



User Manual 1.0



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Chapter 1

What is Places?

Places for Project Teams is a new tool for team communication and information management. Places is designed to provide a structured, intuitive layout for project information as well as fostering team communication through group awareness of a team's progress. Groups of people can discuss, design, and review ideas about their project without leaving their offices. A feature called Active Presence allows you to see who else is in the Place and to send a direct message to them or view their electronic Business Card®. Places aims to bring teams closer together.

Places for Project Teams provides several important advantages towards achieving effective team communication:

- **Customization:** Places for Project Teams is composed of Places components that can be customized as required for your project. Give your meeting Place a name, share it with selected colleagues, set your own milestones and Topics. Create as many Places as you have projects.
- **Intuitive Information Management:** Places for Project Teams provides an intuitive approach to document storage, organization, and navigation. Information is recorded and displayed across a timeline, so anyone on the team can view the team's information, discussions, and feedback by moving chronologically backward and forward through the Place.
- **Note Review:** Team members share notes related to a project, review them, and give feedback from the project Place's virtual workspace. Notes can be reviewed by Topic, by date, or by author. You can respond to contributions made by other members of the group, create an entirely new article, or share documents.
- **Collaboration:** Team members communicate more freely by using notes, e-mail, and shared documents to carry their message. Active Presence lets you see who else is currently using the Place and send them an Instant Message. In this way, teams can take advantage of each other's virtual presence; just as if they had started a conversation in the hallway.
- **Business Cards:** Create Business Cards for all team members listing their fax, phone, and e-mail address. The address provides an electronic link so you can automatically route messages to any member of the team by using

their Business Card. Some of this information is Place specific. You can see what role other users have and what their responsibilities are.

- **Lotus Notes Database:** Places for Project Teams provides easy access to information you already have stored in Notes discussion databases as well as new information you want to integrate.

About This Manual

The *PLACES for Project Teams User Manual* describes the procedure for installing Places and how to use it for everyday project communication. Before using this guide, it is important that you be familiar with the Windows NT or Windows 95 operating system.

Related Documentation

For additional information, refer to the *Lotus Notes User Guide* for information on establishing a user account.

The *Lotus Notes User Guide* document is not required to install and use Places for Project Teams. However, you may find it useful for additional background information.

Chapter 2

Installing Places

This chapter lists the requirements for installing Places for Project Teams and the steps required to install it.

Installation Requirements

Before installing Places for Project Teams, you must have the following:

- Lotus Notes version 4.0 or greater running on Windows 95 or Windows NT version 3.51 or 4.0
- At least a 486 processor, 90 MHz Pentium or greater recommended
- At least 16 MB of memory, 24 MB recommended for NT
- At least 15 MB free space on system disk to install (6 MB used permanently, the rest is used temporarily for installation only)
- SVGA color monitor with at least 256 colors (16-bit color is recommended)
- Printer (optional)
- Lotus Notes accounts for all project team members

Note: Typically a client who uses Notes has access to at least one Lotus Notes server through the network. A Notes server, however is not strictly required since a Notes client can be configured to run as a stand-alone product. Places in this type of configuration is limited to use on a single machine and cannot be shared with others.

Installation

Before installing Places for Project Teams, make sure Lotus Notes has been installed and runs on the target computer. Your Places account and password will be the same as your Lotus Notes account and password so the Notes account must be valid and active. The account number and password can only be changed in Notes.

A word about Lotus Notes: all members of a Place must have at least **author** access to the Notes discussion database, otherwise the user will be unable to post notes in Places. If a user account does not exist or lapses, Places will continue and may appear to work, but most operations will produce an error message and content will be missing.

Note: The steps below explain how to install Places on Windows 95 or Windows NT 4.0. On computers with Windows NT 3.5.1 installed, the procedure is similar to that of Windows 95. In general, instead of the Start Menu in Windows 95, Windows NT 3.5.1 users employ the Program Manager. Instead of a *Taligent Places* item being in the Program menu, there is a Taligent Places Program Group in Windows NT 3.5.1. Otherwise, the steps involved are the same.

Install Places for Project Teams as follows:

1. Install the CD-ROM into the drive and open the CD-ROM directory
or
Download the setup file from the Taligent web site.
2. Double-click *Setup.exe* to start the installation.
3. When the Places for Project Teams installation wizard appears, follow the wizard instructions.
 - To do a **typical**, default installation, you will not need to type anything during the installation process, just press *Next* until it is finished. Places will be installed on your C: drive and will include the Places software, user guide, and two sample places, Latte Lounge and Places Product Sheet.
 - Optionally, you can change the location where Places will be installed. Press the *Browse...* button on the *Choose Destination Location* screen to install in a different location.

Note: If you change your mind about the location AFTER it has been installed, you should use the Windows Uninstall program and reinstall in the desired location. DO NOT try to move the Places directory.

- Optionally, you can choose which pieces you want to install.
 - **Typical** install: Places software, User Guide and the two sample places.
 - **Compact** install: only the Places software (no User Guide or samples)
 - **Custom** install: choose the pieces individually.

Chapter 3

Using Places

How do I get to a Place?

A Place is a shared work and information space for a team, and you may have access to several Places. When you start Places the first thing you will see is the **Directory** which lists all the Places you have access to. For a Place to be listed, you need a PDS (Place Data Source) file for that Place in the Places folder on your computer. To start a new Place you can make your own PDS file by creating a Place with the **Place Maker Wizard**, or join an existing Place by getting a PDS file from someone else (like our sample Places).

Starting Places

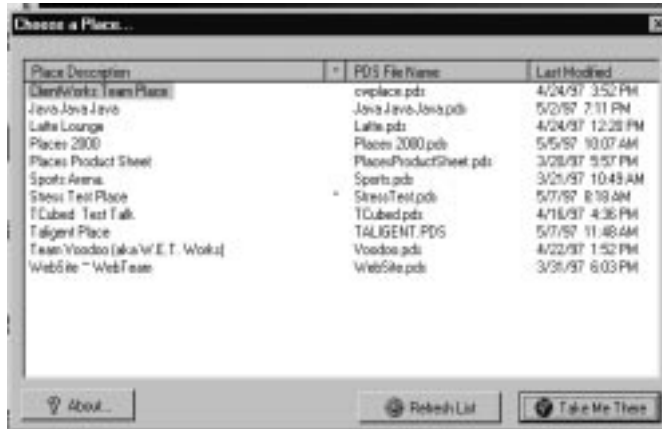
Note: The steps below explain how to start Places on Windows 95 or NT 4.0. On computers with Windows NT 3.51 installed, the procedure is similar to that of Windows 95. In general, instead of the Start Menu in Windows 95, Windows NT 3.51 users employ the Program Manager. Instead of a “Taligent Places” item in the Program menu, there is a Taligent Places Program Group in Windows NT. Otherwise, the steps involved are the same.

1. Click the *Start* button from the Windows 95 task bar.
 2. Select *Programs* from the “Start” menu.
 3. Select *Taligent Places* from the “Programs” menu.
 4. Select *Places for Project Teams*.
-

Note: These will be your selections if you used the default installation. If you chose a different folder you should look for Places for Project Teams in that location.

The Directory

When you open Places, the Directory window appears as shown below:



The Directory contains Place descriptions and PDS file names. It also shows the date when the Lotus Notes database for each Place was last modified. An * is displayed if a Place has changed since your last visit. Click on any of the column headings to sort the list by that category (eg Last Modified)

1. Select a Place, for example, *Places Product Sheet* or *Latte Lounge*.
2. Press *Take Me There*, or double click on the Place Description.
3. Type in your current Lotus Notes password when requested.
4. You will see the Timeline View for the Place you entered.



Use the *Refresh* button to check for updates.



Once you are in a Place, you may go to any other Place listed in the Directory. Select the *Directory* button, or *Place: Open Directory* menu item.

Creating and Accessing Shared Places

Because Places uses Lotus Notes discussion databases, you will need both a Lotus Notes database file (NSF) and a Places file (PDS). You can create and access shared places in three ways:

- Create a **new Place with a new Notes database** using the Place Maker Wizard
- Create a **new Place from an existing Notes database** using the wizard
- Connect to an **existing Place PDS file** by copying it to your Places folder

When you create a new Place and want it to be shared with other people, you will need to make the Notes database and the Place PDS file accessible to others. Typically the Notes database will reside on a shared server that others have access to, then you can make your new place known either through an e-mail or via a note in an existing shared place with the PDS file attached.

Creating a New Place

You create a Place by using the **Place Maker Wizard** to make a PDS file which links to a new, or an existing, Lotus Notes discussion database.

Open the Place Maker:

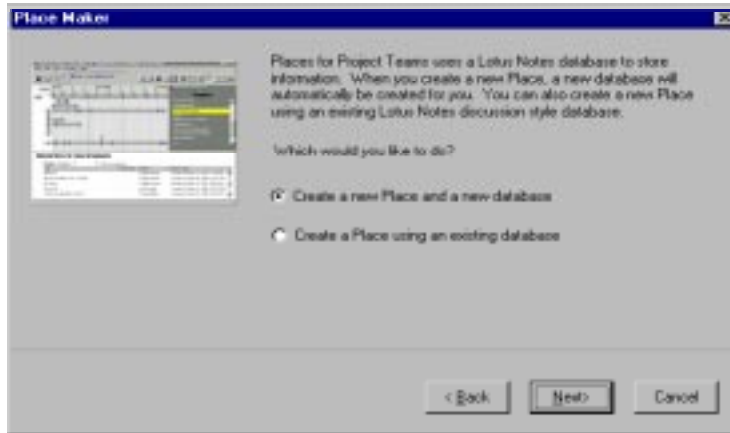
1. Click *Start, Programs, Taligent Places*
-

Note: These will be your selections if you used the default installation. If you chose a different folder you should look for the Place Maker in that location.

2. Select *Place Maker* to launch the wizard
-

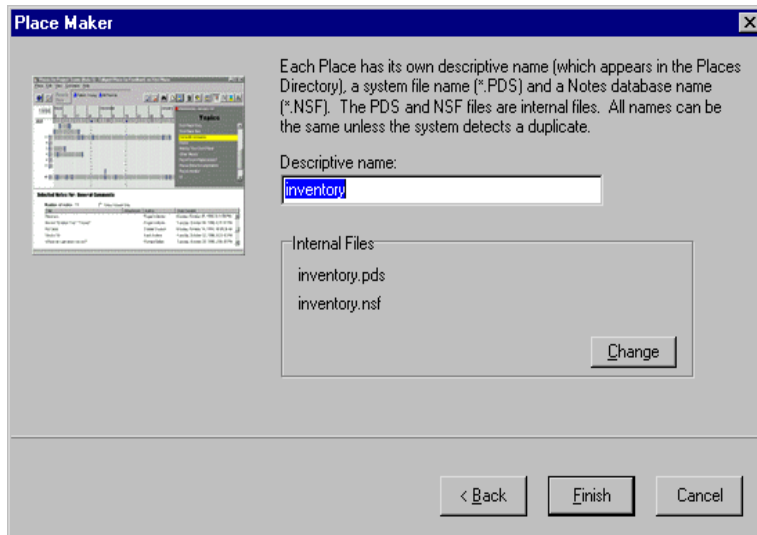
Note: You will see a warning message each time you start the Place Maker to remind you that all Lotus Notes applications need to be closed first. This includes both Notes and Places. This is normal and always as a reminder.

The Place Maker wizard will ask you whether you want to create a new Place and a new database, or create a Place which connects to an existing database:



3. Select *Create a new Place and a new database*. Click *Next*.
4. Place Maker will ask you for the name of the server. The default is local (your machine), but if you want others people to use the Place you will need to use a shared server. Click *Next*.

Note: You must have a Lotus Notes account on all servers where you wish to use or create a Place. To create a new Place you must also have the correct access privileges. See your Notes Administrator if you do not have the correct access.



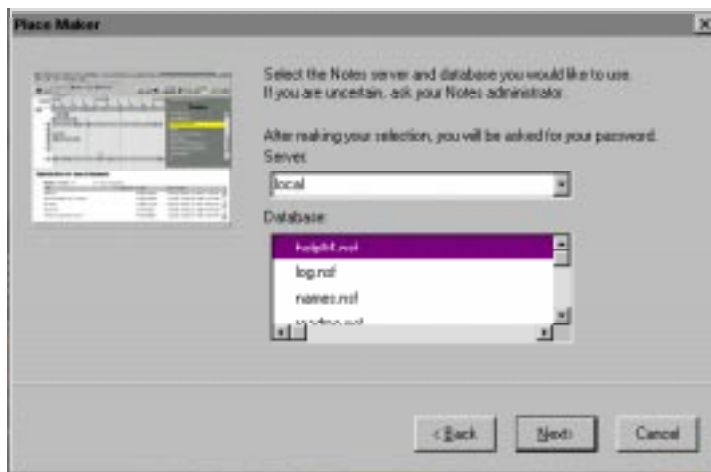
5. Enter a descriptive name for your Place file. This name will be displayed later in the **Directory**. As you enter this name the wizard will automatically enter the system file name (PDS), together with the Notes Database (NSF) file name if it is a new database. You can create a long descriptive name and then edit the file names to be shorter by clicking on the *Change* button. Click *Next*.
6. The wizard will begin creating the PDS and NSF files. You will be asked to enter your Lotus Notes password.
7. Start Places for Project Teams and see your new Place in the Directory.

Creating a New Place from an Existing Lotus Notes Database

Creating a new Place from an existing Lotus Notes database is a very similar procedure to creating a new database and uses the same Place Maker wizard. See above for more details on each step.

Open the Place Maker:

1. Click *Start, Programs, Taligent Places*
2. Select *Place Maker* to launch the wizard
3. Select *Create a Place using an existing database*.
4. Select the name of the server containing the database to which you want to connect. (If no server name is selected by default, click on the arrow button to display a list of available servers.) You will be prompted for your Lotus Notes password. The wizard will display a list of the available databases. Select the one you wish to use.



5. Enter a name for your Place. Since you are connecting to an existing NFS file, this screen only allows you to enter a PDS name.
6. Your PDS file will be created and you will be prompted for your password.
7. Start Places for Project Teams to access your new Place.

Connecting to an Existing Place

In order to connect to an existing Place, you will need access to a Places PDS file. If someone has already created a PDS file, they can email it to you, you can retrieve it from a shared folder, or you can copy a PDS file that someone has added to an existing Place through an attachment or the **External Document List**.

To go to a Place which someone else has created:

1. Copy the PDS file into your Taligent Places directory. (If you did not change the default location when you installed Places, the Place directory will be C:/Program Files/Taligent Places.)

Note: Several Places (PDS files) can link to the same database. You can also connect to an existing Lotus Notes database even if you do not have a PDS file. (See Section **Creating a New Place from an Existing Lotus Notes Database**)

2. Start Places for Project Teams.
3. The new Place will now be listed in your Places Directory.

What can I see in the different views?

Places gives you four unique perspectives on the same information:

- The Timeline View
- The Newspaper View
- The Outline View
- The People View

Each view is useful in different ways, and provides special functions. The Timeline View arranges information across time, within Topics, and provides a high-level view of the information.

The Newspaper View enables you to focus on greater detail, and read groups of notes selected from within the other views.

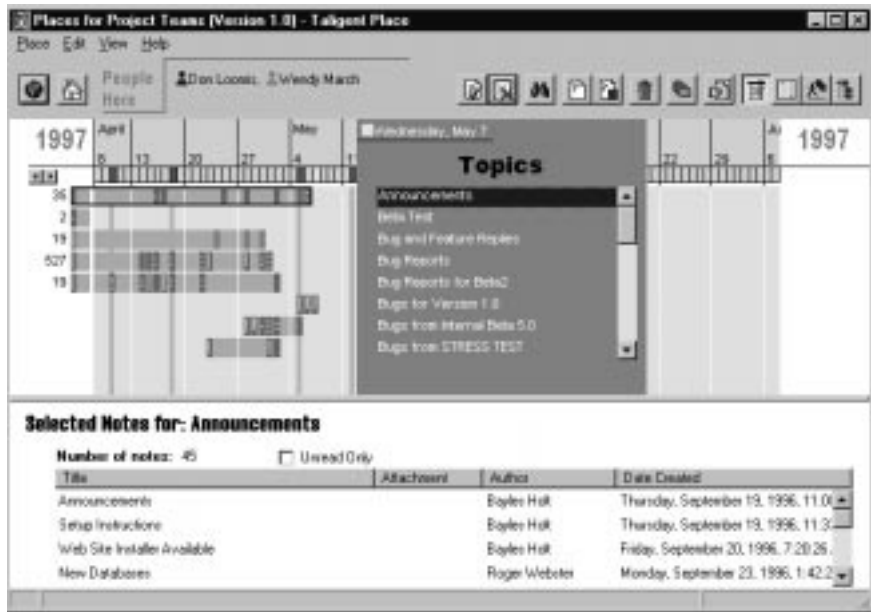
The Outline View shows the thread of responses within Topics, while the People View shows who has written which notes, and on what Topics.

The Timeline is the default View, and is always displayed when you first open a Place. You can reach the other views from the *View* menu, or by using the buttons in the top right of the window.

The Timeline View

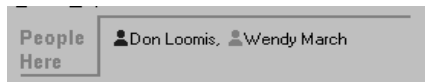


The Timeline View window, shown in the illustration below, is the main window used by Places for Project Teams:



People Here

The *People Here* area shows all of the users currently in this Place. This is also referred to as Active Presence.



When a user opens a Place they are considered to be ‘in’ that Place. Their name is visible to everyone else who is also in that Place, and a colored icon shows their level of activity. The icon is blue when they are currently viewing Places. If they open, or select, a different application it will change to gray, or inactive. Active Presence is designed to give users an awareness of other people’s presence and to foster group communication.



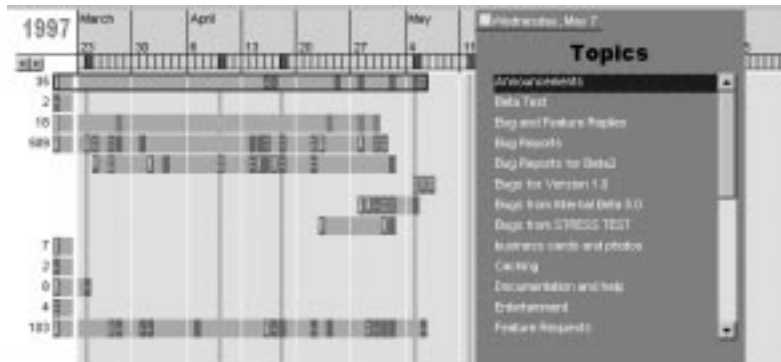
When there are more people in a Place than can be shown at once in the available space, arrows will appear to enable you to scroll through the entire list.

You can double-click on any person's name to display their **Business Card**. (See **How Do I find Out about other People in the Place**)

Timeline Area

The main part of the view contains the Timeline. It is a scrollable area that graphically displays all Topics, messages and notes chronologically in the current Place. Notes are grouped in Topics which are listed alphabetically in the **Topics Area**.

You can move the Timeline chronologically forward and backwards by clicking with the mouse anywhere in the timeline and dragging the mouse left or right. (The cursor will look like a double arrow). You can also scroll by week using the arrow buttons in the top left corner under the year.



Colors and Symbols

Colors and symbols on the Timeline indicate the following:

- A Vertical purple line indicates a milestone set by using the *Edit: Milestones* menu. Milestones can be set by a user to mark any date for any purpose and are seen by all users. To see a milestone's name, move your mouse over the purple block on the calendar headings. (See **Creating Milestones**)
- **Discussion Bars** are horizontal gray bars on the Timeline which represent the duration of the discussions listed in the Topics Area. Dark blocks on the

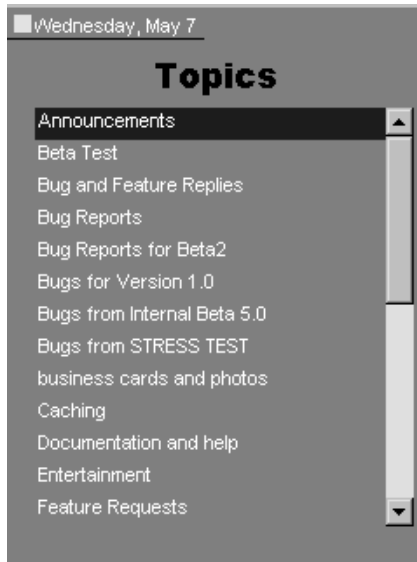
gray bar indicate that one or more notes were created on the same day for that Topic. These are **note blocks**.



- Each note block in a Discussion Bar shows the number of items that were added to a Topic on that date. A solid blue or orange block indicates one note, and white lines are drawn as more notes are added to indicate a 'pile' of notes.
- Orange blocks indicate unread notes.
- Blue blocks indicate notes you have previously read.
- As the mouse pointer moves over a note block, the name and author of the note appear in a flyover list.
- Single click on the note block to 'pin' the list in place and to see the scroll bar. Single click on any note in the list to open one note.
- Double clicking on a note block or a Topic will open that group of notes in the **Newspaper View**.

Topics Area

The Topics Area of the Timeline View window displays an alphabetical list or index of all Topics entered by users of the current Place. The Topics bar is scrollable when the number of Topics exceeds the height of the bar.

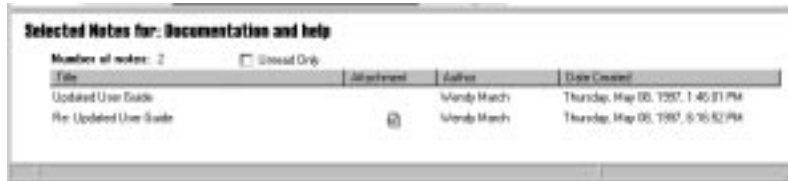



The Topics Area can be moved left or right along the whole extent of the timeline to line the Topics up with the notes (by clicking and dragging with the mouse). To return the Timeline View area to the current date quickly, click on the yellow date box, at the top of the Topics area, next to the date.

Each Topic is shown as a Discussion Bar on the timeline, containing notes posted by any member of the team. The bar also shows when the first and last note were posted for that Topic. Selecting a Topic causes the whole Discussion Bar to be highlighted and the notes for that Topic to be listed in the Summary Area.

Summary Area

The Summary Area at the bottom of the screen displays information and status about the items selected in the adjacent view, such as shown below for the Timeline View. When you first open Places the Summary Area will list **All Notes** in that Place.



Selected Notes for: Documentation and help			
Number of notes: 2		<input type="checkbox"/> Unread Only	
Title	Attachment	Author	Date Created
Updated User Guide		Wendy March	Thursday, May 06, 2007, 1:40:01 PM
Re: Updated User Guide		Wendy March	Thursday, May 06, 2007, 5:16:52 PM

- Click the column label (Title, Attachment, Author, or Date Created) to display the items by date or in alphabetical order based on the label. Click on the column label again to reverse the order. (A triangle will appear next to the column heading to indicate that the notes are sorted by that column. It also indicates the direction of the sort. Pointing upwards indicates a forward sort, pointing downwards indicates a reverse sort.)
- The Summary Area can be resized upward to view more documents by clicking and dragging on the horizontal border, or you can use the scroll bars.
- Select *Unread Only* to display only the unread items from your current selection in the Summary area.
- Click on a person's name in the Summary Area to open their Business Card.
- Click on an attachment icon to save or open a document attached to a note.
- Click on a note's title to open an individual note.



If you want the Summary Area to show all notes again, select the *All Notes* button, or the *Edit: Select All Notes* menu item.

The Newspaper View



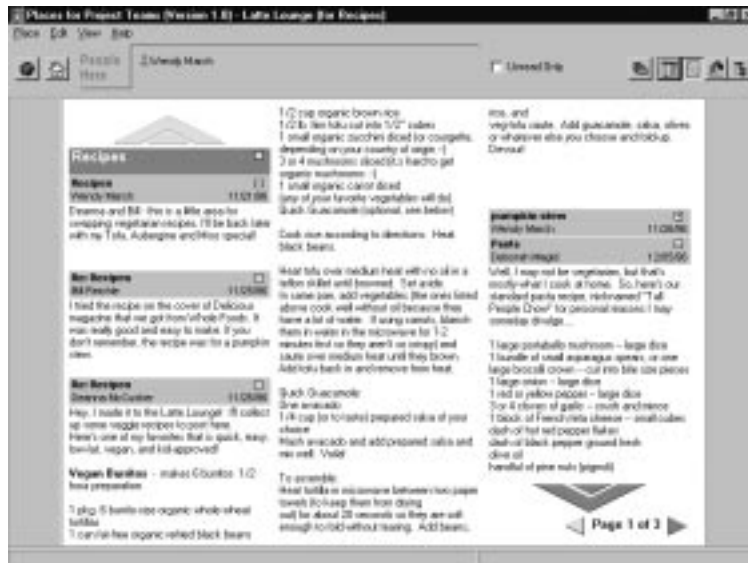
Open the Newspaper View using the *View* Menu, or the *Newspaper View* Button, or by double clicking on a note block or Topic. The Newspaper View displays multiple notes in columns - it looks like a Newspaper! You can scroll through the columns or move page by page. It is a good way to read through all the notes for one Topic, or browse through your unread notes.

The Newspaper view will open with all the notes that are currently selected; which are listed in the Summary area. You can open all notes, though that may take some time. Notes can be selected in the following ways from the Timeline View:

- All unread notes (*Ctrl* key + *Newspaper* button, or *View: Unread News* menu item).
- All notes (using *Select All Notes*).
- All notes in one Topic (by selecting a Topic in the **Topics Area**).
- All notes for a Topic on one day (by selecting a single **note block** on the Timeline).
- A single note (by double clicking on a single note).
- All notes that contain a common text string (using **Find**).

Notes can be selected in the following ways from the People View:

- All the notes by one person (you can also use **Find**).
- All the notes on a single Topic by one person.



Scrolling and Paging

You can move through the notes by scrolling or paging:

The arrows at the top left and bottom right of the screen scroll the columns in a snaking movement, either forwards or backwards.



The larger (outside) arrow moves the text by one **note** at a time. This can be a lot, or a little, depending on the length of the note. The smaller (inside arrow) moves the text by one **line** at a time.



When the arrow shows as a lighter gray, you cannot scroll any further.



You can use these arrows to move back and forth through the newspaper by one page at a time.



Click on the minus sign in the note or Topic heading to collapse the note or Topic.



Click on the plus sign in the note or Topic heading to expand the note or Topic.

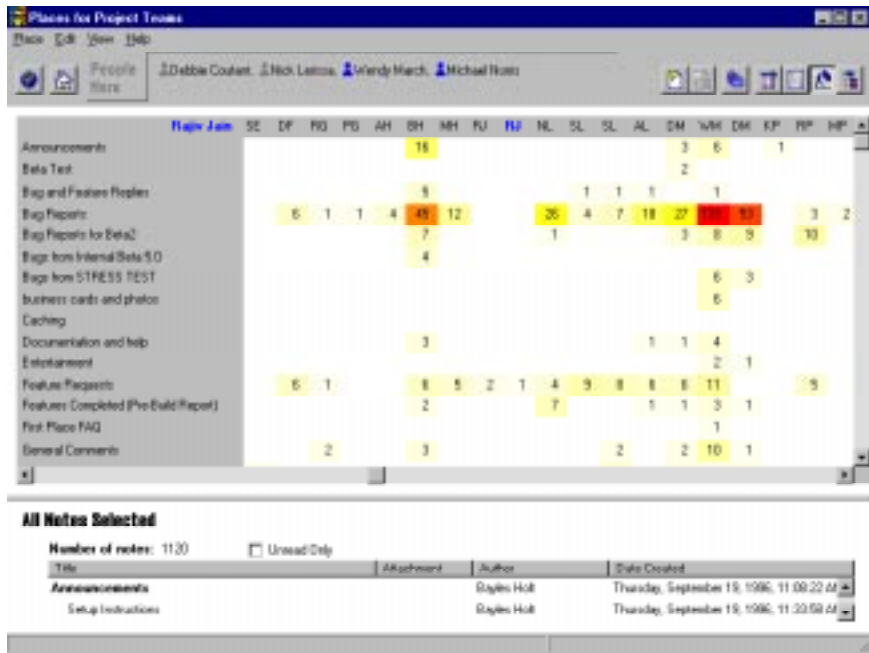
Note: If you collapse a note in the Newspaper View, it will continue to be collapsed every time you open that view until you chose to expand it again. Collapsed notes are not shown when you print a document (see **Printing Multiple Notes**).

The People View



To find out who is the most knowledgeable about a Topic, or who has written the most notes on a Topic, or perhaps to find a note when you can remember who wrote it, but not which Topic it was under, use the People View.

Select the *View: People View* menu item or click the *People View* button. The People View window appears similar to the following:



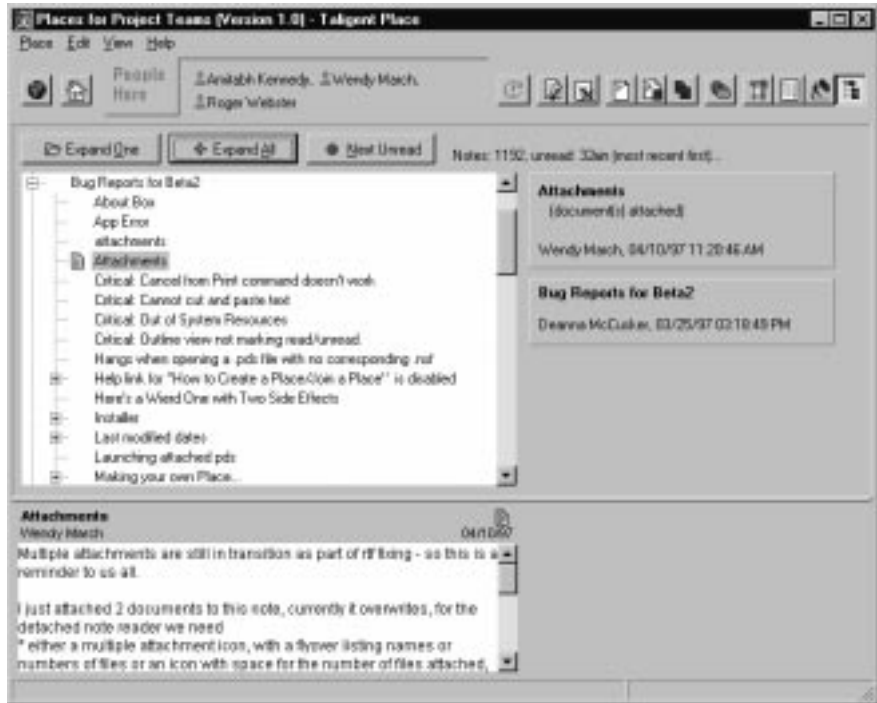
The People View shows a matrix of all Topics in the Place (vertical axis) versus all contributors to those Topics (horizontal axis). The number of responses per Topic and total per individual are displayed.

- The number of notes is indicated by color. A lighter yellow indicates fewer notes, a darker red shows larger numbers of notes.
- As you move your mouse over the grid the full name of the person is displayed to the top left, and the Topic name moves to the right in the Topic List.
- Click on a cell in the grid to list the notes by person or Topic in the Summary Area.
- These selected notes can also be viewed in the Newspaper View by selecting *Newspaper View* from the *View* menu or selecting the *Newspaper View* button, or by double clicking on the cell.

The Outline View



The Outline View shows the entire database of notes arranged hierarchically. Access it from the *View: Outline View* menu, or the *Outline View* Button.



This view provides a way to trace responses as they occurred for a given Topic.

- Click on the symbol to open/close the branch.
 - A + plus symbol indicates an unopened branch.
 - A - minus symbol indicates an opened branch.
- Click on the note to open it and display the contents at the bottom of the screen.
- Double-click to open the note in a separate window.
- An entry with a red dot next to it indicates that this is an **unread note**.
- There are three buttons on this view:
 - *Expand All* - Expand all branches of the outline; toggle to Collapse All.
 - *Expand One* - Expand the current branch.
 - *Next Unread* - Move to the next unread note (indicated by a red dot).

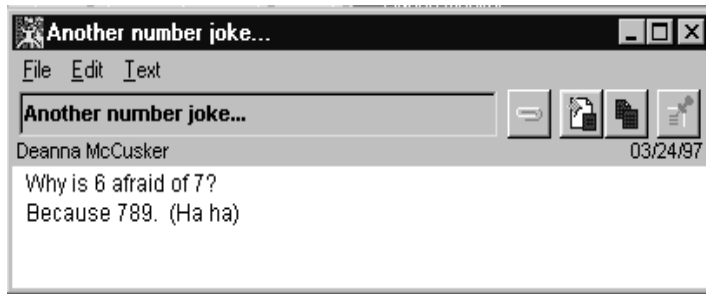


Note: While the Outline View is filling in the discussion thread you can select *Cancel* to stop its progress. Use the *Refresh* button to redraw it again. The *Refresh* button will also be enabled if a note is added to the Place.

The large buttons to the right of the Outline View window show the title and author of each note in the thread of responses, with the note you selected listed at the top. If that note is a response, then the previous note in the thread is listed below, with the first note in the discussion at the bottom. Click on one of these buttons to open the individual note.

How do I Read a Note?

A note can be opened from any view in the Place. Any individual note can be viewed in its own window, or groups of notes can be read together in the Newspaper View.



Timeline View

To view a note in this view, use the following steps:

1. Move the cursor over a gray discussion bar. As you do, a list of notes in each Topic appears in a flyover menu.
2. Double click on a note block to display all the notes for that day in the Newspaper View.

or

Single click on the note block to 'pin' the flyover menu, then click once more to select a single note from the menu and it appears in a separate window.

Single click within the gray bar to select all notes in that Topic. Select *Newspaper View* to read all of them, or double click on the Topic name to open the Newspaper View.

People View

From this view, notes can be viewed by Topic and author. To view a note in this view, use the following steps:

1. Click on the grid square where the initials of the author and the Topic list intersect. A list of notes written by this author appear in the Summary Area at the bottom of the screen. If no notes are shown there, this person has not posted notes on this Topic.
2. Select the note you want to read in the Summary Area and double click to open it.

-
- or*
3. Double click on the cell to open all the notes in the cell in the Newspaper View.

Outline View

1. Select a note on the hierarchy. Every note you select in the Outline View is automatically opened and displayed at the bottom of the view window.
2. Any individual note can be opened in its own window (for printing or responding). The large note button to the right of the Outline View shows its date and author. Click on this large button to display the note in its own window.

Newspaper View

Double clicking on a note or group of notes in another view will open the notes in the Newspaper View.

1. Use this view to read individual notes or groups of notes. Groups are categorized by content, date, author, or Topic.
2. You can use the *Unread Only* checkbox in either the Summary Area or the Newspaper View to see just the unread notes from your selection, or to see all the notes.
3. To read all the unread notes in a Place, hold down the *Ctrl* key while clicking on the *Newspaper View* button, or the *View: Unread News* menu item.

How do I Write a note?

When you post a note in Places you can either respond to a Topic, or respond to a note which someone else has written in a Topic. The difference between these two types of response will only be evident in the Outline View, where the relationship between notes is displayed.

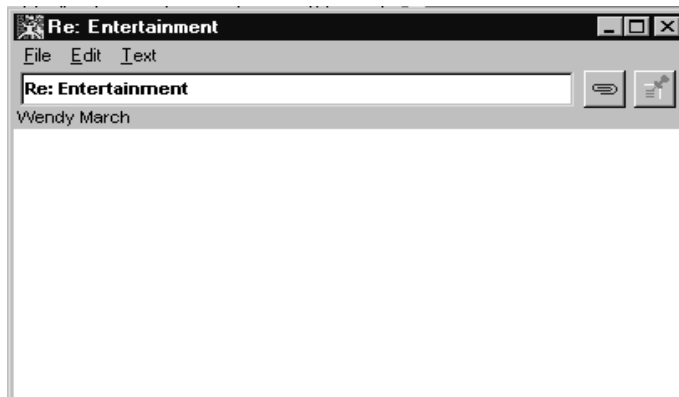
Alternatively, you can start a completely new Topic when you have a new subject to be discussed by the project team.

Responding to a Topic



You can create a new note within an existing Topic from any view. To respond to a Topic in the Timeline View follow these steps:

1. Select a Topic by highlighting a Topic name, or clicking on the light gray area between the note blocks which forms the Discussion Bar.
2. Select the *Respond to Topic* button, or from the *Place* menu, select *Respond to Topic*. The following window appears:



3. Type in a title and add a note to the Topic about its subject.

Note: There is an 80 character limit for the titles of notes.



4. To attach a file to your note, select *Edit: Attachments...*, or click on the *Paperclip* button. Select a file from the Attachments dialog box.



5. Click the *Post* button or select *Post* from the *File* menu.
6. You can edit any note in Places, if you were the original author. You cannot edit a note someone else has written.

The new note appears on today's date on the discussion bar for that Topic in the timeline. It will appear to you as a blue block (previously read), and an orange block (an unread note) to other people in the Place.

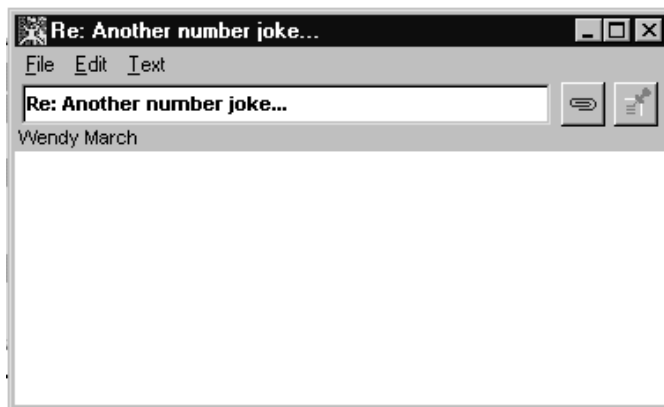
Note: If you edit a Note in Lotus Notes rather than Places it becomes read-only in Places.

Responding to a Note



To make a comment, provide additional information, or continue the discussion further, you can respond to individual notes. To do this in the Timeline View, use the following steps:

1. From the Timeline Area or the Summary area, select a note to which you wish to respond. Click the *Respond to Note* or the *File: Respond to Note* menu item. The following note editor appears:



2. Type in a title for the note of up to 80 characters.
3. Type the message.



4. To attach a file to your note, select *Edit: Attachments...* and select a file from the dialog box, or click on the *Paperclip* button.



5. Click the *Post* button or select *Post* from the File menu.

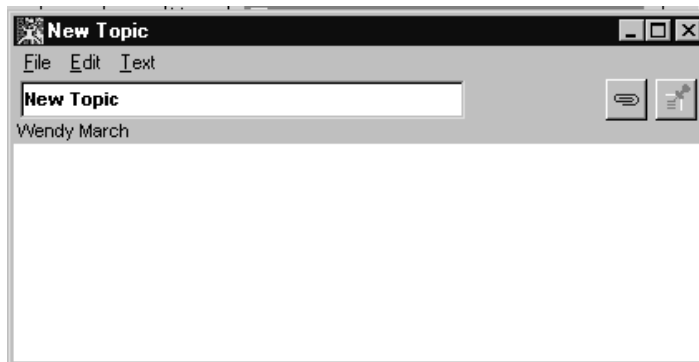
The new note appears on today's date on the discussion bar for that Topic in the timeline. It will appear to you as a blue block (previously read), and an orange block (an unread note) to other people in the Place.

Creating a New Topic



Creating a new Topic uses almost the same procedure as responding to an existing Topic, except it creates a new item in the Topics Area. To create a Topic, use the following steps:

1. From the Timeline View, select the *Add a New Topic* button or from the *Place* menu, select *New Topic*. The following window appears:



2. Type in a title and if desired add a note to the Topic about its subject.

Note: There is a 40 character limit for the names of Topics.

3. Attach Documents in the same way as for a response to a Topic.



4. Click the *Post* button or select *Post* from the *File* menu.

The new Topic appears in the Topics Area on the Timeline, in alphabetical order. The Discussion Bar will show one note block on today's date.

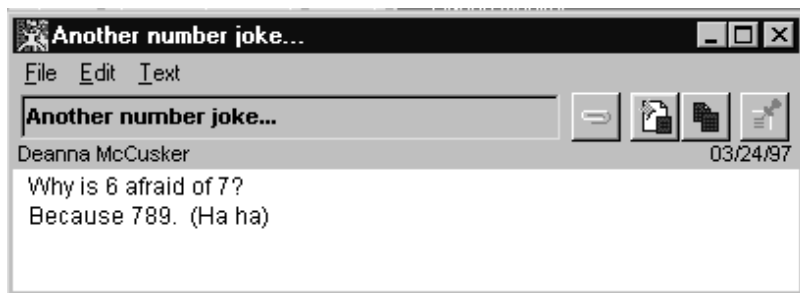
Printing Notes

You can print notes individually or in selected groups, by Topic, by author, by the selection in the **Find** box, or by selecting the entire Places database: *All Notes*.

Printing Single Notes

To print an individual note, use the following steps:

1. Select and open a note. (Refer to **How Do I Read a Note?** for directions on opening a note from different views.)



2. From the *File* menu select one of the following:
 - *Print* - Provides the standard Windows print dialog box to print the note.
 - *Print Once* - Prints the note immediately without showing the print dialog.
 - Optionally, select *Page Setup* to set page size, orientation, and margins to be set. If you don't do this, default page settings are used.

Printing Multiple Notes

To print all notes by Topic, date, content, or author, use the following steps:

1. Open the notes or group of notes to be printed in the Newspaper View (see the **Newspaper View** for an explanation of selecting different groups of notes)
 2. To limit the notes to only unread ones, click the *Unread Only* button at the top of the Newspaper View window.
 3. All notes will be printed exactly as they appear on the screen (collapsed or expanded).
 4. Optionally, select *Page Setup* from the Place menu to set the page size, orientation, and margin settings.
-

Note: The page divisions shown on screen are not the same as those of the printed pages. Use the Print Preview screen to guide you if you wish to print only selected pages.

5. Optionally, select *Print Preview* to see how the printed document will be paginated. One or two pages can be displayed at a time. You can also zoom in to see better detail. Click the *Print* button in the Print Preview dialog window to print the set of notes selected (this is the same as the next step).
6. Select *Print* from the *Place* Menu. The print dialog box appears.
7. Choose any option(s) and click OK.

Deleting Notes



Delete notes as follows:

1. Select the note(s) to be deleted.
-

Note: You can only delete notes which you have written, not notes which others have written. You are also unable to delete a note if other people have responded to your note, unless they delete their notes first.

2. Select *Edit: Delete Selected Notes* or the *Delete* button.
3. Confirm the selection in the dialog box.

Deleting a Topic

To delete a Topic you will need to delete the note which created the Topic, and all the notes which have been added in response:

1. Select the Topic to be deleted.

Note: Because you can only delete notes which you have written, and you are unable to delete a note if there are responses, you will not be able to delete a Topic which includes notes from other people, unless they delete their notes first. (Unless you have Manager Access in Lotus Notes.)

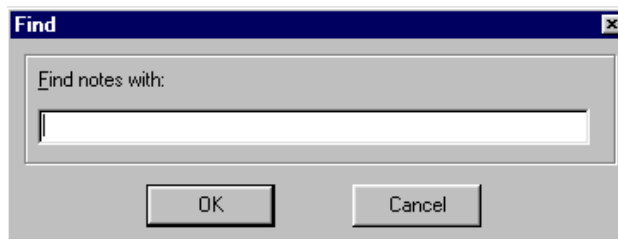
2. Select *Edit: Delete Selected Notes* or the *Delete* icon.
3. Confirm the selection in the dialog box.

Finding Notes



You can find all notes with a specific word by using the *Edit: Find* menu or selecting the *Find* button on the right side of the Timeline View window and entering the word you wish to search for.

You can also search by Topic, by author, by date, by individual selection, and by content.



The results of the Find will be displayed in the Summary Area.

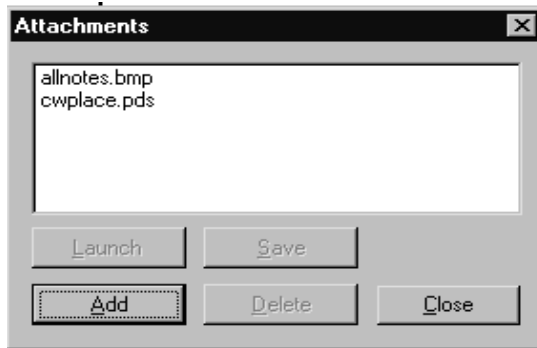
How can I Share Documents with Other People?

There are two ways to share a document in Places. You can either attach a document to a note, or you can put it into the External Document List. Any type of file can be shared in these ways:

Attaching Documents to a Note



Whenever you create a new Topic or note you can attach a document to the note. Select the *Paperclip* button, or the *Edit: Attachments...* menu item to open the Attachments window:



Select *Add* to add files from your computer. When you have finished, click *Close*.

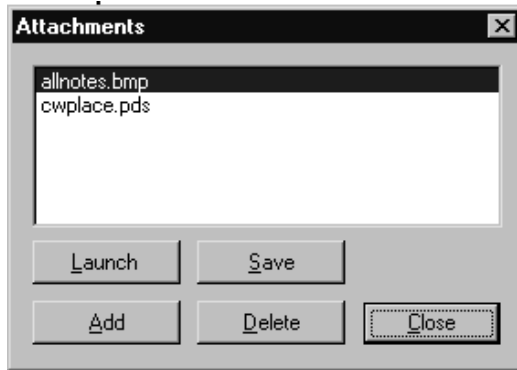


The note will now show this button when there are one or more attachments.

Viewing Attached Documents



Click the Attached document icon to open the Attachment window:



You can choose to view a document by selecting *Launch*, or *Save* it to your computer's disk.

Lotus Notes Content

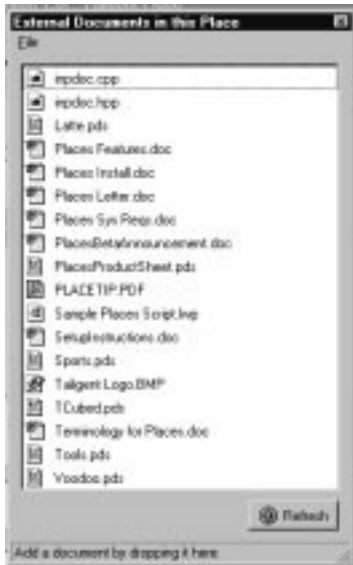


If a note has been written in **Lotus Notes** instead of Places, there may be content, (for instance graphics) which cannot be viewed within Places. To view the full contents of this note, you will have to open it within Lotus Notes.

The External Document List



This is a shared folder which enables you to save and retrieve documents to and from your computer. Put any type of file in the External Document List that you wish to share with anyone visiting this Place. Each Place has its own List.



1. Add a file by dragging it from the Windows desktop to the External Document List, or selecting *File: Add file to list*.
2. To view a document, double click to open it, or select *File: Open read-only copy*.
3. Save a copy to your computer to edit by selecting *File: Copy to local*.
4. Delete a file by selecting *File: Delete*.

The External Document List is an example of somewhere you could use your right mouse button to view a pop-up menu.

How do I find out about other People in the Place?

There are various ways you can find out about the people who are in the Place, or who have contributed to the Place:

- People Here
- People View
- People List
- Business Cards

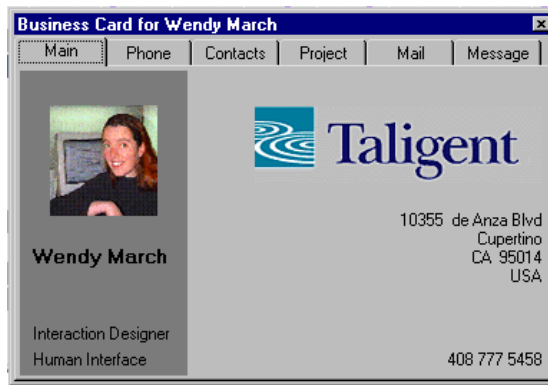
People Here shows you who else is in the Place with you (see the Timeline View for further details). You may want to find out about the author of a note, or find out who has contributed most to a Topic. The People View is where you can find out about people's interests and expertise. The People List shows you everyone who has a Lotus Notes account. They might not use Places, but their Business card will enable you to send an e-mail to their Lotus Notes account.

Wherever you find someone's name (such as in People Here or the Summary Area) you can open their Business Card to find out more about them.

Business Cards

Everyone in Places has a Business Card which displays their contact information, including phone, address and e-mail. The Business Card has both general information (available from **all Places**), and specific information (available from **this Place**). To display a Business Card (yours or someone else's):

1. Double click on a name in the *People Here* list, or in the *Summary Area* to display their Business Card.



2. You can view information in the following categories:

- Main - Gives the person's name and lists their company's name and address, their phone number, job title and department
- Phone - Provides their company and/or personal facsimile, pager, cell phone and telephone number.
- Contacts - Provides their manager's name, and their company and personal home pages, plus (specifically for this Place) a person to contact if they are unavailable.
- Project - (specifically for this Place) Displays their role, responsibilities and team members.
- Mail - Lets you send a private email to the person.
- Message - Lets you send a message that is delivered immediately to the other person, within Places.

Editing your Business Card

To customize or personalize your Business Card, Places provides a **Business Card Wizard**. The Business Card Wizard will display the very first time you use Places. After that it will also display when you enter a new Place for the first time to ask you for Place specific information.

To edit your Business Card at any other time, use the Wizard as follows:

1. Select *Business Card* from the *Edit* menu.
2. Select *All Places* or *This Place*. The following screen appears:



-
3. Follow the Wizard screens to create your Business card, and add bitmap images and links to web pages and other peoples' Business Cards.
 4. The *All Places* wizard enables you to add or change the following information which appears on your Business Card in every Place:
 - Company name and address
 - Title, department and direct telephone number
 - Manager's name
 - Personal and company URL's
 - Company phone and fax numbers
 - Further telephone numbers
 - Bitmap images for a company logo (200 x 55 pixels), and for your picture (93 x 100 pixels)
 - You can also use the *All Places* Wizard to redirect your mail messages to an internet account.
 5. The *This Place* wizard enables you to change the information which will only appear in this place
 - Role in the project
 - Responsibilities
 - A contact if you are unavailable
 - Team members

How can I communicate with other people in the Place?

To communicate with everyone in the group you can post a note, which everyone can see. To communicate with an individual you can either send them an instant message or an e-mail message. Both of these are accessed via their Business Card, or by using your right mouse button to click on their name in *the People Here* window, and selecting *Instant Message...* or *Mail...*

Sending Mail

Mail is sent to a Lotus Notes in-box (unless the person has redirected their mail).

1. Open their Business Card (see above).



2. When the Business Card appears, click on the *Mail* tab.
3. In the Send Mail dialog box, type a subject and the note itself.
4. Click the *Send* button to send it. Click the close box or another tab to cancel your message before it is sent, or to close the card.

Sending an Instant Message

An instant message is sent to another person within this Place. The recipient of an instant message will not see the message until they are in the Place you sent it from, so Instant Messages are most useful to communicate with “People Here”, or regular visitors.

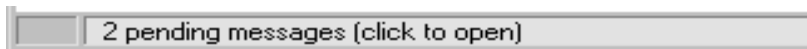
1. Open their Business Card (see above).



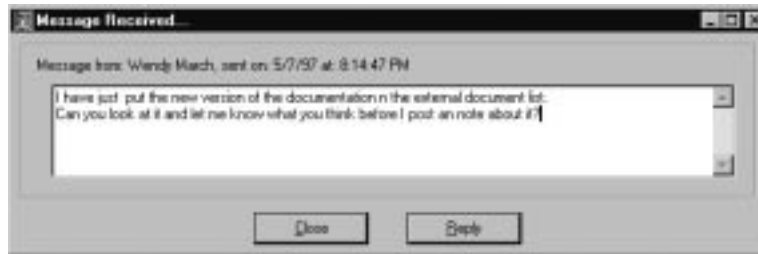
2. When the Business Card appears, click on the *Message* tab.
3. Click the *Send* button to send it. Click the close box or another tab to cancel it before it is sent.

Reading and replying to an instant message

New messages are displayed at the bottom of your Places screen as a yellow block:



1. The number of messages is also shown.
2. Messages will remain until you click on the yellow area, when a message window will appear for each note, showing the sender's name and the date and time it was sent:



3. You can *Close* the message or select *Reply*. A window similar to the message window will open.
4. Type in your reply and click *Send*.

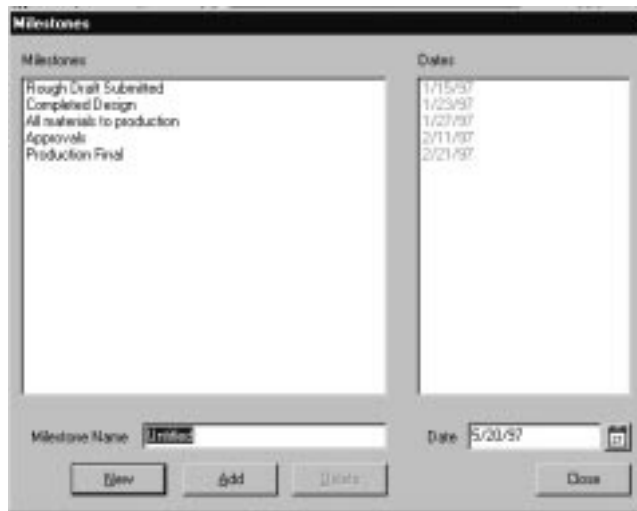
Note: Instant Messages are not archived. Once you close the message window, the message is deleted.

Creating Milestones

Milestones are significant dates for your group, or Project. You may wish to create several of them for any given project. They are shown as a vertical purple line on the timeline.

Adding Milestones

To add a new milestone, use the following steps:



1. From the *Edit* Menu select *Milestones* (or type *Ctrl M*). The Milestones dialog, as shown above, displays any existing milestones and the date when the milestone occurs.
2. Click on the *New* button.
3. Enter its title in the Milestone Name box.
4. Enter the date in the date box shown. Dates must be entered as numbers in the following format: month/day/year.
5. Click *Close*.

Using the Milestone Calendar

The date can also be entered by selecting the calendar icon at the end of the date box. Do this as follows:

1. Click on the *calendar icon* to open a monthly calendar which can be used to easily scroll through dates by day, month or year.
2. Select the date you want by clicking on that date.



3. To confirm your selection and close the calendar dialog, select the button with the *green check* mark. This enters the chosen date into the milestone date box.
4. To ignore or cancel the date shown in the calendar, choose the button with the *red cross*. This also closes the calendar dialog.

Note: Choose a Milestone name and date unique to the Place. If you choose a name that duplicates an existing milestone, Places assumes you are trying to modify an existing milestone and warns you accordingly when you try to add your milestone to the list.

5. Click the *Add* button.

If the milestone is unique for the date you have chosen, your milestone appears in the Milestones portion of the dialog. If, however, you choose a date already set as a milestone, an error message explains that only one milestone is allowed per date.

Modifying an Existing Milestone

1. From the *Edit* Menu select *Milestones* (or type *Ctrl M*). The Milestones dialog displays existing milestones and the date when the milestone arrives.
2. Select the milestone from the list shown.
3. Enter a new date in the date box.
4. Click *Add*.
5. When a new dialog box appears, "Milestone name in Use...", and prompts, "Commit Changes?" click *OK* to confirm the new date, or *Cancel* to ignore it.








Deleting a Milestone








1. From the *Edit* Menu select *Milestones*. The Milestones dialog displays existing milestones and their dates.
2. Select the desired milestone from the list and click the *Delete* button. No confirmation is required.
3. Click the *Close* button.




Buttons, Menus and Shortcuts

Places for Project Teams enables you to do things in several different ways. Most actions can be performed by either selecting from a pull-down menu, clicking on a button, using a keyboard shortcut, or using your right mouse button to bring up a pop-up menu.




Main Views (by Menu Item)





Action	Description	Button	Menu Item	Shortcut / Pop-Up
Open Directory	Closes the current Place and returns you to the Place Directory window.		Place: Open Directory	Ctrl + O
Home	Sets the currently displayed Place as the Home Place (An important Place to you or one you use the most).		Place: Set Current Place As Home	Ctrl + H
New Topic	Creates a new Topic in the Place Topics list.		Place: New Topic	Ctrl + T
Respond to Topic	Creates a new note within a Topic when a Topic is selected from the Topics List.		Place: Respond to Topic	Ctrl + R
Exit	Exits from the Place program and closes all associated windows.		Place: Exit	Alt + F4
Select All Notes	Selects/De-selects all notes in the current Place in the Summary Area.		Edit: Select All Notes	Ctrl + A
Mark Read	Marks the selected note(s) as read, (Blue).		Edit: Mark Read	Shift + Ctrl + R
Mark Unread	Marks the selected note(s) as unread, (Orange).		Edit: Mark Unread	Shift + Ctrl + U
Jump to a Date	Centers a selected date in the current Place timeline.		Edit: Jump to a Date	Ctrl + J

Find	Allows you to find any text string. The results are displayed in the Summary Area.		Edit: Find	Ctrl + F
Business Card	Allows you to customize your own Business Card for this Place or all Places. (Refer to Editing your Business Card) for more information.		Edit: Business Card: All Places This Place	
Milestones	Allows you to specify and name dates for events.. A milestone is represented by a purple vertical bar in the timeline. These are visible by all Place members.		Edit: Milestones	Ctrl + M
Delete Selected Notes	Deletes selected notes from the database of the current Place. You may only delete notes you have written.		Edit: Delete	
Timeline View	Displays the original timeline or calendar view.		View: Timeline View	F5
Newspaper View	Displays selected notes (currently displayed in the Summary Area) in newspaper columns.		View: Newspaper View	F6
People View	Displays a matrix of people and their activity (number of notes created) in the current Place.		View: People View	F7
Outline View	Shows Topics, notes, authors, and responses in a tree structure.		View: Outline View	F8
Unread Notes	Displays all the unread in the Newspaper View.	 + Ctrl	View: Unread News	Ctrl + Newspaper Button

People List	Displays a list of people you can contact from this Place.		View: People List	F9
External Document List	Allows you to store or retrieve documents to or from the Windows desktop in the current Place. These documents are external, shared files in any format.		View: External Document List	F11
Refresh	Redraws the outline view if you select Cancel initially, or a note is added to the Place while you are in this view.		View: Refresh View (in Outline View)	
Help	Activates the help system.		Help: Contents	F1
About	Displays information about the creators of Places.		Help: About	

Note Window

Action	Description	Button	Menu Item	Shortcut / Pop-Up
Post	Saves a newly-written note or changes made to an existing note.		File: Post	Ctrl + S
Discard	Cancels a newly-written note or changes made to an existing note.		File: Discard	
Respond to Topic	Creates a new note in the same Topic as the open note.		File: Respond to Topic	(Ctrl+Shift+R)
Respond to Note	Creates a new note within a Topic which is linked to this note.		File: Respond to Note	(Ctrl+R)
Page Setup	Allows you to set up a page format for printing.		Place: Exit	

Print	Allows you to print using the standard Windows Print Dialog box.		File: Print	
Print Once	Prints the selected note one time immediately.		File: Print Once	
Exit	Prompts you to save or discard the current note and closes the note.		File: Exit	
Undo	Performs a standard Windows Undo function of the last action.		Edit: Undo	(Ctrl+Z)
Cut	Performs a standard Windows Cut function of selected text.		Edit: Cut	(Ctrl+X)
Copy	Performs a standard Windows Copy function of selected text.		Edit: Copy	(Ctrl+C)
Paste	Performs a standard Windows Paste function of selected text.		Edit: Paste	(Ctrl+V)
Attach File to Note	Allows you to attach a document file to a Note.		Edit: Attachments...: Add	
Open Attached File(s)	Allows you to open a file attached to a Note.		Edit: Attachments...: Launch	
Save Attached File(s)	Allows you to save a file attached to a Note to your computer.		Edit: Attachments...: Save	
Delete Attached File(s)	Allows you to delete a file attached to a Note.		Edit: Attachments...: Delete	
Plain text	Returns selected text to plain text.			(Ctrl+P)
Bold	Makes selected text Bold .			(Ctrl+B)
Italic	Makes selected text <i>italic</i> .			(Ctrl+I)

Underline	Underlines selected text.			(Ctrl+U)
Strikeout	Puts a strikeout character through selected text.			(Ctrl+K)
Bullets	Makes the selected text into a bulleted list.			(Ctrl +T)
Color	Sets the color of the selected text to red, blue or the default color.			

Using the Mouse

	Left button, single click	Left button, double click	Right button
General Action	Select.	Open.	Pop-Up Menu.
Timeline View	Selects a single note block and pins flyover list. Selects whole Topic.	Opens Newspaper View for selected notes.	
Status Area	Selects a single note. Toggles sort by alphabet, date, author, attachments.	Opens a selected single note in the Note Window.	
Newspaper View	Selects text for cut and paste. On scroll buttons: scroll by line, note or page. Shift + Click to highlight text across columns.	Selects a whole word (triple click selects a whole paragraph).	
People View	Selects a cell to view notes in Summary Area.	Opens Newspaper View for all notes in a selected cell.	
Outline View	Collapses and expands note hierarchy.		

If I Need More Help

Places has a Help system that you can access at any time while running the software by selecting *Help: Contents*, or using the *F1* key.

If your questions are not answered in the Help System or this User Guide, then check the FAQ (Frequently Asked Questions), or the Places Newsgroup, which can both be found at <http://www.taligent.com>. You may post any question or comment to the Newsgroup and the Places team will respond.

During our 1997 Places 1.0 product introduction, you may also send your questions or requests privately at no additional charge. Use the form available on the Taligent website at www.taligent.com/places. Or, if you prefer, you may send an email to places_support@taligent.com. In either case, a member of the Places team will respond directly to you.

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