and in the same file format.

table
A grid-style container used to organize text, data, or pictures, made up of individual table cells.

template
A pre-developed page layout from which new pages can be created that feature the same design, pattern, or style.

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