

## **Contents**

This is online Help for installing Lotus Notes® Release 3.3.

The Help screens you see during Notes Installation vary depending on the type of installation you are performing.

## Main Menu

Select one of the following options to create a set of Notes workstation or server disks for Windows™ , OS/2®, or Novell® NetWare®:

Create Windows Workstation Diskette Kit

Create OS/2 Workstation Diskette Kit

Create Windows Server Diskette Kit

Create OS/2 Server Diskette Kit

Create Notes Server for NetWare Diskette Kit

**Note** Depending on your installation kit, you may not see all options.

Select **Exit Install** to exit the installation program.

## **Main Menu**

Select one of the following types of Notes installations to install Notes software on your workstation:

### **Install Workstation Software on this System**

Select this option to install Notes workstation software on your workstation.

### **Install Server Software on this System**

Select this option if you plan to set up a Notes server.

### **Install a Public Copy of the Workstation Software in a File Server's Shared Directory**

Select this option if you're a Notes administrator setting up Notes program files for shared use from a file server. This option lets you avoid storing the Notes program files on each user's workstation hard disk.

### **Install the Notes Server for NetWare Software on a Remote Novell Server**

Select this option to set up a Notes Server for NetWare. Note that the server installation requires certain Notes files to complete server setup, so your workstation must have Notes for Windows Release 3.3 installed before you can proceed.

Select **Exit Install** to exit the installation program.

**Note** Depending on your installation kit, you may not see all options.

## **Main Menu**

Select one of the following types of Notes installations to install Notes software on your workstation:

### **Install Workstation Software on this System**

Select this option to install Notes workstation software on your workstation.

### **Install a Public Copy of the Workstation Software in a File Server's Shared Directory**

Select this option if you're a Notes administrator setting up Notes program files for shared use from a file server. This option lets you avoid storing the Notes program files on each user's workstation hard disk.

Select **Exit Install** to exit the installation program.

## **Main Menu**

Select one of the following types of Notes installations to install Notes software on your workstation:

### **Install Server Software on this System**

Select this option if you plan to set up a Notes server.

Select **Exit Install** to exit the installation program.

## **Type of Workstation Installation**

Select one of the following types of Notes software installations:

### **Install Your Own Copy of Notes on this System**

Select this option to install a copy of Notes software on your workstation. The files needed to run Notes will reside on your workstation.

### **Use a Public Copy of Notes Stored on a File Server**

Select this option to run Notes from a public (shared) copy of the software on a network. To use this option, you must specify the public directory path where Notes is located on the file server.

If you don't know the Notes directory path, ask your Notes administrator to assist you.

Select **Cancel** to cancel your selection and return to the Main Menu.

## Specifying Public Directory Path

Specify the location of the shared Notes files on the server to use a public (shared) copy of Notes. You must specify the complete path to the Notes files in the Public Directory text box.

If you're unsure of the path, but you know the drive:

1. Double-click the drive name or letter. A list of directories appears.
2. Select a directory, or type its path in the Public Directory text box.
3. Select **OK** to confirm the Public and Current directories.

Select **Main Menu** to return to the Main Menu.

### **Specifying NetWare Server Information**

Specify the volume name for the file server that will run the Notes Server for NetWare software.

Select **OK** to confirm the file server's volume name.

Select **Cancel** to return to the previous dialog box.



## Specifying Directories for the Notes Files

Select the Notes files you want installed on your workstation. You also can install Notes online documentation databases and later add them to your workspace. Be sure you specify the directory in which to store the Notes files:

[Program files](#)

[Personal data files](#)

[Template application files](#)

[Example files](#)

[Documentation databases](#)

[Help](#)

[Tutorial databases](#)

[Notes Guided Tour](#)

[Novell support files](#)

**Note** Be sure the target drive has enough free disk space. The amount of free disk space on available drives is displayed in the Available Space list box. Compare the amount shown for the target drive with the Total size of selected files shown in the dialog box.

Select **OK** to confirm your selections.

Select **Browse Disk** to search local and network hard disks for directories to store Notes program and personal data files.

Select **Main Menu** to return to the Main Menu.

## Specifying Directories for the Notes Files

Select the Notes files you want installed on your workstation. You also can install Notes online documentation databases and later add them to your workspace. Be sure you specify the directory in which to store the Notes files:

[Personal data files](#)

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**Note** Be sure the target drive has enough free disk space. The amount of free disk space on available drives is displayed in the Available Space list box. Compare the amount shown for the target drive with the Total size of selected files shown in the dialog box.

Select **OK** to confirm your selections.

Select **Browse Disk** to search local and network hard disks for directories to store Notes program and personal data files.

Select **Main Menu** to return to the Main Menu.

## Specifying Directories for the Notes Files

Select the Notes files you want installed in a shared directory on the file server. Be sure you specify the directory in which to store the Notes files:

Program files

Template application files

Example files

Documentation databases

Help

Tutorial databases

Notes Guided Tour

Novell support files

**Note** Be sure the target drive has enough free disk space. The amount of free disk space on available drives is displayed in the Available Space list box. Compare the amount shown for the target drive with the Total size of selected files shown in the dialog box.

Select **OK** to confirm the specified drive and directory to store the Notes files.

Select **Browse Disk** to search local and network hard disks for directories to store Notes program and personal data files.

Select **Main Menu** to return to the Main Menu.

## **Browse**

Select an available directory or drive from the Directories list box in which to store Notes files. You can also specify a directory or drive by typing it in the New Directory text box. Each directory selected appears in the New Directory text box and becomes the active directory.

Select **OK** to confirm the directory or drive shown in the New Directory text box and return to the previous dialog box.

Select **Cancel** to cancel your selection and return to the previous dialog box.

## Adding Icons

If you want the Install Program to add Notes icons automatically, verify that the check boxes next to each Notes icon that you want to have appear in a group window are selected. You can create a new group or assign the icon(s) to an existing group. The default Group Name is Main.

Select **OK** to confirm the group to which the Notes icon(s) will be added.

Select **Cancel** to cancel all selections and return to the previous dialog box.

Select **Main Menu** to return to the Main Menu.

## Confirm Deletion

Notes Install scans the target drive and displays files from an older or a different version of Notes, and files that aren't compatible with Notes files for the current operating system. You should delete older or non-compatible files. If you want to keep files, deselect them.

Select **Yes** to confirm deleting obsolete files.

Select **No** to cancel the deletion of these files.

## Notes Install Program

Notes Install prompts you for the disk required to complete the installation if you're installing Notes from disks. If your Notes administrator makes you a set of installation disks, they should be labeled to reflect the prompts you see.

Select **OK** after inserting the required disk to continue the installation.

Select **Cancel** to cancel the installation process.

## **Install Remote Workstation Software on this System**

Select this option to install Notes software on your workstation without network drivers. A remote workstation is one that's not connected to a server via a LAN.



## Program Files

Select this option if you plan to install the complete set of Notes program software on your workstation or if you are setting up Notes for sharing on a file server. You need to install these files to run Notes.

Select **Browse Disk** if you're not sure where to store the program files. Keep the following considerations in mind when selecting this option:

- If you're installing Notes for the first time, type the name of the directory where you want Notes stored, or accept the default directory. Notes Install prompts you to confirm the creation of this directory if it doesn't already exist.

**Note** Store Notes program files in a directory other than the root directory.

- If you're installing Notes over a previous version of the software, the directory specified should be the directory where the previous version of Notes is stored.
- If you use a dual-boot system (DOS and OS/2) and you plan to install Notes for both operating systems, you should name the directories accordingly, for example, C:\DOSNOTES and C:\OS2NOTES. Don't store both copies of the Notes program files in the same directory because Notes Install will delete the files for the other operating system.

## Personal Data Files

Select this option if you're installing either a private or public copy of Notes workstation software on your workstation. Your personal data files are the files that identify you and how you've installed Notes. They include your NOTES.ID, NOTES.INI, DESKTOP.DSK, modem command files, and files representing local databases. These files provide the following:

- store settings for using Notes
- provide communication settings for working with Notes remotely
- maintain the list of databases and settings in your Notes workspace

**Note** Unless you are installing a Notes Server for NetWare, personal data files don't have to be stored in the same directory (or subdirectory) as the Notes program files. However, if you choose to have Notes Install store these files in a separate directory, be sure you add the Notes program files directory name to the path in your AUTOEXEC.BAT (Windows) or CONFIG.SYS (Presentation Manager®) file.

Select **Browse Disk** if you're not sure where to store your personal data files. Keep the following considerations in mind when selecting this option:

- If you're installing Notes for the first time, type the name of the directory where you want your data files stored or accept the default. Notes Install prompts you to confirm the creation of this directory before the installation begins.

**Caution** If you are installing a Notes Server for NetWare, data files *must* be located in the same directory as the Notes program files.

- If you're installing Notes over a previous version of the software, be sure the directory specified is where the data files for the current version of Notes reside.
- If you use a dual-boot system (DOS and OS/2) and you plan to install Notes for both operating systems, you should store personal data files in the same directory for both operating systems, for example, C:\NOTES\DATA. Don't store both copies of the Notes program files in the same directory because Notes Install will delete the files for the other operating system.
- If you're installing Notes so that multiple users can share a workstation, specify a different data directory for each user. For example, use each person's name, as in C:\GBROOKS.

## Template Application Files

Select this option to install a local version of Notes database template files.

- If you are installing Lotus Notes Express™, you can use certain template files but cannot perform any design or administrative changes on those files.
- If you are installing Lotus Notes Desktop™, you can use all template files but cannot perform any design or administrative changes on those files.
- If you are installing Lotus Notes, you can use all template files and then modify the design as needed for your specific application.

For a complete discription of the templates, including which templates are installed with Notes Express, see A Quick Tour of Lotus Notes.

If you are installing a server, you should include these files in your selection so all users have access to templates. If you are installing a workstation, installing these files is optional. Notes Install stores templates in the same directory as other Notes data files.

**Note** Notes dial-up users should install these files to use Notes templates from a remote workstation.

## Example Files

Select this option to install examples of Notes applications. The examples contain sample documents and demonstrate both basic and advanced design features that you can copy or adapt when creating your own Notes applications. The files are installed in the EXAMPLES subdirectory of the directory used for storing Notes data files.

Installing these files is optional for workstations, but recommended for server installations.

To add the example databases to your workspace after installation, choose **File - Open Database** and open the EXAMPLES subdirectory. Highlight and select **Add Icon** for each database in the subdirectory. Use **File - Database - Copy - Design Only** to copy an example's design.

**NOTE** If you are using Lotus Notes Express, you can access only certain databases. If you do not have access, a message appears.

### CUSTOMER SERVICE APPLICATION SUITE

- These five ready-to-use applications can be used in a Customer Service group. They are accompanied by an online documentation database, *Customer Service Application Guide*.

*Call Tracking Database (CTRAK.NSF)*

*Data Dictionary (DATADICT.NSF)*

*Customer Suggestions (SUGGEST.NSF)*

*Knowledge Base (TECHNOTE.NSF)*

*Product Design Problems (PDPROBS.NSF)*

### BASIC APPLICATION DESIGN

- Template & Example Card Catalog (CARDCAT.NSF) describes the templates and example files provided with Notes.
- Electronic Library (HRDOCS.NSF) illustrates how to use Notes to store reference information online so that users can search for documents pertaining to a certain subject. The example explains how to ready the database for text searches and revision tracking.
- Notes News (NOTENEWS.NSF) demonstrates how Notes can enhance employees' productivity by centralizing information from both internal and external news sources. News items can be viewed, sorted, and distributed in a number of ways.
- Support Conference (SUPPCONF.NSF) is a discussion database that allows workgroup members to discuss ideas and problems. A user can "drop in" when and where it's convenient without losing the flow of the conversation.
- Wholesale Customer Tracking (WSCUST.NSF) shows how diverse workgroups can consolidate information such as contact names, sales calls, meetings, and correspondence to save time and be better prepared for customer activities.

### ADVANCED APPLICATION DESIGN

- Business Card Request (BUSCARD.NSF) demonstrates how to use Notes to create and track work requests. It includes features such as looking up information in another database to fill out forms and sending automatic mail notices to people interested in the request.
- Lookup Keyword Library (LOOKUP.NSF) is a catalog that gives other databases the ability to retrieve company-wide information such as department names, addresses, or product numbers from a central location. The Business Card Request database searches this database to fill in fields on the Business Card Request form.
- Call Tracking (CALLTRAK.NSF) shows how Notes can be used to track the status of service problems and to create a growing repository for knowledge that the whole group can use. It includes macro buttons that automate information entry and status updates.
- Contract Library (CONTRACT.NSF) uses Notes to store and organize word processed legal documents. Word processed documents are contained in Notes documents as embedded OLE objects, so they can be edited by launching the word processing program without leaving Notes.
- Travel Authorizations (TRAVAUTH.NSF) uses Notes to create and track travel requests. It includes advanced features such as background macros that perform regular functions on the documents, automatic mail notices to people interested in the status of the request, and separate sections within documents that protect access to sensitive information.
- These five databases demonstrate how to automate workflow with Notes:

*Product Catalog & Requisitions (PRODCAT.NSF)*

*Purchasing Requisitions Example Name & Address Book (PRNAMES.NSF)*

*Purchasing Item Tracking (LINEITEM.NSF)*

*Requisition Approvals (APPROVAL.NSF)*

*Jim Hansen's Mail (JHANSEN.NSF)*

## Help

Notes Help serves as an online user's guide and provides information on all Notes features.

If you are installing a server, you should install Help so all users who use the server have access to online Help. If you are installing a workstation, installing a local copy of Help is optional.

**Tip** If you are a dial-up user, having a local copy of Help is convenient. Otherwise, you can access Help *only* after establishing a connection to a Notes server.

Notes Install adds Notes Help to your workspace the first time you press **F1**.

## Documentation Databases

Select this option to install the Notes online documentation databases in the DOC subdirectory of the directory used for storing Notes data files.

If you install Lotus Notes Express, you can access:

- Dial-up Notes - provides instructions and helpful information for using Notes from a remote workstation.
- Notes Internals: Data Exchange - describes the DDE/OLE specification and how Notes employs it. The book expands on the section covering this topic in the *Site and Systems Planning Guide*.
- Notes Internals: Security - describes different levels and types of Notes security and provides example security scenarios. Included are descriptions ACLs and privileges, encryption, public/private keys, certificates, and user IDs and passwords. Server to server dialog is also explained.
- Network Driver Documentation - provides Notes administrators with installation and configuration information for running Lotus Notes on specific networks.
- Installation Guide (Lotus Notes Server for NetWare) - provides instructions for installing and setting up the first Lotus Notes Server for NetWare and the Notes for Windows workstation that accompanies it.
- *Adobe Type Manager User Guide* for Lotus Notes - explains how to install and run the Adobe Type Manager® program with Windows.
- Release Notes (for the PC) - provides information on new features, including considerations for administrators who are upgrading to a new release. (This file is in the Notes DATA directory.)

If you install Lotus Notes Desktop or Lotus Notes, all of the above plus:

- Automating Workflow with Lotus Notes - presents a methodology for analyzing and diagramming workflow applications and provides practical advice on developing applications that automate workflow. It also supplies sample forms, fields, buttons and macros that you can copy and paste directly into your own workflow applications.
- Customer Service Application Guide - describes how to install, set up, and use the five Notes databases that make up the Customer Service Application suite.
- Notes Internals: Mail - provides an overview of the structure of the Notes mail system as well as a look at the Notes subsystems that control mail addressing, mailing, and routing. There is additional material on specific Notes gateways, X.400 compliance, and miscellaneous topics.

Installing these databases is optional.

To add any of the documentation databases to your workspace after installation, choose **File - Open Database** and open the DOC subdirectory. Highlight and select **Add Icon** for each database you want to use.

## Tutorial Databases

Select this option to install the Notes online tutorial databases in the DOC subdirectory of the directory used for storing Notes data files:

- *A Quick Tour of Lotus Notes* - provides a guided introduction to all the basic activities in Notes. By reading the Quick Tour and performing the procedures, a user learns about the Notes workspace, how to use Notes Help, how to work with databases and documents, how to use Notes mail, and more. The Quick Tour also contains descriptions of the three license types - Lotus Notes Express, Lotus Notes Desktop, and Lotus Notes - and the features of each.
- The *Quick Tour Sample Database* - used with A Quick Tour of Lotus Notes.

Installing these databases is optional.

To add *A Quick Tour of Lotus Notes* and the sample database to your workspace after installation, choose **File - Open Database** and open the DOC subdirectory. Highlight and select **Add Icon** for the two databases.



## **Notes Guided Tour**

Select this option to install the *Notes Guided Tour*, a multi-media presentation that demonstrates the most important features of Notes.

The Guided Tour is installed in the Notes program directory, with the file name NOTETOUR.EXE.

## **Novell Support Files**

Select this option to install network files that allow Notes to run in a Novell NetWare environment.

The following files are installed when you select this option:

NETBIOS.EXE

NWCALLS.DLL

NWIPXSPX.DLL

If you already have some of these files on your machine, the Install program only copies those that are more recent than the ones on your hard disk.

You can deselect this option if you do not run on a Novell NetWare network.