

# Using IBM<sup>®</sup> Lotus<sup>®</sup> Symphony<sup>™</sup> Documents: Beyond Basics

*Student Guide*

# Using IBM® Lotus® Symphony™ Documents: Beyond 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. By performing some intermediate tasks in Lotus Symphony Documents, such as specifying page properties, adding styles, and adding charts, shapes, or graphics, you can advance your knowledge for 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 intermediate 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:

- Modify page properties and apply styles to format a document
- Add charts and graphics to a document.



# Course Requirements

## Hardware

This course assumes users will be using their personal computers 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 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
My Quarterly Report Beyond Basics	My Quarterly Report Beyond Basics.odt	Documents file to be used in the activities.
WWCorp Logo	wwcorplogo.png	Graphic file to be used in an activity.

## 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 <b>Start</b> → <b>Control Panel</b> → <b>Add or Remove Programs</b> .
3	In the <b>Add or Remove Programs</b> dialog box, click <b>IBM Lotus Symphony</b> and then click <b>Remove</b> . <b>Note:</b> 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 <a href="http://symphony.lotus.com/software/lotus/symphony/home.nsf/home">http://symphony.lotus.com/software/lotus/symphony/home.nsf/home</a> and click <b>Download</b> 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 <b>Continue</b> . Select <b>I agree</b> after viewing the licensing information, and then click <b>I confirm</b> .
2	In the <b>Download using Download Director</b> dialog box, select <b>Lotus Symphony Setup for Windows</b> and click <b>Download now</b> .

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

## Task 3: Install the Course Data Files

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







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

Step	Action
1	Open the <b>Y1300labfiles.zip</b> file and run the <b>Y1300labfiles.exe</b> self-extracting file. This executable will create the <b>\lotus_ed\</b> folder and install sub-folders named <b>\Documents</b> , <b>\Spreadsheets</b> , and <b>\Presentations</b> . <b>Note:</b> 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 <b>activity</b> is a student-centered learning process that allows students to learn by performing a task. Activities can be instructor-led or completed independently.
	<b>Scenario</b> 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.
	<b>Caution</b> 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.
	<b>Tips</b> and <b>notes</b> provide additional information, guidance, or a hint about a topic or task.
	An <b>Instructor Note</b> 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 <b>Display Slide</b> provides a prompt to the instructor to display a specific slide. The Display Slide icon is included in the Instructor Guide only.



# Formatting Documents

- **Topic A:** Specifying Page Properties
- **Topic B:** Using Styles

## **Introduction**

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Altering the appearance of a page to suit the content helps to make an impression. A formal letter needs to have a simple border, whereas a certificate can have a colorful border. By changing a variety of page options, you can adjust content to fit on the page, as well as enhance the document's appearance and readability. This lesson will expand upon the various page properties that you can configure, and also describe how to apply customized styles to enhance the appearance of your documents.

After completing this lesson, you should be able to:

- Explore how to number pages.
- Examine how to modify styles in your documents.



## Topic A: Specifying Page Properties

IBM® Lotus® Symphony™ Documents provides a wealth of formatting options that you can apply to text, lists, and charts within your document. However, sometimes you will want to format the page properties of the entire document. For example, you might want your text to appear in several columns for a newsletter, or you may need to change the margins to accommodate different sizes of paper.

### The Lotus Symphony Documents Page Properties Sidebar

One of the main interface elements 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 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. When you first begin working in a new document, the Text Properties are shown in the sidebar by default. However, additional properties may be selected by clicking the drop-down menu button in the Properties sidebar. The page properties for your document can be viewed by clicking the menu icon, and then clicking **Page Properties**. The following figure shows the Page Properties sidebar.

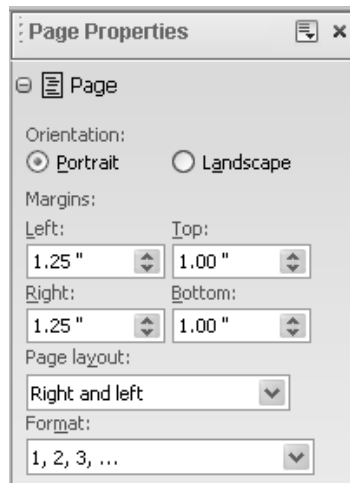


Figure 1-1: The Page Properties sidebar

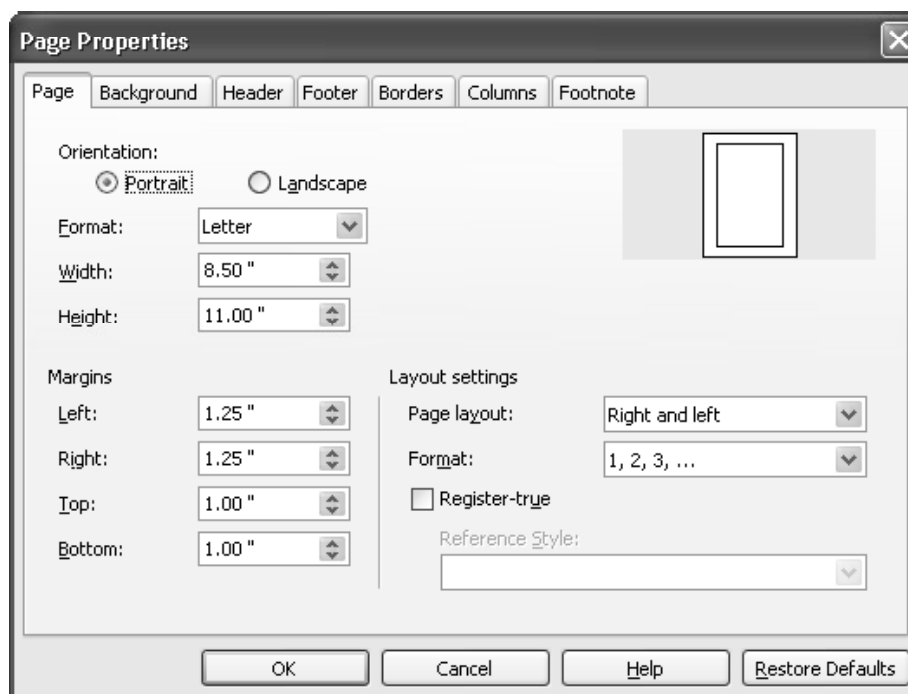
The most commonly used page properties are available on the sidebar, such as page orientation and margins. However, these represent only a small subset of the available page properties of your document. Click the **More Page Properties** button at the bottom of the Page Properties sidebar to open the **Page Properties** dialog box.



**Note:** You may also click **File→Page Setup** to open the **Page Properties** dialog box.

## Page Layout Properties

The **Page Properties** dialog box contains the full set of page properties that you can customize. The first tab displayed in this dialog box is the **Page** tab, which contains options for configuring the page layout. You may notice that these layout options are strikingly similar to those on the **Page Properties** sidebar. On this page of the dialog box, however, you can specify the type of paper that will be used when printing this document. By providing precise width and height requirements, you can tailor your document to accommodate the size of the paper or envelope. The following figure shows the **Page** tab of the **Page Properties** dialog box.



**Figure 1-2: The Page tab of the Page Properties dialog box**





**Caution:** It is important to be aware that when you make a change to your document using the **Page Properties** dialog box, the change may not be undone by clicking **Edit→Undo**. If you are unhappy with your change and wish to revert the document to its previous state, you must re-open the **Page Properties** dialog box and manually change the setting back. You may want to save your document before adjusting the page properties, as a precaution.

## Page Background Properties

The second tab item displayed in the **Page Properties** dialog box is the **Background** tab. In the **Background type** drop-down list, you can choose whether you want the background to be a solid color or a graphic. This graphic can be one of the many graphic patterns that are installed with Lotus Symphony Documents, or it can be a link to any image on your computer. The following figure shows the default settings for the document background.

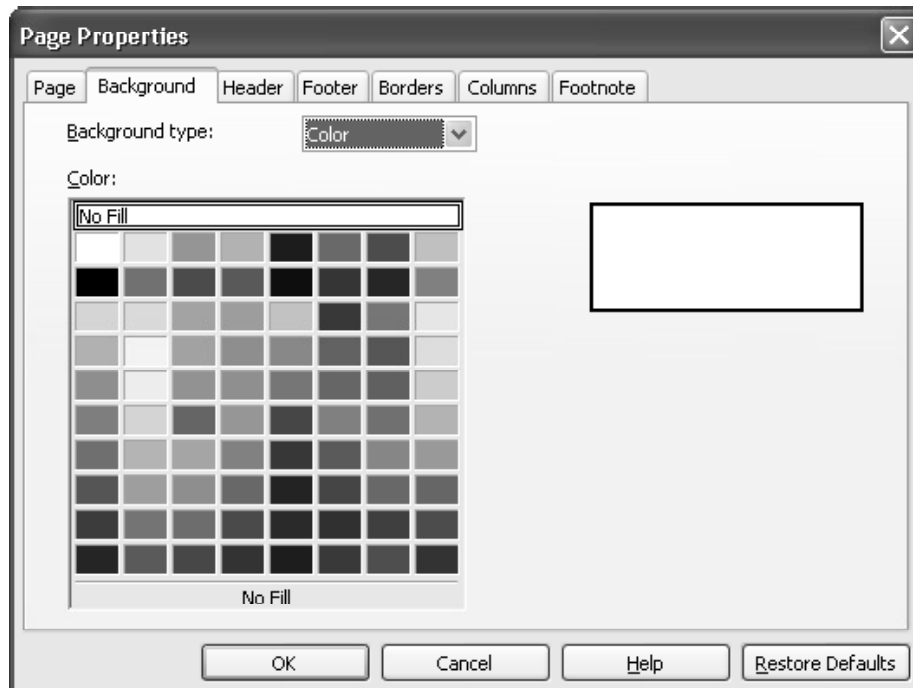


Figure 1-3: *The Background tab of the Page Properties dialog box*

## Page Header and Footer Properties

A **header** is the region in a page's top margin, and a **footer** is the region in a page's bottom margin. Headers and footers can contain textual or graphical information that is common to all or to some of the pages in a document. Common header and footer information includes such items as company name, chapter or document title, dates, and page numbers.

In the **Page Properties** dialog box, you can add a header or footer to your document by using the **Header** tab and **Footer** tab, respectively. Each is independent of the other; you do not need to have both enabled if you do not wish. On each tab, you can specify the height of the header or footer and the left and right margins. If you click the **More** button on either tab, you can customize your header or footer with a different background color or border. The following figure shows the **Header** tab.

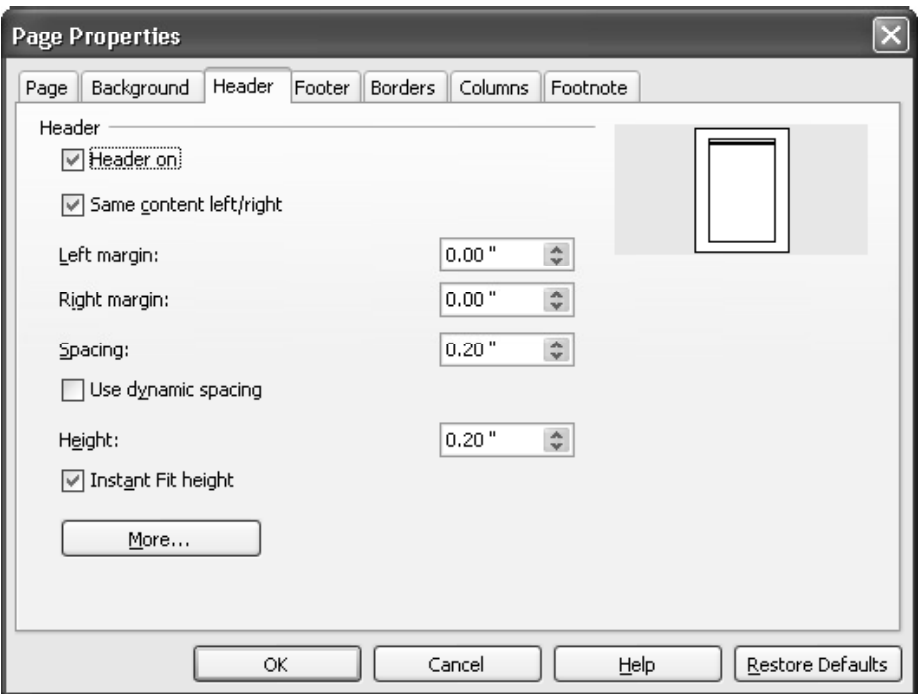


Figure 1-4: The Header tab of the Page Properties dialog box

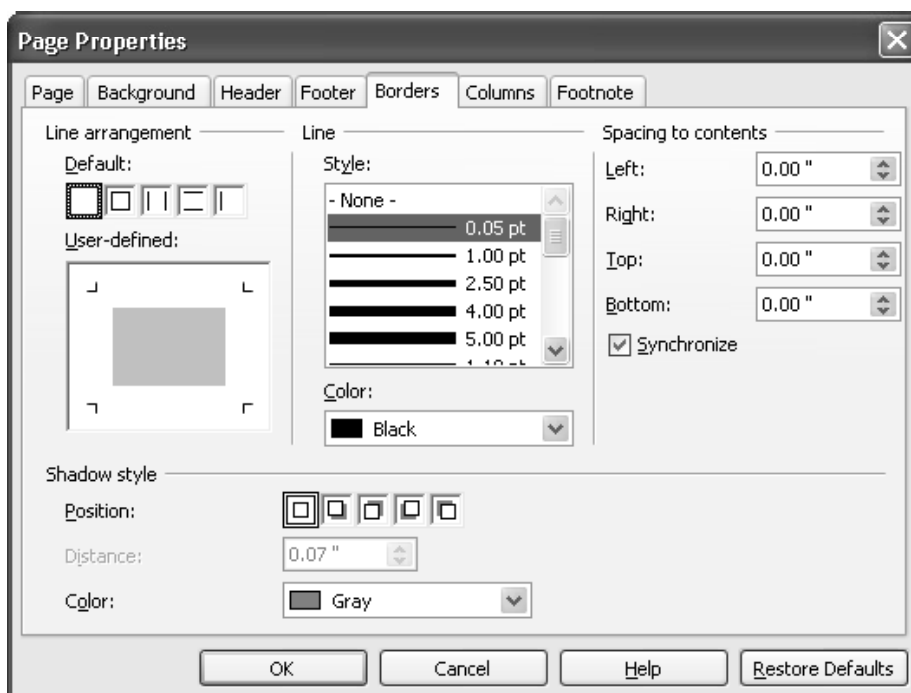
Page Border Properties

A **border** is a decorative line or pattern that is displayed around objects. Lotus Symphony Documents enables you to add a border around each page of your document, if desired. In the **Page Properties** dialog box, you can view all border-related options by clicking the **Borders** tab. The following table describes the four distinct sections of this tab.

Borders tab section	Description
Line arrangement	Options for line placement around each margin. You can choose between left only, left and right, top and bottom, all, or none. If none of these options are what you need, you can define a line arrangement below.

Borders tab section	Description
<b>Line</b>	Options for the thickness and style of the line. You can select the color of the line as well.
<b>Spacing to contents</b>	Options for specifying the space from the border lines to the content of the document. The spacing may be different on each margin, or synchronized.
<b>Shadow style</b>	Options for selecting a shadow to add to the border. The shadow position, distance, and color can be changed.

The following figures shows the options available on the **Borders** tab.



**Figure 1-5: The Borders tab of the Page Properties dialog box**

## Column Properties

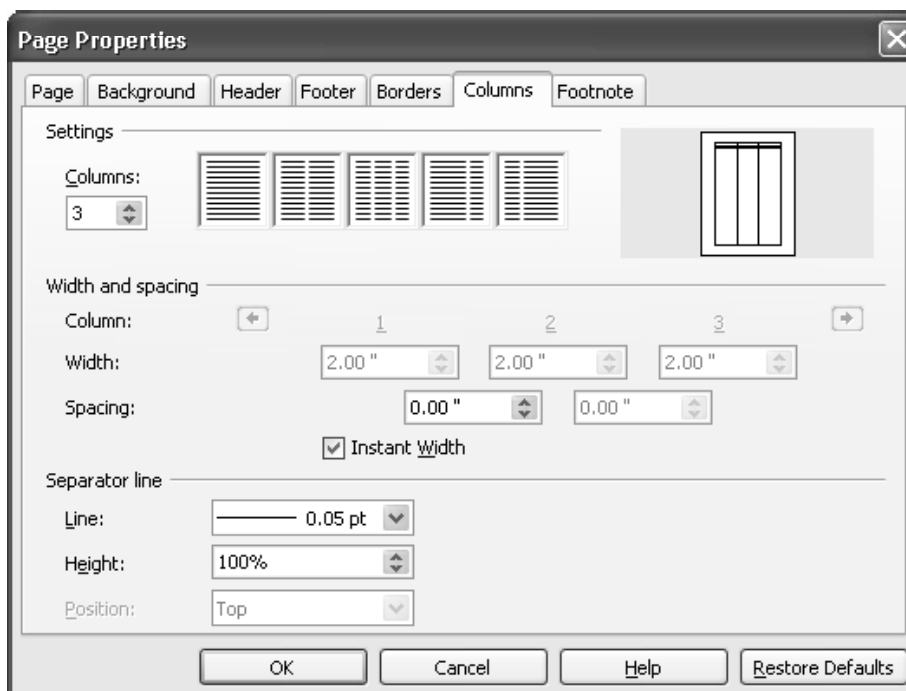
**Columns** are layout options that organize and present text as columns on a page. In text columns, the text flows from one column to the next only after the space in the first column is filled. Just as in a newspaper or magazine article, as the text flows to the next page, it resumes in the first column on the left-most part of the page. The columns can be customized by reducing the size or spacing between them. This layout can be applied to a particular section, from a selected point onward, or to the whole document. You can insert column breaks to force text after a break to wrap to the next column.

In the **Page Properties** dialog box, click the **Columns** tab. The set of icons at the top enables you to quickly select between one, two, or three columns, but you can specify a greater number if necessary. The width and spacing is identical between columns by default, but you can adjust the column width and space between each column in the middle section of the tab. Lastly, you can optionally add a separator line to the space in between columns, and specify the line thickness, height, and position.



**Note:** You may notice that there is not an option to disable columns in this dialog box. Instead, selecting the **1 column** option at the top will cause the text in the document to flow from the left margin to the right margin.

The following figure shows the setting for a document to have three columns that are all equally spaced and separated by a thin line.



**Figure 1-6: The Columns tab of the Page Properties dialog box**

## Footnote Properties

A **footnote** is a small section of text placed at the bottom of a page in the document. This note often comments on and may cite a reference for part of the main body of text. A footnote is commonly flagged by a superscript number following that portion of the text to which the note is in reference.

In the **Page Properties** dialog box, click the **Footnotes** tab to view the footnote formatting options available to you. However, unless you already have a footnote inserted into your document, editing the options on this tab will not result in any visible change. You must first add a footnote in order to change the properties on this tab.

To add a footnote, place the cursor where the note should be marked in the document text, and then click **Create→Footnote**. It is recommended that you leave the default options selected in the dialog box, and then click **OK**. You will notice two changes to your document. First, a superscript number **1** is placed at the cursor location, indicating that supporting information is location at the bottom of the page. Second, a footnote area is created at the bottom of the page, preceded by the number **1**. Here, you can freely enter the contents of your footnote.

Should you need to add a second footnote, simply repeat this process. As long as the default **Automatic** option is selected in the **Create Footnote** dialog box, a second footnote is added to your document and indicated by the number **2**. If you were to delete your first footnote, Lotus Symphony Documents will automatically re-label this footnote accordingly.

The following figure shows an example of a document containing a footnote.

#### Bottom Line

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<sup>1</sup>. As a result, all the Company's long-term debt was retired, all convertible preferred stock was either retired

<sup>1</sup> All financial details can be found in the auditor's fourth-quarter report.

**Figure 1-7: A document containing a footnote**

## Numbering Pages

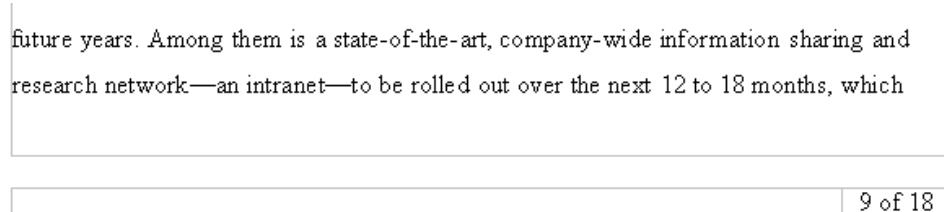
If you are working with a larger document, it may be helpful to number the pages of your document for reference. The quickest way to do this is to click **Create→Page Numbering** on the menu bar. In the **Page Numbering** dialog box, you can specify whether you want the page number to appear at the top (header) or at the bottom (footer), as well as the alignment of the page number.

The page number is treated like a typical footer, and thus can be edited by accessing the footer's page properties. If you notice that only the odd pages or only the even pages are being numbered, open the **Page Properties** dialog box, and click the **Footers** tab. Select the **Same content left/right** check box, and then click **OK** to apply your changes.

#### Adding a page count

You can also add an automated page count field to your footer so that the reader of your document knows how many total pages there are in the document. Place the cursor after the page number in the footer, add a space, and type the word *of*, followed by another space. Now, click **Create**→**Fields**→**Page Count**.

The following figure shows page numbering and page count in a document footer.



**Figure 1-8: *Page numbering and page count in a document footer***



**Note:** You may need to drag the resize handle to extend the page numbering box in the footer in order to accommodate the page count field.



## Topic B: Using Styles

Imagine having to manually change all of the formatting attributes every time you added a new heading, table, or list to your document. This could be a tedious and time-consuming task. Symphony Documents can simply the formatting process by allowing you to create specific styles for repeating elements in your document.

### Style Types

A **style** is a defined set of visual formatting elements that can be applied to the text of your document. Styles allow you to define specific text or space formatting, and then apply it multiple times throughout your document when necessary. For example, you can specify a number of text attributes that you would like applied to all tables, headings, lists, or bullets in your document, without having to individually format all of these elements every time.

IBM® Lotus® Symphony™ Documents has a bank of available styles for you to use or modify to suit your needs. This list of styles can be viewed by clicking **Layout**→**Style List** or by pressing the F11 key. At the top of the **Style List** dialog box, a drop-down list allows you to sort through the various style types available.

The following table describes the style types.

Style type	Description
Paragraph	Displays formatting styles for paragraphs. Use paragraph styles to apply the same formatting, such as font, numbering, and layout to the paragraphs in your document.
Text	Displays formatting styles for text. Use text styles to apply font styles to selected text in a paragraph.
Frame	Displays formatting styles for frames. Use frame styles to format frame layouts and position.
Page	Displays formatting styles for pages. Use page styles to determine page layouts, including the use of headers and footers.
List	Displays formatting styles for numbered and bulleted lists. Use list styles to format number and bullet characters and to specify indentation.

An additional drop-down list at the bottom of the dialog box can help you search for specific styles in your document. You can filter the style list by styles already applied to this document, custom user-defined styles, or view styles in hierarchical order. The following figure shows the **Style List** dialog box.

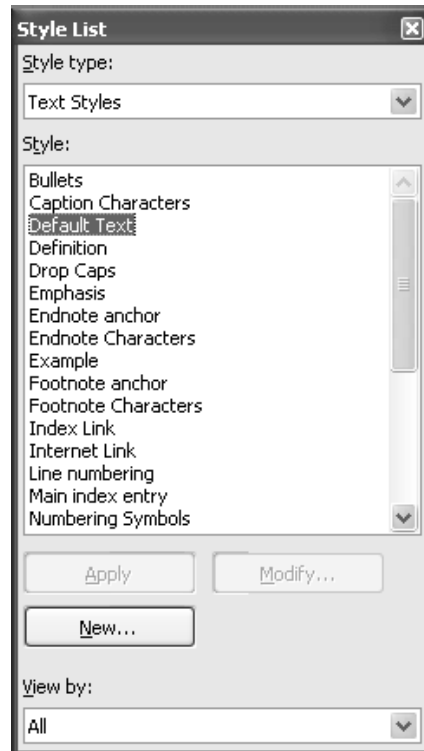


Figure 1-9: *The Style List dialog box*

## Applying Styles

Applying a style to a section of your document is performed no differently than applying any single formatting to a section of the document. The difference here is that when applying a style to a block of text, for example, you are applying multiple formatting attributes all at once to that text instead of just a single attribute.

To apply a style to a particular section of your document, highlight the exact region that you wish to format. Click **Layout**→**Style List** or press the F11 key to open the **Style List** dialog box. Use the drop-down lists to refine the list of styles provided in the dialog box, and select the style you wish to apply. When you click **Apply**, the new style is applied to the highlighted region of your document.





**Note:** Instead of using the **Style List** dialog box to apply a style, you can use the style list available on the toolbar. However, this list is not comprehensive. You may wish to use the **Style List** dialog box to be sure you are viewing the widest assortment of available styles.

## Creating Styles

In addition to the bank of supplied styles available to you, Lotus Symphony Documents allows you to create your own customized styles for future use. By defining all characteristics of your new style at once, you will save time by being able to apply this style multiple times within your document, or even across documents.

For instance, assume that you would like all bulleted lists to appear in bold, 16-point Arial font and be double-spaced. Instead of applying all of these formatting attributes to every individual list you encounter, it would make more sense to create a customized style for bulleted lists.

If you want to create your own style, click **Layout→Style List** or press the F11 key to open the **Style List** dialog box. From here, click the **New** button to begin creating a new style. In the **Style** dialog box, a wide assortment of tabs is provided, allowing you to create very customized styles.

The following table describes the available tabs.

Style tab	Allows you to customize
<b>Style</b>	The name of the style, position in the list, and category.
<b>Indents &amp; Spacing</b>	Indentation of the content and spacing in between lines.
<b>Alignment</b>	Justification of the content.
<b>Text Flow</b>	Hyphenation, breaks, or paragraph splitting requirements.
<b>Font</b>	Font, style, size, language, and color.
<b>Effects</b>	Underlining, strikethrough, and emphasis marking, as well as effects such as all lowercase or all uppercase.
<b>Position</b>	Superscript or subscript positioning, font spacing, and text rotation.
<b>Numbering</b>	Automatic line numbering, and which number to begin with.

Style tab	Allows you to customize
<b>Tabs</b>	Tab position, type, and fill characters.
<b>Drop Caps</b>	Number of drop cap letters or words, and contents of drop caps.
<b>Background</b>	Background graphic or color.
<b>Borders</b>	Border lines; line type, width, and color; spacing to contents, and shadow style.
<b>Condition</b>	Conditions for when to apply styles to specific context.

When your new style is created, it will be placed in the list of available styles. It is now available for use within this document, as well as other documents.

### Adding a style from the toolbar

An alternative method for creating a new style is to click the *Style* drop-down list in the toolbar, and then click **New Style**. This will open the **Style** dialog box and allow you to define all attributes for your new style.

### Modifying Styles

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It is sometimes easier to make a few small adjustments to an existing style than to create an entirely new style. Lotus Symphony Documents allows you to make changes to the default library of styles, in addition to the customized styles that you have created.

To modify either a predefined or customized style, open the **Style List** dialog box, and then click **Modify**. Once you are finished making changes to the style, click **OK** to save it.



## Activity 1-1: Format Documents

### Data Files:

- My Quarterly Report Beyond Basics.odt


### Scenario


By changing the page properties and applying styles to a document, you can add life and vibrant tone to any type of document. Adjusting margins, changing background colors, and adding headers and footers are just a few of things you can do in order to give your document everything it needs to accomplish its goal.

To complete this activity:

- Change the size of the top and bottom margins to 0.50.
- Change the background color of the document to light green.
- Add a header and footer with a yellow background.
- Add a shadowed border to the document.
- Add page numbering to the footer.
- Change the text style of the **Introduction** paragraph to Strong Emphasis.

Follow these steps to format your document.

Step	Action
<b>Change the size of the top and bottom margins to 0.50.</b>	
1.	In IBM Lotus Symphony, click <b>File</b> → <b>Open</b> → <b>File</b> . In the Open dialog box, browse to C:\lotus_ed\Documents and double-click the <b>My Quarterly Report Beyond Basics.odt</b> file to open it.   <b>Note:</b> If you have completed the Documents Basics course, you may use the My Quarterly Report.odt file you created in that course for this activity.
2.	On the Properties sidebar, click the <b>Popup</b> drop-down menu button and click <b>Page Properties</b> .
3.	On the Page Properties sidebar, click the <b>More Page Properties</b> button.
4.	In the <b>Page Properties</b> dialog box, on the <b>Page</b> tab, under <b>Margins</b> , change the <b>Top</b> field and the <b>Bottom</b> field to .50
<b>Change the background color of the document to light green.</b>	
5.	Click the <b>Background</b> tab. Verify that <b>Color</b> is in the <b>Background type</b> field and then under <b>Color</b> , click <b>Gray 15%</b> and then click <b>OK</b> .  <b>Result:</b> The background of the document is changed to gray.

Step	Action
<b>Add a header and footer with a yellow background.</b>	
6.	Click the <b>More Page Properties</b> button and then click the <b>Header</b> tab. Under <b>Header</b> , select the <b>Header on</b> check box. Click the <b>More</b> button. From the colors displayed, click <b>Yellow</b> and then click <b>OK</b> .
7.	Click the <b>Footer</b> tab. Under <b>Footer</b> , select the <b>Footer on</b> check box. Click the <b>More</b> button. In the <b>Border/Background</b> dialog box, click the <b>Background</b> tab. Select <b>Yellow</b> and then click <b>OK</b> .
<b>Add a shadowed border to the document.</b>	
8.	Click the <b>Borders</b> tab. Under <b>Line arrangement</b> , under <b>Default</b> , click <b>All Borders</b> .
9.	Under <b>Line</b> , under <b>Style</b> , click the <b>1.00 pt</b> line.
10.	Under <b>Shadow</b> style, click the <b>Cast Shadow to Bottom Right</b> position. Click <b>OK</b> to close the <b>Page Properties</b> dialog box.
<b>Add page numbering to the footer.</b>	
11.	Click <b>Create</b> → <b>Page Numbering</b> . In the Page Number dialog box, accept the defaults to add the page numbers to the center of the footer by clicking <b>OK</b> .
<b>Change the text style of the Introduction paragraph to Strong Emphasis.</b>	
12.	Highlight the <b>Introduction</b> paragraph. Click <b>Layout</b> → <b>Style List</b> .
13.	Click the <b>Style type</b> drop-down arrow and click <b>Text Styles</b> . Scroll down the <b>Style</b> list and click <b>Strong Emphasis</b> . Click <b>Apply</b> and then close the <b>Style List</b> dialog box.
14.	Click <b>File</b> → <b>Save As</b> . In the <b>Save in</b> field. In the <b>File Name</b> field, type <code>My Quarterly Report Beyond Basics 1</code> and click <b>Save</b> .
	 <b>Note:</b> Leave the file open; you will use it in the next lesson.



## Lesson Summary

Documents vary in purpose and therefore may require different formatting methods to accommodate special demands. This may involve changing the margins, background colors, borders, column style, headers, footers, or other attributes. Special styles can be created, modified, and applied to your text so that you can define a specific format one time and then use it multiple times. This lesson described the page property and custom style features available to help you tailor the look and feel of your documents.





## **Adding Visual Elements to Documents**

- **Topic A:** Using Charts
- **Topic B:** Adding Graphics and Shapes

## **Introduction**

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Most of the features you have examined to this point have been concerned with formatting text and page properties of a document. However, IBM® Lotus® Symphony™ Documents allows you to do so much more with the documents you create. In today's media-rich world, the ability to enhance a document with charts and graphics is essential. This lesson will show you how to create professional-looking documents by adding visual aids such as charts and graphics to your pages.

After completing this lesson, you should be able to:

- Modify a chart in a document.
- Explore the Shape Properties sidebar.





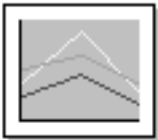
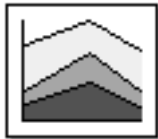
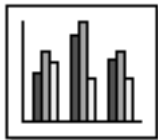
## Topic A: Using Charts

There is always a purpose behind creating a document. No matter what the aim of the document is, the goal of the document is typically to relay information to others. When you are trying to convey information that summarizes data collected over a period of time, it is often helpful to display this information in the form of a chart. Supporting your document with visual aids not only helps enforce your message, but it adds an attractive element to your document.

### Chart Types

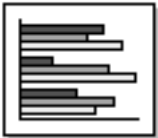

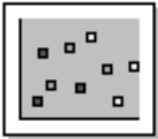
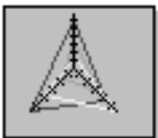
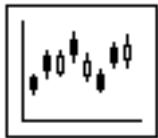
IBM® Lotus® Symphony™ Documents lets you present data graphically in a chart, so that you can visually compare data within a series and view trends in the data. The data source of the chart can be IBM® Lotus® Symphony™ Spreadsheets or a table within Lotus Symphony Documents. When a chart is embedded into the same document as the data source, it stays linked to the data, allowing the chart to automatically update when you change the source data.

The following table describes the wide variety of chart types available in Lotus Symphony Documents.

Chart type	Appearance	Description
Line		Plots values along an x-axis and connects values with lines. Available in 2D or 3D format.
Area		Based on the line chart, with the area in between the axis and the line filled in. Available in 2D or 3D format.
Column		Displays data as vertical rectangular bars of lengths proportional to the value that they represent. Available in 2D or 3D format.

## Topic A: Using Charts


### Lesson 2 ■ Adding Visual Elements to Documents

Chart type	Appearance	Description
Bar		Displays data as horizontal rectangular bars of lengths proportional to the value that they represent. Available in 2D or 3D format.
Pie		Shows data as a circle, with each wedge representing a percentage of the entire data set. Available in 2D or 3D format.
XY		Displays one set of numerical data along the x-axis and another set of numerical data along the y-axis. These values are combined into single data points and displayed in clusters. Also known as a scatter chart. Available only in 2D format.
Radar		Displays three or more quantitative variables represented on axes starting from the same origin point. Also known as a spider chart or star chart. Available only in 2D format.
Stock		Plots the rises and drops of stock prices; sales volumes and the total number of shares are selected using icons. By default, the size of the icons does not exceed that of the line width. Only the closing stock price is visibly marked by a small dash. All points are not visible until you integrate other graphics. Available only in 2D format.

The most effective chart to use in your document will depend on the type of data you are using as a source, and what information you are trying to derive from it. For example, a line chart would work well for illustrating revenue growth over a period of time, while a pie chart would be better suited for showing a breakdown of how each department is contributing to total revenue. When in doubt, you can always experiment with a few chart types to find the best option.

## Adding and Formatting a Chart

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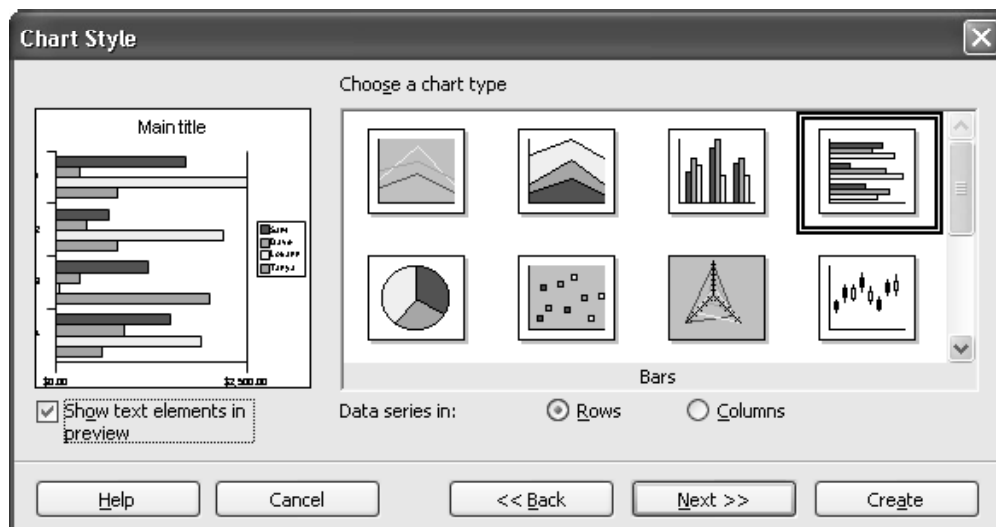
As with many other functions in Lotus Symphony Documents, there are multiple ways in which you can add a chart to your document. No matter which method you end up using, it is recommended that you first define the range of data that you want your chart to cover. In Lotus Symphony Documents, locate the table containing the data you would like displayed in a chart, and then click and drag to select the desired data range. With the range highlighted, click **Create→Chart**. You can also click the down arrow next to the **Create**  button on the toolbar and click **Chart**.

On the **Selection** page of the dialog box, you will need to set a number of options. If these are not set correctly, the output of your data will appear incomplete or improperly formatted.

- **Area:** This is the range of data in your table. If you have not already selected it prior to creating your chart, you can move the dialog box so that you can click and drag the region of your data.
- **First row as caption:** Select this check box if the first row of data in the source should be used as labels, not actually as data itself.
- **First column as caption:** Select this check box if the first column of data in the source should be used as labels, not actually as data itself.

When you have these options configured correctly, click **Next** to advance to the next page in the dialog box. Here, you will select the type of chart you want. All available chart types are displayed, along with a thumbnail preview of what your data will look like. After you have made your selection, it is important that you have the **Data series in** option selected correctly. This is critical to ensure that your data is sorted by the appropriate category. If you are not sure which is correct, switch between the two options and make note of the change that occurs in the preview window.

The following figure shows options in the **Chart Style** dialog box.



**Figure 2-1: A 2D bar chart selected with Rows as the data series**

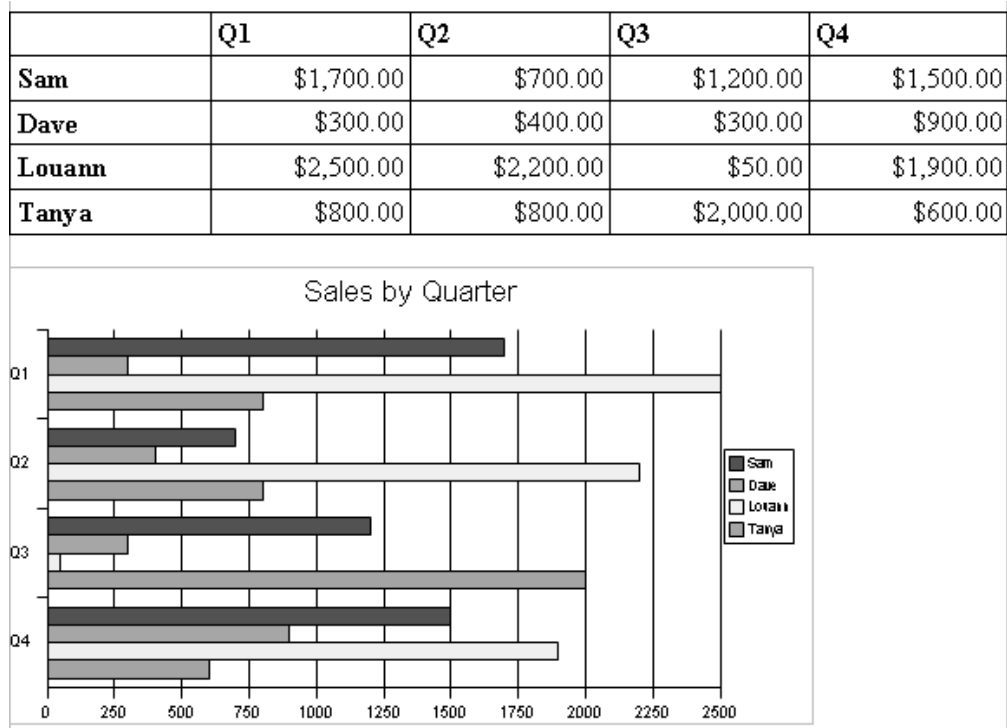
On the third page of the dialog box, you will select the variant of the chart output. This will depend on the type of chart you are creating, as some options are not available for all chart types. On this page, you can also add or remove grid lines for the x and y axes of your chart.

Lastly, you can provide labels for your chart. You have the option of displaying a chart title, a color-coded legend, and labels for the axes, if applicable. These labels are dependent on the type of chart. For example:

- 2D line chart: You can label the x-axis and y-axis.
- 3D line chart: You can label the x-axis, y-axis, and z-axis.
- Pie chart: There are no axes to label.

When you are finished formatting your chart, click the **Create** button to finalize it. Your chart appears in your document. You can use the surrounding resize handles to increase or decrease the size of the chart. The chart can also be moved to a different region of the document by cutting it and pasting it in the new location.

The following figure shows a completed bar chart.



**Figure 2-2: Completed bar chart below the data source**

## Modifying an Existing Chart

Now that you have created, formatted, and placed the chart in your document, you can still make modifications to its appearance. The following table describes the modifications you can make to a table once it has been created.

Modification	How you do it
Change the title	Double-click the chart, and then double-click the title. You can now freely edit the title text.
Edit the legend	Double-click the chart and then click <b>Layout</b> → <b>Legend</b> . You can customize borders, fill color, transparency, text attributes, font effects, and position. Note that categories may not be added to or removed from the legend.
Change the axis text	Double-click the chart, and then double-click the axis title. You can now freely edit the axis text.

Modification	How you do it
Change text properties	Double-click the chart, and then click the <b>Layout</b> menu. From here, you can choose whether you want to edit the text properties for the title, legend, or axis.
Change the chart style	Double-click the chart, and then click <b>Layout→Chart Style</b> .
Change chart color scheme	Double-click the chart, and then click the chart itself to select it. Double-click the individual segment of the chart that you wish to modify in the <b>Data Point</b> dialog box.
Update the source data	Locate the original data source for the chart, and change one or more values. Click away from the data source, and the chart will reflect the new data.



**Caution:** Modifying a chart does have its limitations. If you need to add new rows or columns to the data source, you may be required to generate a new chart to accommodate these new categories of data. The automatic update feature of the chart assumes that no new cells are being added or removed from the original data source.



## Topic B: Adding Graphics and Shapes

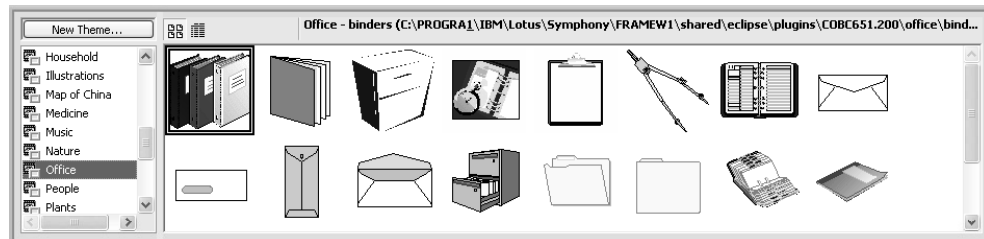
Adding charts and graphs can help you visually communicate information that might otherwise be difficult to convey. However, you will likely encounter situations where you would like to add images to your document that are not tied to information. Including elements such as a company logo, a photograph, or even an image you create yourself can give your document a personal and attractive feel.

### Adding a Graphic from the Gallery

IBM® Lotus® Symphony™ Documents allows you to enhance the appearance of your document with graphic objects. These images may be local image files on your computer, or they may be from the supplied image bank that installs with the IBM® Lotus® Symphony™ suite. This image bank is known as the **Gallery**, and it contains an assortment of images that are classified by genre.

To view the images available in the Gallery, click **Tools**→**Gallery**. This opens the Gallery pane at the top of your document. Like the Properties sidebar, this pane can be lengthened or shortened by dragging the edge of the pane accordingly. The arrow at the bottom of the pane can be clicked to collapse the pane, and then clicked once again to expand it.

The following figure shows the Gallery pane.



**Figure 2-3: The Gallery pane**

On the left side of the pane, images are sorted by theme. Click any of these themes to view the assortment of images on the right side of the pane. You can double-click an image to view a larger preview of it, and double-click again to view all images.

When you have located an image that you would like inserted into your document, place the cursor at the location where the image should be added. Right-click the image in the Gallery, and click **Insert**→**Copy**. The image is pasted at the cursor position. You can also add an image by dragging the Gallery image to the preferred location in your document. If you are done adding images to your document, click **Tools**→**Gallery** to close the Gallery pane.

#### Resizing the image

You will notice that when you click the image in your document, eight green boxes appear around the image. These are called **resizing handles**, and they can be used to change the dimensions of your image. Click any of these boxes and drag the image to the appropriate size. Note that changes to the size of your image can always be undone.

#### Adding a Graphic from a File

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In addition to the images available to you in the gallery, Lotus Symphony Documents allows you to import local images from your hard drive, such as illustrations, photographs, or custom logos. Lotus Symphony Documents supports all major image types, including (but not limited to):

- .bmp
- .gif
- .jpg
- .pct
- .png
- .psd
- .tga
- .tif

To insert a local image into your document, click **Create→Graphic From File**. In the **Create Graphics** dialog box, navigate to the location of the image to be inserted, select the image, and then click **Open**. The image is inserted at the cursor position. As with Gallery images, you can resize this image as needed.

#### The Graphic Properties Sidebar

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As you discovered earlier, the Properties sidebar is context-sensitive, meaning that the contents of the pane will change according to the object currently selected in your document. When you click an image in your document, the **Graphic Properties** sidebar is automatically displayed to the right of your document.



**Note:** If the Properties sidebar was closed prior to selecting an image, it can be re-opened by clicking **View→Properties Sidebar→ Open**.

On the **Graphic Properties** sidebar, the most common graphic functions are provided for quick access. In the **Position and Size** section, you can change the location of the graphic and change the dimensions of the image. If you select the **Keep ratio** check box, then changing one dimension will automatically change the other dimension in order to preserve the proportion of width to height.



The following figure shows the **Graphic Properties** sidebar.



**Figure 2-4: The Graphic Properties sidebar**

In the **Wrap** section of the **Graphic Properties** sidebar, you can configure the text to wrap around the image. The various icons displayed represent the available options to justify the image within the text.

At the bottom of the **Graphic Properties** sidebar, you can click the **More Graphic Properties** button to display the full assortment of options to customize the appearance of your image. The following table describes the tabs in this dialog box.


Graphic Properties tab	Attributes to customize
<b>Size and Position</b>	Image height, width, position, and anchor point.
<b>Options</b>	Image name, links, and protection.
<b>Wrap</b>	Text wrapping and spacing around image.
<b>Hyperlink</b>	URL to link to, name of link, and description.
<b>Graphics</b>	Image color, luminance, filter, graphic mode, and orientation.
<b>Crop</b>	Image scaling and size.
<b>Borders</b>	Border arrangement, line width and color, spacing to contents, and shadow style.
<b>Background</b>	Background fill color, if any.

Graphic Properties tab	Attributes to customize
Macro	Events and assigned macros.
Alternative Text	Text to display in a Web browser when the selected object is unavailable. Used to assist people with disabilities; for graphics and objects only.

## The Drawing Toolbar

Lotus Symphony Documents allows you to draw freehand objects in your document. The **Drawing** toolbar is provided to allow you quick access to the drawing functions. Click **Create**→**Drawing Object** to display the **Drawing** toolbar at the top of your document.



**Note:** If all options in the Drawing toolbar are not currently visible, you have the ability to drag the toolbar down a level to view all icons. Click the Drawing toolbar docking icon  and drag it down to a new row in the toolbar area to make all buttons visible. All toolbars may be arranged in this manner.


The **Drawing** toolbar will remain open until you close it. Click **Create**→**Drawing Object** once again to hide the toolbar from the upper region. The following figure shows the **Drawing** toolbar.











Figure 2-5: *The Drawing toolbar*





## Adding Lines and Shapes

Before you begin adding lines and shapes to your document, take a moment to explore all of the options that are available to you on the **Drawing** toolbar. A good artist always examines the full palette of materials before creating a new piece of art. The following table describes the icons that are displayed within the **Drawing** toolbar, and how to use them.

Drawing toolbar icon	Function
Selection 	Lets you select objects in the current document. To select an object, click the object with the arrow. To select more than one object, drag a selection frame around the objects. To add an object to a selection, press Shift, and then click the object.

## Lesson 2 ■ Adding Visual Elements to Documents

Drawing toolbar icon	Function
Quickshapes 	Lets you create a basic rectangle, oval, or 3D object. When drawing a rectangle or oval, press and hold Shift to create a perfect square or circle. By default, rectangles and ovals are not filled.
Lines 	Draws a straight line where you click and drag in the current document. To constrain the line to 45 degrees, hold down Shift while you drag. Click the down arrow to select special lines, including: <ul style="list-style-type: none"> <li>● Freeform</li> <li>● Polygon</li> <li>● 45-degree objects</li> <li>● Curves</li> <li>● Dimension lines</li> </ul>
Arrows 	Draws a straight arrow where you click and drag in the current document. To constrain the arrow to 45 degrees, hold down Shift while you drag. Click the down arrow to select special arrow heads.
Connectors 	Draws a special curved or angled arrow where you click and drag in the current document. Click the down arrow to select special arrow heads.
Basic shapes 	Draws a filled shape where you click and drag in the current document. When drawing a rectangle or oval, press and hold Shift to create a perfect square or circle. Click the down arrow to select various filled shapes.
Block arrows 	Draws a filled block arrow where you click and drag in the document. Click the down arrow to select various arrow patterns and shapes.
Flow charts 	Draws a custom filled shape where you click and drag in the document. Click the down arrow to select from the most commonly used shapes in flowchart design.
Symbols 	Draws a filled symbol where you click and drag in the document. Click the down arrow to select from various star shapes and other symbols.

Drawing toolbar icon	Function
Callouts 	Draws a callout box where you click and drag in the document. The pointer should be positioned toward another object in your document to indicate a characteristic of that object. The pointer can be dragged if necessary. Click the down arrow to select from various callout shapes.
Fontwork 	Inserts specially formatted graphic text into your document. You can specify the text that appears, font and size, and style to apply to the text.
Extrusion 	Adds a three-dimensional effect to another graphical object already drawn in the document. You can specify the depth of the shadow, direction, lighting source, color, and brightness.
Text Box 	Adds a text box to a region in the document. Click and drag a region for the text box before entering the text. The Text Properties sidebar can be used to change the attributes of the text that you create.

To add a line or shape to your document, click the icon that represents the object you would like to draw, and then click and drag within your document to place it. Just as with adding Gallery graphics, resizing handles are provided to allow you to change the location and dimensions of your shape.

### Adding text to filled-in shapes

As an alternative to using the text box functionality to label specific shapes, you can double-click within a filled shape in your document to add text to it. This text can be modified or removed at any time by double-clicking within the shape and making any necessary revisions.

### Arranging image order

When you are creating overlapping objects, you may need to change the layering of the objects, such that one graphic appears behind another graphic instead of in front of it. This is known as arranging the order. To change the order of a graphic, right-click the graphic to be changed, and click **Arrange**. You can then bring the graphic all the way to the front, move it forward one level, move it backward one level, or move it all the way to the back.

## Grouping objects

If you have a cluster of objects that you would like to be treated as a single object, you can group the objects together. When grouped, Lotus Symphony Documents will treat the grouped objects as a single object. To group objects, select the components by holding Shift while clicking them, or click and drag around the region. Right-click your selection and click **Group**→**Group**. Grouped objects can later be ungrouped by selecting the object and clicking **Group**→**Ungroup**. The following graphic shows two objects grouped as a single object.



**Figure 2-6:** *Two objects grouped as a single object*

## The Shape Properties Sidebar

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When you click an image in your document, the **Shape Properties** sidebar is automatically displayed to the right of your document. This sidebar displays the most commonly used tasks for manipulating graphical objects in your document. These include options for changing the position and size of the graphic; the line style, color, and width attributes; and the area fill color.

The following figure shows the **Shape Properties** sidebar.

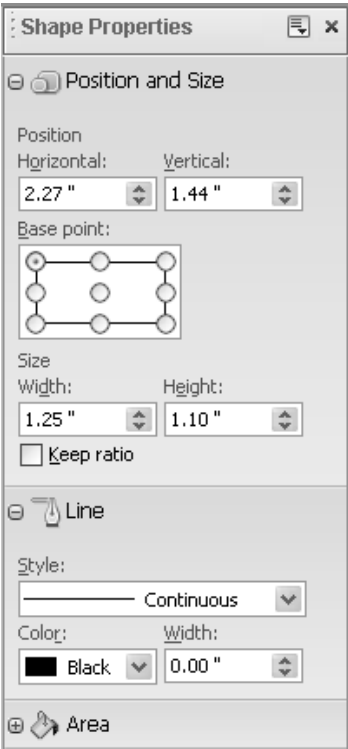


Figure 2-7: *The Shape Properties sidebar*



**Note:** If the Properties sidebar was closed prior to selecting an graphical object, it can be re-opened by clicking **View→Properties Sidebar→Open**.

As with the other sidebars, the options provided on the **Shape Properties** sidebar represent only a subset of the total available properties than can be used to customize your graphics. Click the **More Shape Properties** button at the bottom of the sidebar to open the **Shape Properties** dialog box. The following table describes the tabs and options contained within them.

Shape Properties tab	Attributes to customize
Position and Size	Horizontal and vertical position, width and height, base points, and anchor point.
Rotation	Rotation angle and pivot point
Slant & Corner Radius	Slant angle and corner radius.
Line	Line style, width, and color; arrow width and endpoint style.

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Shape Properties tab	Attributes to customize
Area	Background fill color, if any.
Shadow	Shadow position, distance, color, and transparency.
Transparency	Object transparency and gradient.
Alternative Text	Text to display in a web browser when the selected object is unavailable. Used to assist people with disabilities; for graphics and objects only.



## Activity 2-1: Add Visual Elements to Documents

### Data Files:

- My Quarterly Report Beyond Basics 1.odt
- WWCorp Logo.jpg

### Before you begin:

If necessary, open Lotus Symphony Documents and open the **My Quarterly Report Beyond Basics 1.odt** file.

### Scenario

To display the information in the **Projects in Progress** table in a different way, the information in the table can be used to create a chart that will provide the readers of the document with a different perspective on what is currently be developed. A couple of graphics also need to be added to complete the document.

To complete this activity:

- Create and format a chart based on the **Projects in Progress** table.
- Add the WWCorp logo to the header.
- Add a star graphic to the document.

Follow these steps to add visual elements to your document.

Step	Action
<b>Create and format a chart.</b>	
1.	Click below the <b>Projects in Progress</b> table and press Enter. Type <i>This chart shows the project expectations for next quarter and</i> and press Enter.
2.	Highlight all of the information in the <b>Projects in Progress</b> table, and then click <b>Create→Chart</b> .
3.	In the <b>Create Chart</b> dialog box, on the <b>Selection</b> page, verify that the <b>First row as caption</b> and <b>First column as caption</b> check boxes are selected, and click <b>Next</b> .
4.	In the <b>Chart Style</b> dialog box, verify that the <b>Columns</b> chart type is selected and that the <b>Data series in</b> is set to <b>Columns</b> , and click <b>Next</b> .
5.	On the next <b>Chart Style</b> screen, select the <b>Show text elements in pre-view</b> check box. Verify that the <b>Hours of Training</b> and <b>Completion Estimate (days)</b> headings are in the legend and the project titles are displayed on the x-axis. Accept the other defaults on the screen by clicking <b>Next</b> .



## Lesson 2 ■ Adding Visual Elements to Documents

Step	Action
6.	On the next screen, clear the <b>Chart title</b> check box, and click <b>Create</b> .
7.	If necessary, cut and paste the chart to move it under the text you entered to begin this activity.
8.	Double-click to select the chart, and then click <b>Layout→Axis→Y Axis</b> .
9.	In the <b>Y Axis</b> dialog box, clear the check box next to <b>Automatic</b> for the <b>Maximum</b> field. Double-click in the <b>Maximum</b> field and type 40
10.	Clear the check box next to <b>Automatic</b> for the <b>Major interval</b> field. Double-click in the <b>Major interval</b> field and type 5
11.	Clear the check box next to <b>Automatic</b> for the <b>Minor interval</b> field. Double-click in the <b>Minor interval</b> field and type 5 and then click <b>OK</b> .
<b>Add the WWCorp logo to the header.</b>	
12.	Place the cursor in the header, and then click <b>Create→Graphic from File</b> .
13.	In the <b>Create Graphics</b> dialog box, navigate to C:\lotus_ed\Documents and select <b>wwcorplogo.png</b> . Click <b>Open</b> .
14.	Right-click in the header and click <b>Align Text→Centered</b> .
15.	Scroll down in the document, and place the cursor below the chart. Type You are the star with Worldwide Education!
16.	Highlight the text you just typed, and then click the <b>Popup drop-down menu</b> and click <b>Text Properties</b> . On the <b>Text Properties</b> sidebar, click the <b>Style</b> drop-down arrow and click <b>Bold Italic</b> .
<b>Add a star graphic to the document.</b>	
17.	Click <b>Tools→Gallery</b> . Scroll down the <b>Theme</b> list, and click <b>Shapes</b> . Click the Star and drag it into the document below the sentence you just typed.
18.	To close the Gallery, click <b>Tools→Gallery</b> .
19.	Click <b>File→Save</b> and then click <b>File→Close</b> .



## Lesson Summary

In addition to providing options for customizing text and page properties, Lotus Symphony Documents includes a library of features for adding visual elements to your documents. Charts can help you visually present data or information that might be otherwise difficult to convey. You can also add pre-installed clipart images to your document, import graphics and photographs, or draw objects by using freehand drawing tools. Visual elements help you create professional-looking documents that are much more appealing and informative than ordinary text files.



## Follow-up

In this course, you formatted a document by changing the page properties and applying styles. You increased the complexity of your document by adding tables, charts, and graphics. These skills will help you in your daily work with Lotus Symphony Documents, as you create more attractive and effective documents with less effort than before.

## What's Next?

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

Also available are the following courses:

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



## Additional Resources

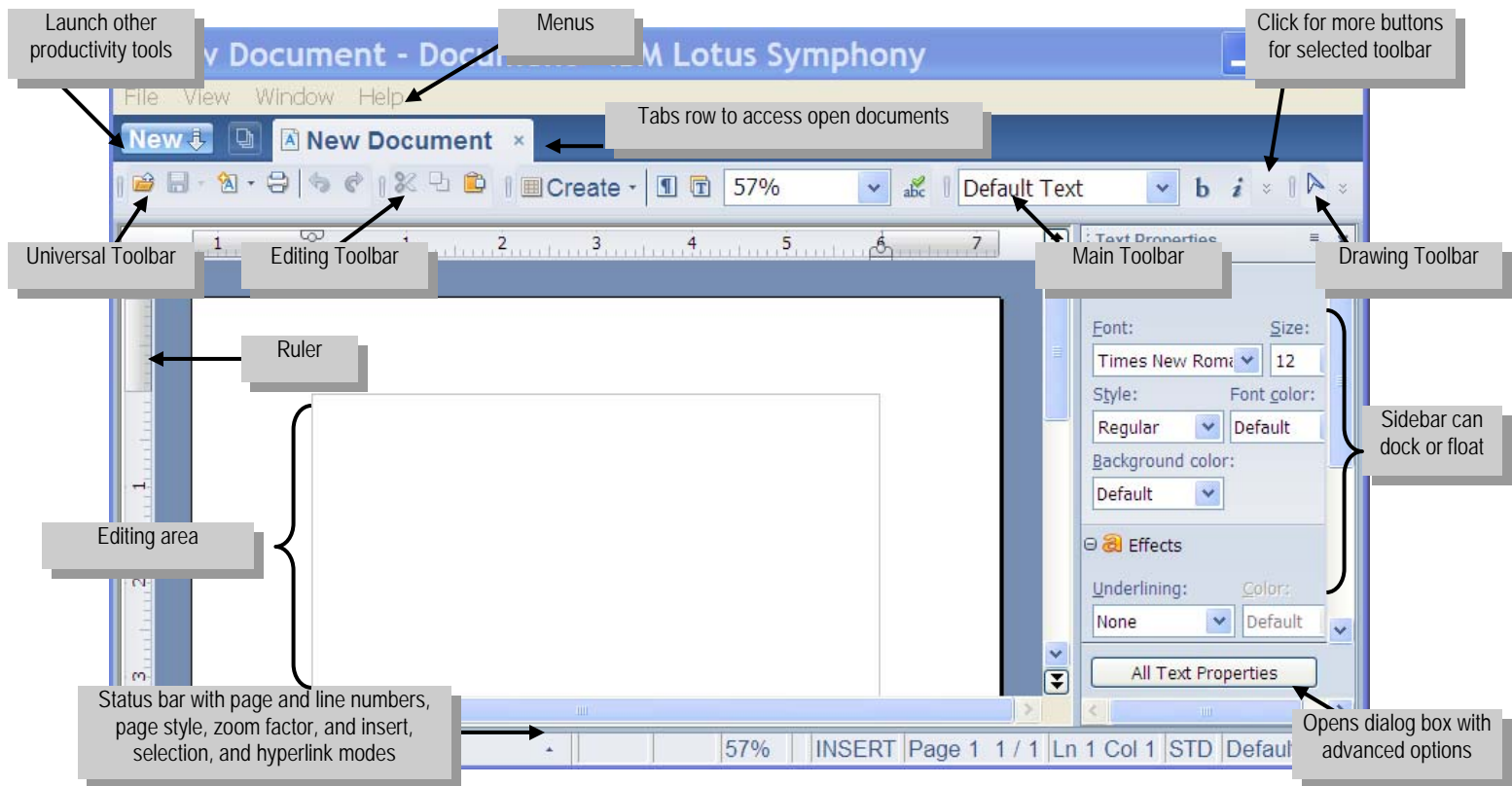
The following additional resources are available for more information on Lotus Symphony Documents:

- Tour: [http://symphony.lotus.com/idcontents/pdf/N8T30/start\\_n8t30.htm](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](http://symphony.lotus.com/idcontents/tutorial/en/documents_tutorial/start_documents.htm)
- Toolbar Reference Card: [http://symphony.lotus.com/idcontents/refcard/en/n8r30\\_refcard dita-pdf-minimal.pdf](http://symphony.lotus.com/idcontents/refcard/en/n8r30_refcard dita-pdf-minimal.pdf)
- Keyboard Reference Card: [http://symphony.lotus.com/idcontents/refcard/en/n8r30\\_shortcut dita-pdf-minimal.pdf](http://symphony.lotus.com/idcontents/refcard/en/n8r30_shortcut dita-pdf-minimal.pdf)




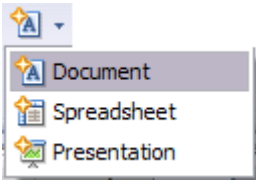

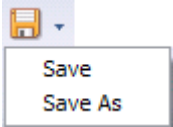





As they are developed, other resources may be added to this location: <http://symphony.lotus.com/software/lotus/symphony/help.nsf/home>.

### Available Plug-Ins




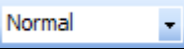















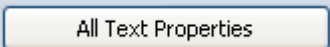



Extend the value of Lotus Symphony with plug-ins from IBM, partners, and developers. A complete list of all available plug-ins can be found here: <http://symphony.lotus.com/software/lotus/symphony/plugin.nsf/home>



## Creating and editing documents







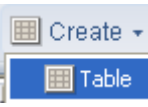










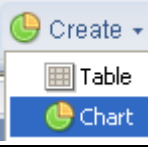
Microsoft Word	Lotus Documents
To open a document, click  .	Click  .
To create a new document, click  .	 Click
To create a new doc from a template, click <b>File→New</b> , select the template location, and browse for the template.	Click <b>File→New→From Template</b> .
To save a document, click  .	 Click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

## Formatting documents

Microsoft Word	Lotus Documents
To change font appearance, click <b>B</b> , <b>I</b> , or <b>U</b> .	Click  ,  , or  .
To apply a style, select one from the <b>Style</b> list. 	Select one from the <b>Apply Style</b> list. 
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 <b>Format</b> → <b>Font</b> .	Select the format option in the <b>Text Properties Sidebar</b> or click 
To apply other paragraph formats, click <b>Format</b> → <b>Paragraph</b> .	Select the format option in the <b>Paragraph Properties Sidebar</b> or click 
To copy formatting, click  .	Click  .
To add a note, click <b>Insert</b> → <b>Comment</b> .	Click <b>Create</b> → <b>Note</b> .

# Moving from Microsoft® Word to IBM® Lotus® Documents


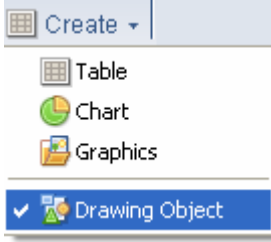


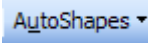

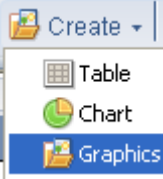
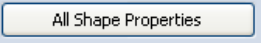


## Using lists, tables, and charts

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



## Managing document layout

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

## Inserting and formatting graphics

Microsoft Word	Lotus Documents
To display the <b>Drawing</b> toolbar, click  .	Click  .
To create a text box, click  .	Click  .
To draw a shape or line, click a shape on the <b>Drawing</b> toolbar, or click  .	Click  or any other shape on the <b>Drawing</b> toolbar.
To insert a graphic file, click <b>Insert→Picture→From File</b> .	Click  .
To insert from a graphic gallery, click <b>Insert→Picture→ClipArt</b> .	Click <b>Tools→Gallery</b> .
To format a shape, click <b>Format→AutoShape</b> .	Click  .
To insert text as a graphic, click  .	Click  .

## 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 <b>Search Scope</b> and click <b>New</b> .
Create a PDF	Select <b>File→Export as PDF</b> .
Open Print Preview	Press Ctrl+Alt+P.
Search through thumbnails of all open documents	Click  , then type in the <b>Find</b> field.
Move to any part of the document by page, section, or object	Press F5 to open the <b>Navigators</b> .
Open the Style List	Press F11.
Turn on numbering	Press Ctrl+W.
Turn on bullets	Press Shift + F12.
Manage Instant Corrections settings	Click <b>Tools→Instant Corrections</b> .





# Glossary

**footer**

A region of text, separated from the main body of text, that appears at the bottom of each page.

**footnote**

A note placed at the bottom of the page that comments on or cites a reference for part of the main body of text. It is typically flagged by a superscript number within the main body text.

**Gallery**

A supplied bank of thematically sorted images that installs with the Lotus Symphony suite.

**header**

A region of text, separated from the main body of text, that appears at the top of each page.

**Lotus Symphony**

A suite of free, OpenDocument Format (ODF) based office applications that includes spreadsheets, presentations, and word-processing documents.

**Properties sidebar**

A pane within the Lotus Symphony interface that provides quick access to the most commonly used formatting functions for the current context.

**style**

A defined set of visual formatting elements that can be applied to document text.



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