Contact Management in Notes 4.6

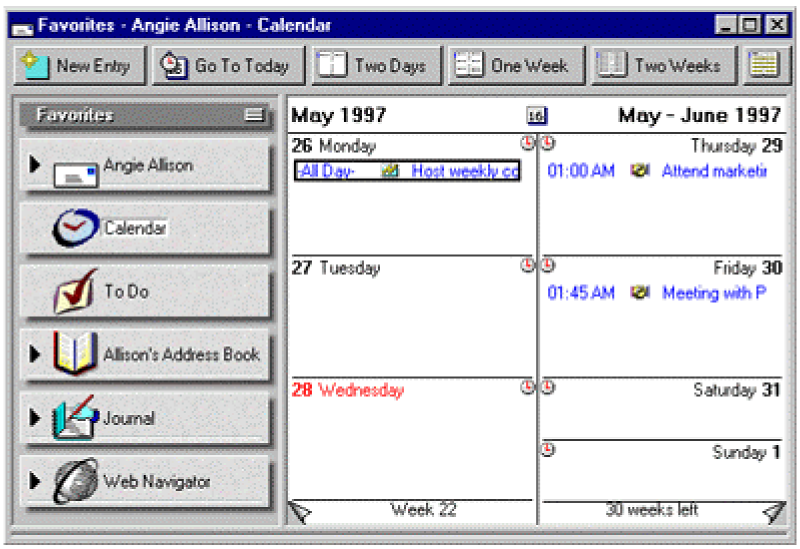
[Editor's note: This article resides in "Iris Today," the technical Webzine located on the http://www.notes.net Web site produced by Iris Associates, the developers of Domino/Notes.]

Overview

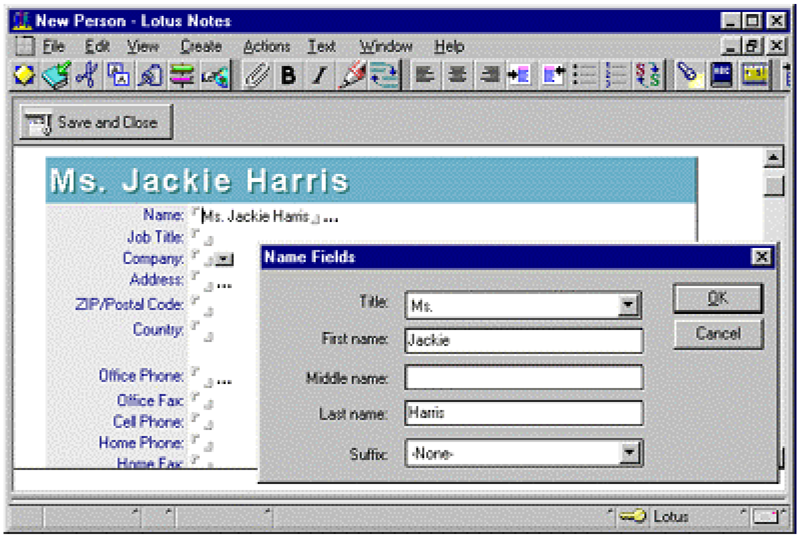
The Notes 4.6 client is the first step towards integrating personal information and contact management (PIM) features into Notes. The Notes 4.6 interface makes it simpler to access and navigate among databases, and expands the range of personal information you can store in your address book. Furthermore, Iris developers have introduced time-saving data entry tools for contact management, and have provided new options for printing your calendar views.

More specifically, the Notes 4.6 PIM features include:

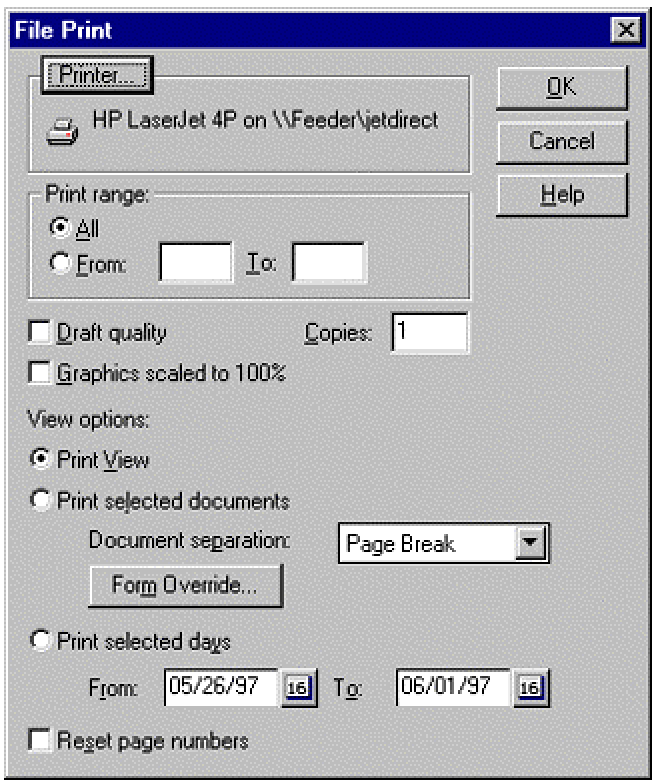
- The Portfolio database: A new type of Notes database that lets you create a database collection, which you access from within a common, streamlined interface. Since Notes users can create and manage their own Portfolios, they can organize databases into their own sets of useful tools. Portfolios can run from servers and replicate like any other Notes database.



- A redesigned Personal Address Book: The Personal Address Book now allows you to store a wider range of contact information. A new Person document automatically parses name form entries, breaking complex information into specific fields. This reduces your data entry time, while collecting a rich array of contact information.



- New options for printing Calendar views: You can now print any of the four Calendar views, and select ranges of dates to print.

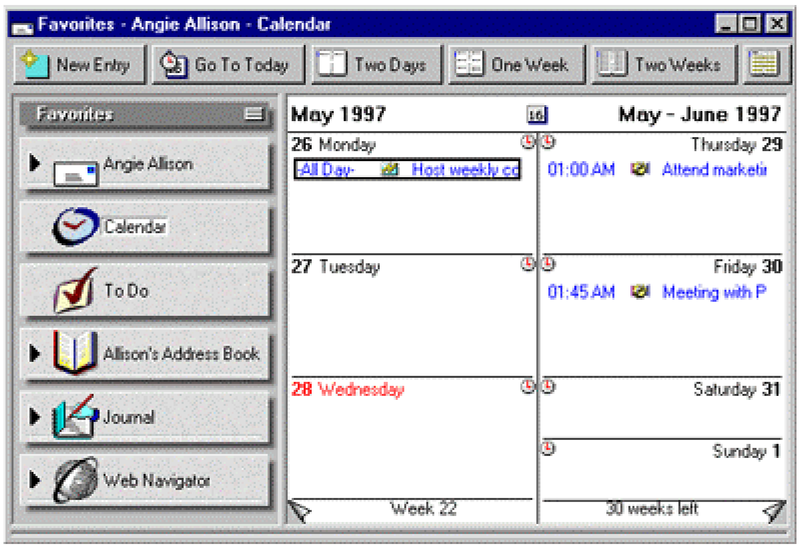


In the rest of this article, you'll learn more about these new PIM features, including some basics for how to use them.

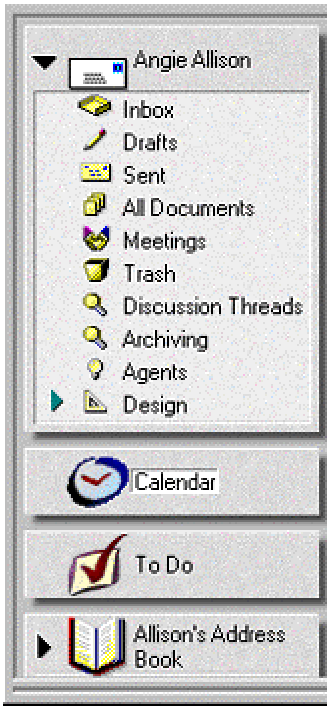
Organizing your work into Portfolio databases

A Portfolio is a custom collection of databases all accessible from the same space. You can think of Portfolios as a container for holding other databases. Once part of the Portfolio, a database and its documents can be accessed just as you would any other Notes database. For example, the first time you run Notes 4.6, the Setup program creates a Portfolio database called "Favorites" and automatically includes your mail, Personal Address Book, Journal and Web Navigator databases in the Portfolio. You can think of Favorites as your core personal information management databases.

After opening a Portfolio, you'll see the new Portfolio Navigator, the graphical interface for viewing and moving among your databases. When you click on any of the database icons in the left pane, the database's view appears in the regular view pane. Clicking on another database replaces the view with one from the new database.



The Portfolio database's one-click navigation reduces the time it would normally take to individually open databases from the desktop. You can see all of the available views for any database by clicking on the database twistie, giving you full access to your database.



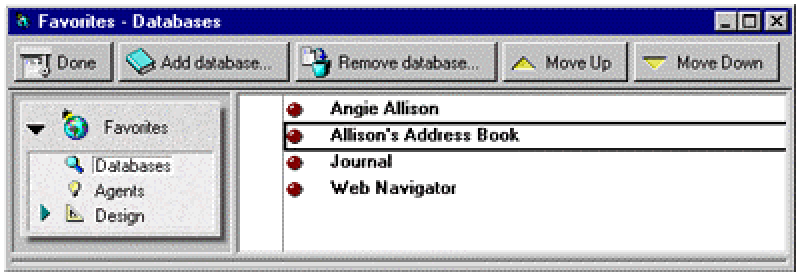
Robbie Shaver, one of the developers of the Portfolio, thinks that Portfolios will help users overcome the common problem of database sprawl. Instead of having hundreds of databases scattered across workspace tabs, users can now use Portfolios to consolidate their databases under a single icon. Besides simpler navigation, he says that Portfolios make it easier to search across multiple databases. Multi-database searching, while available with Release 4.5, takes fewer mouse clicks. Now you can just create a search string and apply the string to each of the databases with just a single click.

What makes a Portfolio tick?

A Portfolio is based on a new database Design type called Portfolio. The Portfolio type tells Notes how to deal with certain events. For example, clicking on the database icon in the Portfolio automatically generates the Portfolio navigator and displays icons representing the Portfolio's databases. You're not actually opening the Portfolio database, just displaying the databases contained in the Portfolio with the new Portfolio Navigator interface.

Under the hood, the Portfolio database is not much more than a series of Notes documents describing the database. These documents also include a Notes doclink to the database itself. Normally, these database documents are in a hidden view. You can edit them manually, however, from the Portfolio's Title bar.

The Portfolio Title is a new Notes interface element appearing directly above the list of database icons in every Portfolio database. You can click on the Portfolio Title to access the Edit Portfolio menu option, which then opens a view of the database documents. Like any Notes document, you can open and even edit these documents.



The Edit Portfolio view contains handy Action bar items for managing the Portfolio. You can add and remove databases, and reorder how the databases appear in the navigator. Adding a database to a Portfolio doesn't alter the individual database in anyway. You can still access it from your desktop if you wish. In addition, removing the database from the Portfolio does not delete the actual database or remove the database from the workspace.

Putting Portfolios to work

What are good applications for Portfolios? Since they're pretty simple to create and administer, any end-user, with a few instructions, can organize their existing desktops by adding a few personal Portfolios and adding their own selection of databases, using the Favorites Portfolio as an example.

Notes wouldn't be Notes without a few exciting workgroup and enterprise uses as well. Since Portfolio databases are much like regular Notes databases, they can reside locally or on a server. This means that you can set up a departmental Portfolio with a custom set of databases. For example, a Sales Portfolio would contain all of the Sales-related databases. Then, when a new sales person was hired, instead of creating a workspace with a dozen or more databases, you could add the single Sales Portfolio icon to the person's workspace.

How about centralized administration of user workspaces after installation? Sound like a Notes dream? Not anymore. Let's say you have a Corporate Portfolio that contains all of your company's basic databases like the phone directory, benefits database and job listings. When you set up a user's workspace, you add the Corporate Portfolio. Later, a new Notes application becomes available. Rather than sending out a Notes message with a doclink to all of your users, you just add the new database to the Corporate Portfolio and suddenly, the new database is on every desktop. Pretty exciting.

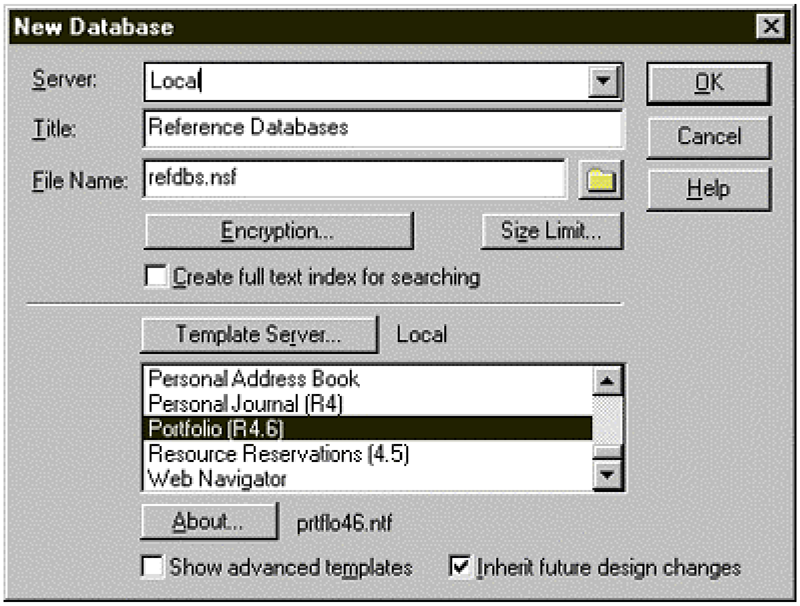
Creating a basic Portfolio

Creating a portfolio simply involves creating the actual Portfolio database, and then adding databases to that Portfolio.

Creating a Portfolio database

You create a Portfolio just as you would any other Notes database, by creating a new database based on the Portfolio template.

1. Choose File - Database - New, and complete the New Database dialog box.



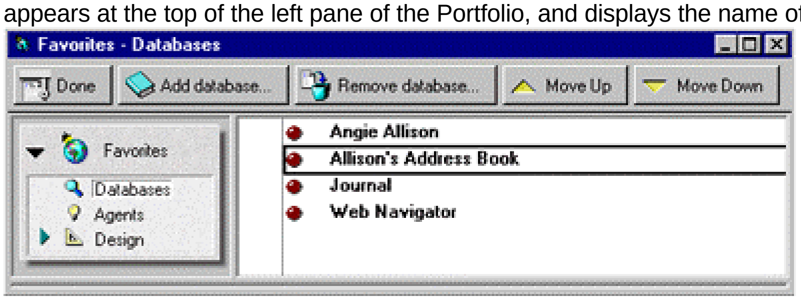
2. In the Server field, specify whether you want the new Portfolio database to reside on a server or on your local machine. You can type the server name or select the server name from the drop-down menu. The default is Local.
3. In the Title field, type the Portfolio database title.
4. In the File Name field, type the full path and directory name for storing the Portfolio database. You can click the folder icon to browse for a directory.
5. From the list of templates at the bottom of the dialog box, select the Portfolio (R4.6) template.
6. Click OK. Notes will automatically create the new Portfolio database and place it on your desktop.

Adding new databases to a Portfolio

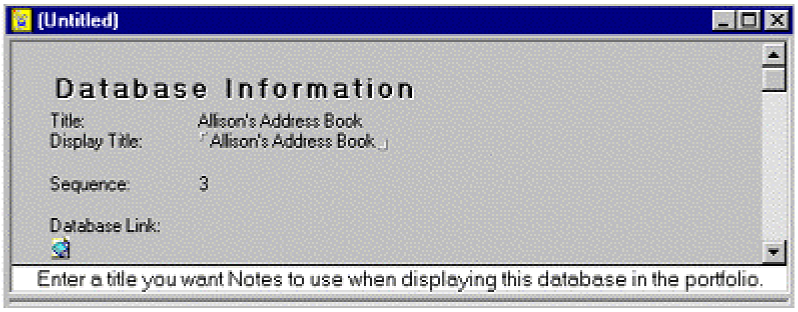
There are two ways to add a Notes database to a Portfolio: either by dragging and dropping the database onto the Portfolio icon, or by editing the Portfolio. We'll use the edit method, so we can explore the additional options that are available.

To add a database by editing the Portfolio:

1. Be sure that the database you want to add to the Portfolio is already on your desktop.
2. Open the Portfolio database.
3. Click the Portfolio name bar in the left pane, and select Edit Portfolio. (The Portfolio name bar appears at the top of the left pane of the Portfolio, and displays the name of the Portfolio database.)



4. Click Add Database and select one or more databases to add to the Portfolio.
5. To change the name that displays for the database, double-click on the database name. In the Database Information document, type a new name for the database in the Display Title field.



6. Click Move Up or Move Down if you want to reorder how the databases appear in the Portfolio navigator.
7. Click Done when you are finished. Your new databases will automatically appear in the left pane of the Portfolio.

Note: The Portfolio can only display 20 database icons in the left Navigator pane. It will, however, allow you to add more than 20; you just won't see them all.

Using new Personal Address Book features

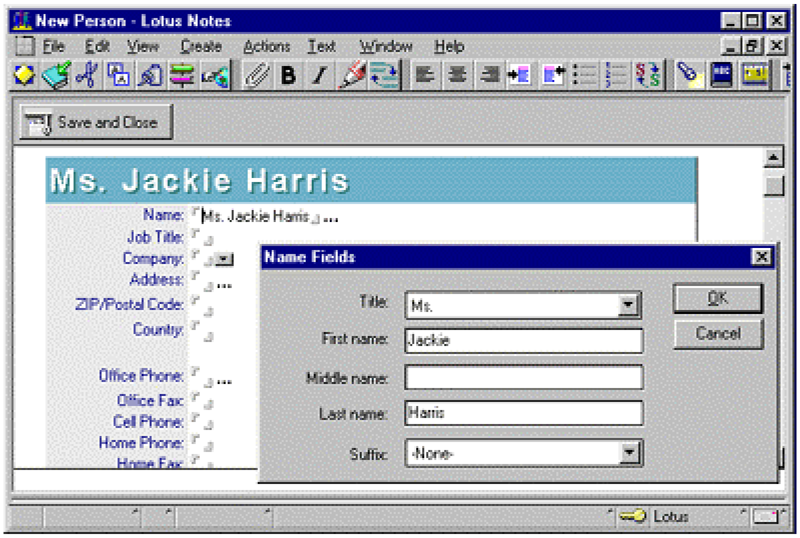
The next PIM feature in the Notes 4.6 client focuses on making it easier for you to enter contact information into the Personal Address Book. Iris developer Rob Slapikoff and others in the 4.6 development team designed a variety of forms, subforms and graphical elements to streamline the whole process of entering information into Person documents. At the same time, they redesigned the Personal Address Book views to display and organize more contact information. Unlike previous releases of Notes, users can now store a wider range of contact information, ranging from cell phone numbers to fax numbers.

The new contact management features are available in the new Personal Address Book template. If you are upgrading to Notes 4.6, you must replace the design of your Personal Address Book to use the new features (by choosing File - Database - Replace Design, and selecting the Personal Address Book template).

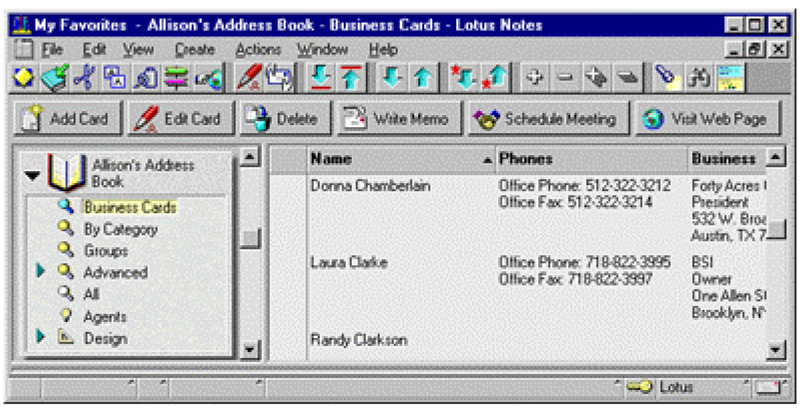
Power to the Person

The new Person document makes it easier to create, enter and access personal contact and client information. Take the new Name field, for instance. You can enter a new user name faster and more accurately. Just enter the person's name and title, for example, Ms. Jackie Harris, and Notes automatically parses it into the separate Name fields.

When parsing isn't exactly precise, new field forms play a big part in improving accuracy. For example, by double-clicking the ellipsis (...) next to the Name field, you can access a form that displays the separate components that actually make up the Name. If necessary, you can edit each field to correct any occasional parsing errors. You can even customize some field labels on the fly. If you need a field for a person's departmental receptionist, you can rename the label of a spare field to whatever you want. This makes the Person document extremely customizable.



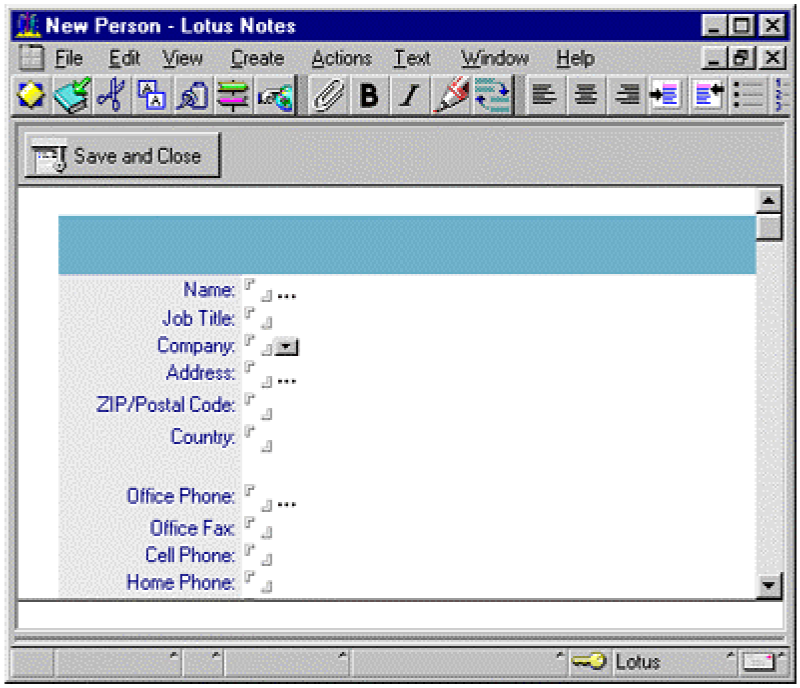
Views have also been redesigned to give you more information at a glance. The new Business Card view lists not only the person's name, but also pertinent phone and mailing addresses. The Category view has similar information, but is organized by the categories entered in the Person document's Category field. Of course, all of these views and forms are customizable.



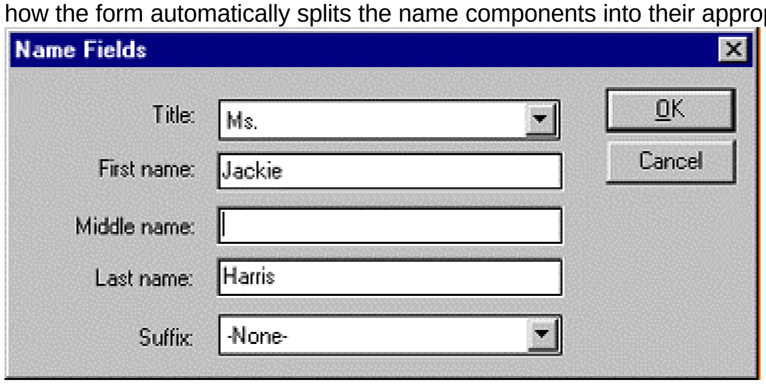
Adding a contact to your Personal Address Book

To add a contact to your Personal Address Book:

1. Open your Personal Address Book and click Add Card. (Click Edit Card to make changes to a Person document that already exists.)

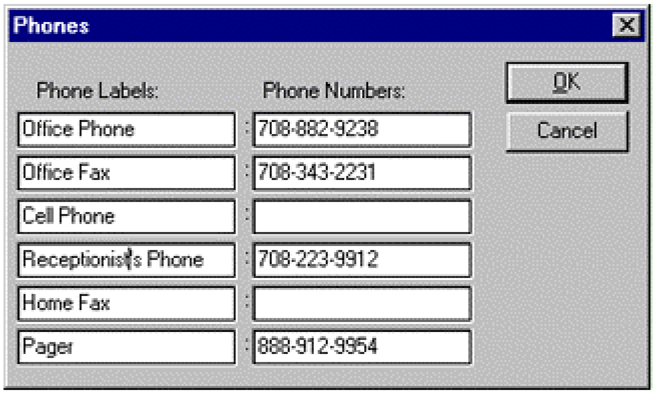


2. In the Name field, enter the person's name. You can enter a first name, middle initial, and last name, as well as a title and suffix, if necessary. Click the ellipsis (...) next to the Name field to view how the form automatically splits the name components into their appropriate fields.

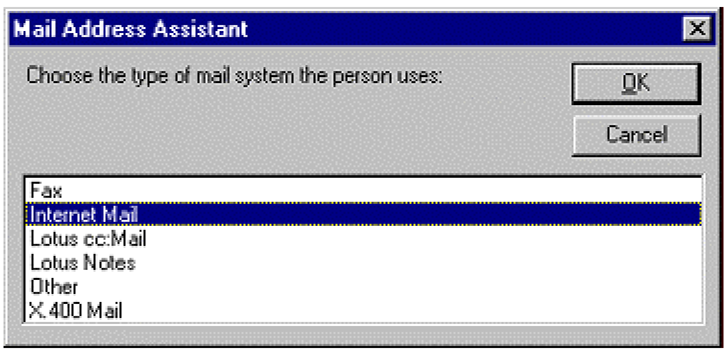


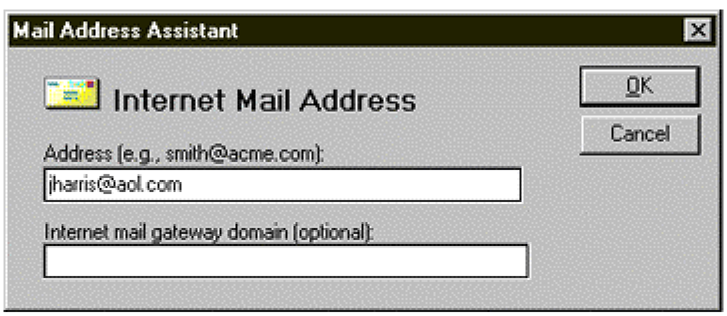
3. In the Job Title field, enter the person's job title description, for example, Sr. Marketing Manager.
4. In the Company field, press enter to select an existing company name or enter a new name. If you select an existing company name, the company's postal address is automatically filled in.
5. In the Address field, enter the person's street address, including the city and state. You can enter multiple lines. Click the ellipsis (...) next to the Address field to view how the form automatically splits the address components into their appropriate fields.
6. Enter the ZIP code in the ZIP/Postal code field.

7. Enter phone numbers into any of the phone or pager fields. If you want to rename any of the fields, for example, to create an Departmental Receptionist instead of a Home Phone, click the ellipsis (...) and change the text in the Phone Labels column. The new name will automatically appear on the Person document and in the Business Card view.



8. In the E-Mail address field, enter the person's e-mail address. Click the ellipsis (...) to select the person's mail type, either Notes, cc:Mail or Internet mail. Clicking on a mail type brings up a dialog box for entering address information for the selected mail system.





9. The Categories field lets you organize your users under one or more headings in the Category view of the address book. You can enter a new category or press enter to select from existing categories. Each person can have one or more categories, such as, Prospect and Personal.
10. Click More Info and enter any additional information about this person in the Business and Home sections.
11. Save and close the document.

Printing Notes Calendar views

The last PIM feature we'll discuss is the new capability to print your Calendar views. It goes without saying that most people find it convenient to carry around a printed copy of their calendar. It's certainly convenient to pull out a couple of sheets of paper to see what appointments and other calendar items are coming up on a busy road trip. The Notes 4.6 client introduces new options for printing any of your calendar views, including Two Days, One Week, Two Weeks and One Month. When you choose File - Print, you can either select to simply print the view, or you can select a range of days to print.

Printing the Calendar view

Use the following steps to print your Calendar view.

1. Select the Calendar view type you want to print (Two Days, One Week, and so on).
2. Choose File - Print. Under View options, select Print View to print the exact contents of your calendar view. Or, select "Print selected days" to print only a specific range of dates in the calendar view.