Using IBM® Lotus® Symphony™ Documents: Power User

Student Guide

Using IBM® Lotus® Symphony™ Documents: Power User

Notices

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Table of Contents

Using IBM® Lotus® Symphony™ Documents: Power User

Lesson 1: Working with Large Documents

Appendix A: Additional Resources

About This Course

As your documents increase in length, they begin to get harder to manage for both you and your readers. Imagine trying to use a textbook that has no table of contents, no chapter titles, no index, and no page numbers. This would certainly make the book more difficult to use for both the teacher and the students. These same features that are used to label and quickly locate specific information in a document are available in IBM® Lotus® Symphony™ Documents, so that you can make larger sized documents much easier to navigate.

Larger documents can also make the collaboration process challenging. People who review your document will likely want to make revisions to the text or provide feedback within your document. What happens when multiple people are reviewing your document at the same time? Doing this the old-fashioned way, with hard copies and red ink, could be a long and tedious process. Imagine sitting at your desk and comparing your original document page by page against the hard copies marked up by each reviewer. Lotus Symphony Documents allows this review process to happen electronically, and eliminates the need to search for comments and changes, thus making document collaboration a breeze. In this course, you will become familiar with the features you can use to save time and effort when dealing with larger sized documents.

Course Description

Target Student

This course is designed for IBM® Lotus® Symphony™ end users who will use these materials to learn the power-user 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 features for making large documents easier to use.

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 Microsoft Windows®.

• At least 512 MB of 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.

• Microsoft Windows® XP with SP2 or Microsoft 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
Annual Report with Tables	Annual Report with Tables.doc	Document to be used in the activity for this course.

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 course 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.

Working with Large Documents

- ■ **Topic A:** Working with Large Documents
- ■ **Topic B:** Collaborating on Documents
- ■ **Topic C:** Using Navigators

Introduction

IBM® Lotus® Symphony™ Documents is much more than a word-processing program. It can be used to save documents in a variety of other file formats, to collaborate on complicated business documents, and to manage how documents are accessed and distributed.

When dealing with larger sized documents, the collaboration process can be difficult. How are you to manage revisions that are made to your document when multiple parties are reviewing it at the same time? How can you make your document easier to navigate for other reviewers? Lotus Symphony Documents is equipped with a robust feature set that can allow you to accurately manage revisions to large documents and make documents easier to navigate through.

After completing this lesson, you should be able to:

● Install and use optional plug-ins.

● Explore the mail merge feature of Lotus Symphony Documents.

● Explore the Form Navigator function in Lotus Symphony Documents.

Topic A: Working with Large Documents

Over the course of completing your document, it is very likely that others will want to review it. As the document gets larger, it can become increasingly difficult to remember where specific sections of text were located within the document. Lotus® Symphony® Documents™ allows you to add features to your document such as an index, a table of contents, and footnotes to make the document easier to navigate and revisit at another time.

Importing a File

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 Lotus Symphony Documents. Lotus Symphony Documents is a program designed to let you create, edit, share, and save word-processing documents.

Lotus Symphony Documents is compatible with other word-processing programs, including Microsoft® Word. Files that have been created in Word can be viewed and edited in Lotus Symphony Documents. The process for opening a file not originally written in Lotus Symphony is the same as for opening a normal Lotus Symphony Documents file. Click the **Open** button on the toolbar, and then in the **Open** dialog box, verify that **All Files** is selected in the **Files of type** drop-down list.

The following figure shows the options available in the **Files of type** drop-down list.
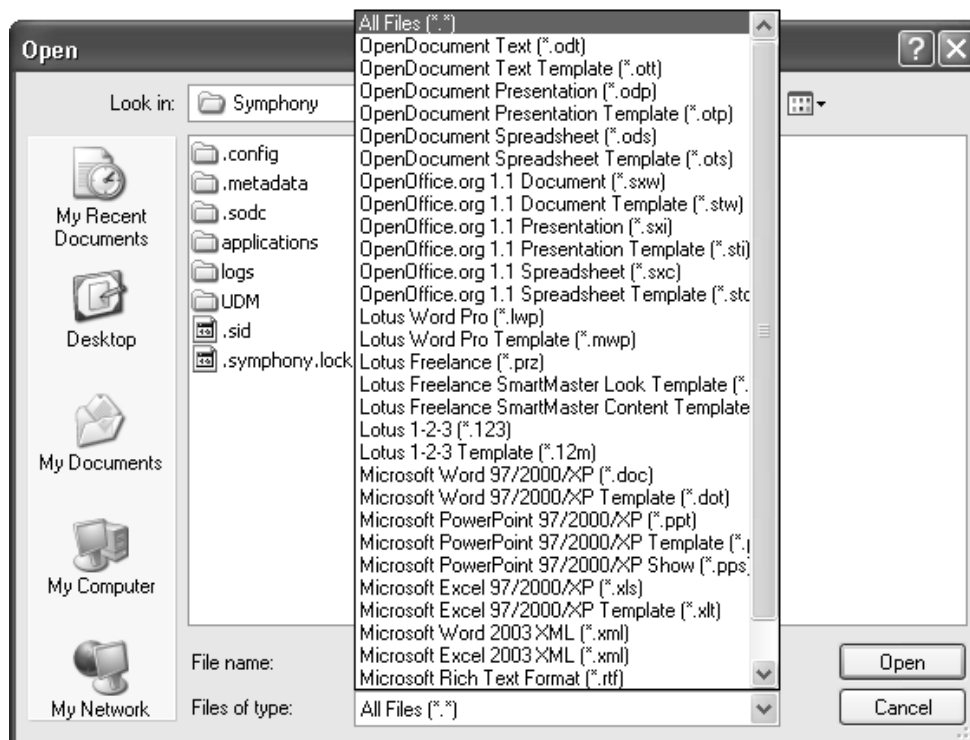
Figure 1-1: *Lotus Symphony Documents supported file types*

Supported document types

Document types that may be opened 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 few most recent files you have 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 choose the file you want to open.

Exporting a File

Not only does Lotus Symphony Documents allow you to open files written in other formats, but it permits you to save your file in various formats. When you use the **Save As** command, the default .odt extension is applied to your file, thereby saving it as a Lotus Symphony Documents file. However, you have the option of saving your document in other formats. In the **Save as type** drop-down list, click the appropriate format to save your document.

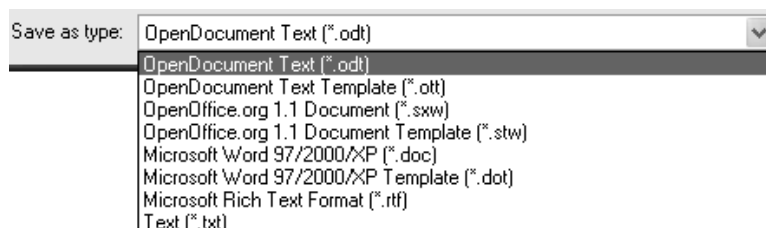The following figure shows the options in the **Save as Type** drop-down list.

Save as type:	OpenDocument Text (*.odt)	∨
	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 1-2: *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.

Exporting documents to PDF format

A unique feature of the Lotus Symphony suite is the ability to export a document directly to 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.

Inserting Calculations in a Document

Lotus Symphony Documents allows you to perform mathematical calculations in your document and immediately display the results. This is one of the many robust features that differentiates Lotus Symphony Documents from other word-processing programs.

Calculations are performed and entered into your document via the **Formula Input** toolbar. Click **View→Formula Input Line** to display the **Formula Input** toolbar, or press F2 to toggle between showing and hiding the toolbar. Place the cursor to the right of the equals sign on the toolbar, and enter your calculation, for example, `365/7` Click the check mark icon in the toolbar to calculate the result, or press Enter. The toolbar disappears, and the result is placed at the cursor position of your document.

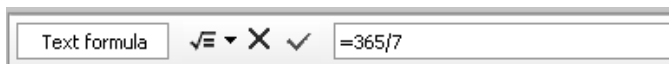The following figure shows the Formula Input toolbar.

Figure 1-3: *The Formula Input toolbar*

Using predefined functions

A set of predefined functions is available for you to use. With the **Formula Input** toolbar open, click and hold the formula icon, and select a formula. For example, you can click **Statistical Functions→Mean** to have Lotus Symphony Documents calculate the average of several figures for you. This requires you to enter a series of numbers, each separated by a vertical slash | character. The result is placed into your document.

The following figure shows the Mean statistical formula.

Figure 1-4: *The Mean statistical function with three values entered*

Editing a calculated result

After you have inserted a calculated result into your document, you can make changes to it instead of entering the formula all over again. You can tell that a number is the result of a calculation by rolling the mouse pointer over it. If the number was calculated with the **Formula Input** toolbar, a tooltip will appear and indicate what numbers were used as input. Double-click the calculated number, and the **Edit Fields** dialog box appears. In the **Formula** text box, you can make adjustments to your formula and then click **OK** to have it re-calculated.

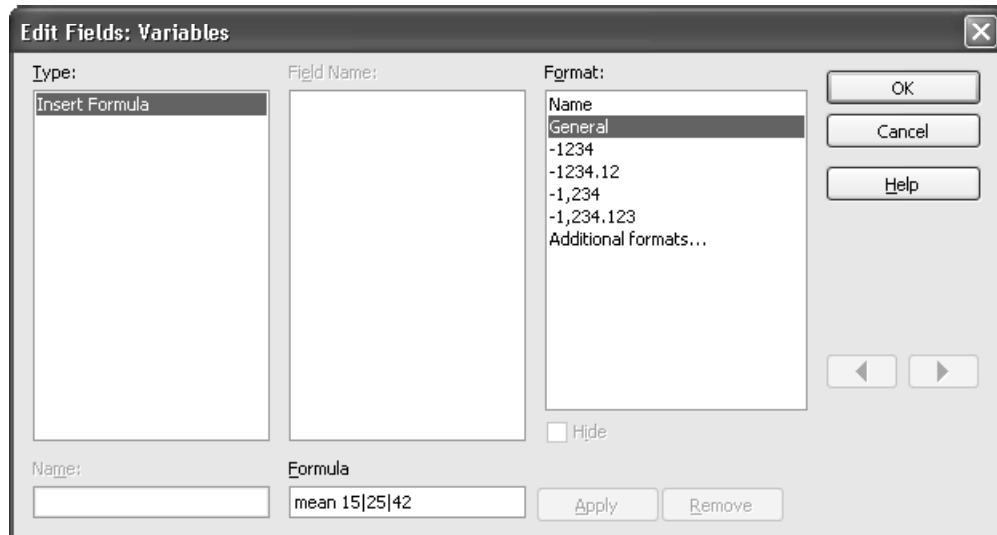The following figure shows the **Edit Fields** dialog box.

Figure 1-5: *The Edit Fields dialog box*

Inserting Footnotes or Endnotes

Footnotes refer to additional information about a topic at the bottom of a page, and **endnotes** refer to supplemental information at the end of the document. To add a footnote or endnote, place the cursor where the text should be flagged in the document body, and then click **Create→Footnote.** In the **Create Footnote** dialog box, in the **Type** section, you can select whether you would like to add a footnote or endnote.

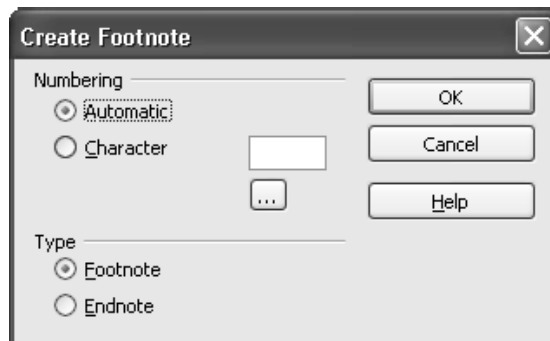The following figure shows the **Create Footnote** dialog box.

Figure 1-6: *The Create Footnote dialog box*

Once you have added a footnote or endnote, you will notice two changes to your document. First, a superscript character, or **anchor,** is placed at the cursor location, indicating that supporting information is location at the bottom of the page or at the end of the document. Second, an area of text is

added to your document. Again, this depends on the type of note added. Adding a footnote will create a text region area at the bottom of the page where the anchor was placed. Endnote regions are always added to the end of the document, regardless of the location of the endnote anchor.

The following figure shows a paragraph containing a footnote and endnote.

We significantly strengthened our balance sheet this year, in large part due to the completion of two common stock transactions that raised aggregate gross proceeds of $18.75 million of equity capital from two strategic investors.[1] As a result, all the Company's long-term debt was retired, all convertible preferred stock was either retired or converted into common stock, and all historical accrued but undeclared dividends on convertible preferred stock were forgiven.[i] Additionally, the Company secured a $13 million revolving credit facility that is available to fund new initiatives.

[1] All financial details can be found in the auditor's fourth-quarter report.

Figure 1-7: *A paragraph containing a footnote and endnote*

By default, footnotes are automatically numbered as numerals (1, 2, 3…) while endnotes are lowercase Roman numerals (i, ii, iii…). This can be changed by manually specifying a character in the dialog box when adding the note, but it is recommended that you leave the automatic numbering as default. With automatic numbering enabled, Lotus Symphony Documents will automatically change the anchor numbers and synchronize the numbering to your footnotes and endnotes any time you add or remove a note.

Editing a footnote or endnote

Footnote and endnote text can freely be edited at any time. You can locate the location of the note text itself within your document, click within the note, and make changes to the text. However, you can also click the superscript note anchor to link you directly to the note corresponding to that reference. If you wish to delete a footnote or endnote, locate the note anchor, and then delete it. The note text will automatically be deleted as well.

Creating a Table of Contents

If you are working with a larger document, it may be helpful to add a table of contents at the beginning of the document to help your readers quickly locate the information they are looking for. Lotus Symphony Documents provides a very fast and simple way to automatically generate a table of contents at the current cursor position of your document.

There are a few steps you can take to ensure that the word processor is arranging the hierarchy correctly. A hierarchy is a classification of items according to their relationship to each other and their common characteristics to larger categories. It will benefit you to apply specific heading styles to

the various page and section headings throughout your document. Major sections should have a **Heading 1** style applied to them, while their sub-categories should have a **Heading 2** style. Further sub-sections of these sub-categories would have a **Heading 3** style, and so forth.

In the following figure, the default **Heading 1** style is applied to the **To Our Stockholders** text, while the default **Heading 2** style is applied to **Mile-stones.**

To Our Stockholders

Milestones

This fiscal year was truly a foundation-building year for WWCorp, Inc. Fueled by a

continued strong economy and robust commercial real estate markets, we significantly

increased our revenues and earnings, strengthened our balance sheet, and put in place a

Figure 1-8: *Default Heading 1 and Heading 2 styles*

Once this preparation work is done, you can generate an accurate table of contents within seconds. Place the cursor where you would like the table to be generated. Click **Create→Index and Table→Indexes and Tables.** In the **Insert Index/Table** dialog box, verify that **Table of Contents** is displayed in the **Type** drop-down list. You can also provide a name for the table of contents, specify the range of pages to cover, and how many levels deep to provide entries.

The following figure shows an example of a table of content with three levels displayed.

Table of Contents

To Our Stockholders..1
    Milestones..1
    Legal Issues...1
    Strategy...2
Review of Year Results..3
    Financial Overview...3
        Net Income..3
        Bottom Line...4
Market Forecast..5
    Residential..5
    Corporate..6
    Rental...6
    Relocation...6

Figure 1-9: *Table of contents with three levels shown*

Updating the table of contents

By default, the table of contents that you generate is read-only and cannot be manually changed. This can be disabled when you first create the table of contents. In the **Insert Index/Table** dialog box, clear the **Protected against manual changes** check box if you would like to be able to make manual edits to the table after it has been generated.

If changes are made to your document, and you have not many any manual changes to the table of contents, Lotus Symphony Documents provides an easy way to update it to reflect the most recent changes to your document. Place the cursor within the table of contents, right-click within the table, and click **Update Index/Table.** The table of contents is immediately updated.

Deleting the table of contents

If you have set the table of contents to not allow manual changes, you will not be able to delete the table of contents by selecting it and pressing the Backspace or Delete keys. These are considered to be manual changes and are not permitted. Instead, place the cursor within the table of contents, right-click within the table, and click **Delete Index/Table.** The table of contents is removed.

Creating an Index

Lotus Symphony Documents allows you to create an index for your document. An **index** is an ordered list of key terms or phrases that appear throughout your document. In larger documents, this helps users to locate a specific term to view information relevant to that term.

As with the table of contents, an index can be generated quickly and easily. Place the cursor where you would like to create an index, and then click **Create→Index and Table→Indexes and Tables.** In the **Type** drop-down list, click **Alphabetical Index** to generate an index that lists all terms alphabetically. You can select whether or not this index may be manually edited as well. If you want the index to ignore the case of the term, clear the **Case sensitive** check box.

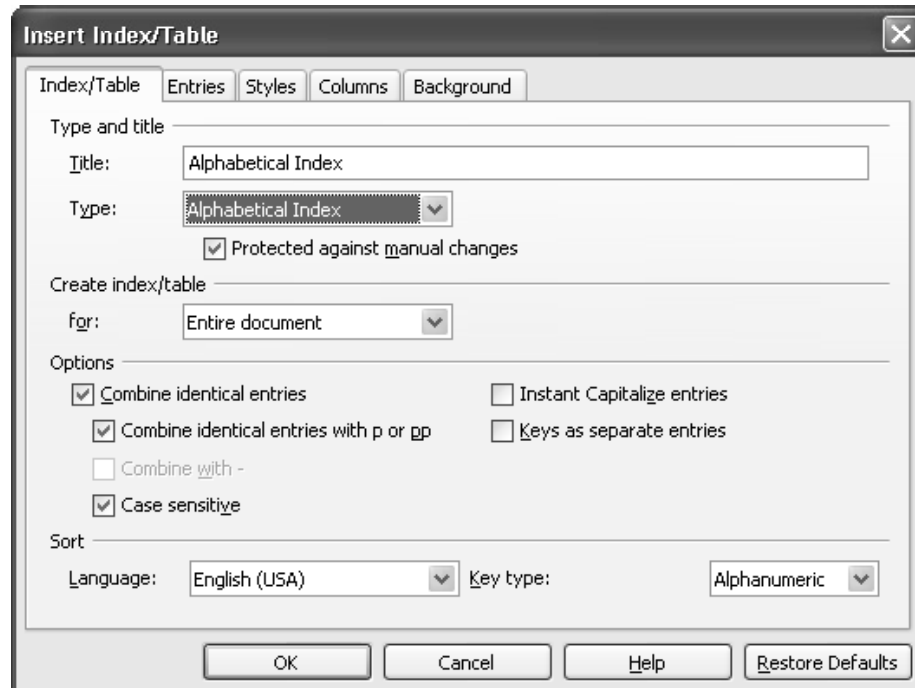The following figure shows the **Insert Index/Table** dialog box.

Figure 1-10: *The Insert Index/Table dialog box with Alphabetical Index selected*

Adding terms to the index

Generating an index will not produce very much for you if you have not first added terms to the index. Prior to creating the index, you must first sift through your document and identify all key terms that you would like to be included in your index. When you have located a term to be added, double-click the word to select it, or highlight the text by clicking and dragging. Click **Create→Index and Table→Entry** to open the **Insert Index Entry** dialog box. It is important that you configure these options correctly to ensure that your index is built properly.

The following table describes the options and fields.

Option/Field	Description
Entry	Enters the term in this text box to the index.
1st key	Makes the current selection a subentry of the word that you enter here. For example, if you select **cold,** and enter `weather` as the first key, the index entry is **weather, cold.**

Option/Field	Description
2nd key	Makes the current selection a sub-subentry of the first key. For example, if you select **cold,** and enter `weather` as the first key and `winter` as the second key, the index entry is **weather, winter, cold.**
Main entry	Makes the selected text the main entry in an alphabetical index. The productivity tools display the page number of the main entry in a different format than the other entries in the index.
Apply to all similar texts	Automatically marks all other occurrences of the selected text in the document. Text in headers, footers, frames, and captions is not included. You cannot use this function for an entry that you entered manually in this dialog.
Match case	Distinguishes between uppercase and lowercase characters.
Whole words only	Searches for whole words that are identical to the search text.

Editing and deleting index entries

Unless you have enabled manual revisions to your index, you will need to relocate the indexed entries within your document and then edit or delete them. This would be nearly impossible without some mechanism to visually identify the terms you have tagged to be indexed. Fortunately, Lotus Symphony Documents provides such a feature. Click **View→Field Shadings** to turn on field shading for elements in your document. All terms that are indexed in your document will be shaded with a grey background to make them stand out.

The following figure shows a paragraph with field shadings enabled.

This fiscal year was truly a foundation-building year for WWCorp, Inc. Fueled by a continued strong economy and robust commercial real estate markets, we significantly increased our revenues and earnings, strengthened our balance sheet, and put in place a solid platform from which we can now aggressively implement our long-term growth strategy.

Figure 1-11: *Paragraph with field shadings enabled*

Place the cursor within the index term that you wish to edit or remove, and then right-click and click **Index Entry.** In the **Edit Index Entry** dialog box, you can adjust the properties of the entry, or click **Delete** to remove it from the index. The back and forward arrows can help you quickly pass between the currently indexed terms in your document.

Note: Deleting a term in this dialog box does not delete it from your document. It will delete it only from the index.

Updating the index

After you have made changes to your index, you can quickly apply all revisions to your index. Right-click within your index and click **Update Index/ Table** to have Lotus Symphony Documents reflect all revisions you have made to the indexed terms in your document.

Securing a Document

Lotus Symphony Documents provides a feature that lets you assign a password to a document to prevent users from making unauthorized changes to it. When a user attempts to open a document that has been password protected, he or she will be prompted to provide a password. The document is opened only when the password is correctly entered.

To protect a document with a password, click **File→Security-→Document Protection.** You will be prompted to type a password, and then confirm it by typing it a second time. The password must be at least five characters in length. Any time a user (yourself included) wishes to open this document from now on, this password must be entered.

The following figure shows the **Password** dialog box.
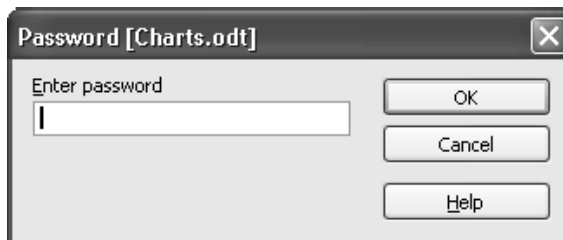
Figure 1-12: *The Password dialog box*

To remove file protection from your document, open the document and then click **File→Security→Document Protection.** Delete the text from both password fields and click **OK.**

Installing and Using Plug-ins

Plug-ins are optional add-ons that are created by IBM, partners, and developers. These plug-ins extend the value of Lotus Symphony by providing additional functions that are not included with the basic Lotus Symphony installation. Follow the steps to install a plug-in:

1. Ensure that Lotus Symphony version 1.1 is installed on your machine, and upgrade if necessary.
2. Start Lotus Symphony.

3. From the main menu, click **File→Application→Install.** The Install wizard is displayed.

4. On the Feature Updates page, select **Search for new features to install,** and click **Next.**

5. On the Application Locations page, click **Add Zip/Jar Location.**

6. Navigate to the location of the update (a zipped file, which contains features, plug-ins folders, and one site.xml file), click **Open,** and then click **Finish.**

7. On the Search Results page, select the feature, and click **Next.**

8. On the Feature License page, select **I accept the terms in the license agreements,** and click **Next.**

9. Click **Finish** to begin the installation.

10. After the installation is finished, close Lotus Symphony and then restart it.

There are many plug-ins available for IBM Lotus Symphony. Please visit http://symphony.lotus.com/software/lotus/symphony/plugin.nsf/home to see a comprehensive list of available plug-ins. The plug-ins that are recommended for Lotus Symphony Documents include **IBM Lotus Symphony Diff** and **IBM Lotus Symphony Xforms.**

Lotus Symphony Diff plug-in

The **IBM Lotus Symphony Diff** plug-in adds capabilities to compare two document files with simple text, marking differences with different colors. Documents are compared at the paragraph level. A modified paragraph is marked with a blue color, a deleted paragraph is marked with a red color, and an added paragraph is marked with a purple color. The comparison is based on the original file.

The plug-in package name is **com.ibm.productivity.tools.sample.diff.updatesite.zip.** It contains the updatesite package ready to be deployed to Lotus Symphony. Refer to the **Readme.odt** zip file for more information.

Lotus Symphony Xforms plug-in

ODF documents may contain XFORM data, which can be used to embed structured data from a database or XML files. You are able to operate on a specific part of these structured data. The **IBM Lotus Symphony Xforms** plug-in enables you to directly operate the XFORM data in an ODF document, which increases productivity for users.

Topic B: Collaborating on Documents

Your document may go through many rounds of reviews, which could result in the creation of multiple document versions. People who review your document will likely want to offer you feedback by adding comments or making revisions to the text. However, without a system in place to track or manage comments, it can be difficult to determine which changes were made by each reviewer. IBM® Lotus® Symphony™ Documents offers features that help you collaborate with peers. By using change recording, adding comments, and managing revisions, you can ensure that your document is always current and incorporates feedback from all reviewers.

Recording Changes

It is very rare that a document does not get reviewed or revised by another party at some point over the course of its creation. Lotus Symphony Documents allows you to enable the recording of changes as they are made in a document, so that another party can quickly determine what was changed from one version to the next. This eliminates the need to open two separate versions of the same document and compare them line by line in order to discover what was changed.

To enable change recording, click **Edit→Revisions→Record.** Certain changes in your document are not recorded, such as changing tab stops, page margins, or other document-related properties. Change recording will, however, make note of any text additions, deletions, alterations, and other various formatting. For example, when you delete a word from a document with change recording enabled, the word will not physically be removed. Rather, the word will be highlighted in red with a strikethrough, to indicate that it was deleted. Similarly, text that has been added will be represented with a red underline.

The following figure shows a paragraph with change recording enabled.

To put the year in <u>broader</u> perspective, this year marked the Company's ~~5ᵗʰ~~<u>fifth</u> consecutive year of profitability after a difficult period in the beginning due to extremely challenging market conditions. Rather than simply ride the wave of a recovering real estate marketplace and reap short-term rewards, we ~~have~~ worked diligently during the year to take steps that will position the Company for continuous, long-term growth.

Figure 1-13: *A paragraph with change recording enabled*

The default behavior for displaying changes to the document can be customized. Click **File→Preferences,** and then navigate to **IBM Lotus Symphony→Lotus Symphony Documents→Changes.** Here, you can modify the way that Lotus Symphony Documents will flag changes that have been made to your document.

Accepting and Rejecting Changes

The benefit of recording the changes made to a document is the ease in which another person may review these revisions. Instead of comparing documents on a line-by-line basis, Lotus Symphony Documents calls attention to all text and text-formatting changes to the document.

When you are ready to review the changes made by another reviewer, open the document and click **Edit→Revisions→Accept or Reject.** In the **Accept or Reject Changes** dialog box, a list of all changes to the document is provided.

The following figure shows the **Accept or Reject Changes** dialog box.
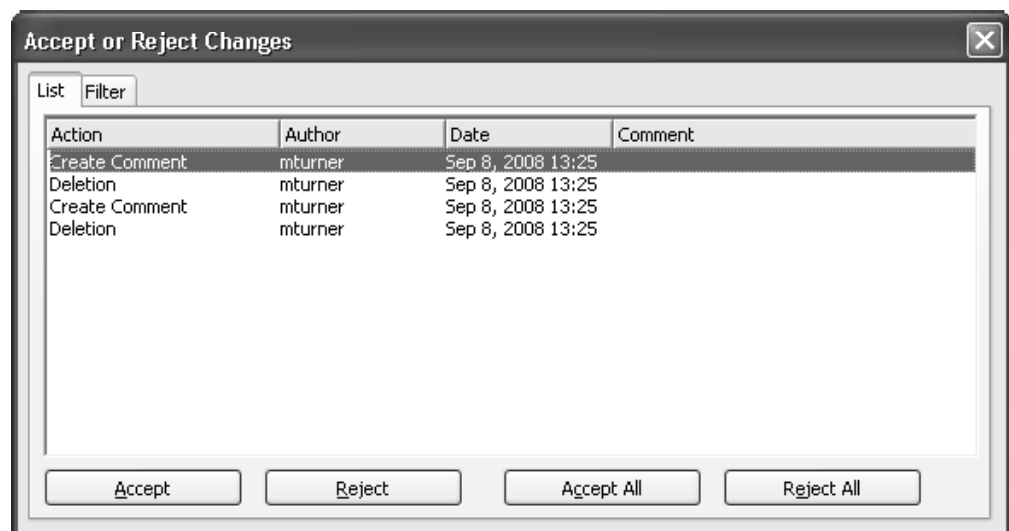
Figure 1-14: *The Accept or Reject Changes dialog box*

The actions that you can take are provided at the bottom of the dialog box. The following table describes the results of those actions.

Action	Result
Accept	Accepts the currently selected change in the list above and removes the change highlight in the document.
Reject	Rejects the currently selected change in the list above and places the original text in the document.
Accept All	Accepts all changes made to the document at once, and removes all change highlighting.
Reject All	Rejects all changes made to the document, and removes all change highlighting.

On the **Filter** tab of the dialog box, you can narrow your search of specific changes to the document. This is especially helpful when the document has been through multiple reviews since you last saw it. You can filter the recorded changes by specifying a range of dates, sorting by author, by action, or by any comments that have been entered.

Using Comments

Comments provide a way for you and others to communicate with each other within the document, but without adding text to the content of the document itself. The benefit of this is that the comments travel along with the document itself and are not lost or misplaced in long e-mail chains. Comments are marked with the name of the user who has entered the comment, and they are also timestamped to indicate when the comment was made.

A comment may be added only to text that has been changed in the document, with change recording enabled. The purpose of the comment is to provide an explanation as to why the change was made. You can insert a comment by placing the cursor within the changed text, and click **Edit→ Revisions→Comment.** In the **Create Comment** dialog box, you may provide a short message about the change. This comment will be visible when another reviewer opens the document and accepts or rejects changes. It will also be displayed any time the mouse is rolled over that particular change.

The following figure shows the **Create Comment** dialog box.
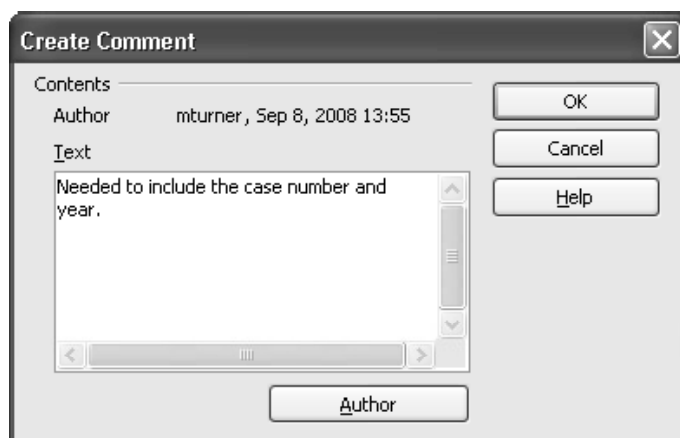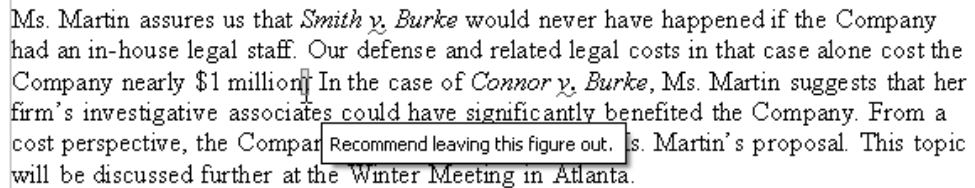
Figure 1-15: *The Create Comment dialog box*

Comments vs. notes

It is important to be aware of the difference between a comment and a note. A comment may be applied only to a change that has been made to a document with change recording enabled. A note, on the other hand, may be made anywhere in the document and does not need to be associated with any particular changes.

To add a note to your document, place the cursor where you would like to add a note, and click **Create→Note.** Provide the text to be displayed in your note, and click **OK.** A small yellow marker will indicate the presence of a note in the document. This note text is visible when a user rolls over the note. You can double-click the note marker at any time to edit it, or click the note and press Delete to remove it.

The following figure shows note text.

Ms. Martin assures us that *Smith v. Burke* would never have happened if the Company had an in-house legal staff. Our defense and related legal costs in that case alone cost the Company nearly $1 million. In the case of *Connor v. Burke*, Ms. Martin suggests that her firm's investigative associates could have significantly benefited the Company. From a cost perspective, the Compan| Recommend leaving this figure out. |s. Martin's proposal. This topic will be discussed further at the Winter Meeting in Atlanta.

Figure 1-16: *The note text is displayed when rolled over*

Caution: It is important that you do not highlight text before adding a note. The yellow note marker will overwrite any selected text. Instead, place the cursor to mark the location of the note without highlighting any text.

Merging Document Versions

In order to save time, it is sometimes necessary to have multiple parties review a document and record changes all at the same time. When a document has been edited by more than one person, Lotus Symphony Documents allows you to merge the edited copies into the original. The only requirement is that the documents differ only and exclusively in the recorded changes; all other original text must be identical. This means that multiple people cannot suggest conflicting edits to the same original piece of text.

Open the original document into which you want to merge all copies, and then click **Edit→Revisions→Merge Document.** A file selection dialog box is displayed. Select the copy of the document to merge into the original. If there have been no subsequent changes to the original document, the copy is merged into the original. If changes have been made to the original document, you cannot merge the copy into the original.

Performing a Mail Merge

Documents that you create may need to be personalized or individually customized per each recipient. This would normally require you to create a separate document for each recipient, and then individually print these documents one by one. As the number of recipients increases, so does the amount of time required to personalize and print all documents.

Lotus Symphony Documents has a feature called **mail merge,** which transforms this highly mundane project into a quick and easy task. The mail merge feature allows you to enter placeholder fields within a document, which are then populated automatically with values. These values are listed in a separate source file that you can create yourself if necessary or specify within Lotus Symphony Documents.

For example, suppose that you would like to send acceptance letters to 50 people who were accepted into an educational program. Instead of creating and printing 50 separate documents, you can draft a single document and use placeholder variables for each recipient's name and address. A list of names and addresses can be added from a source file, which can be one of three types:

● Lotus Symphony Spreadsheets (.ods)

● IBM Lotus Notes contacts (.nsf)

● Comma-separated values (.csv)

The following figure shows a sample source file that is an ordinary IBM® Lotus® Symphony™ Spreadsheets file, in which categories have been made for each placeholder that will be needed in the document. Each row of the source file is a recipient for this letter.

	A	B	C	D	E
	First Name	**Last Name**	**Address**	**CityState**	**Zip**
	Michael	Smith	123 Main Street	Rochester, NY	14623
	Timothy	Jones	4652 East Avenue	Portland, OR	97201
	Susan	Lake	91 William Circle	Tuskegee, AL	39083

Figure 1-17: *A Lotus Symphony Spreadsheets mail merge source file with three entries listed*

To begin creating your mail merge batch, you will need to define the source of the data. In Lotus Symphony Documents, click **Tools→Mail Merge.** A pane appears to the left of your document. Expand the **Select Recipients** category if necessary, and then click **Browse.** Navigate to the data source file on your computer that contains the placeholder categories as well as the values. In our example, the Lotus Symphony Spreadsheet file shown in the previous figure has been selected. In the **Insert Fields** section of the mail merge pane, notice that the placeholder fields listed translate directly to the column headings in the source file.

The following figure shows the **Insert Fields** placeholders.
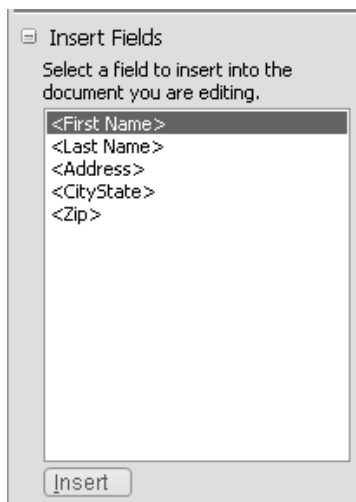
Figure 1-18: *The Insert Fields placeholders*

You can now begin inserting these placeholders into your document. Position the cursor at the desired location, select the placeholder you wish to add, and then click the **Insert** button. The placeholder is inserted into your document, and is indicated by surrounding brackets. Continue to add each field appropriately. Moving along with our example, each placeholder has been positioned into the document as illustrated in the following figure. Note that fields may be used more than once.

Figure 1-19: *Placeholder positioning within a document*

Note: Note that any time, you can expand or collapse the mail merge pane by clicking **Tools→Mail Merge.**

Preview the mail merge

Since your list of recipients is likely to be substantial, you will want to preview your mail merge to confirm that you have correctly mapped each field in the correct location, and that the individual values are being inserted accordingly. Open the mail merge pane if it is not already open, click the **Finish Merge** button at the bottom of the pane, and then click **Preview.** Within the preview window, notice that a list of recipients is displayed on the

left. You can select or clear any of the check boxes to exclude specific recipients when you print this batch. As you click the **Previous Recipient** and **Next Recipient** icons on the toolbar, notice that the document changes automatically to reflect the values of the selected entry.

The following figure shows a mail merge print preview.
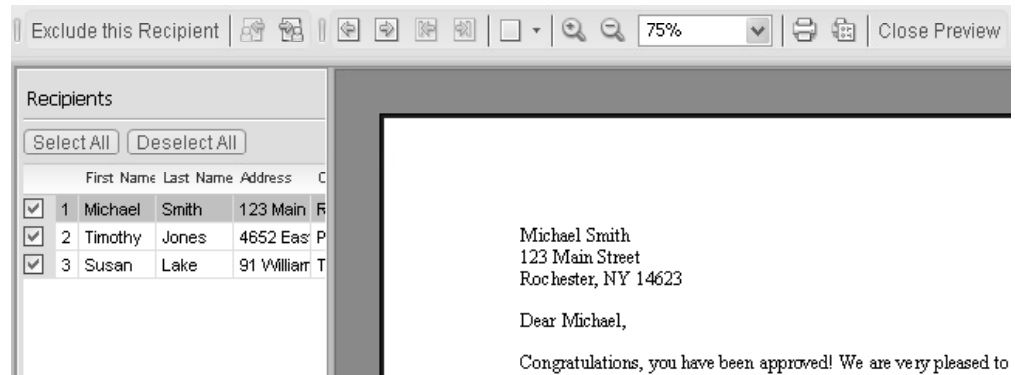
Figure 1-20: *The mail merge print preview*

Printing a mail merge

When you are satisfied with your mail merge template, click the **Finish Merge** button at the bottom of the pane, and then click **Print.** In the **Mail Merge – Print** dialog box, select which recipients to print documents for, select how to print the document per recipient, and then click **OK.** Your document will be printed for all selected recipients in a single batch.

Topic C: Using Navigators

IBM® Lotus® Symphony™ Documents allows you to create rich documents that contain a variety of visual elements in addition to text. Large documents may include an assortment of text formatting, graphics, tables, lists, and other objects. When reviewing a large document, it may be cumbersome to search through the entire document to locate a specific object that you want to revisit. Lotus Symphony Documents has a built-in Navigator function that sorts all document objects into groups and allows you to quickly locate any element of the document from a single pane.

Navigate Through a Document

Finding specific sections or visual elements in a smaller document is usually never an issue. However, when you are working with large documents, it can be difficult to comb through each page to locate a specific paragraph, table, graphic, note, or hyperlink. Lotus Symphony Documents includes a very useful feature called the **Navigator,** which can be used to quickly locate such items within a document.

The many tools available within the Navigator can be accessed by clicking **Edit→Navigator.** This opens the **Navigator** floating toolbar, which can be freely positioned by default. It may be docked by pressing CTRL and dragging it to any edge of the document, and undocked by pressing CTRL and double-clicking the toolbar.

Inside the Navigator, you can quickly jump to various elements of your document. The icons listed in the content portion of the toolbar describe the components of your document that you can locate. The expand icon indicates that there are components within that category. For example, in the following figure, there are one or more headings, tables, graphics, OLE objects, indexes, and notes within this particular document.
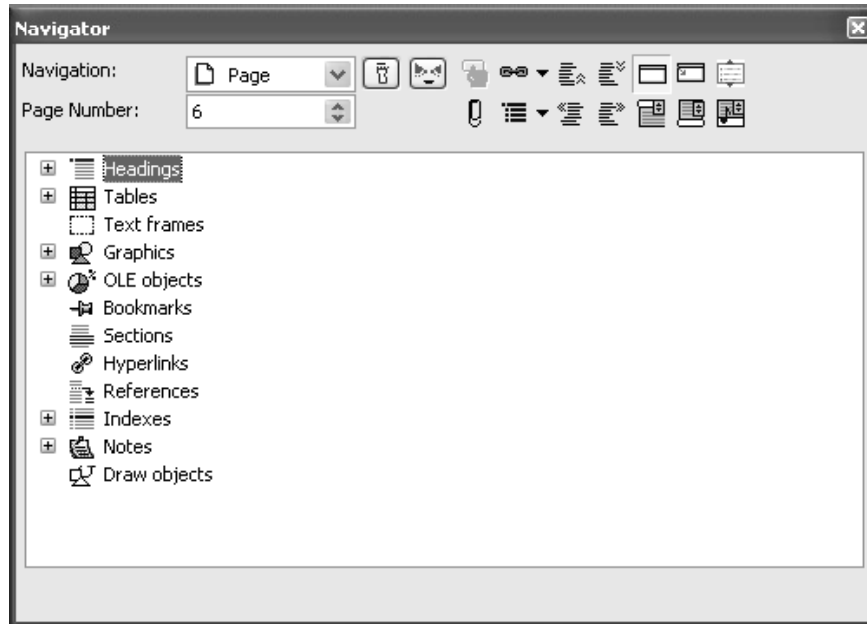
Figure 1-21: *The Lotus Symphony Documents Navigator*

You can expand any of these categories to view all occurrences of these elements within the document. For instance, expanding the **Tables** group will show the names of all tables located in your document. Double-clicking a table in this list will take you directly to that table within the document itself. This is very useful for locating the position of notes within a large document, as the indicators are small and easy to miss. Within the Navigator, you can expand the **Headings** category to view a hierarchy of the document structure. Again, double-clicking any of the items listed here will bring you to the location of that heading within the document.

The Form Navigator

Forms are templates that include special content controls to simplify data entry for a user. Forms can include controls such as check boxes, drop-down lists, or placeholder instruction text that a user can replace with a single click.

Within the **Navigator** toolbar, there is a built-in function to manage any forms and form controls within your document. Click the **Form Navigator** button to open the floating **Form Navigator** toolbar. This toolbar provides a means for viewing the various forms that you are using in your document. In the following figure, the **Standard** form has three form controls added to the document: an option button, check box, and time field control.
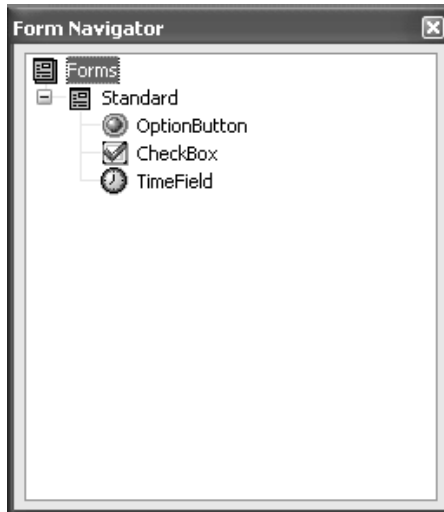
Figure 1-22: *The Form Navigator*

Provided that you have already manually added these optional form controls to your document, you can manage the properties of these controls in the Form Navigator. The properties can be configured by right-clicking a specific control and clicking **Properties** in the pop-up menu. On each of the tabs shown of the dialog box for that control, you can configure the control's parameters. The following table describes these tabs.

Control Properties tab	Description
General	Generic and physical characteristics of the control, including name, label, tab order, text properties, color, and border.
Data	Data-related attributes, including binding, expression, constraint, calculation, and data type.
Events	Any actions that should trigger specific events when the control is interacted with.

Note: The majority of Lotus Symphony Documents users will likely not be adding form controls to documents, and thus do not need to become too familiar with the Form Navigator toolbar. This functionality is intended for those with an advanced background in programming and form controls. All available form controls are accessible in the Form Functions toolbar, and can be viewed by clicking **View**→**Toobar**→ **Form Functions.**

Activity 1-1: Work with Large Documents

Data Files:

- Annual Report.doc

Scenario

In order to complete the Annual Report for WWCorp, you need to import a file, create a table of contents and an index, and insert footnotes and endnotes in the document. You will also track changes, accept changes, and add a comment to the document.

To complete this activity:

● Import the **Annual Report.doc** file.

● Add footnotes and endnotes.

● Create a table of contents.

● Create an index.

● Track and accept changes, and add a comment to the document.

Follow these steps to work with large documents.

Step	Action
Import the Annual Report.doc 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 the directory where the supplied files are stored. Click the file **Annual Report.doc,** and then click **Open.** In the **Lotus Symphony** message box, select the **Do not show this warning again** check box and click **OK.**
Add footnotes and endnotes.	
4.	Navigate to page 2 and click to place the cursor after the last sentence of the **Strategy** paragraph. Click **Create→Footnote.** In the **Create Footnote**dialog box, make sure that **Automatic** and **Footnote** are selected. Click **OK**. Enter the following text as a footnote: `More information about our strategy is found in the fourth-quarter report.` **Result:**The footnote is added to the page and the footnote reference number is placed after the paragraph.

Step	Action
5.	To add an endnote, click **Create → Footnote.** In the **Create Footnote** dialog box, make sure that **Automatic** and **Endnote** are selected. Click**OK.** Enter the following information as an endnote: `More information about our National Affiliate Program can be found on the Company's intranet site.` **Result:** The endnote is added to the last page of the document and the endnote reference number is placed after the paragraph.
Create a table of contents.	
6.	Navigate to page i (before page 1), place the cursor at the top of the page and click **Create→Index and Table→Indexes and Tables.** In the **Insert Index/Table** dialog box, verify that **Table of Contents** is displayed in the **Type** drop-down list. Click **OK.** Delete the words Contents, Figures, Tables, and Authorities.
Create an index.	
7.	Quickly browse through your document and select at least 10 key terms that will be added to the index. When you find a term that you wish to add, double-click the word and then click **Create→Index and Table→Entry** to open the **Insert Index Entry** dialog box. Click **Insert.** You can leave the **Insert Index/Table** dialog box open while you look for more terms, and then simply select the new term and click **Insert.**
8.	Navigate to page 21, select the word **Index,** and delete it. Click **Create→Index and Table→Indexes and Tables.** In the **Insert Index/Table** dialog box, on the **Index/Table** tab, click the **Type** drop-down list and select **Alphabetical Index.** Click **OK.**
Track and accept changes, and add a comment to the document.	
9.	Click **Edit→Revisions→Record.** Navigate to the **Net Income** section and replace **$10.6 million** with `$11.6 million`, and also replace **$1 million** with `$2 million` Under **Bottom Line,** replace **$18.75 million** with `$19.75 million`
10.	Navigate to the **Rental** section and delete the last sentence. Go to **Relocation Team** section and replace **Atlanta** with `New York`
11.	Navigate to the beginning of the file, and click **Edit→Revisions→Accept or Reject.** In the **Accept or Reject Changes** dialog box, accept all changes except the deletion in the **Rental** section. Do not reject the change. Close the dialog box, highlight the deleted text, and then click **Edit→Revisions→ Comment.** Add the following text: `Not sure if this text should be deleted. Could you please advise?` and then click **OK.**
12.	Save the file as `Annual Report Final` in **OpenDocument Text** format and then close the file.

Lesson Summary

As a document increases in size, it becomes more difficult to review and navigate. This can make the process of receiving and managing feedback from multiple reviewers a difficult task. In this lesson, you explored the features available to you in Lotus Symphony Documents that can make large documents easier to work with.

Adding a table of contents, an index of key terms, footnotes, and endnotes can make the document easier to read through. Change tracking and revision management allow you to accurately manage and incorporate all feedback provided to you from reviewers. You also examined the Navigator feature, and how it can help you quickly locate specific items within a large document, eliminating the need to manually search page by page.

Follow-up

In this course, you managed, revised, and distributed long documents. You discovered how Lotus Symphony Documents can be used with other programs for document collaboration, and how to navigate through a document. You made documents and information accessible to specific people and programs. When you utilize these tools, your documents become a source for information and collaboration with other individuals.

What's Next?

After completing the *Using IBM® Lotus® Symphony™ Documents: Power User* course, you may want to continue with any of 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*

Also available are the following courses:

- *Using IBM® Lotus® Symphony™ Documents: Basics*
- *Using IBM® Lotus® Symphony™ Documents: Beyond Basics*

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
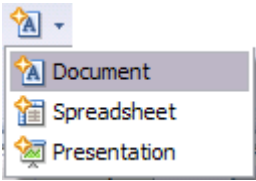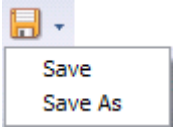
As they are developed, other resources may be added to this location: http://symphony.lotus.com/software/lotus/symphony/help.nsf/home.
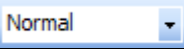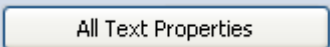
Available Plug-Ins

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

Labels on the screenshot:
- Launch other productivity tools
- Menus
- Click for more buttons for selected toolbar
- Tabs row to access open documents
- Universal Toolbar
- Editing Toolbar
- Main Toolbar
- Drawing Toolbar
- Ruler
- Sidebar can dock or float
- Editing area
- Status bar with page and line numbers, page style, zoom factor, and insert, selection, and hyperlink modes
- Opens dialog box with advanced options

Screenshot text:
- v Document - Doc... ... M Lotus Symphony
- File   View   Window   Help
- New   New Document ×
- Create   57%   Default Text   b   i
- Text Properties
- Font: Size: Times New Roma   12
- Style: Font color: Regular   Default
- Background color: Default
- Effects
- Underlining: Color: None   Default
- All Text Properties
- 57%   INSERT   Page 1   1 / 1   Ln 1 Col 1   STD   Defau

Creating and editing documents
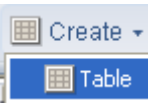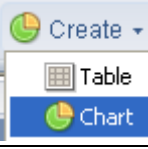
Microsoft Word	Lotus Documents
To open a document, click	Click .
To create a new document, click .	Document, Spreadsheet, Presentation. Click .
To create a new doc from a template, click **File→New**, select the template location, and browse for the template.	Click **File→New→From Template.**
To save 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.**
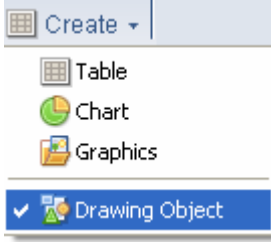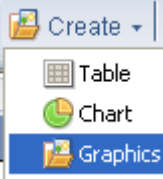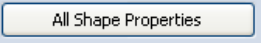
Using lists, tables, and charts

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 ⬇AZ or ⬇ZA .	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

endnote
Similar to a footnote, but instead is placed at the end of the document rather than the bottom of the page in which the flagged text appears.

field shadings
Highlighted grey regions in your document that call attention to special items such as non-breaking spaces, custom hyphens, index entries, and footnotes.

footnote
A note of text, placed at the bottom of a page in a document, that comments on or may cite a reference for part of the main body of text. It is typically marked by a superscript number in the main text.

form
A template that includes special content controls to simplify data entry for a user.

index
An ordered list of key terms or phrases that appear throughout your document.

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

ODF
(OpenDocument Format) An open standard file format for electronic office documents such as spreadsheets, charts, and word-processing documents.

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

Index

A

anchors, 8

C

calculated results
  editing, 6
calculations, 5
changes
  accepting and rejecting, 16
  recording, 15
comments, 17

D

document types, 4
document versions
  merging, 18
documents
  opening recently accessed, 4
  securing, 13

E

endnotes, 7
  editing, 8

F

field shadings, 12

files
  exporting, 5
footnotes, 7
  editing, 8
Form Navigator, 23

I

indexes, 10
  adding terms to, 11
  deleting, 12
  editing, 12

L

Lotus Symphony, 3
Lotus Symphony Diff plug-in, 14
Lotus Symphony Xforms plug-in, 14

M

mail merges, 19
  previewing, 20
  printing, 21

N

Navigator, 22
notes, 17